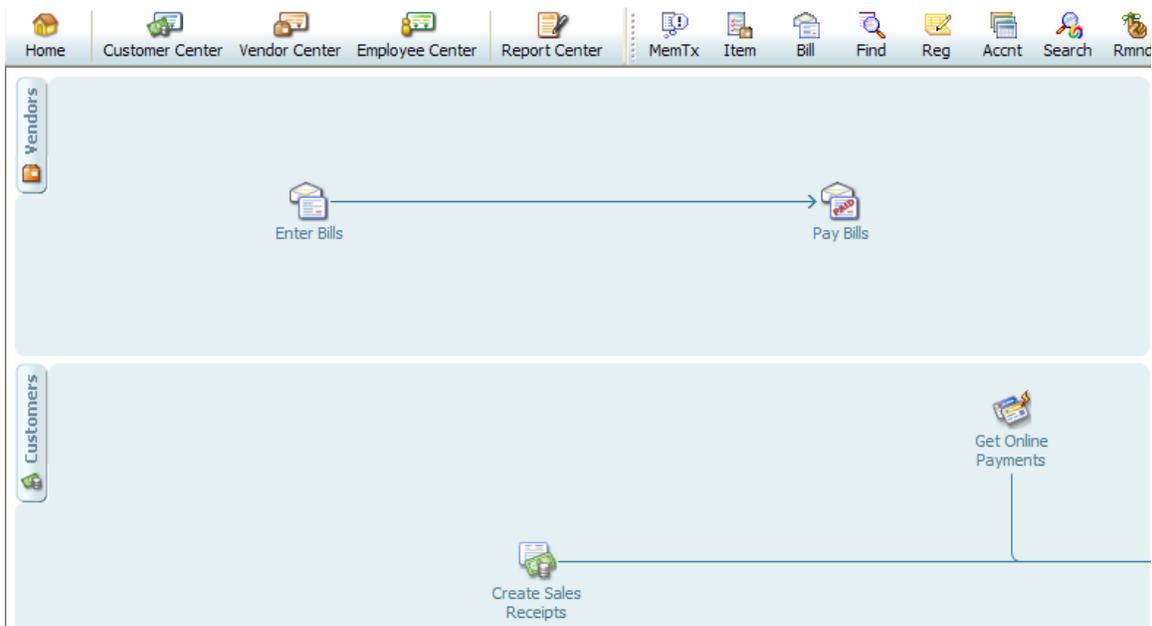# EDIT A CUSTOMER OR VENDOR

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

To edit a Customer or Vendor click on the Home Icon on the QBs Main Page. Notice that there is an Icon for Vendors in the Vendor Navigator section and also a Customers Icon in the Customer Navigator section of the Home Page.


By clicking either button you will be taken to either the Customer Center or the Vendor Center. Notice that you can also reach the same place by clicking on the Customer Center or Vendor Center in the Icon section of the QBs Main Page.


To edit a customer select the customer in the "**Customers & Jobs**" list in the Customer Center. Notice that when you select it the right hand upper portion of the screen will display the Customer information.
