

Vendor Maintenance

Vendor maintenance includes adding a vendor record, changing information for an existing vendor, and making a vendor's record inactive. The three maintenance tasks are covered in detail on the following pages, including QBO windows.

Add a Vendor Record – Quick Reference Table

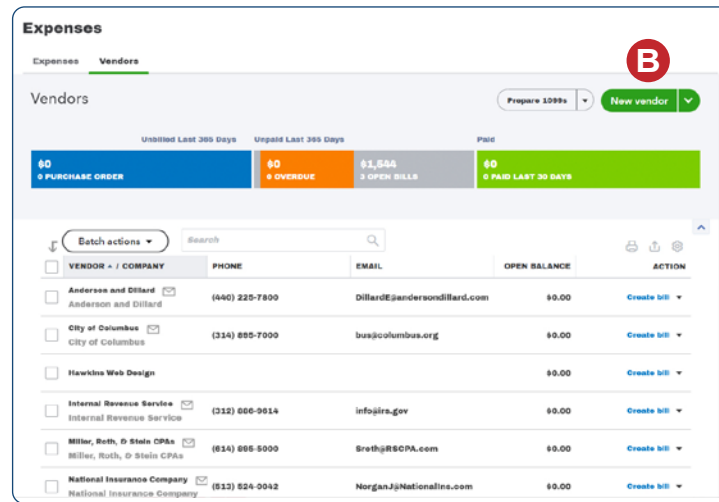
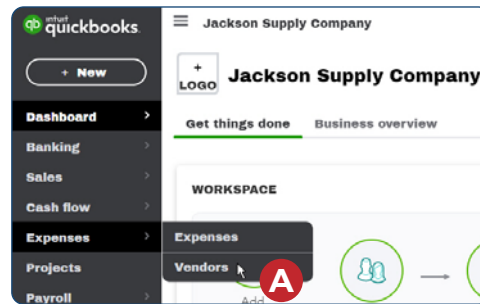
Step	Box or Other Location	Procedure
A	QBO Navigation Bar	Click Expenses → Vendors to open the vendor listing.
B	New Vendor button (in vendor listing)	Click the New Vendor button in the vendor listing to open the Vendor window .
C	Company name *	Type the vendor's name.
D	Email, Phone, Mobile, Fax, Other, Website, etc. boxes *	Type the vendor's various contact and website information, to the extent available.
E	Address section	Type the vendor address.
F	Business ID No./Social Security No. **	Type the appropriate tax identification number for the vendor.
G	Track payments for 1099 **	If the vendor is a 1099 vendor, select the Track payments for 1099 check box .
H	Terms **	Select the payment terms for the vendor.
I	Account no. **	If the vendor's system assigns an account number to the company, type the account number.
J	Default expense category **	Select the default general ledger account to be used for purchases from the vendor.
K	Opening balance **	Type the vendor's opening balance, even if it is 0.
L	As of **	Select the date of the opening balance for the vendor.
M	Vendor window (all sections)	Review the information in all sections of the Vendor window to verify that it is correct.
N	Save button	Save the new vendor record and close the window .

* Name and contact section

** Additional info section



Add a Vendor Record QBO windows



Vendor window - Name and contact section

The screenshot shows the 'Vendor' window with the 'Name and contact' section expanded. A red circle labeled 'M' is on the left side of the window. A red circle labeled 'C' is on the 'Company name' field. A red circle labeled 'D' is on the right side of the contact fields, which are grouped by a red bracket.

