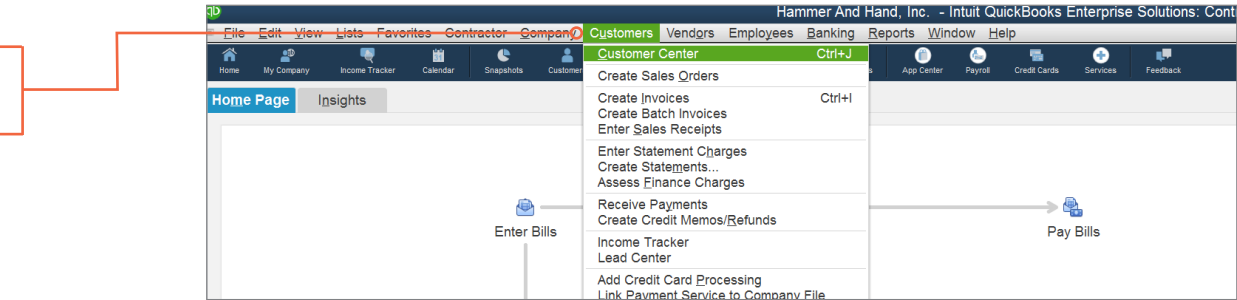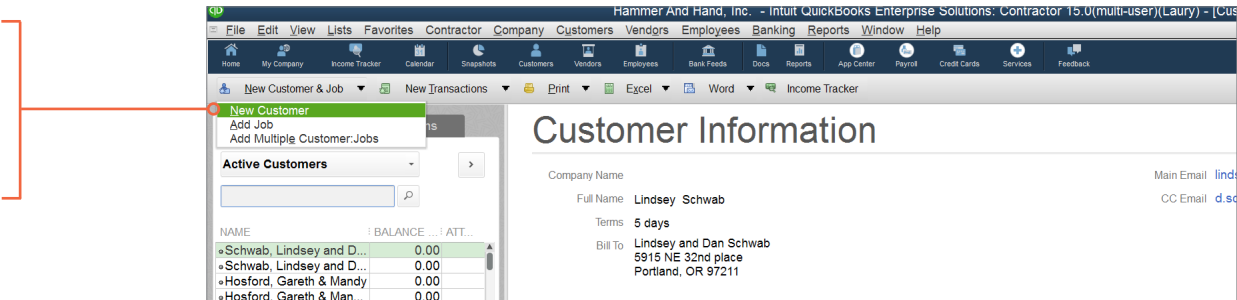## ADDING NEW CUSTOMERS IN QUICKBOOKS

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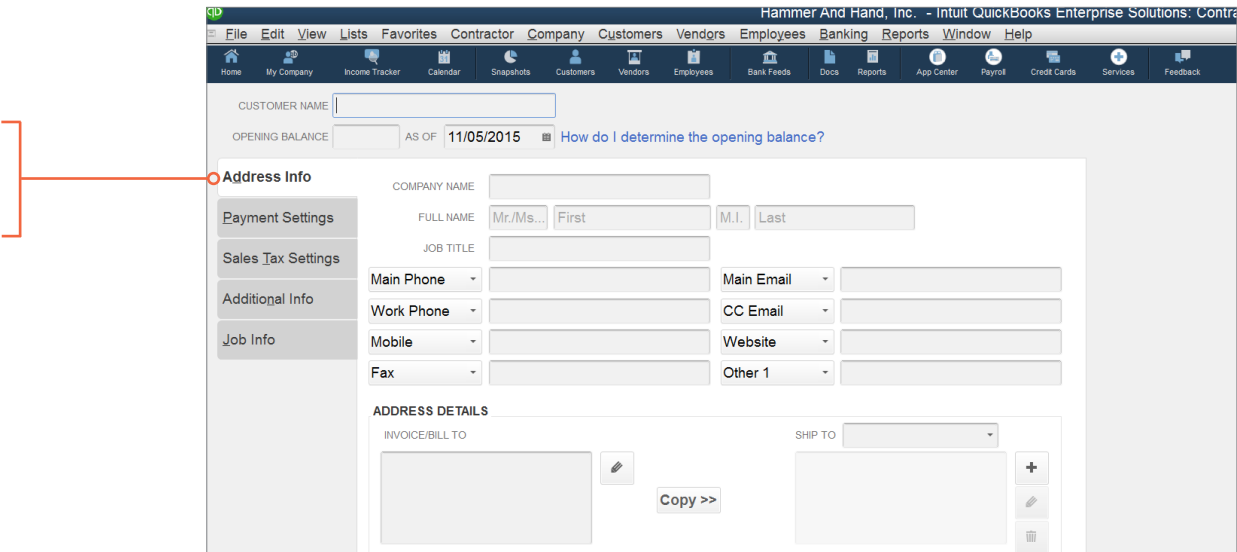Customers > Customer Center

