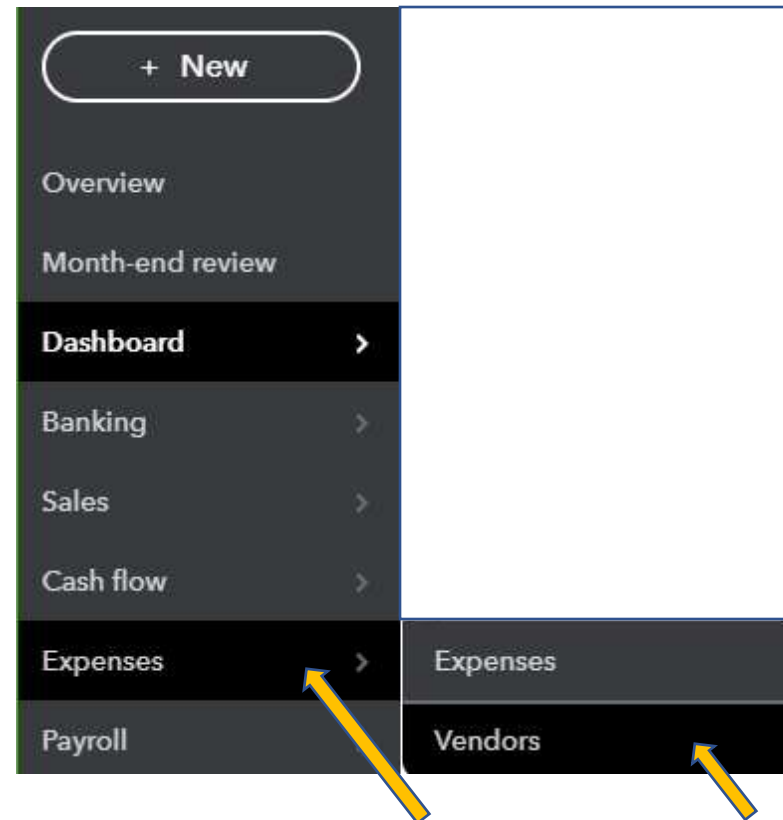
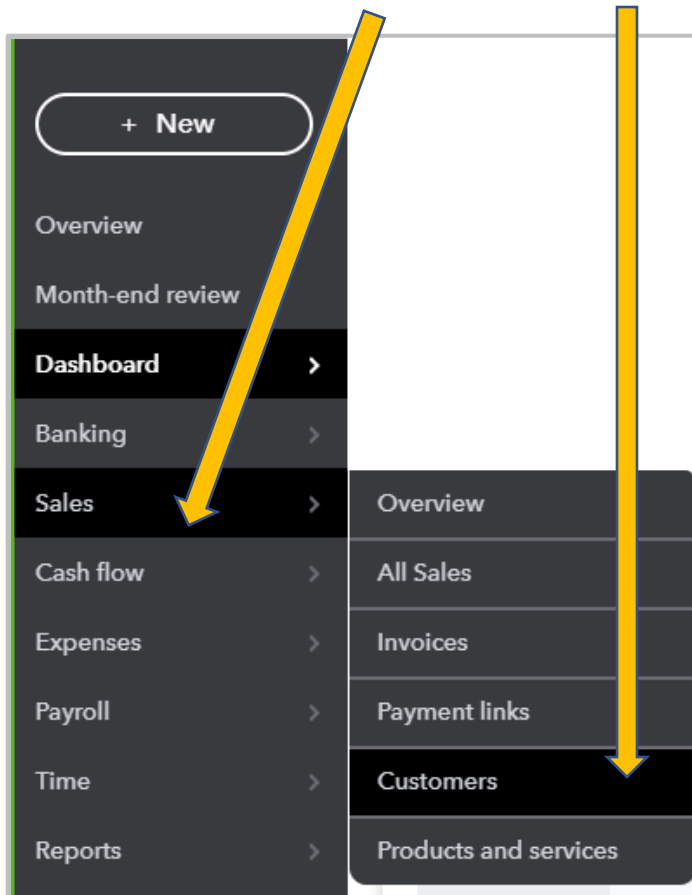


EDIT A CUSTOMER OR VENDOR

Sometimes it may be necessary to edit a customer or vendor that exists in QuickBooks Online (QB)s). This procedure is provided as a step-by-step procedure on editing a customer or vendor.

