Activity Sheet: All About Customers

**Activity #1**

*Practice Adding a New Customer*

1. From the Home Screen, click on **Customers**
2. In the Customer Center, click on **New Customer & Job** in the toolbar and select **New Customer**
3. In the New Customer window that appears, enter the following information in the **Address** tab:
   1. Type **Joe Smith** in the **Customer Name** field and the **Company Name** field
   2. In the **Invoice/Bill To** box, type:

**321 Bird St.**

**Elgin, IL 60123**

* 1. **Copy** the address over to the **Ship To** box

1. Click on the **Payment Settings** tab and enter the following information:
   1. Use the drop-down menu next to **Payment Terms** to select **Net 30**
   2. Type **1000.00** in the **Credit Limit** field
2. Click on the **Additional Information** tab and enter the following information:
   1. Use the drop-down menu next the **Customer Type** to select **Commercial**
3. Click **Ok** to add the new customer to the list

**Activity #2**

*Practice Creating an Invoice*

1. In the **Customers** area on the Home Screen, click on **Create Invoice**
2. In the **Create Invoices** window that appears, enter the following information:
   1. Use the drop-down menu next to **Customer/Job** to select **Hughes, David**
   2. Use the drop-down menu next to **Template** to select **Intuit Service Invoice**
   3. Change the **Invoice Number** to **200**
3. Click in the first line in the **Item** column
   1. Use the drop-down menu to select **Design**
   2. In the **Quantity** field, type **5**
   3. In the **Description** box, add *for backyard* to the end of the text
4. Select one of the options from the drop-down menu next to **Customer Message**
5. Click **Save & Close**

**Activity #3**

*Practice entering payments received from customers*

1. In the **Customers** area on the Home Screen, click on **Receive** **Payments**
2. In the **Receive Payments** window that appears, enter the following information:
   1. Use the drop-down menu next to **Received From** to select **Crenshaw, Bob**
   2. In **Payment Amount** field, type **16.03**
   3. Select **Check** as the **Payment Method**
   4. In the **Check Number** field, type **111**
   5. Let the **Date** default
3. Click **Save & Close**

**Activity #4**

*Practice recording deposits from received payments*

1. In the **Banking** area on the Home Screen, click on **Record Deposits**
2. In the window that appears, enter the following information:
   1. In the Select Payments to Deposit table, click on **Crenshaw, Bob**
   2. Click on **Ok**
3. Click **Save and Close**