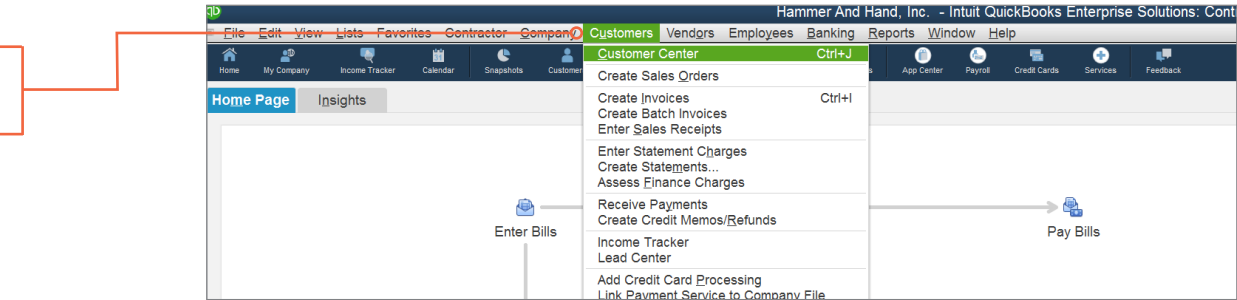


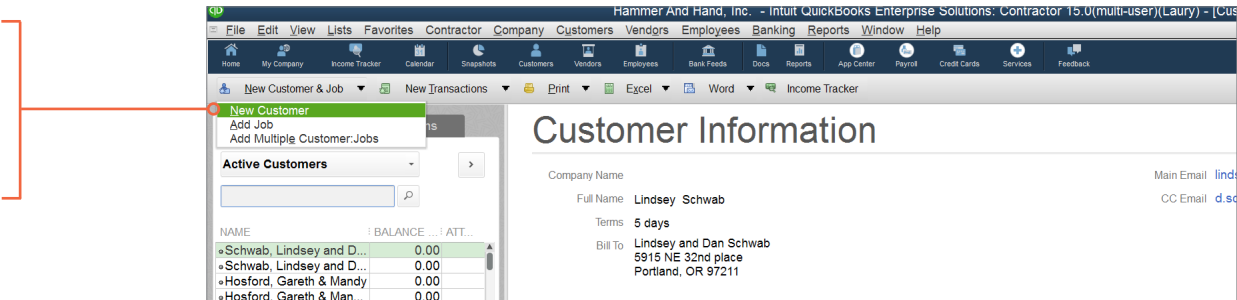
ADDING NEW CUSTOMERS IN QUICKBOOKS

From the top of the screen, click on:
Customers > Customer Center



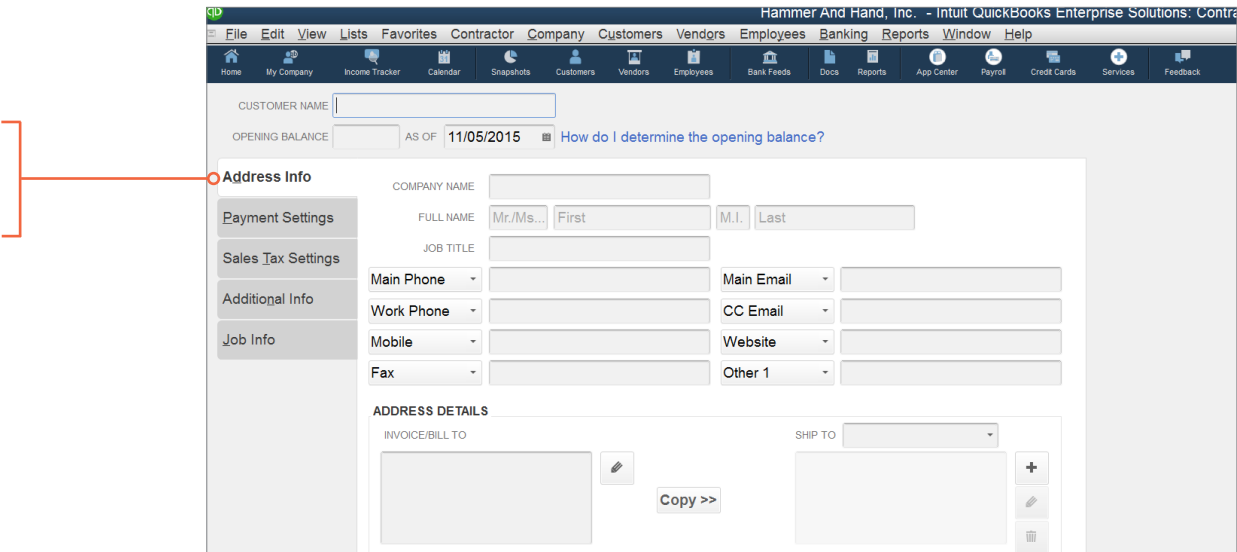
Search Customer's Name in search window to confirm that
the client is not already entered.

