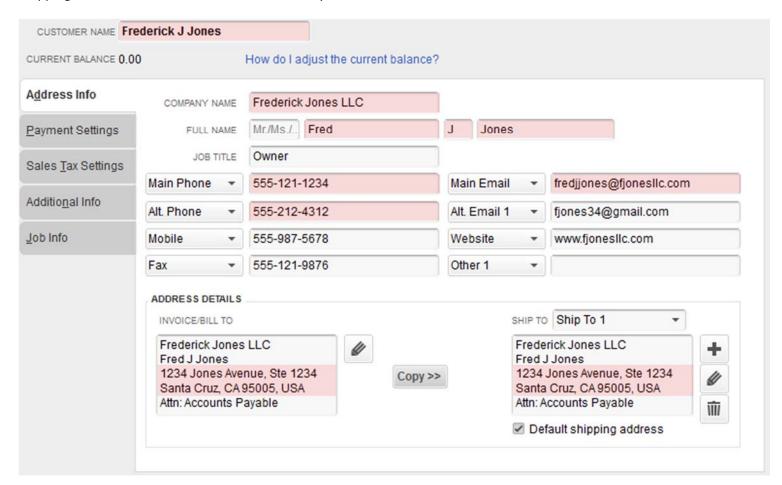


This guide explains the BEST PRACTICES for maintaining the QB customer center customer records.

The QB customer center is a valuable tool for providing customer information. It requires regular maintenance, as customer information will change over time (address and phone numbers change, names change, etc.).

Managing the QuickBooks Customer Center (customer list) is vital to accurate customer mapping between PayPal and QuickBooks. Unfortunately, QuickBooks does not provide acceptable guidelines for entering or maintaining customer records. The QuickBooks "free form" INVOICE/BILL TO" and "SHIP TO" data fields further complicate matters.

This example is a complete **Address Info** customer record, the highlighted fields are used by SimplePort for customer mapping between the QB Customer record and PayPal.



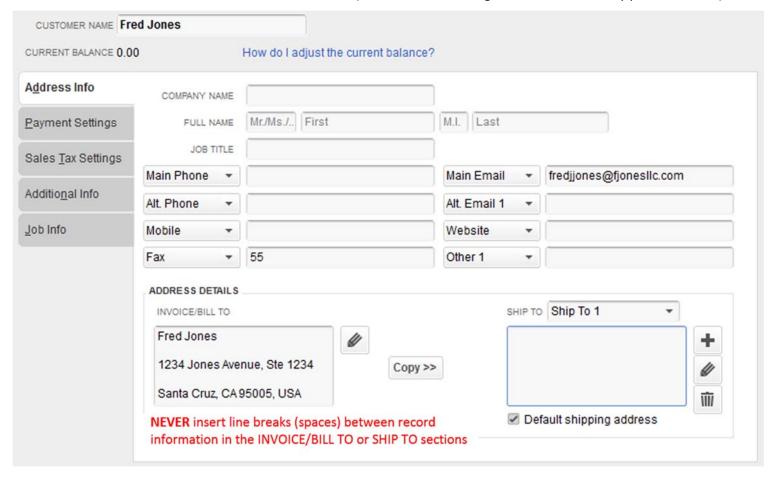
The next example shows a poor **Address Info** customer record, where information is missing and entries have been made into sections that result in QuickBooks interpretation issues. This is simply not understanding how QuickBooks utilizes the information contained in the customer record.







A QuickBooks customer record should **NOT** look like this: (too much info missing and data not correctly placed in fields)



Entering lines breaks (spaces) where QB expects an actual field value forces the next value entered to be assigned to an incorrect record, since these records are "free form" QB really doesn't care what value is entered into those fields, but it then miss-aligns records for both the Billing Info and the Shipping Info (if copied to that section).

Those fields should look like the following image when data has been correctly entered:



For detailed information on using the customer record ADDRESS DETAILS section, review pages four and five of this guide.

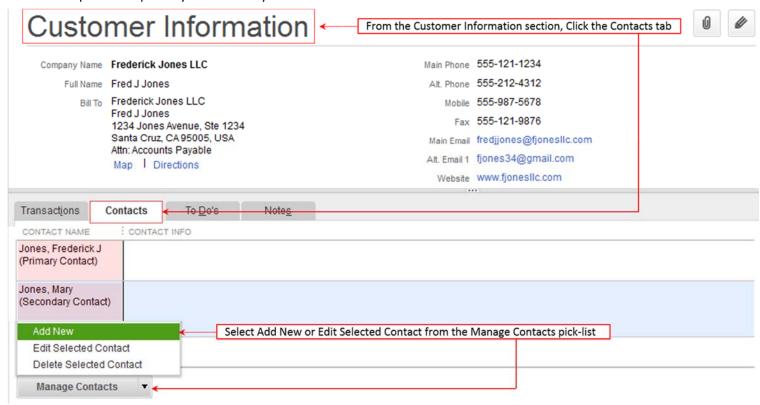
SimplePort also utilizes the primary contact and secondary contact information for mapping to customers. (In earlier QB editions these fields are known as "Contact" and "Alt. Contact"). With the release of QB2013 entering and accessing the contacts information has changed.



