

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.

CUSTOMER NAME **Frederick J Jones**

CURRENT BALANCE 0.00 [How do I adjust the current balance?](#)

**Address Info**

Payment Settings

Sales Tax Settings

Additional Info

Job Info

COMPANY NAME **Frederick Jones LLC**

FULL NAME Mr./Ms./J. **Fred** **J** **Jones**

JOB TITLE **Owner**

Main Phone **555-121-1234** Main Email **fredjones@fjonesllc.com**

Alt. Phone **555-212-4312** Alt. Email 1 **fjones34@gmail.com**

Mobile **555-987-5678** Website **www.fjonesllc.com**

Fax **555-121-9876** Other 1

ADDRESS DETAILS

INVOICE/BILL TO

Frederick Jones LLC  
 Fred J Jones  
 1234 Jones Avenue, Ste 1234  
 Santa Cruz, CA 95005, USA  
 Attn: Accounts Payable

Copy >>

SHIP TO **Ship To 1**

Frederick Jones LLC  
 Fred J Jones  
 1234 Jones Avenue, Ste 1234  
 Santa Cruz, CA 95005, USA  
 Attn: Accounts Payable

Default shipping address

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)

The screenshot shows a customer record for "Fred Jones" with a current balance of 0.00. The "Address Info" section contains several fields: COMPANY NAME, FULL NAME (split into Mr./Ms./J., First, M.I., Last), JOB TITLE, Main Phone, Main Email (fredjjones@fjonesllc.com), Alt. Phone, Alt. Email 1, Mobile, Website, Fax (55), and Other 1. The "ADDRESS DETAILS" section shows "INVOICE/BILL TO" and "SHIP TO" (Ship To 1) fields. The "INVOICE/BILL TO" field contains the text: "Fred Jones", "1234 Jones Avenue, Ste 1234", and "Santa Cruz, CA95005, USA". A red warning message states: "NEVER insert line breaks (spaces) between record information in the INVOICE/BILL TO or SHIP TO sections".

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:

The screenshot shows the same customer record for "Fred Jones" but with correct data entry. The "INVOICE/BILL TO" field contains: "Frederick Jones LLC", "Fred J Jones", "1234 Jones Avenue, Ste 1234", "Santa Cruz, CA95005, USA", and "Attn: Accounts Payable". The "SHIP TO" field (Ship To 1) contains the same information. A "Copy >>" button is visible between the two address boxes. The "Default shipping address" checkbox is checked.

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...

**Customer Information** ← From the Customer Information section, Click the Contacts tab

Company Name **Frederick Jones LLC** Main Phone 555-121-1234  
 Full Name Fred J Jones Alt. Phone 555-212-4312  
 Bill To Frederick Jones LLC Mobile 555-987-5678  
 Fred J Jones Fax 555-121-9876  
 1234 Jones Avenue, Ste 1234 Main Email fredjones@fjonesllc.com  
 Santa Cruz, CA 95005, USA Alt. Email 1 fjones34@gmail.com  
 Attn: Accounts Payable Website www.fjonesllc.com  
[Map](#) | [Directions](#)

Transactions **Contacts** ← To Do's Notes

CONTACT NAME CONTACT INFO

Jones, Frederick J (Primary Contact)

Jones, Mary (Secondary Contact)

Add New ← Select Add New or Edit Selected Contact from the Manage Contacts pick-list  
 Edit Selected Contact  
 Delete Selected Contact  
 Manage Contacts

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

CONTACT DETAILS

JOB TITLE MR./MS/...

Enter First Name and Last Name → FIRST NAME Secondary (Required) MI  
 → LAST NAME Contact

Work Phone  
 Work Fax  
 Mobile  
 Main Email  
 Additional Email

CONTACT TYPE Secondary Contact  
 Additional Contact  
 Primary Contact  
 Secondary Contact

From the "Contact Type" pick-list select Primary Contact or Secondary Contact → New Cancel

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 ADDRESS 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:

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:

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.

BADDR1=COMPANYNAME  
BADDR2=FULLNAME[FN-MI-LN]  
BADDR3=STREET ADDRESS  
BADDR4=CITY ST ZIP CNTRY  
BADDR5=SPECIALNOTES

Customer Street Address  
(if using a secondary address, like APT # or Suite # include it in the BADDR3 record)  
123 Anystreet, Suite 1234, or 123 Anystreet, Apt 23B

BADDR1=COMPANYNAME  
BADDR2=FULLNAME[FN-MI-LN]  
BADDR3=STREET ADDRESS  
BADDR4=CITY ST ZIP CNTRY  
BADDR5=SPECIALNOTES

City, State (Province), ZIP Code, Country (country is optional)  
Sacramento, CA 92513, USA.  
Do not spell out US State, use the Federal two character code for US State abbreviations

BADDR1=COMPANYNAME  
BADDR2=FULLNAME[FN-MI-LN]  
BADDR3=STREET ADDRESS  
BADDR4=CITY ST ZIP CNTRY  
BADDR5=SPECIALNOTES

Special Instructions: Attn: Fred Jones, or C/O Accounts Payable

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

CUSTOMER NAME **Frederick J Jones**

CURRENT BALANCE 0.00 [How do I adjust the current balance?](#)

**Address Info**

COMPANY NAME **Frederick Jones LLC**

FULL NAME **Mr./Ms./J. Fred J Jones**

JOB TITLE **Owner**

Main Phone **555-121-1234** Main Email **fredjones@fjonesllc.com**

Alt. Phone **555-212-4312** Alt. Email 1 **fjones34@gmail.com**

Mobile **555-987-5678** Website **www.fjonesllc.com**

Fax **555-121-9876** Other 1

ADDRESS DETAILS

INVOICE/BILL TO

SHIP TO **Ship To 1**

Frederick Jones LLC  
Fred J Jones  
1234 Jones Avenue, Ste 1234  
Santa Cruz, CA 95005, USA  
Attn: Accounts Payable

Frederick Jones LLC  
Fred J Jones  
1234 Jones Avenue, Ste 1234  
Santa Cruz, CA 95005, USA  
Attn: Accounts Payable

Copy >>

Default shipping address