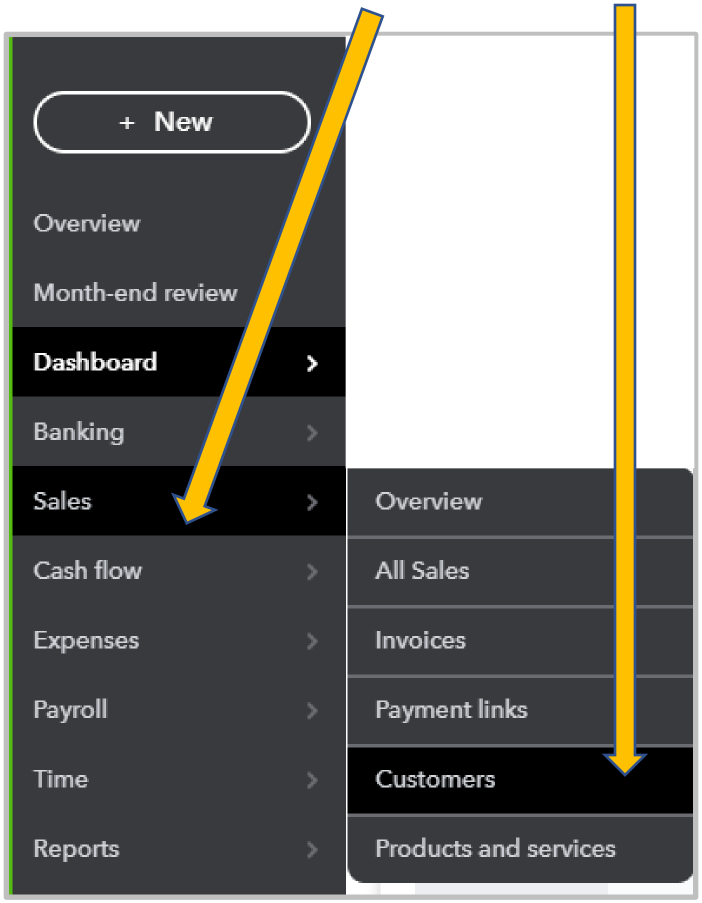
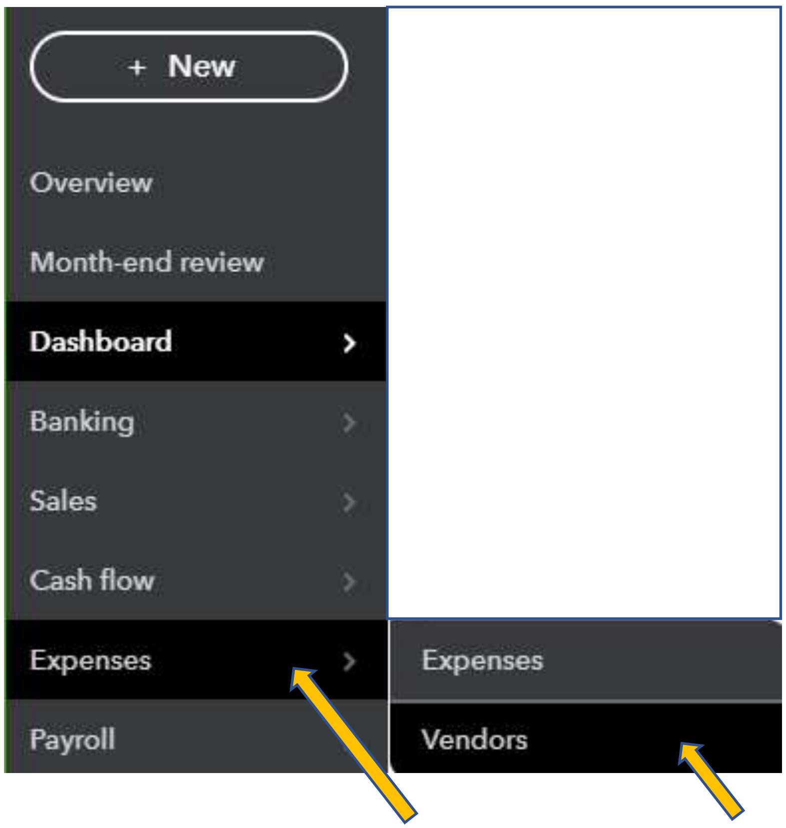
EDIT A CUSTOMER OR VENDOR

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"

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The Customers List or Search Window becomes available.

