

## 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

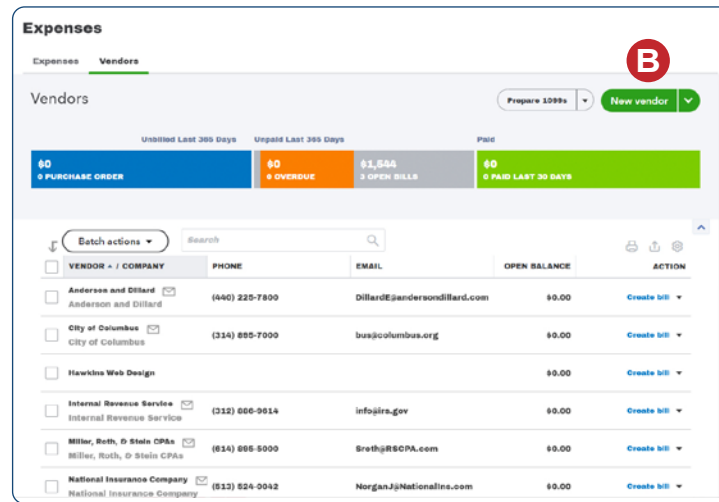
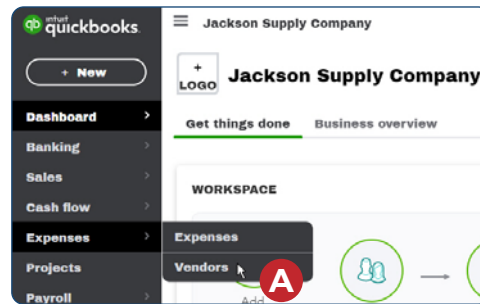
| Step     | Box or Other Location  | Procedure  |
|----------|--|--|
| <b>A</b> | <b>QBO Navigation Bar</b>                                      | Click <b>Expenses</b> → <b>Vendors</b> to open the vendor listing.                               |
| <b>B</b> | <b>New Vendor button (in vendor listing)</b>                   | Click the <b>New Vendor button</b> in the vendor listing to open the <b>Vendor window</b> .      |
| <b>C</b> | <b>Company name *</b>  | Type the vendor's name.  |
| <b>D</b> | <b>Email, Phone, Mobile, Fax, Other, Website, etc. boxes *</b> | Type the vendor's various contact and website information, to the extent available.              |
| <b>E</b> | <b>Address section</b>   | Type the vendor address.   |
| <b>F</b> | <b>Business ID No./Social Security No. **</b>                  | Type the appropriate tax identification number for the vendor.                                   |
| <b>G</b> | <b>Track payments for 1099 **</b>                              | If the vendor is a 1099 vendor, select the <b>Track payments for 1099 check box</b> .            |
| <b>H</b> | <b>Terms **</b>  | Select the payment terms for the vendor.   |
| <b>I</b> | <b>Account no. **</b>  | If the vendor's system assigns an account number to the company, type the account number.        |
| <b>J</b> | <b>Default expense category **</b>                             | Select the default general ledger account to be used for purchases from the vendor.              |
| <b>K</b> | <b>Opening balance **</b>                                      | Type the vendor's opening balance, even if it is 0.  |
| <b>L</b> | <b>As of **</b>  | Select the date of the opening balance for the vendor.   |
| <b>M</b> | <b>Vendor window (all sections)</b>                            | Review the information in all sections of the <b>Vendor window</b> to verify that it is correct. |
| <b>N</b> | <b>Save button</b>   | 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** **L** As of  04/29/2022

**N**

Reference – Purchases and Cash Disbursements Cycle Activities:

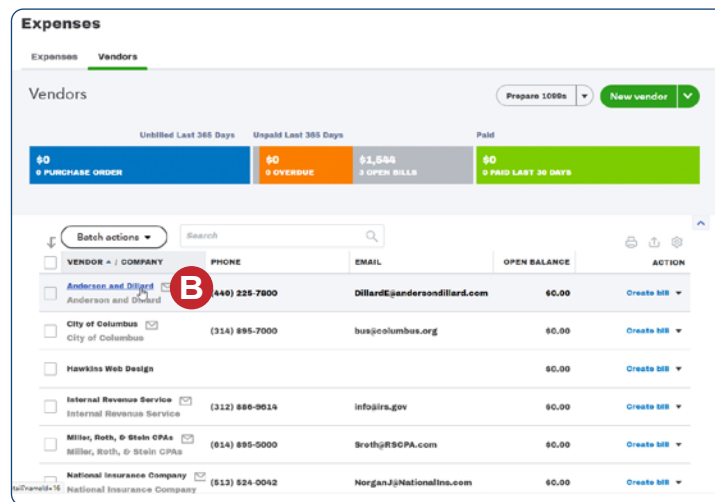
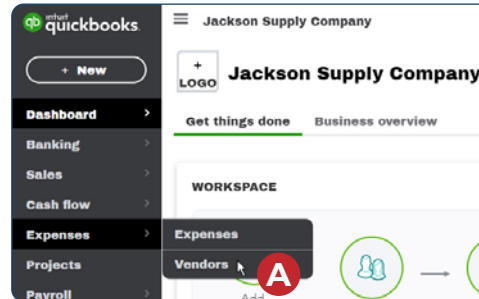
Vendor Maintenance