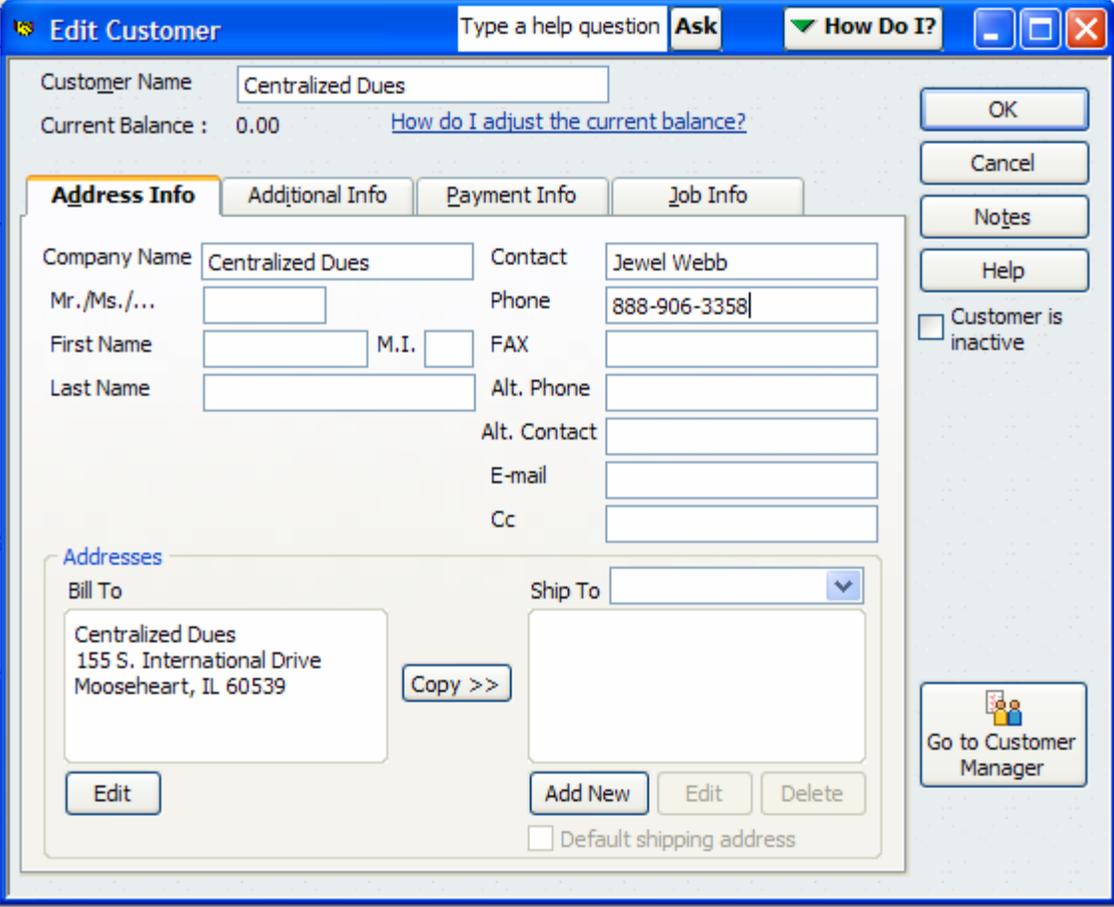
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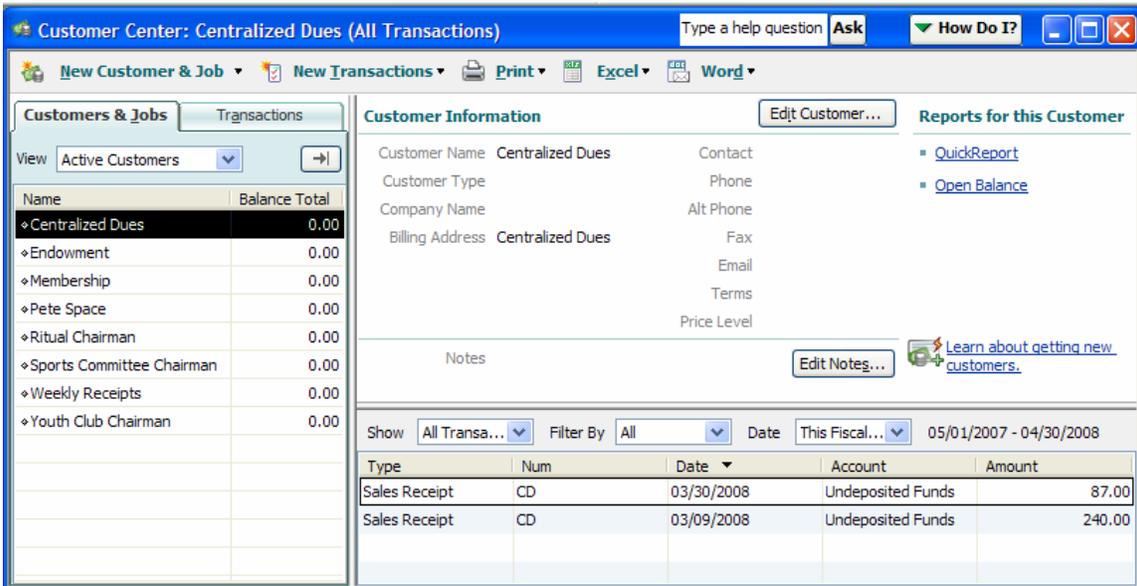
To Edit the Customer select the [Edit Customer...] button in the Customer Center. This will cause the "**Edit Customer**" screen to be displayed.