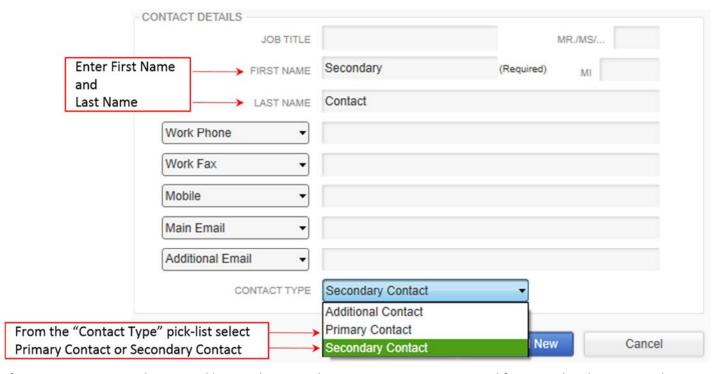




To add or update the primary or secondary contact information...



In the CONTACT DETAILS section complete the FIRST NAME and LAST NAME fields (at minimum):



If customer mapping is being used by SimplePort and a payment comes into PayPal from: Frederick Jones, Fred J Jones, Mary Jones, Fred Jones or Frederick Jones LLC, that payment will be mapped to the Frederick J Jones customer, as a number of







different entries in the customer record for that one customer have been found, all of which are the same customer and a new customer record will not be generated in the imported data.

This is how SimplePort customer mapping works, but it requires customer record information being accurate.

This following information is technical and concerns proper usage of the customer record INVOICE/BILL TO and SHIP TO sections.

There are five specific fields used by QB in the ADDRRESS DETAILS INVOICE/BILL TO and SHIP TO sections:



SimplePort makes arbitrary decisions on customer record data placement if no values are present, but if there are data values from PayPal to insert in the record, they have to be placed somewhere.

QB has two fields in the customer record that are used to auto-populate specific fields in the INVOICE/BILL TO section.

By default, if it entered in the customer record, QB will auto-populate the BADDR1 record with the COMPANYNAME field value:

BADDR1=COMPANYNAME

COMPANY NAME | Company Name Field *

BADDD2=FULLNAME[FN-MI-LN] BADDR3=STREET ADDRESS BADDR4=CITY ST ZIP CNTRY BADDR5=SPECIALNOTES

If entered, QB will also auto-populate the BADDR2 record with the FULLNAME values (First Name, Middle Initial, Last Name). We always recommend entering a primary First Name and Last Name value for all customers.



If no COMPANY NAME value is present then we use the BADDR1 - BADDR3 records in the INVOICE/BILL TO fields:

Without a COMPANY NAME value in the customer record, the INVOICE/BILL TO section will look like this:

Fred Jones
123 Any Street
Any City, CA 12345, USA
In this example BADDR4 and BADDR5 are not used and BADDR4 values have been shifted to the BADDR3 record.

If a COMPANY NAME value was added to the customer record after the customer record was created, QB will not auto-populate the BADDR1 record in the INVOICE/BILL TO section. You must

enter that information into the INVOICE/BILL TO section, shift the First and Last Name values down one record and place the COMPANY NAME record in the BADDR1 field.







Following those changes the INVOICE/BILL TO section will look like this:

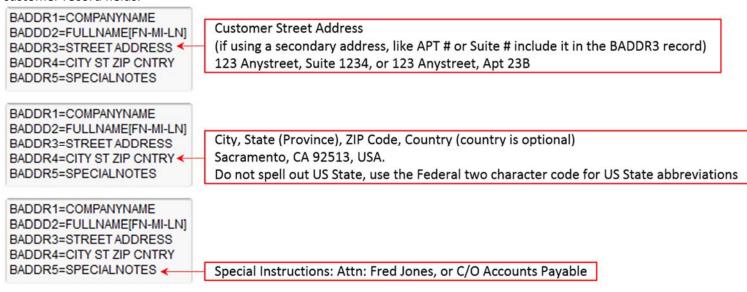
Frederick Jones LLC Fred Jones 123 Any Street Any City, CA 12345, USA

This holds true for the FULLNAME (First, MI and Last Name) fields, if that info is added after initially creating the customer record you must enter

that information into the INVOICE/BILL TO section and place them in the correct field locations.

Be sure to update the SHIP TO information after updating the INVOICE/BILL TO section (as necessary).

The other INVOICE/BILL TO records are entered directly into the INVOICE/BILL TO section and are not pulled from other customer record fields.



This is a well-organized and fully completed **Address Info** customer record:

