QuickBooks® Online Newsletter

FROM THE OFFICES

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Using QuickBooks Online's Customer Records

Your customers are your company's lifeblood. Are you managing those relationships carefully? Here's how QuickBooks Online can help.

If you've been in business long enough to remember tracking your customers manually, you probably rememberwhat a nightmare it was. Maybe you had a card file and paper folders – and lots of sticky notes and calendar notations.

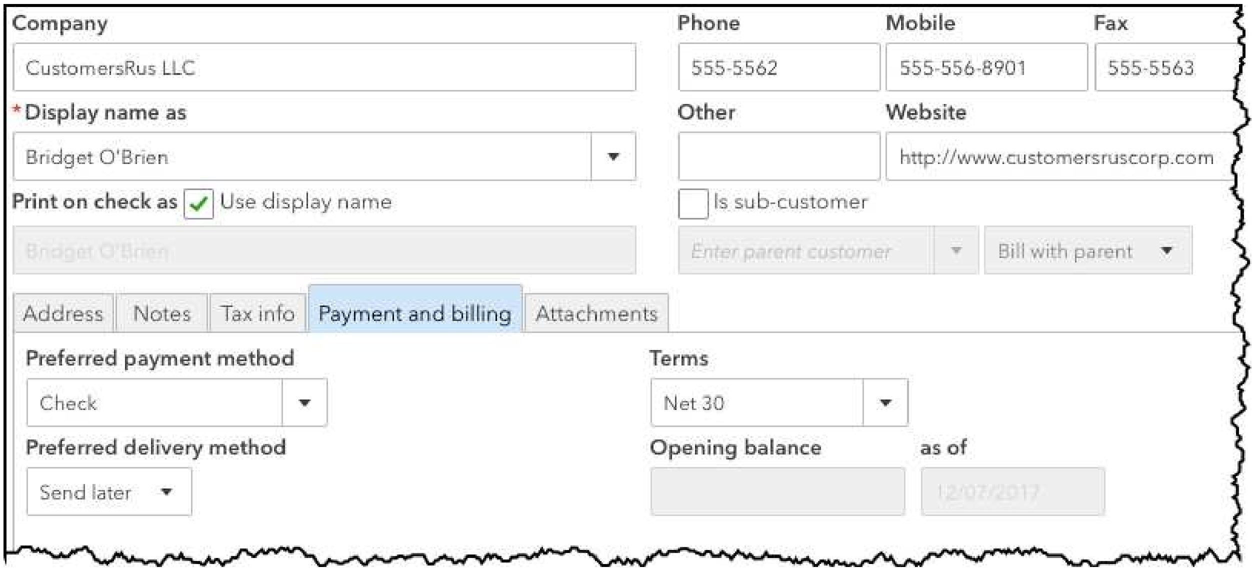
Unless you had an unusually effective organization system, it was probably difficult to find historical transactions when customers called with questions, for example, and you may have experienced cash flow problems because it was hard to keep up with invoices and statements and payments.

If you're already using QuickBooks Online, you know those days are over. But have you explored all the customer relationship management tools available to you on the site?

Thorough Records

The core of any good customer-tracking system is a comprehensive set of individual profiles. QuickBooks Online offers thorough, flexible record templates for just that purpose. Click **Sales** in the main toolbar, then the **Customers** tab at the top of the screen. To create a new customer record, click **New Customer** off to the right to open the **Customer Information** window.

Note: If you have your customer database in an existing Excel or .CSV file, you should be able to import it. QuickBooks Online provides instructions for this.



You can create a profile for each customer in the ***Customer Information*** *window.*

You'll need to enter a lot of the information yourself here, mostly contact details. A down arrow next to a field indicates that there's a drop-down list of options available.

