



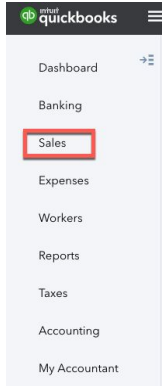
Adding / Subtracting Customers

1. Click on **sales** on the left side of the screen
 2. Click on **customer** on the top menu bar
 3. To add a customer
 - a. Click on the green button labeled **New Customer**
 - b. Enter the customer information
 - c. **Display name as** is the only mandatory field
 - d. Click on save
 4. To remove a customer
 - a. Find the customer in the list
 - b. Click on their name
 - c. Click on **edit**
 - d. Click on **make inactive**
 - e. Click save
-

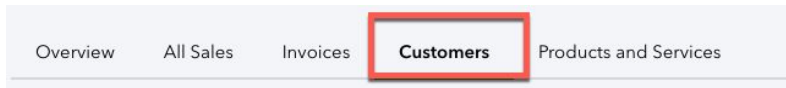


Adding / Subtracting Customers

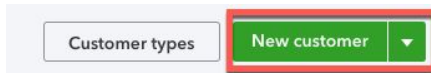
1. Click on **sales** on the left side of the screen



2. Click on **customers** on the top menu bar



3. To add a member (customer)
 - a. Click on the green button labeled **New Customer**



- b. Enter the customer information
- c. **Display name as** is the only mandatory field
- d. Click on save

Customer information ×

Company	Email
<input type="text"/>	<input type="text" value="Separate multiple emails with commas"/>
Title First name Middle name Last name Suffix	Phone Mobile Fax
<input type="text"/>	<input type="text"/>
* Display name as	Other Website
<input type="text"/>	<input type="text"/>
Print on check as <input checked="" type="checkbox"/> Use display name	<input type="checkbox"/> Is sub-customer
<input type="text"/>	Enter parent custome Bill with parent
Address Notes Tax info Payment and billing Attachments Additional Info	
Billing address map	Shipping address map <input checked="" type="checkbox"/> Same as billing address
Street	Street
City/Town State/Province	City/Town State/Province
ZIP code Country	ZIP code Country

Cancel Privacy **Save**



- 4. To remove a customer
 - a. Find the customer in the list

<input type="checkbox"/>	CUSTOMER ▲ / COMPANY	PHONE	OPEN BALANCE	ACTION
<input type="checkbox"/>	Amy's Bird Sanctuary	(650) 555-3311	\$239.00	Receive payment ▼
<input type="checkbox"/>	Bill's Windsurf Shop	(415) 444-6538	\$85.00	Receive payment ▼
<input type="checkbox"/>	Cool Cars	(415) 555-9933	\$0.00	Create invoice ▼

- b. Click on their name
- c. Click on **edit**

Bill's Windsurf Shop

Bill's Windsurf Shop | 12 Ocean Dr., Half Moon Bay, CA 94213

[Add notes](#)

Edit

- d. Click on **make inactive**
- e. Click save

Customer information

Company
Bill's Windsurf Shop

Email
Surf@Intuit.com

Title **First name** **Middle name** **Last name** **Suffix**
 Bill Lucchini

Phone **Mobile** **Fax**
(415) 444-6538

*** Display name as**
Bill's Windsurf Shop

Print on check as Use display name
Bill's Windsurf Shop

Other **Website**

Is sub-customer
Enter parent customer Bill with parent

Address **Notes** **Tax info** **Payment and billing** **Attachments** **Additional Info**

Billing address map
12 Ocean Dr.
Half Moon Bay CA 94213
Country

Shipping address map Same as billing address
Street
City/Town State/Province
ZIP code Country

Privacy