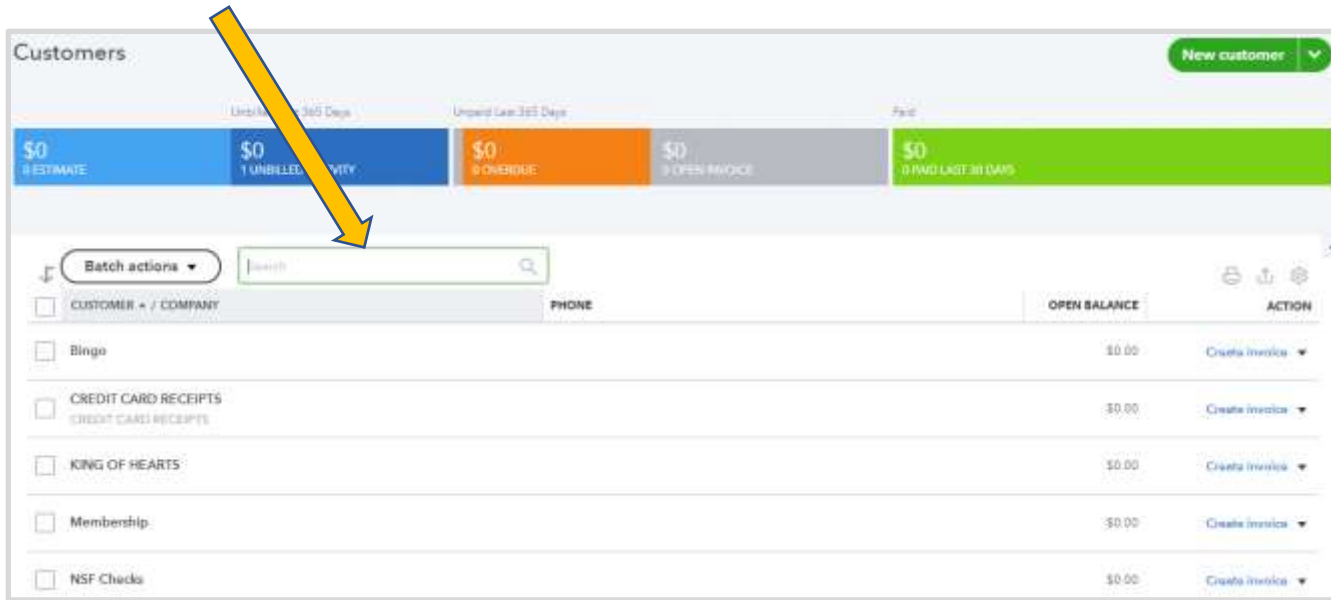
To edit a customer: Choose “Sales” then “Customers” in the Dashboard.



To edit a Vendor: Choose “Expenses” then “Vendors”