The Vendor List or Search Window becomes available

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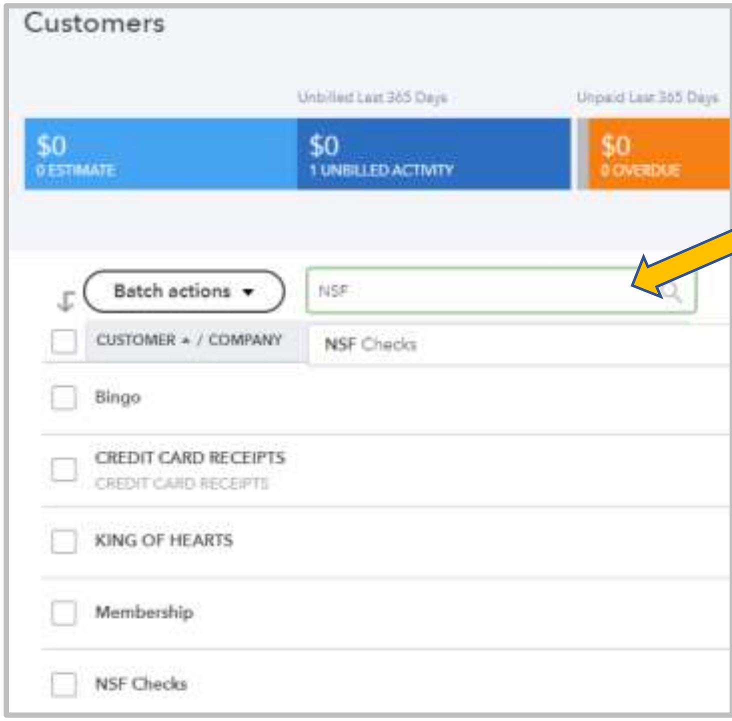
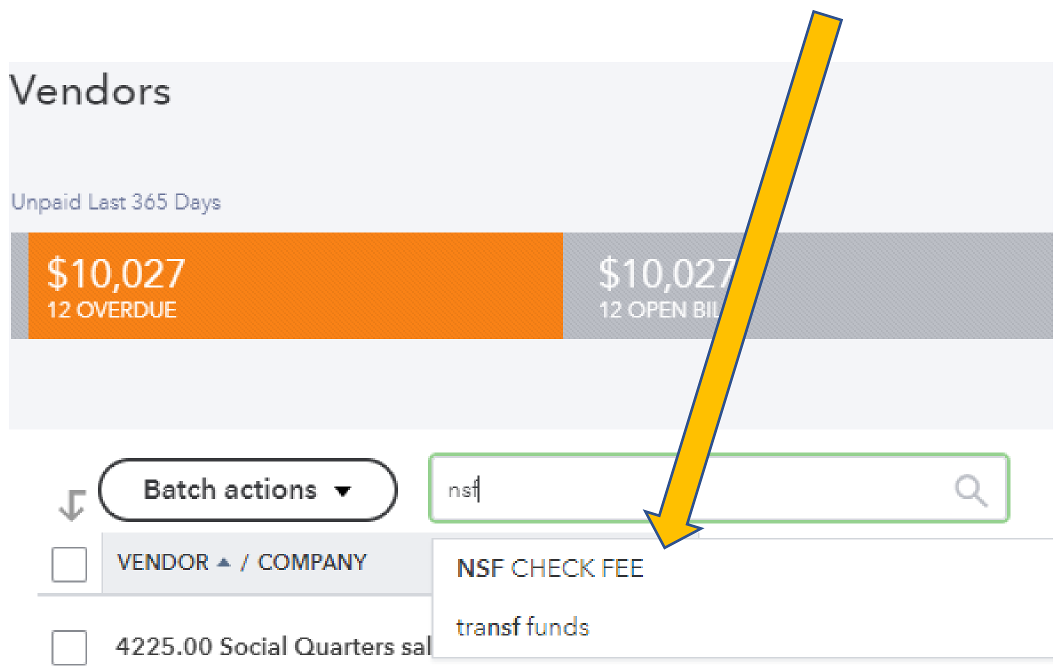


Once you start to type the first few letters of the customer, the search window provides a drop-down of choices.

