1. Enter this information in the Address Info tab:

| Customer Name | **Sherwood Tours**  Because you’re not entering an opening balance, you don’t need to change the date for the As Of field. |
| --- | --- |
| Company Name | **Sherwood Tours**  You can use keyboard shortcuts to copy/paste if it’s faster for you. |
| Full Name | **Ms. Cheri Romaine** |
| Job TItle | **Owner** |
| Main Phone | **(503) 555-9962** |

 Use the **Tab** key to move from field to field.

1. Address Details Invoice/Bill To: **21192 Langer Farms PkwyEnterSherwood, OR 97140**  
   *Before typing the address, click at the end of the last line of text, in this case the name*Cheri Romaine*, and press* **Enter**.
2. Click **Copy>>**to copy the address to the Ship To field, which saves it as the default shipping address, and click **OK**in the Add Shipping Address Information window.
3. Click the **Payment Settings**tab and use this image to fill in the information:

zoom image

1. Click the **Additional Info**tab and select **Referral**from the Customer Type List.

 Tracking how customers were acquired can serve as a valuable marketing tool.

1. Click **OK**to complete the New Customer record.

Edit a Customer

*Ginny Sinclair got married and changed her name, so you need to edit the entry in the Customers & Jobs List.*

1. Locate and then double-click **Sinclair, Ginny**in the Customers & Jobs List to open the Edit Customer window.
2. Correct the name to read: **Park, Ginny**  
   *You will need to correct this in four separate places in the Edit Customer window.*
3. Click the **Additional Info**tab and select **From advertisement**as the Customer Type.
4. Click **OK**to accept the change and leave the Customer Center open.

Delete a Customer

*Willamette Tour Enterprises has gone out of business without booking a tour, so you will delete the company from the Customers & Jobs List. And since you don’t anticipate Jose Hernandez returning as a customer, you will mark him as inactive.*

1. Locate and right-click **Willamette Tour Enterprises**,choose **Delete Customer:Job**,and click **OK**to confirm.
2. Right-click **Hernandez, Jose**and choose **Make Customer:Job Inactive**;leave the Customer Center open.  
   *Jose Hernandez will no longer appear on the Customers & Jobs List, as it’s filtered to show only active customers. If you choose the Active Customers drop-down arrow  and select All Customers, you will see the inactive customers listed with an “X” next to their names and jobs. Switch back to Active Customers to hide the Inactive Customers.*

Add Jobs to a Customer

*The YMCA has submitted its summer camp schedule, so you will create a separate job for each camp session it will be running.*

1. From the Customers & Jobs List, select **YMCA of the Keys**,click the **New Customer & Job**button, and choose **Add Job**.
2. Type **Camp Mar28**in the Job Name field and click **OK**.  
   *Notice the right side of the window says*Job Information*rather than*Customer Information.
3. Using the procedure in steps 17–18, create these additional jobs for the YMCA:

* **Camp Jun27**
* **Camp Jul11**
* **Camp Jul25**

1. Close the Customer Center window.