EDIT A CUSTOMER OR VENDOR

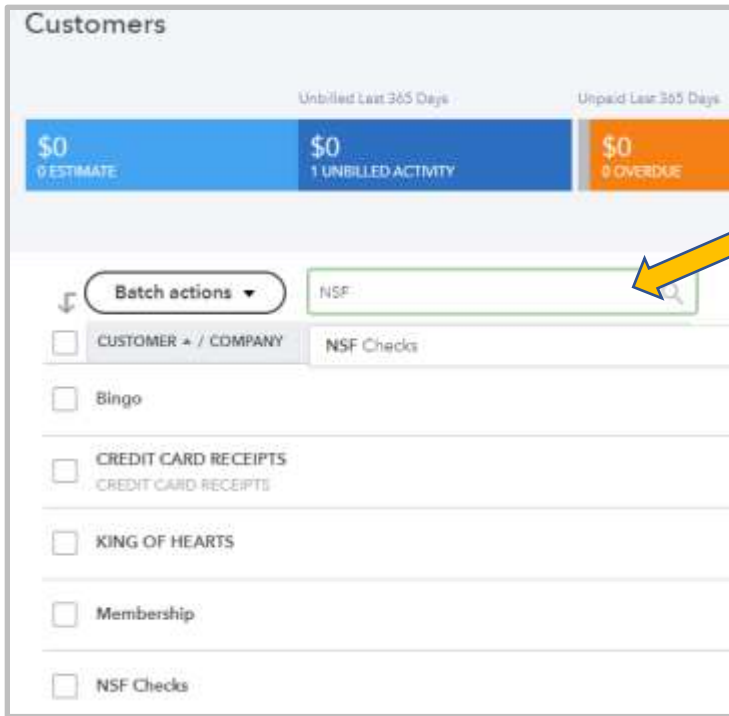
The Customers List or Search Window becomes available.



