

How to Use QuickBooks' New Customer Groups

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You can now create groups of customers and automate the process of sending payment reminders.

QuickBooks has a new set of tools that can help you deal with what is probably one of your most pressing problems: getting customers to pay. Here's how to use this new feature.

Creating Your Groups

QuickBooks has added an entry in the **Customers** menu to take you to these new tools. Go to **Customers | Payment Reminders | Manage Customer Groups**. In the window that opens, click **Create Customer Group**. QuickBooks then walks you through a three-step wizard. First, you enter a **Name** for your group in the first field of the **Group details** window. We'll call ours "California High Balance." If you'd like you can add a **Description**. Click **Next**.

In the **Select fields** window, you'll set the filters for the group. If you'd rather open your complete list of customers and choose the ones you want manually, you can skip this step. For our example, we'll define a group by choosing:

- One or more **Fields**. We want to narrow the group down to California customers. Click the down arrow in the **Field** box and select **State**.
- An **Operator**. Here, you'd select **Equals**.
- A **Value**. QuickBooks will display a list of states. Click the box in front of **CA**. If you'd like to include more states, you can do so. When you're done, click **Add**. You'll see your **Selected fields** in the box below.

The screenshot shows the 'Select fields' window in QuickBooks. It has three columns: 'Field', 'Operator', and 'Value'. In the 'Field' column, a dropdown menu is open showing 'Open Balance' selected. In the 'Operator' column, a dropdown menu is open showing 'Greater Than' selected. In the 'Value' column, a text box contains '500'. Below these columns is a 'Selected fields' section. It contains two entries: 'State Equals' and 'Open Balance Greater Than 500'. There is an 'Add' button to the right of the 'Operator' dropdown.

You can set the parameters for your group by selecting multiple fields, operators, and values.

We want to narrow the list down to customers in California who have open balances of more than \$500. So, you'd select **Open Balance** for the **Field**, **Greater Than** for the **Operator**, and **500** for the **Value**. Then click **Add** again to move your filter into the **Selected fields** box.

You can keep adding filters to narrow down your list even more if you'd like. When you're done, click **Next**. The **View/select customers** window opens displaying the results of your search in a table whose columns include **Name**, **Overdue balance**, and **Avg days to pay**. There's a checkmark in the box in front of **Automatically add new or remove existing customers based on fields and values selected in this group**.

If you leave the box checked, QuickBooks will move customers into the group as their open balances top \$500 and out when they catch up on their payments. Uncheck the box, and you'll have to add and remove customers manually, which would take vigilance and a lot of extra work. If you're satisfied with the list, click **Finish**, then **OK**. The **Manage groups** window now contains an entry for your new group.

Entries here are earmarked with icons indicating whether they are manually or automatically updated. You can also click links in the **Actions** column to edit or delete a group or send an email to it. If you select the last option, a window will open containing your list of customers (you can unselect any of them) and a composition box for your email.

Sending Payment Reminders

To start working with Payment Reminders, open the **Customers** menu and click **Payment Reminders | Schedule Payment Reminders**. Click **Let's get started**. From the next window, you can send either invoices or statements. Click **New schedule** next to **Invoice** and enter a name in the box that opens. We'll call ours **15 days past due** since we want to create reminders for customers who are more than 15 days past due.

We want this to go to all customers who fit the criteria, so click **<Add New>** in the drop-down list that follows **Send reminder to**. Call the new group **All customers** in the window that opens. Click **Next**, then **Next** again to display your entire list of customers. Click **Finish**, then **OK**. Back on the **Schedule payment reminders** screen, click **+ Add Reminder**. This overlapping window will open:

You can see and edit what your reminder will say and what fields will be replaced with real data.

Enter **15** after **Send this reminder** and select **after** from the drop-down list. QuickBooks supplies a sample email that you can edit if you'd like. Real data will, of course, replace the text in brackets. You can delete any of these and add more by clicking **Insert Field** in the lower right corner. Be very careful if you modify the bracketed fields. Brackets should surround the exact text that comes from the QuickBooks options supplied.

When you're satisfied with your email, you can **Check spelling**. Then click **OK**. You'll be back at the **Payment reminders** screen where you can save your reminder or add another.

QuickBooks will now prompt you to send reminders when they're due. You can track them in your customers' invoice histories and in your sent mail folder. When the time comes, open the **Customers** menu, and select **Payment Reminders | Review & Send Payment Reminders**. QuickBooks will display a list of reminders that need to be dispatched. Make sure all of the reminders you want to send have a checkmark in the box next to them and click **Send Now**.

There's nothing difficult about using these new QuickBooks tools, but you should be very careful with them. You don't want to annoy customers by sending payment reminders unless they're really warranted. You also don't want to let late payments languish. Should you choose to use them, we'd be happy to walk you through the process to prevent errors. As always, we're available to respond to your questions about QuickBooks and to help you make optimal use of it in your business.

SOCIAL MEDIA POSTS

Do you have a lot of customers who routinely pay their invoices late? QuickBooks has a new tool to help: **Payment Reminders**.

QuickBooks' new **Payment Reminders** allow you to create groups of customers who need to be reminded about late payments.

You can now create groups of customers in QuickBooks based on your own criteria and send emails to them.

If you use QuickBooks' new **Payment Reminders**, be very careful when you're modifying their automated emails.