Name and contact

Company name:

Vendor display name *:

Title: First name: Middle name: Last name: Suffix:

Email: Phone number:

Mobile number: Fax:

Other: Website:

Name to print on checks:

Add a Vendor Record

QBO windows (continued)

Vendor Window - Address section

M

Address

Street address 1

Street address 2

City

State

ZIP code

Country

[Map](#)

E

Vendor Window - Additional info section

M

Additional info

Taxes

Business ID No. / Social Security No. **F** **G** Track payments for 1099

Expense rates

Billing rate (/hr)

Payments

Terms **H** Account no. **I**

Accounting

Default expense category Choose account **J**

Opening balance **K** **As of** 04/29/2022 **L**

N

Reference — Purchases and Cash Disbursements Cycle Activities:

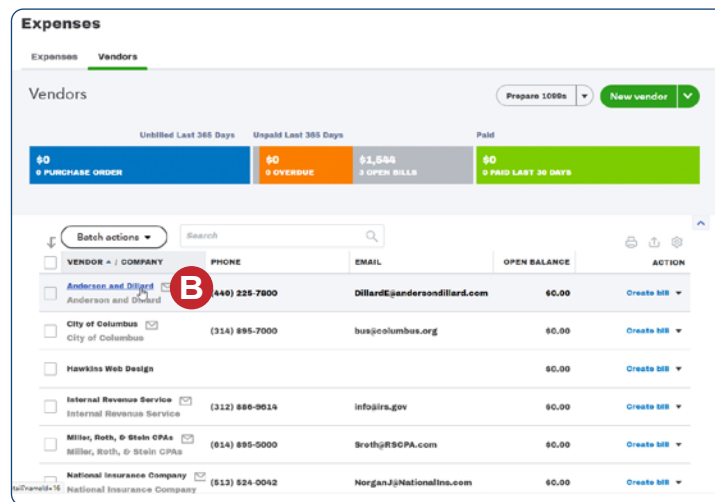
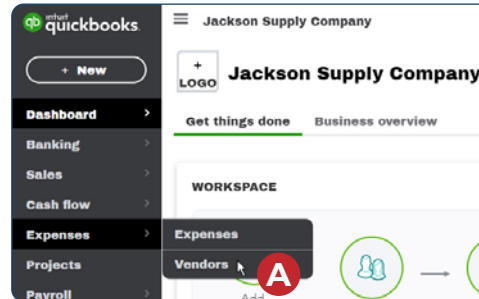
Vendor Maintenance



Change Information in an Existing Vendor's Record – Quick Reference Table



Step	Box or Other Location	Procedure
A	QBO Navigation Bar	Click Expenses → Vendors to open the vendor listing.
B	Vendor List	Locate the vendor you want to edit and click the vendor's name in the Vendor/Company column to open the vendor's individual page.
C	Vendor Details tab	Click the Vendor Details tab to open detailed information for the vendor.
D	Edit button	Click the Edit button to open the Vendor window for the vendor.
E	Vendor window	Change appropriate information in the Vendor window .
F	Save button	Save the changes to the vendor record and close the window.

Change Information in an Existing Vendor's Record QBO windows



Change Information in an Existing Vendor's Record

QBO windows (continued)

Anderson and Dillard   Edit New transaction ▾

Anderson and Dillard | 10030 Aberdeen Way, Cleveland, OH 44101




No notes available. Please click to add notes.

\$0.00 OPEN

\$0.00 OVERDUE

C



Transaction List | Vendor Details

Batch actions ▾ Filter ▾   

< First Previous 0-0 of 0 Next Last >

<input type="checkbox"/>	DATE ▾	TYPE	NO.	PAYEE	CATEGORY	MEMO	TOTAL	ACTION
There are no transactions matching the criteria.								

< First Previous 0-0 of 0 Next Last >

Anderson and Dillard   Edit New transaction ▾

Anderson and Dillard | 10030 Aberdeen Way, Cleveland, OH 44101

No notes available. Please click to add notes.