The Vendor List or Search Window becomes available

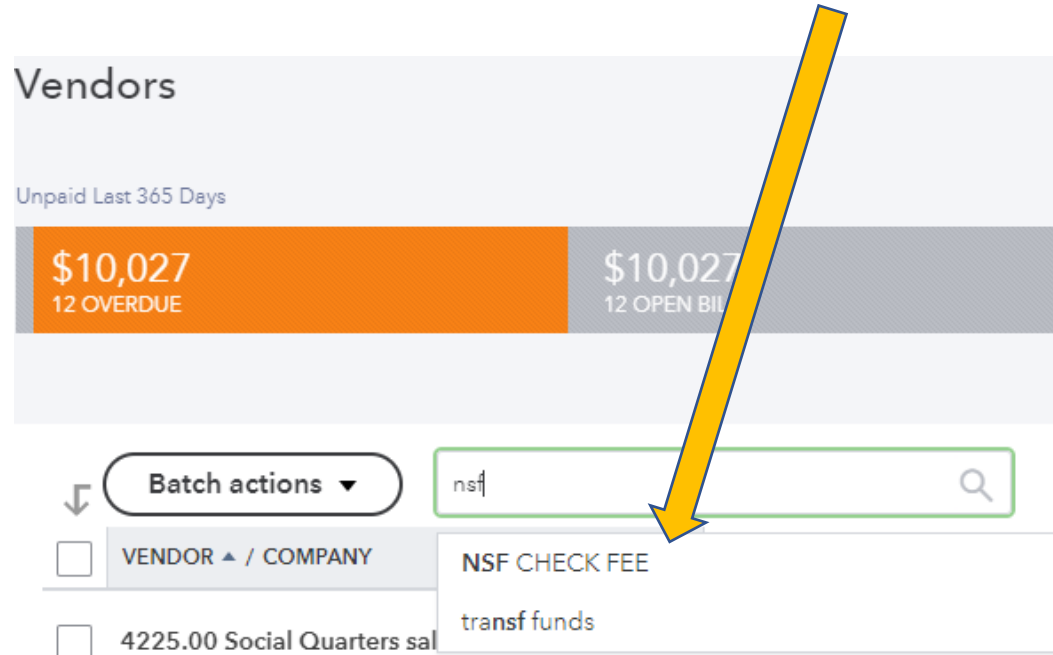


EDIT A CUSTOMER OR VENDOR

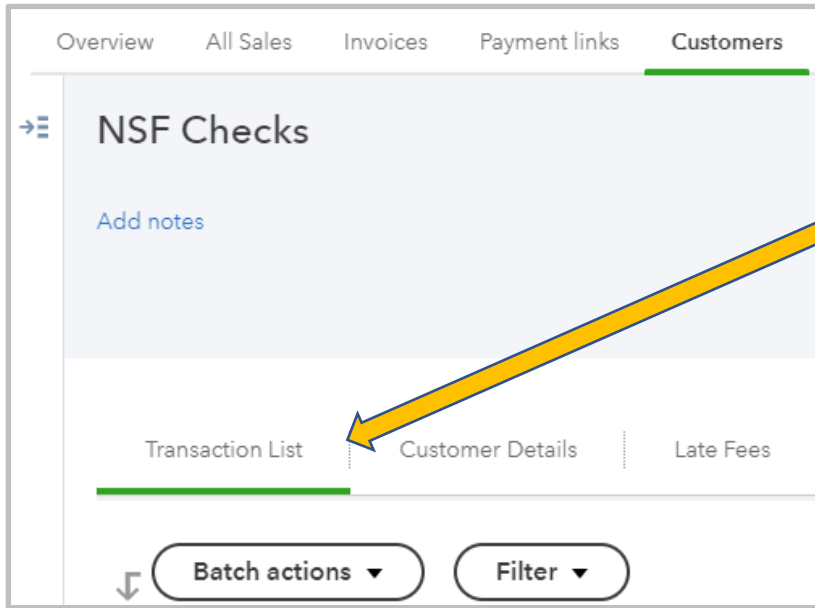


Once you start to type the first few letters of the customer, the search window provides a drop-down of choices.

The same goes for the Vendor search window. The example shows that it will not always be the first few letters, but the ones that match.

