



## Breakthrough Solutions, LLC

*Providing solutions to help your business succeed!*

QuickBooks® Tip - Setting up Customers, Vendors, or Other Names, faster

You can type in less information if you set up new names in these lists using this procedure:

- 1) Go to the Customer Center, the Vendor Center, or the Other Name List from the list menu
- 2) Enter the new customer in the Address Info tab
- 3) The first example shows setting up an individual
- 4) The second example shows setting up a business
- 5) The fourth example shows setting up a business with an individual contact name

### New Customer Setup

The screenshot shows the 'New Customer Setup' dialog box in QuickBooks. The 'Address Info' tab is active. The 'Customer Name' field is empty. The 'Opening Balance' field is empty, with a date of 11/30/2010 and a link to 'How do I determine the opening balance?'. The 'Company Name' field is empty. The 'Contact' field is empty. The 'Mr./Ms./...' field is empty. The 'First Name' field contains 'John', the 'M.I.' field contains 'M', and the 'Last Name' field contains 'Doe'. The 'Phone', 'FAX', 'Alt. Phone', 'E-mail', and 'Cc' fields are empty. The 'Bill To' and 'Ship To' fields are empty, with a 'Copy >>' button between them. The 'Customer is inactive' checkbox is unchecked. The 'OK', 'Cancel', 'Next', and 'Help' buttons are on the right side.

When you press the Tab key or Enter key (Provided that you changed your preference to allow the usage of the Enter key) the name will populate to the Customer Name field, the Address field and the Contact field. (See next page)

**New Customer**

Customer Name

Opening Balance  as of  [How do I determine the opening balance?](#)

**Address Info** | Additional Info | Payment Info | Job Info

Company Name  Contact

Mr./Ms./...  Phone

First Name  M.I.  FAX

Last Name  Alt. Phone

Alt. Contact

E-mail

Cc

Addresses

Bill To  Ship To

Default shipping address

Customer is inactive

## New Vendor Setup

**New Vendor**

Vendor Name

Opening Balance  as of  [How do I determine the opening balance?](#)

**Address Info** | Additional Info | Account Prefill

Company Name  Contact

Mr./Ms./...  Phone

First Name  M.I.  FAX

Last Name  Alt. Phone

Alt. Contact

E-mail

Cc

Print on Check as

Addresses

Billed From Address  Shipped From Address

Vendor is inactive

When you press the Tab key or Enter key the name will populate to the Vendor Name field, the Address field and the Print in Check as field. (See next page)

**New Vendor**

Vendor Name Breakthrough Solutions, LLC

Opening Balance \_\_\_\_\_ as of 11/30/2010 [How do I determine the opening balance?](#)

**Address Info** Additional Info Account Prefill

Company Name Breakthrough Solutions, ... Contact \_\_\_\_\_

Mr./Ms./... \_\_\_\_\_ Phone \_\_\_\_\_

First Name \_\_\_\_\_ M.I.  FAX \_\_\_\_\_

Last Name \_\_\_\_\_ Alt. Phone \_\_\_\_\_

Alt. Contact \_\_\_\_\_

E-mail \_\_\_\_\_

Cc \_\_\_\_\_

Print on Check as Breakthrough Solutions, LLC

Vendor is inactive

Addresses

Billed From Address Shipped From Address

Breakthrough Solutions, LLC

Copy >>

Edit Edit

OK Cancel Next Help

## Other Name Setup

**New Name**

Name \_\_\_\_\_

Company Name \_\_\_\_\_ Contact \_\_\_\_\_

Mr./Ms./... \_\_\_\_\_ Phone \_\_\_\_\_

First Name Trish M.I. A FAX \_\_\_\_\_

Last Name Smith Alt. Ph. \_\_\_\_\_

Name and Address \_\_\_\_\_ Alt. Contact \_\_\_\_\_

E-mail \_\_\_\_\_

Account No. \_\_\_\_\_

Billing Rate Level \_\_\_\_\_

Address Details

OK Cancel Next Help

Name is inactive

When you press the Tab key or Enter key the name will populate to the Name field, the Name and Address field and the Contact field.

**New Name**

Name Trish A Smith

Company Name \_\_\_\_\_ Contact Trish A Smith

Mr./Ms./... \_\_\_\_\_ Phone \_\_\_\_\_

First Name Trish M.I. A FAX \_\_\_\_\_

Last Name Smith Alt. Ph. \_\_\_\_\_

Name and Address Trish A Smith Alt. Contact \_\_\_\_\_

E-mail \_\_\_\_\_

Account No. \_\_\_\_\_

Billing Rate Level \_\_\_\_\_

Address Details

OK Cancel Next Help

Name is inactive

## \*Please Note:

There is a difference between adding a new individual versus a company name. Adding an individual using the Address Info tab will populate the name to the Contact field. Adding a company name will not populate to the Contact field unless you use both a company name and the first and last name of an individual as shown below:

**New Vendor**

Vendor Name: Breakthrough Solutions, LLC

Opening Balance: [ ] as of 11/30/2010 [How do I determine the opening balance?](#)

**Address Info** | Additional Info | Account Prefill

Company Name: Breakthrough Solutions, ... | Contact: [ ]

Mr./Ms./...: [ ] | Phone: [ ]

First Name: Trish | M.I.: [ ] | FAX: [ ]

Last Name: Smith | Alt. Phone: [ ]

Alt. Contact: [ ]

E-mail: [ ]

Cc: [ ]

Print on Check as: Breakthrough Solutions, LLC

Addresses

Billed From Address: Breakthrough Solutions, LLC | Shipped From Address: [ ]

Copy >>

Edit

Vendor is inactive:

OK, Cancel, Next, Help

**New Vendor**

Vendor Name: Breakthrough Solutions, LLC

Opening Balance: [ ] as of 11/30/2010 [How do I determine the opening balance?](#)

**Address Info** | Additional Info | Account Prefill

Company Name: Breakthrough Solutions, ... | Contact: Trish Smith

Mr./Ms./...: [ ] | Phone: [ ]

First Name: Trish | M.I.: [ ] | FAX: [ ]

Last Name: Smith | Alt. Phone: [ ]

Alt. Contact: [ ]

E-mail: [ ]

Cc: [ ]

Print on Check as: Breakthrough Solutions, LLC

Addresses

Billed From Address: Breakthrough Solutions, LLC Trish Smith | Shipped From Address: [ ]

Copy >>

Edit

Vendor is inactive:

OK, Cancel, Next, Help