\$0.00 OPEN

\$0.00 OVERDUE

Transaction List | Vendor Details

D Edit

Vendor: Anderson and Dillard

Billing address: 10030 Aberdeen Way
Cleveland, OH 44101

Email: DillardE@andersondillard.com


Phone: (440) 225-7800

Terms:

Mobile:

Company: Anderson and Dillard

Fax: (440) 225-7899

Notes: No notes available. Please click to add 

Other:

Website: <http://www.ADillard.com>

Attachments: Maximum size: 20MB

Drag/Drop files here or click the icon

[Show existing](#)




Change Information in an Existing Vendor's Record

QBO windows (continued)

Vendor Window (with additional sections collapsed)

E

Vendor ✕

 **Name and contact**^

Company name

Vendor display name *

Title

First name

Middle name

Last name

Suffix

Email

Phone number


Mobile number


Fax


Other

Website

Name to print on checks

 **Address**∨

 **Notes and attachments**∨

 **Additional info**∨

[Privacy](#)

Save

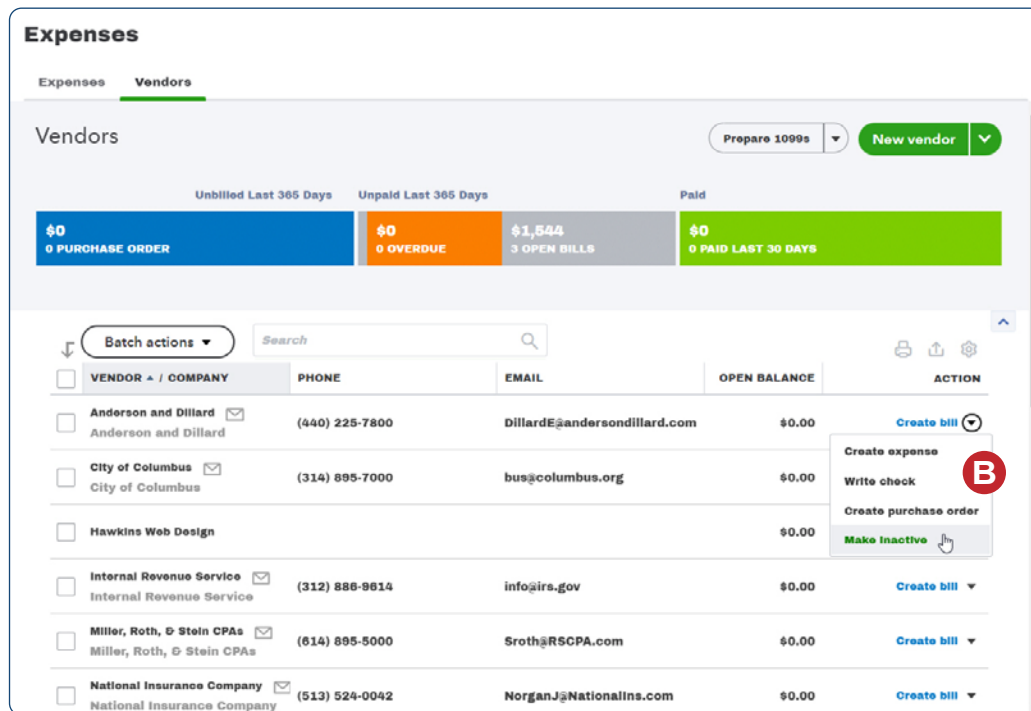
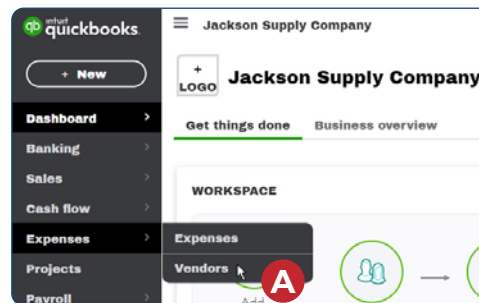
F



Make a Vendor's Record Inactive – Quick Reference Table

Step	Box or Other Location	Procedure
A	QBO Navigation Bar	Click Expenses → Vendors to open the vendor listing.
B	Action column drop-down list button	Locate the vendor you want to make inactive → click the Action column drop-down list button on that vendor's line → select Make inactive . Note that this selection will not appear if the vendor has open transactions.
C	QBO message	A message will appear that says "Are you sure you want to make [vendor name] inactive?" Click the Yes/Yes, make inactive button .

Make a Vendor's Record Inactive QBO windows



Make a Vendor's Record Inactive

QBO windows (continued)

