

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

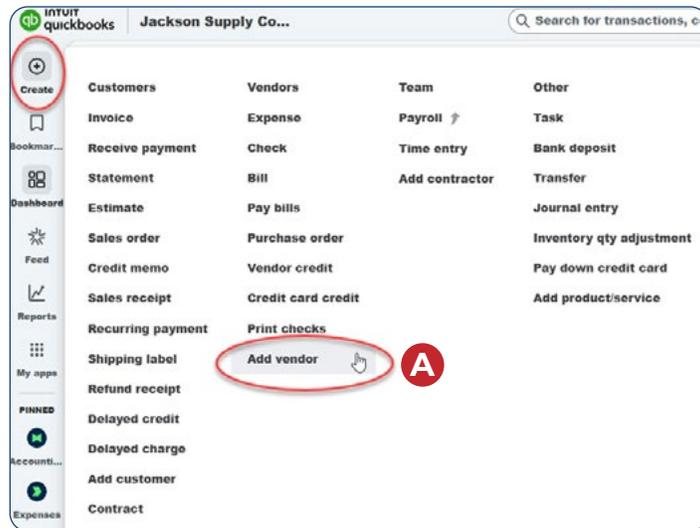
* Name and contact section

** 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. The 'Company name' field is circled in red and labeled with a red 'B'. The 'Vendor display name' dropdown menu is highlighted with a green border. The 'Name and contact' section includes the following fields: 'Company name', 'Vendor display name', 'Title', 'First name', 'Middle name', 'Last name', 'Suffix', 'Email', 'Phone number', 'Mobile number', 'Fax', 'Other', 'Website', and 'Name to print on checks'. A red bracket on the right side of the form, labeled with a red 'C', encompasses the 'Email', 'Phone number', 'Mobile number', 'Fax', 'Other', and 'Website' fields. A red 'L' is located to the left of the 'Name and contact' section header.

Add a Vendor Record

QBO windows (continued)

Vendor Window - Address section

L

Address

Street address 1

Street address 2

City

State

ZIP code

Country

[Map](#)

D

Vendor Window - Additional info section

L

Additional info

Taxes

Business ID No. / Social Security No. **F**

Track payments for 1099

Expense rates

Billing rate (/hr)

Payments

Terms **G**

Account no. **H**

Accounting

Default expense category **I**

Opening balance ⓘ

Opening balance **J**

As of 04/29/2022 **K**

M

Reference — Purchases and Cash Disbursements Cycle Activities:

Vendor Maintenance

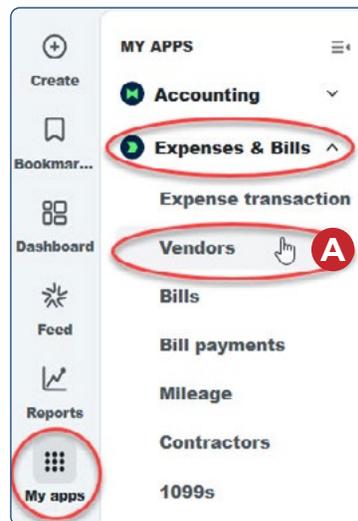


Change Information in an Existing Vendor's Record – Quick Reference Table

Step	Box or Other Location	Procedure
A	My apps menu	Click Expenses & Bills → 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	If the Vendor Details tab is not the default open 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)

Vendors Give feedback Prepare 1099s New Vendor

Unbilled Last 365 Days: 0
Unpaid Last 365 Days: 0
Paid: 0

FOR YOU
Never worry if you're paying enough payroll taxes. Focus on your business while QuickBooks Payroll calculate, file and pay your payroll taxes for you.*
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Search

<input type="checkbox"/>	VENDOR ↑	COMPANY NAME	PHONE	EMAIL	1099 TRACKING	OPEN BALANCE	ACTION
<input type="checkbox"/>	American Linen Supply		(614) 896-1000	JLewis@alsupply.com		\$0.00	Create bill ↓
<input type="checkbox"/>	Anderson and Dillard		(440) 225-7800	DillardE@andersondillard.com		\$0.00	Create bill ↓
<input type="checkbox"/>	City of Columbus		(314) 895-7000	bus@columbus.org		\$0.00	Create bill ↓
<input type="checkbox"/>	Internal Revenue Service		(312) 886-9614	info@irs.gov		\$0.00	Create bill ↓
<input type="checkbox"/>	Miller Roth & Associates State CPAs		(614) 896-5000	Sroth@RSCPA.com		\$0.00	Create bill ↓

Anderson and Dillard ✉ 📞

Company: -
Billing address: 10030 Aberdeen Way, Cleveland, OH 44101, United States
Bill Pay ACH info: -

Notes: [Add notes](#)

SUMMARY
\$0.00 Open balance
\$0.00 Overdue payment

Transaction List **Vendor Details** **Notes**

All transactions Filter Dates: Last 12 months

No expenses found
Try to change some filters to see more results.