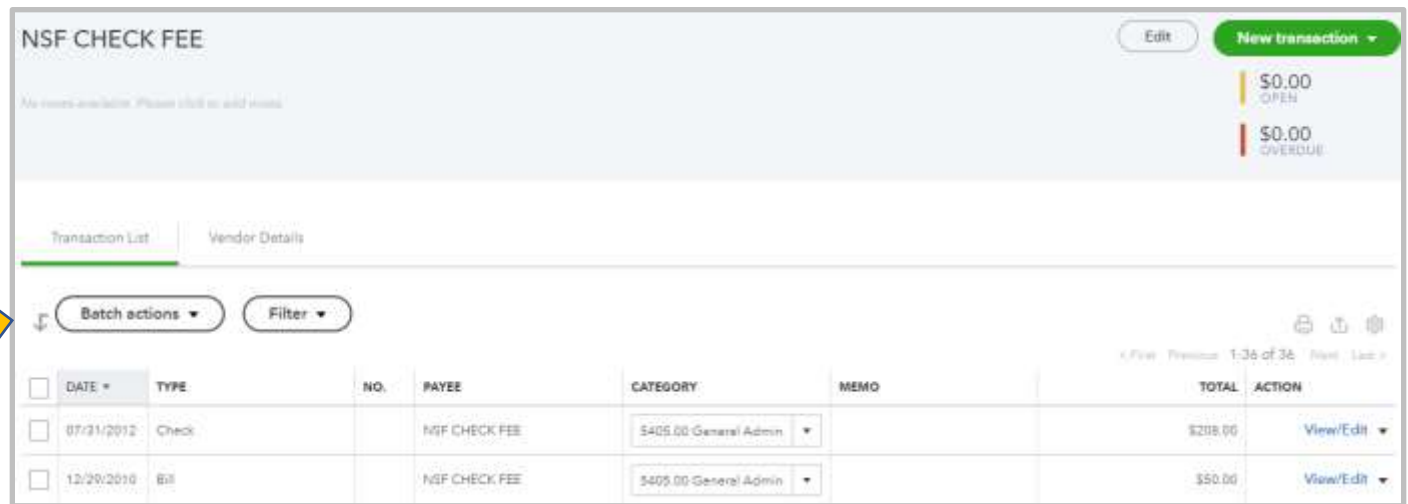


EDIT A CUSTOMER OR VENDOR



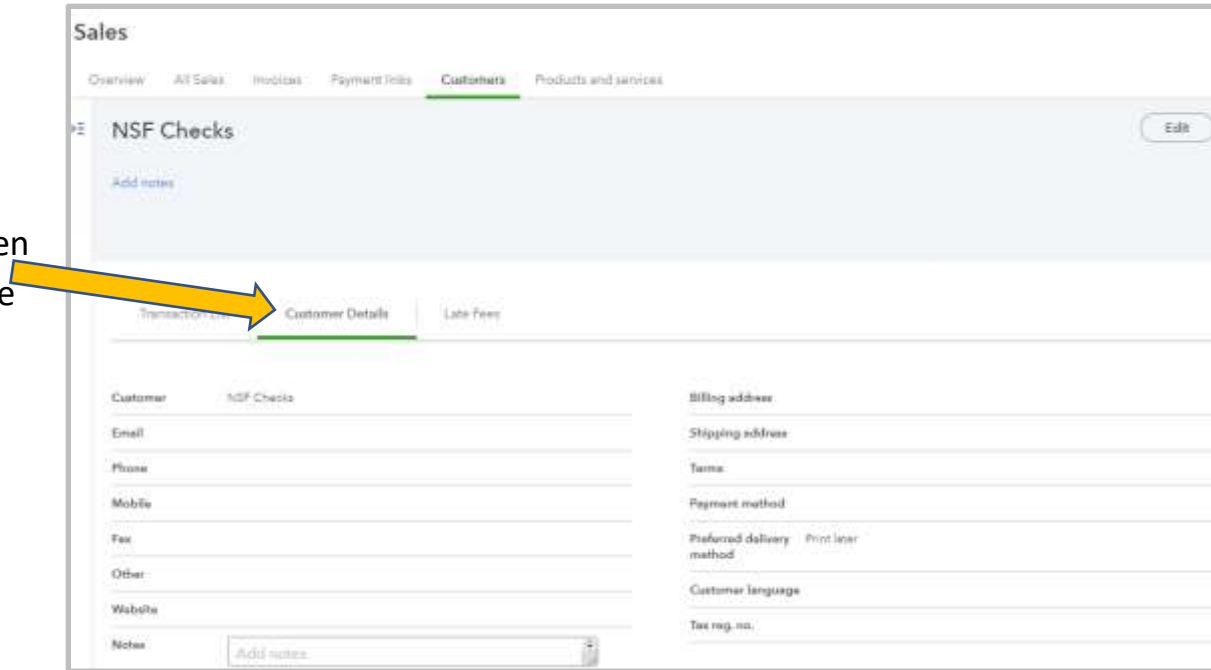
By clicking on the correct Customer Name, a new window appears with a list of transactions. The tabs at the top displays "Transaction List" underlined.

By clicking on the correct Vendor Name a new window appears with a list of transactions. The tabs at the top displays "Transaction List" underlined.

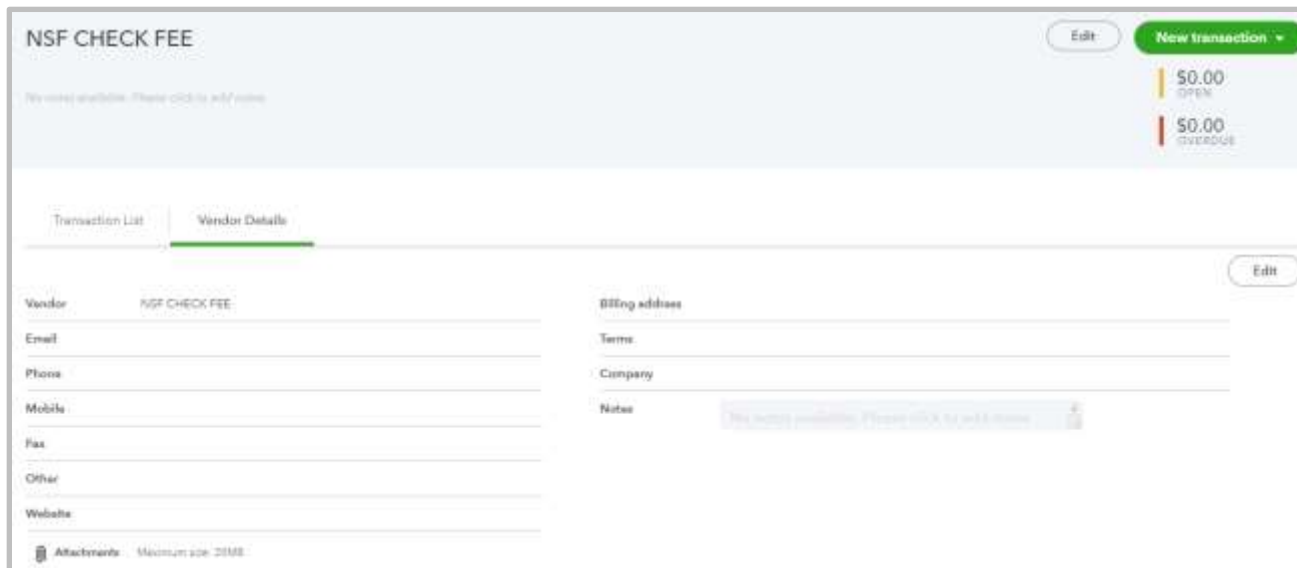


EDIT A CUSTOMER OR VENDOR

Click the mouse on the words “Customer Details” and the screen changes to information about the Customer.



Click the mouse on the words “Vendor Details” and the screen changes to information about the Vendor.



Either “edit” button for Customer or for Vendor will bring up the Customer/Vendor Information to change

EDIT A CUSTOMER OR VENDOR

HINT: Entering the information on the Customer into the “**Company**” field and clicking the TAB key will automatically populate the “**Display Name as**” and “**Print on Check**” sections of the screen. When the “**Quick Add**” button is clicked in the “**Enter Sales Receipt**” screen the only fields populated are the “**Company**” and “**Display Name as**” fields.

Customer information

Title First name Middle name Last name Suffix Email
 Separate multiple emails with commas

Company Phone Mobile Fax

* Display name as Other Website

Print on check as Use display name Is sub-customer

Address Notes Tax info Payment and billing Language Attachments Custom fields Additional Info

Billing address map Shipping address map Same as billing address

Cancel Make inactive Privacy Save

Make any changes you would want, then click “Save.”

Once you no longer need this Customer you can make them inactive (hidden) by pressing the “Make Inactive” Button

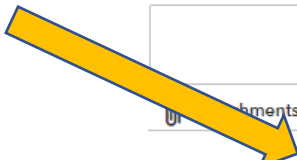
EDIT A CUSTOMER OR VENDOR

Same goes for the Vendor information Screen.

HINT: Entering the information on the Vendor into the “**Company**” field and clicking the TAB key will automatically populate the “**Display Name as**” and “**Print on Check**” sections of the screen. When the “**Quick Add**” button is clicked in the “**Enter Bill**” screen the only fields populated are the “**Company**” and “**Display Name as**” fields.

Remember to Click “Save”

Once you are sure that you are no longer going to need a particular Customer/Vendor – make them inactive.



Vendor Information ✕

Title	First name	Middle name	Last name	Suffix	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Separate multiple emails with commas"/>
Company					Phone
<input type="text"/>					<input type="text"/>
* Display name as					Mobile
<input type="text" value="NSF CHECK FEE"/>					<input type="text"/>
Print on check as <input checked="" type="checkbox"/> Use display name					Fax
<input type="text" value="NSF CHECK FEE"/>					<input type="text"/>
Address map					Other
<input type="text" value="Street"/>					<input type="text"/>
<input type="text" value="City/Town"/>			<input type="text" value="State/Province"/>		Website
<input type="text" value="ZIP code"/>			<input type="text" value="Country"/>		<input type="text"/>
Notes					Terms
<input type="text"/>					<input type="text" value="Enter Text"/>
Attachments Maximum size: 20MB					Opening balance
<input type="text"/>					<input type="text" value="as of"/>
					<input type="text" value="09/18/2021"/>
					Account no.
					<input type="text" value="Appears in the memo of all payments"/>
					Business ID No. / Social Security No.
					<input type="text"/>
					<input type="checkbox"/> Track payments for 1099
					Default expense account
					<input type="text" value="Choose Account"/>

Cancel
Make inactive
Privacy
Save