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

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

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

*No notes available. Please click to add notes.*

Edit New transaction ▾

\$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** ✉ ☎

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

*No notes available. Please click to add notes.*

D Edit New transaction ▾

\$0.00 OPEN

\$0.00 OVERDUE

Transaction List
Vendor Details

---

**Vendor** Anderson and Dillard

**Email** [DillardE@andersondillard.com](mailto:DillardE@andersondillard.com)

**Phone** (440) 225-7800

**Mobile**

**Fax** (440) 225-7899

**Other**

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

**Attachments** Maximum size: 20MB

Drag/Drop files here or click the icon

[Show existing](#)

**Billing address** 10030 Aberdeen Way  
Cleveland, OH  
44101

**Terms**

**Company** Anderson and Dillard

**Notes** No notes available. Please click to add

Edit

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Reference — Purchases and Cash Disbursements Cycle Activities:

Vendor Maintenance


# 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

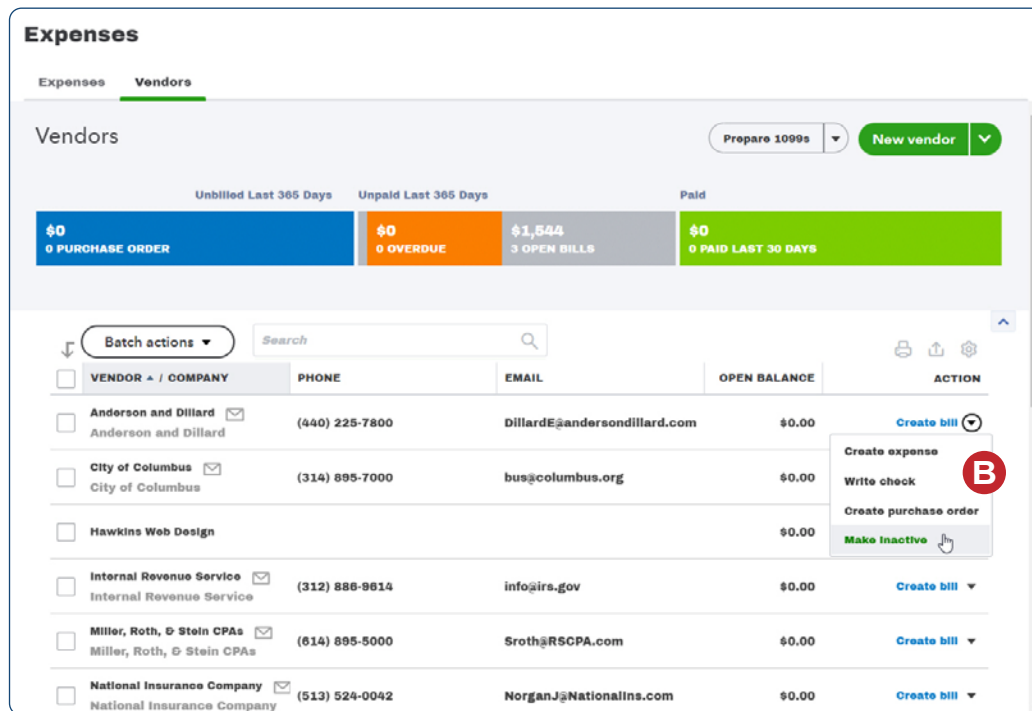
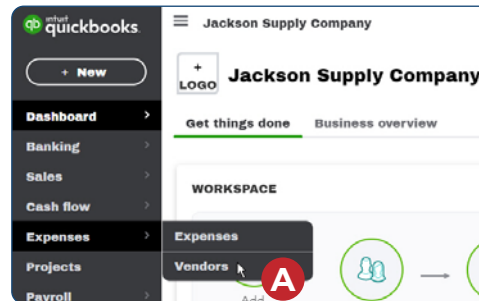




## Make a Vendor's Record Inactive – Quick Reference Table

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

## Make a Vendor's Record Inactive QBO windows



## Make a Vendor's Record Inactive

QBO windows (continued)

