

Perform Maintenance Activities

There are five types of maintenance in this project. The purposes of maintenance for each type are to (1) add, (2) change, or (3) delete default information for the five maintenance windows. Information that is changed through maintenance can be categorized into two types:

1. Information that makes it easier to record transactions. An example is information in a drop-down list to identify customers.
2. Information that directly affects the amounts recorded in subsequent transactions. Examples include a change in the unit selling price of a product and a pay rate increase for an employee.

In addition to the maintenance tasks described above, other areas of *QuickBooks* involve maintenance. For example, setting up a new company in *QuickBooks* requires knowledge of most maintenance windows and tasks. Chapter 10 provides instructions and practice for setting up a new company.

Accessing a Maintenance Window

The second column in the table on page 59 shows the sequence of steps necessary to access each maintenance window. Notice that the first step in accessing each maintenance window is to select an icon from the Home Page.

Additional Windows Within Each Maintenance Window

Three of the five maintenance windows have additional windows (sub-windows) that are accessed from the main window by the use of tabs. Inventory and General Ledger maintenance windows have no tabs. The main tab is shown for these three maintenance windows when the main window is first opened. The sub-windows contain additional information related to the main maintenance window. Only certain sub-windows are used in the project.

Instructions for Each Type of Maintenance Window

Instructions for using each of the five types of maintenance windows is explained in a section that follows. Each section contains window illustrations, along with reference tables for adding, changing, and deleting a record. The Quick Reference Table on the facing page identifies the Reference book page numbers for each type of maintenance.

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Quick Reference Table

Maintenance Window Name	Steps Necessary to Access Maintenance Window	Functions Performed by Maintenance Window
Customer Maintenance (pages 60–63)	<p>Add a new record: <i>Click the Customers icon → Customers & Jobs tab → New Customer & Job button → New Customer.</i></p> <p>Change a record or delete a record: <i>Click the Customers icon → Customers & Jobs tab → right-click on any customer → Edit Customer: Job or Delete Customer: Job.</i></p>	Used to add a new customer, view and /or change data for an existing customer, or delete a former customer.
Vendor Maintenance (pages 64–67)	<p>Add a new record: <i>Click the Vendors icon → Vendors Tab → New Vendor button → New Vendor</i></p> <p>Change a record or delete a record: <i>Click the Vendors icon → Vendors tab → right-click on any vendor → select Edit Vendor or Delete Vendor.</i></p>	Used to add a new vendor, view and /or change data for a vendor on file, or delete a former vendor.
Inventory Item Maintenance (pages 68–72)	<i>Click the Items & Services icon → right-click on any item → select New, Edit Item, or Delete Item.</i>	Used to add a new inventory item, view and /or change existing information, or delete an item no longer being purchased or sold.
Employee Maintenance (pages 74–80)	<p>Add a new record: <i>Click the Employees icon → Employees Tab → New Employee button.</i></p> <p>Change a record or delete a record: <i>Click the Employees icon → Employees tab → right-click on any employee → select Edit Employee or Delete Employee.</i></p>	Used to add a new employee, view and /or change existing employee information, or delete a former employee.
General Ledger Account Maintenance (pages 82–85)	<i>Click the Chart of Accounts icon → right-click on any account → select New, Edit Account, or Delete Account.</i>	Used to add a new general ledger account, view and /or change data for an account on file, or delete an account no longer being used.