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

Sales Tax Settings Tab

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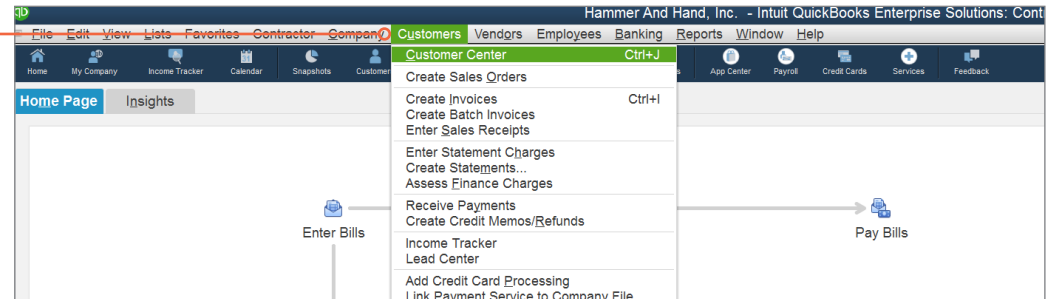- Tax Item – use drop down if WA, otherwise no tax for OR
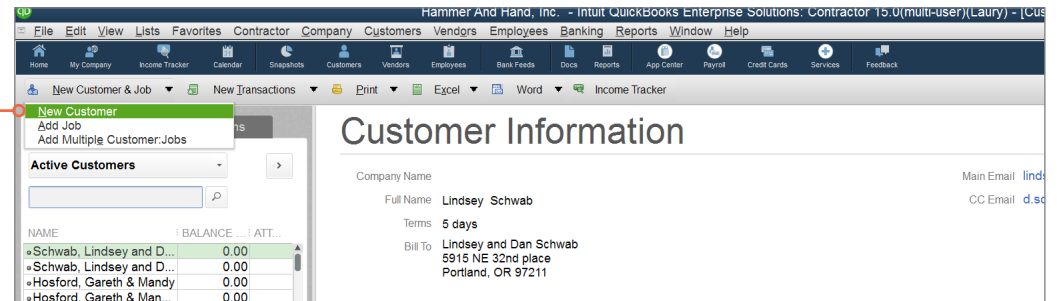
Additional Info Tab

- Nothing gets enetered here

ADDING A NEW JOB IN QUICKBOOKS

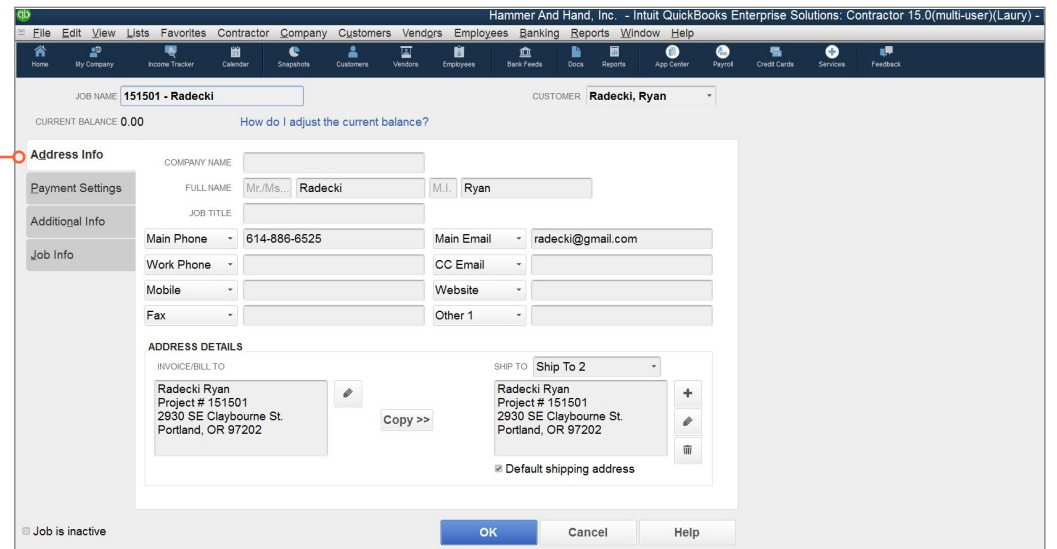From the top of the screen, click on:
Customers > Customer Center

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

Additional Info Tab

Use drop down menus to enter:
- Project Manager
- Location
- Project Lead
- Team (Project Administrator)

Job Info Tab

- Nothing gets enetered here