The lower left quadrant of the screen contains a series of tabbed information windows. Click on each to enter what you can about each customer's:

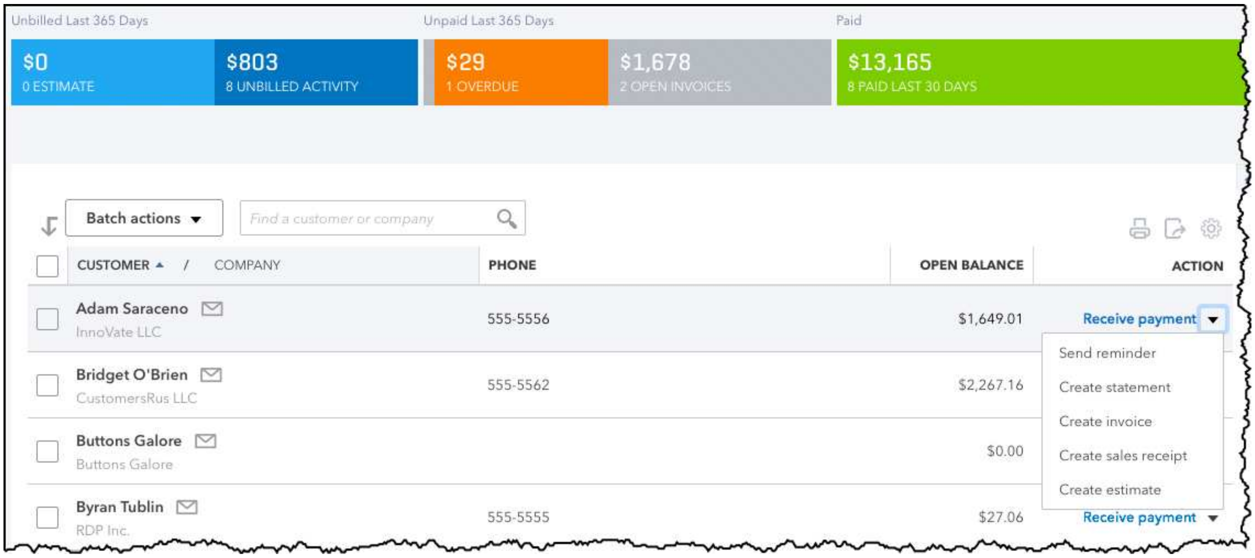
- **Address** – both billing and shipping
- **Notes** – any that you'd like to enter
- **Tax info** – exemption details and default tax code (if taxable)
- **Payment and billing** – preferred payment and delivery method, payment terms, and opening balance
- **Attachments** –any files pertaining to this customer that you want to include

When you're done, click **Save**. Your new record will appear in your list of customers. You'll be able to toggle back and forth between the details you just entered and a list of their transactions.

Working with Customers

You can always add new customers as you go along, but it's a good idea to enter records for all of them before you start creating transactions. It will save time down the road, and their accessibility will help with other accounting tasks.

When you click on **Sales | Customers** now, you'll see something like this:



*Your **Customers** page contains a list of customers with links to related activities. It also provides a color-coded row of bars that represent the status of invoices and estimates.*

The **Customers** page consists of many elements. The main section displays a table of your customers. Click on one to open the page containing the **Transaction List** and **Customer Details**.

On this screen, though, you'll only see columns for **Customer/Company**, **Phone**, **Open Balance**, and **Action** by default; click the gear icon in the upper right if you want to include more columns here. When you click on the down arrow next to a field in the **Action** column, a drop-down list will display the options available for that customer, like **Receive payment**, **Send reminder**, and **Create Statement**.

A series of colored bars runs across the top of the screen. Each represents the current status of a specific transaction type: **Estimates**, **Unbilled Activity**, **Overdue**, **Open Invoices**, and **Paid Last 30 Days**. Click on any of these to open a list of pertinent transactions.

You can do all of these activities elsewhere in QuickBooks Online, but it's convenient to be able to work directly from the **Customers** screen, too. The fewer clicks, the better.

Call on Us

Did you make a resolution to start using QuickBooks Online this year? The site was built for use by business managers, not accountants, but it can still be a little daunting at first. We're always available to take your questions and help you with setup and/or daily implementation. Connect with us if you need assistance.

Social media posts

New to QuickBooks Online and a bit confused? We can help you with setup and implementation. Contact us today.

Have you created profiles for all your customers? QuickBooks Online contains record templates to accommodate this.

Want a quick look at the status of your sales transactions? Click **Sales | Customers**.

You can do a lot of your sales tasks by accessing the **Customers** page. Click the **Sales** icon in the navigation bar. Questions? Call us.