If it's a new customer, click on New Customer & Job in top
left drop down.



Address Tab

Enter customer name, address, and e-mail. Include "cc"
e-mails, i.e. spouse, accountant, etc.



Payment Settings Tab

- Payment Terms: Use drop down to choose as defined for invoicing in the signed contract
- Payment Settings: Enter Preferred Delivery - Email

Customer Name: Radecki, Ryan
Current Balance: 0.00

Address Info

ACCOUNT NO. CREDIT LIMIT

Payment Settings

PAYMENT TERMS PRICE LEVEL

Sales Tax Settings

PREFERRED DELIVERY METHOD E-mail

PREFERRED PAYMENT METHOD

CREDIT CARD INFORMATION

CREDIT CARD NO.

EXP. DATE /

NAME ON CARD

ADDRESS

ZIP / POSTAL CODE

ONLINE PAYMENTS

Let this customer pay you by:

☐ Credit Card ☐ VISA ☐ MasterCard ☐ American Express

☐ Bank Transfer (ACH) ☐ Bank

☐ Customer is inactive

OK Cancel Help

Sales Tax Settings Tab

- Tax Code - Tax or Non
- Tax Item - use drop down if WA, otherwise no tax for OR

Customer Name: Radecki, Ryan
Current Balance: 0.00

Address Info

TAX CODE Tax

Payment Settings

TAX ITEM No Sales Tax

Sales Tax Settings

RESALE NO.

King County - Sammamish 9.5%	Sales Tax Item	King County - Sammamish Sales Tax 9.5%
King County (non RTA)	Sales Tax Item	King County Sales Tax - 8.6%
Kitsap Co. - 8.7%	Sales Tax Item	Kitsap County Sales Tax - 8.7%
No Sales Tax	Sales Tax Item	No Sales Tax
Seattle - 9.6%	Sales Tax Item	Seattle Sales Tax - 9.6%
Vancouver 8.4%	Sales Tax Item	Vancouver Sales Tax - 8.4%