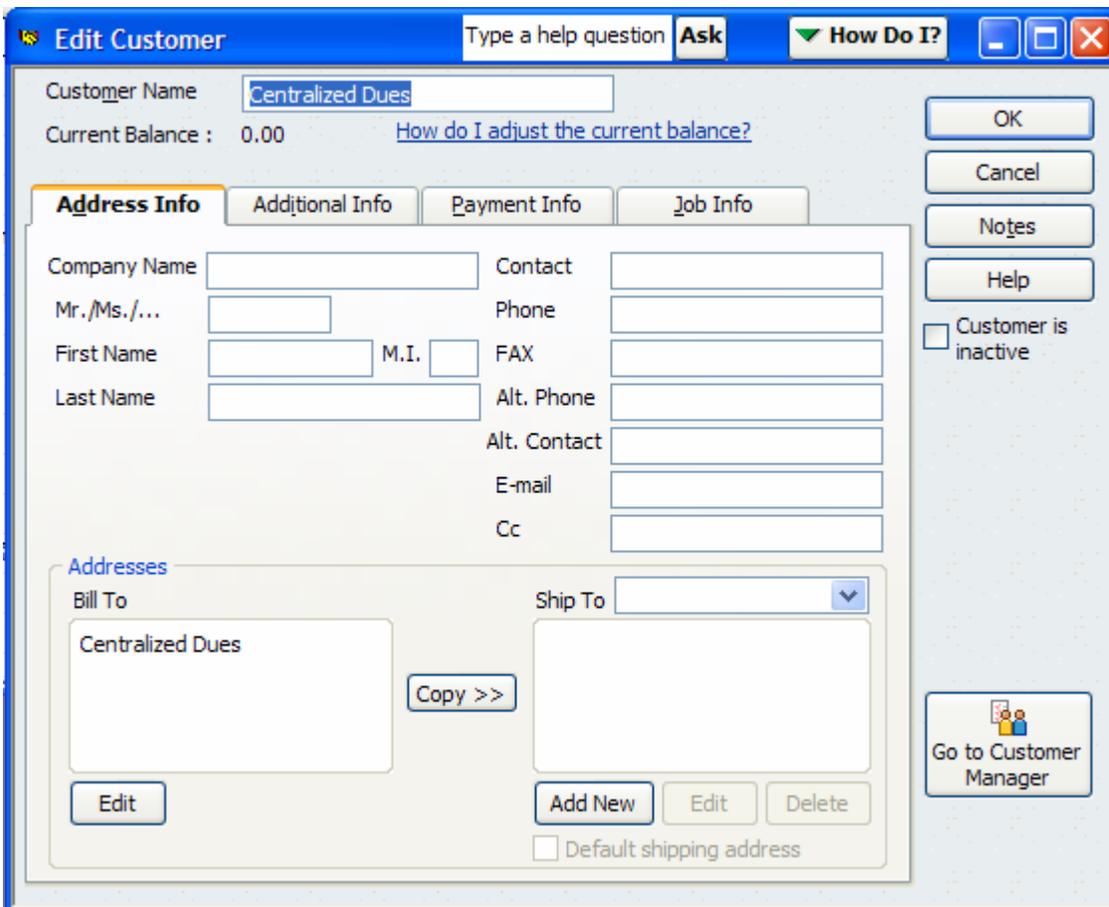
Information that is already populated for this customer will be displayed. To make changes simply enter the applicable information into the required fields and click the

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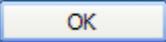
OK button. **HINT:** Entering the information on the Customer into the "**Company Name**" field and clicking the TAB key will automatically populate the "**Customer Name**" and "**Bill To**" sections of the screen. When the "**Quick Add**" button is clicked in the "**Enter Sales Receipt**" screen the only fields populated are the "**Customer Name**" and "**Bill To**" fields.


To Edit a Vendor go to the Vendor Center and select the vendor in the "**Vendors**" list. This will cause the Vendor information to be displayed in the upper right hand corner of the Vendor Center screen.
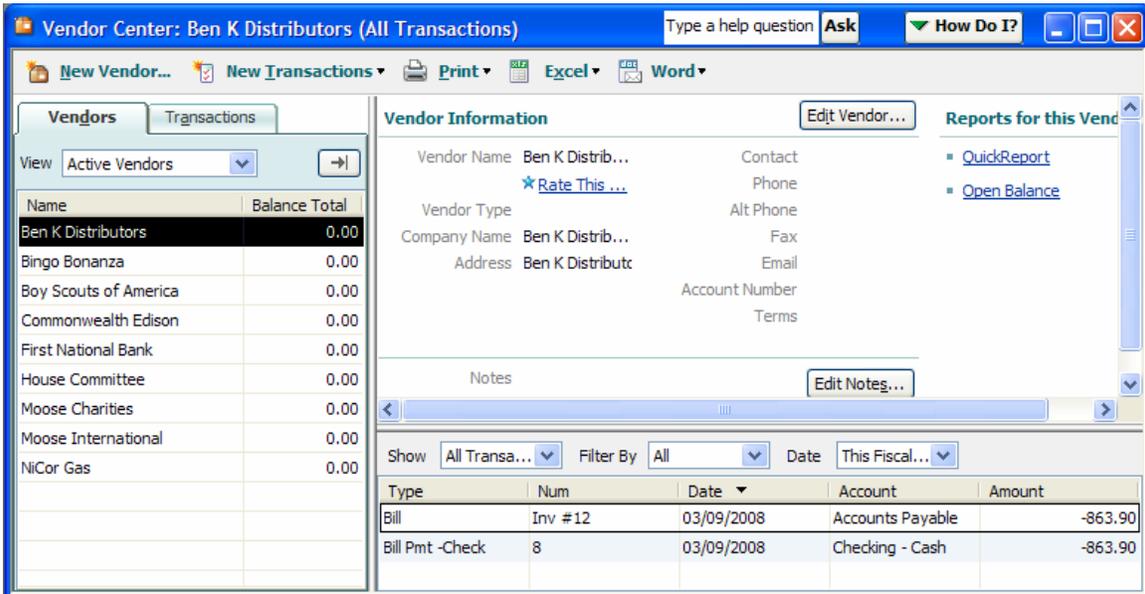
To edit the vendor click the [Edit Vendor...] button.   This will cause the "**Edit Vendor**" screen to be displayed.
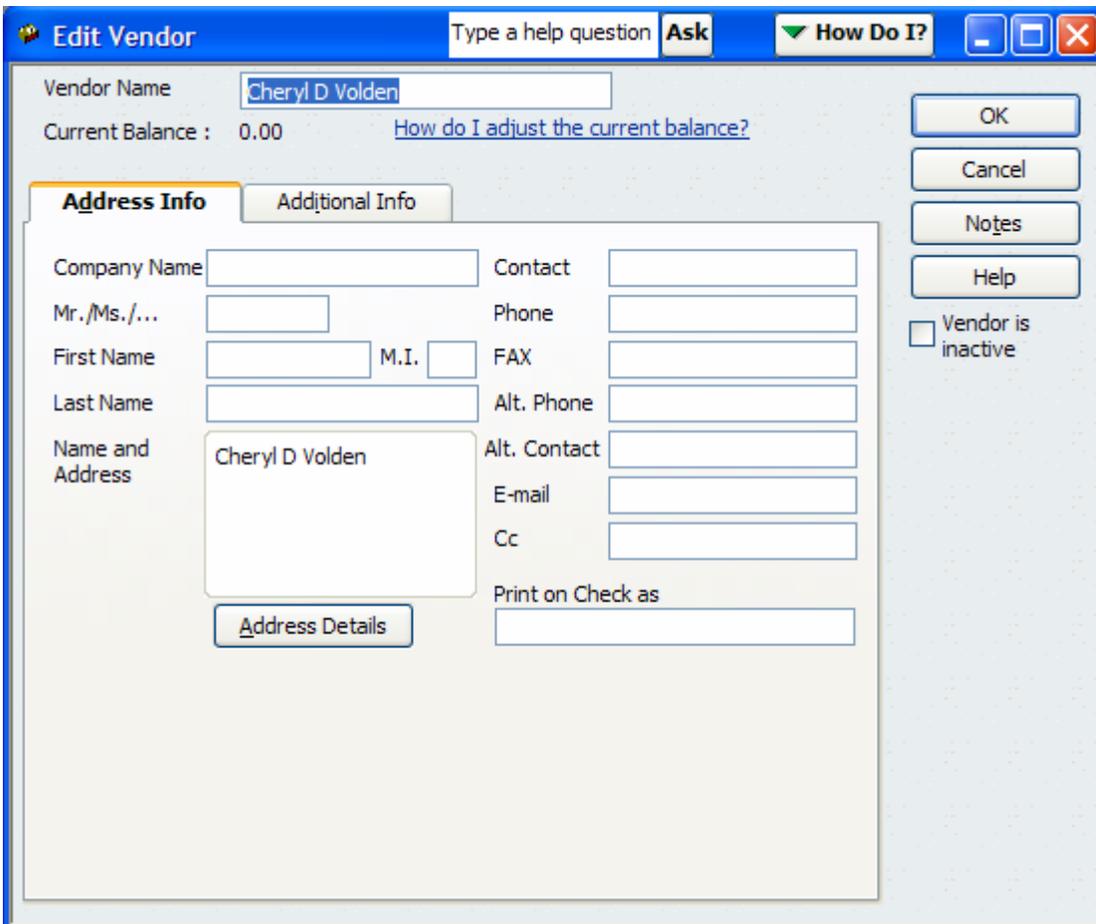
Information that is already populated for this vendor will be displayed. To make changes simply enter the applicable information into the required fields and click the

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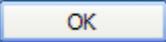
OK button. **HINT:** Entering the information on the Vendor into the "**Company Name**" field and clicking the TAB key will automatically populate the "**Vendor Name**" and "**Name and Address**" sections of the screen. When the "**Quick Add**" button is clicked in the "**Enter Bills**" screen it only populates the "**Vendor Name**" and "**Name and Address**" portions of the Vendor screen.
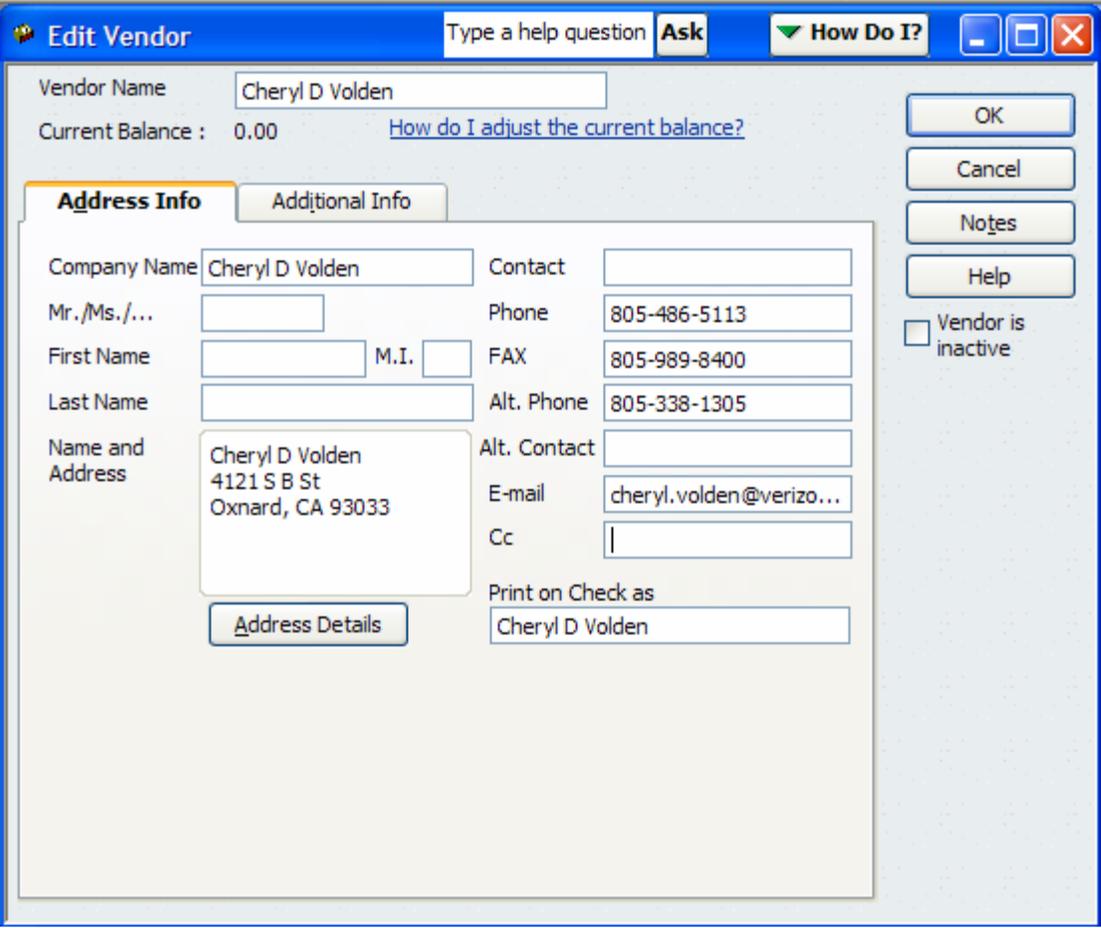
Notice on the screen that there is also a place to enter specific information needed for printing checks directly from QBs.

There is also the "**Additional Info**" tab that should be populated with information on the Vendor that can be used to automatically populate the bill such as the Account Number for that Vendor.

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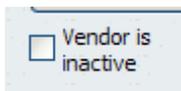
Additionally you can set the vendor to Inactive when this vendor is no longer an active vendor for your fraternal unit. Simply click the box next to Vendor is inactive and it will no longer display the vendor in the vendors list.
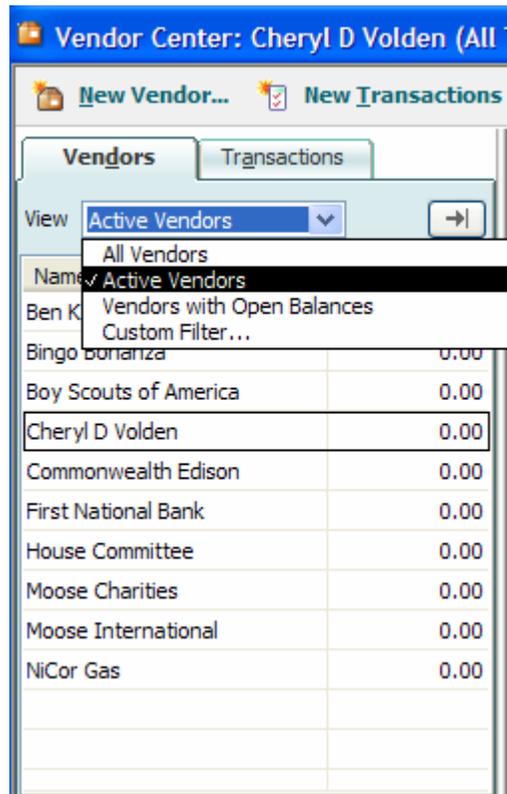
To see a list of all vendors you will need to click the drop down next to the View in the Vendors list to see all available choices. Selecting "All Vendors" will display vendors that are both active and inactive.

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