

Customer/Student details						
Title	First name	Middle name	Last name	Suffix	Company	Display name as

Information w						
Male (Mr)/ Female (Ms)	1st Name	2nd Name	SURNAME (In Capitals)	Student number	Grade/ Class	Name + SURNAME

* This is the information we have on a spreadsheet before opening the customers in QBO that we need to be
 * Please note Schools/Colleges have hundreds of students and it does not always make sense to put it in by

	First Name + Last Name		Company	
Not Available	Not split	Not Available		Not Available

* How can one facilitate the extra basic information as per the spreadsheet that is in line with the QBO basic
 * How can one facilitate the Customer reports to show more columns reflect this detail so it can be exported t

Customer Information required when opening a new Customer in QBO:

More details							Sub
VAT Registration No.	Email	Phone	Mobile	Fax	Other	Website	Sub-customer ?

Information required from Schools/Colleges for QBO which is then allocated under the main Customer

<i>n/a</i>	<i>Parent Customer Details</i>	<i>n/a</i>	<i>Student number</i>	<i>n/a</i>	<i>Yes</i>
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We noted this number helps to search for a Student/ Customer

Unable to Import hand.

Detailed information allowed when importing Customers into QBO

Tax Reg. No.	Email	Phone	Mobile	Fax	Website	
					Not Available	Not Asked

Additional details to be imported?
 Export to Excel regularly?

-customer?/Parent Details		Address:				
		Billing Address:				
Parent	Bill with parent ?	Street	City	State	Postal Code	Country

headings as above:

<i>Main Customer</i>	Yes	<i>Parent Customer details</i>
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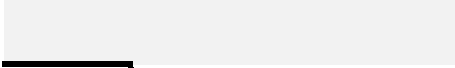
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		Street	City	State	Postal Code	Country
No Link created	Not Asked					

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Shipping same as Billing address ?



Yes

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	Opening Balance	Opening Balance Date
	Extra Appreciated	Extra Appreciated