☐ Customer is inactive

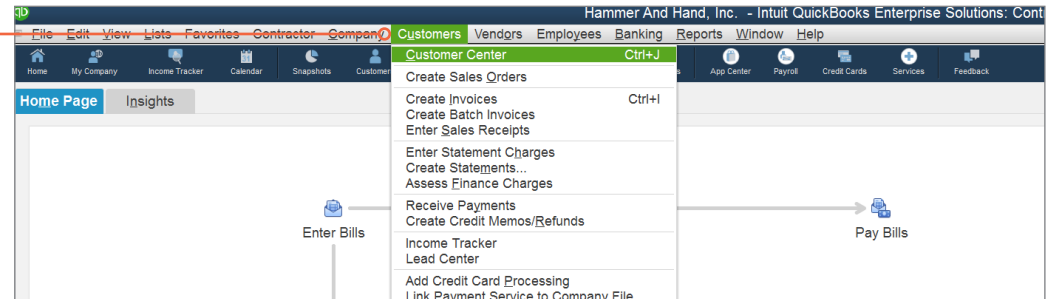
OK Cancel Help

Additional Info Tab

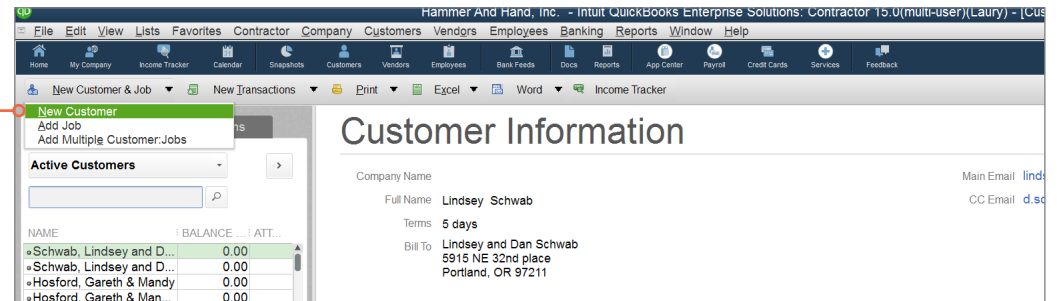
- Nothing gets entered here

ADDING A NEW JOB IN QUICKBOOKS

From the top of the screen, click on:
Customers > Customer Center

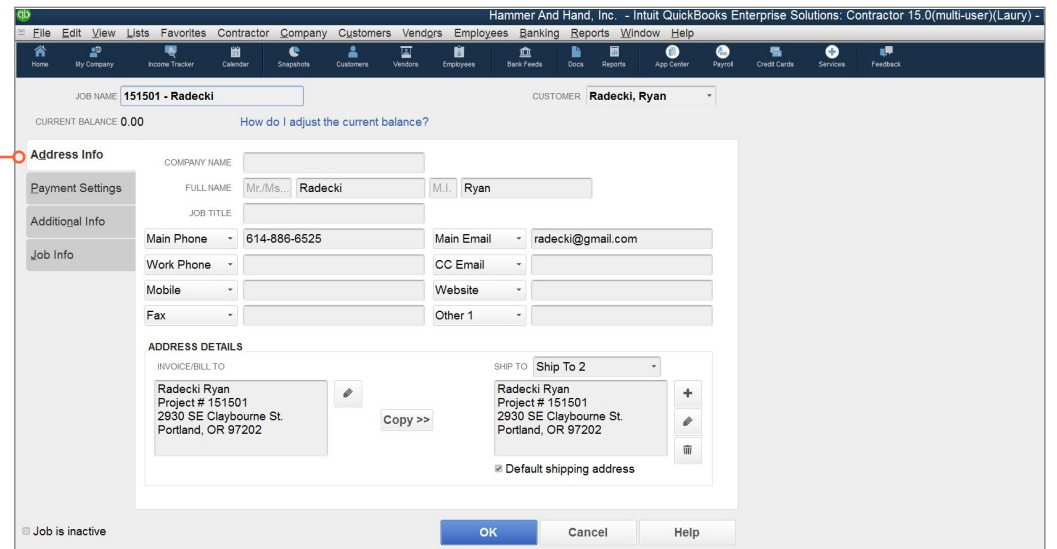


Search Customer's Name in search window. Right click on customer name and choose "Add Job" from the dropdown menu.



Address Info Tab

- Main email. Include "cc" emails. i.e.: spouse, accountant, etc.
- In Address Details box, enter Project # underneath the client name



Payment Settings Tab

- Account Number: enter Job Number
- Price Level: Use drop down to choose as outlined in signed contract

Hammer And Hand, Inc. - Intuit QuickBooks Enterprise Solutions: Contractor 15.0(multi-user)

File Edit View Lists Favorites Contractor Company Customers Vendors Employees Banking Reports Window Help

Home My Company Income Tracker Calendar Snapshots Customers Vendors Employees Bank Feeds Docs Reports App Center Payroll Credit Cards Services Feedback

JOB NAME: 151501 - Radecki CUSTOMER: Radecki, Ryan

CURRENT BALANCE: 0.00 How do I adjust the current balance?

Address Info

ACCOUNT NO.: 151501 CREDIT LIMIT:

Payment Settings

PREFERRED DELIVERY METHOD: E-mail PRICE LEVEL:

Additional Info

PREFERRED PAYMENT METHOD:

Job Info

CREDIT CARD INFORMATION

CREDIT CARD NO.: EXP. DATE: NAME ON CARD: ADDRESS: ZIP / POSTAL CODE:

Can I save the Card Security Code?

ONLINE PAYMENTS

Let this customer pay you by:

☐ Credit Card ☒ Bank Transfer (ACH)

☐ Job is inactive

OK Cancel Help

Additional Info Tab

Use drop down menus to enter:

- Project Manager
- Location
- Project Lead
- Team (Project Administrator)

Job Info Tab

- Nothing gets entered here

Hammer And Hand, Inc. - Intuit QuickBooks Enterprise Solutions: Contractor 15.0(multi-user)

File Edit View Lists Favorites Contractor Company Customers Vendors Employees Banking Reports Window Help

Home My Company Income Tracker Calendar Snapshots Customers Vendors Employees Bank Feeds Docs Reports App Center Payroll Credit Cards Services Feedback

Customer Center: Radecki, Ryan:15101 - Radecki Development

New Customer & Job New Job

JOB NAME: OPENING BALANCE: 0.00 AS OF: 11/19/2015 How do I determine the opening balance?

Address Info

CUSTOMER TYPE: REP:

Payment Settings

Additional Info

Job Info

CUSTOM FIELDS

PROJECT MANAGER: Coop LOCATION: PDX PROJECT LEAD: TBD TEAM: Aaron

Define Fields

☐ Job is inactive

OK Cancel Help