Change Information in an Existing Vendor's Record

QBO windows (continued)

Anderson and Dillard

Company	Billing address	Bill Pay ACH info
-	10030 Aberdeen Way, Cleveland, OH 44101, United States	-

Notes
[Add notes](#)

SUMMARY

- \$0.00 Open balance
- \$0.00 Overdue payment

Transaction List **Vendor Details** Notes

Contact info

Vendor	Anderson and Dillard
Email	DillardE@andersondillard.com
Phone	(440) 225-7800
Mobile	-
Fax	(440) 225-7899
Other	-
Website	http://www.ADillard.com

Additional info

Bill Pay ACH info	-
Billing address	10030 Aberdeen Way, Cleveland, OH 44101, United States
Terms	-
Company	-
Notes	-

Attachments

[Add attachment](#)
Max file size: 20 MB

[Show existing attachments](#)

Edit



Change Information in an Existing Vendor's Record

QBO windows (continued)

Vendor Window (with additional sections collapsed)

E

X

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

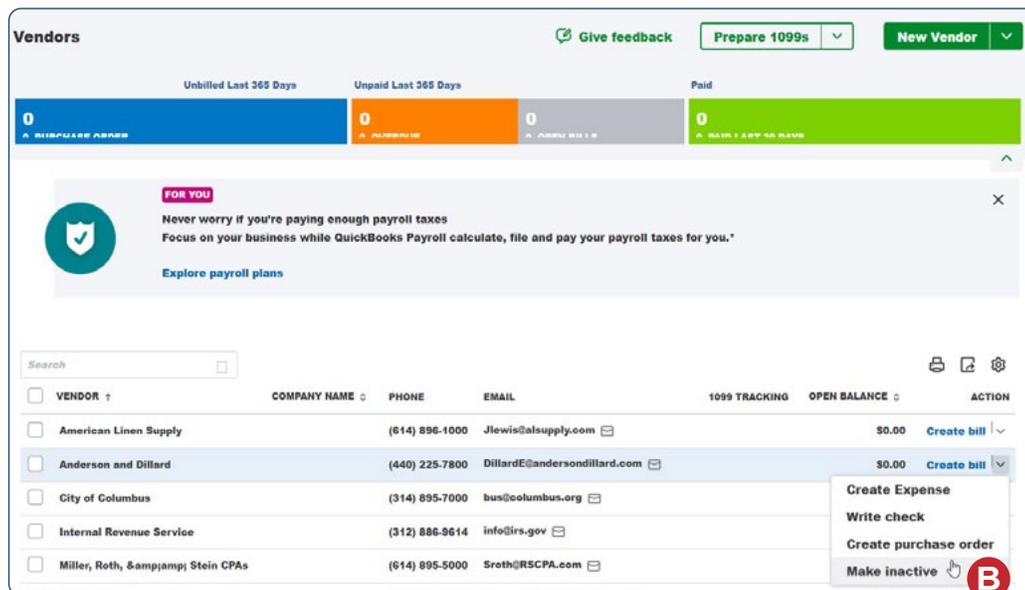
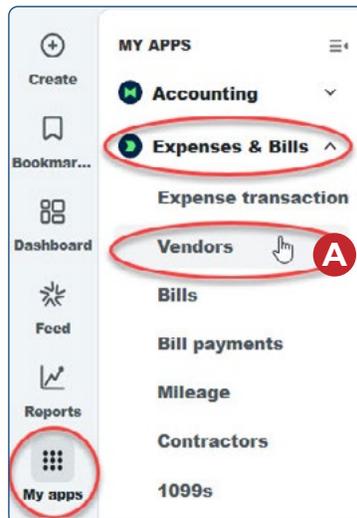
F



Make a Vendor's Record Inactive – Quick Reference Table

Step	Box or Other Location	Procedure
A	My apps menu	Click Expenses & Bills → 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, make inactive button .

Make a Vendor's Record Inactive QBO windows



Make a Vendor's Record Inactive

QBO windows (continued)

