Customer Maintenance

Customer maintenance includes adding a customer record, changing information for an existing customer, and making a customer's record inactive. The three maintenance tasks are covered in detail on the following pages, including *QBO* windows.

Add a Customer Record – Quick Reference Table

| Step	Box or Other Location	Procedure
A	**QBO Navigation Bar**	**+ Create → Add customer** to open the customer listing.
B	**Company name***	Type the customer's name.
C	**Email, Phone, Mobile, Fax, Other, and Website, etc. boxes***	Type the customer's various contact and website information, to the extent available.
D	**Addresses section**	Complete the **Billing address** information. If the shipping address is different, uncheck the **Same as billing address check box** and complete the **Shipping address** information.
E	**Primary payment method****	If the customer has a primary method of payment (check, ACH, credit), select the method.
F	**Terms****	Select the default payment terms for the customer.
G	**Customer type*****	Select the customer type, if applicable.
H	**Opening balance*****	Type the customer's opening balance, even if it is 0
I	**As of*****	Select the date of the opening balance for the customer.
J	**Customer window (all sections)**	Review the information in all sections of the **Customer window** to verify that it is correct.
K	**Save button**	Save the new customer record and close the window.

* Name and contact section.
** Payments section.
*** Additional info section.

Add a Customer Record
QBO windows
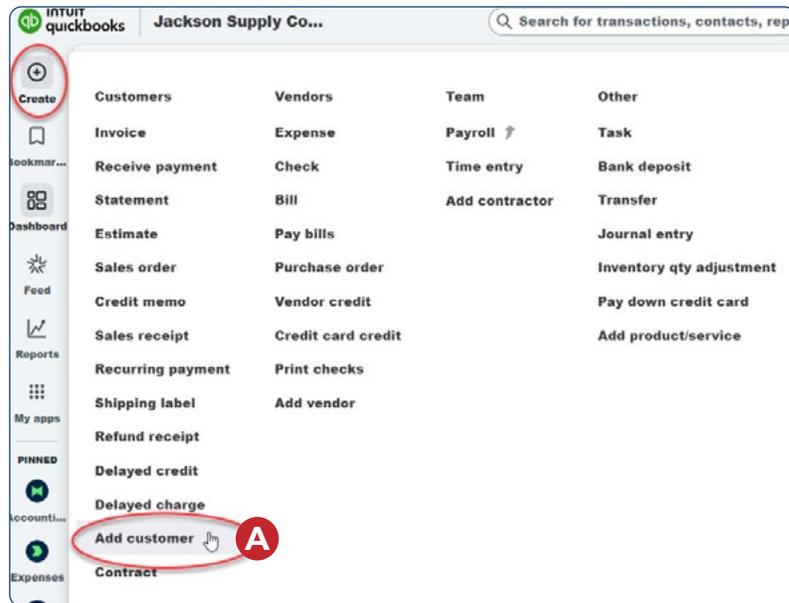
Customer Window - Name and contact section

Add a Customer Record
QBO windows *(continued)*

Customer Window - Addresses section

J

Addresses

Billing address

Street address 1

Street address 2

City

State

ZIP code

Country

D

Map

Shipping address

D ☑ Same as billing address

Customer Window - Payments section

J **Payments**

Primary payment method

E Select a primary payment ...

Terms

F

Sales form delivery options

Language to use when you send invoices

English

Credit Limit

Add a Customer Record
QBO windows *(continued)*

Customer Window - Additional info section

Change Information in an Existing Customer's Record – Quick Reference Table

Step	Box or Other Location	Procedure
A	**My Apps menu**	Click **Customer Hub** → **Customers** to open the customer listing.
B	**Customer List**	Locate the customer you want to edit and click the customer's name to open the customer's individual page.
C	**Customer Details tab**	If the **Customer Details tab** is not the default open tab, click the **Customer Details tab** to open detailed information for the customer.
D	**Edit button**	Click the **Edit button** to open the **Customer window** for the customer.
E	**Customer window**	Change appropriate information in the window. Review results for completeness and accuracy.
F	**Save button**	Save the revised customer record and close the window.

Change Information in an Existing Customer's Record
QBO windows

Change Information in an Existing Customer's Record
QBO windows *(continued)*

Note: See next page for Customer Details tab contents.

Change Information in an Existing Customer's Record

QBO windows *(continued)*

See next page for additional window

Customer Window (with additional sections collapsed)

Make a Customer's Record Inactive – Quick Reference Table

Step	Box or Other Location	Procedure
A	**My apps menu**	Click **Customer Hub** → **Customers** to open the customer listing.
B	**Action column drop-down list button**	Locate the customer you want to make inactive and click the **Action column drop-out list button** on that customer's line → select **Make inactive**.
C	*QBO* **message**	A message will appear that says "Are you sure you want to make [customer name] inactive?" Click the **Yes, make inactive button**.

Make a Customer's Record Inactive
QBO windows

Make a Customer's Record Inactive
QBO windows *(continued)*