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.



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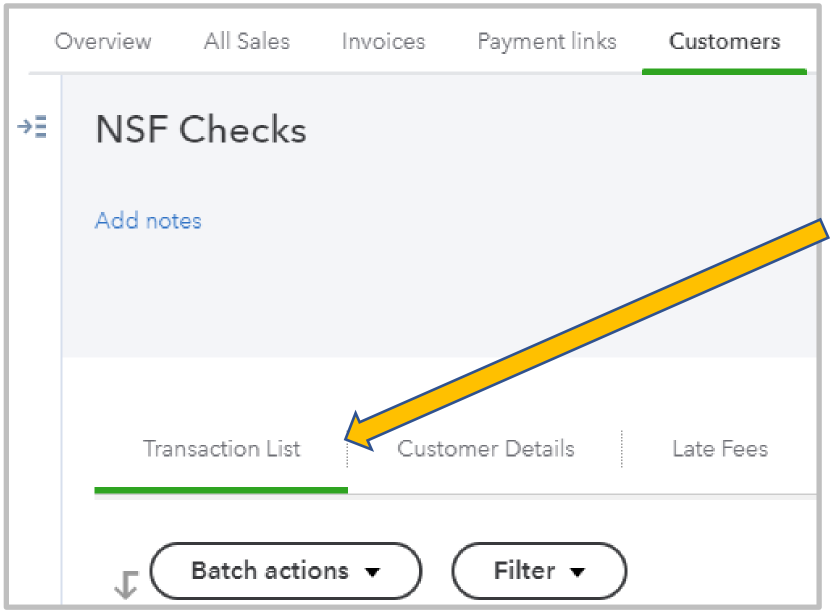
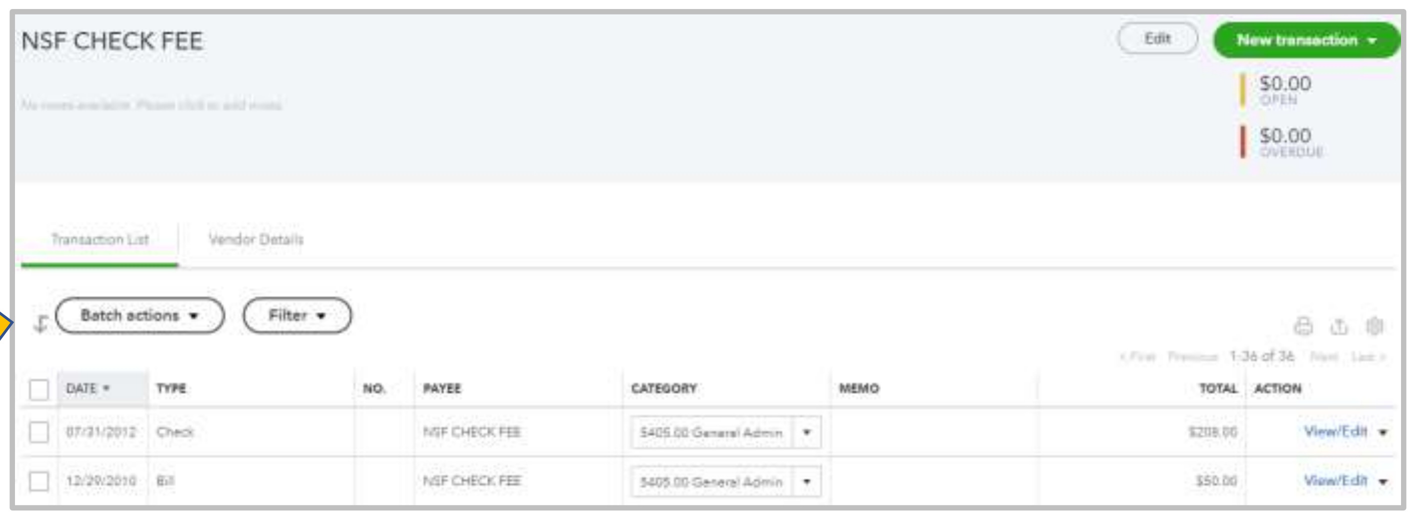


By clicking on the correct Customer Name, a new window appears with a list of transactions. The tabs at the top displays "Transaction List" underlined.

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.



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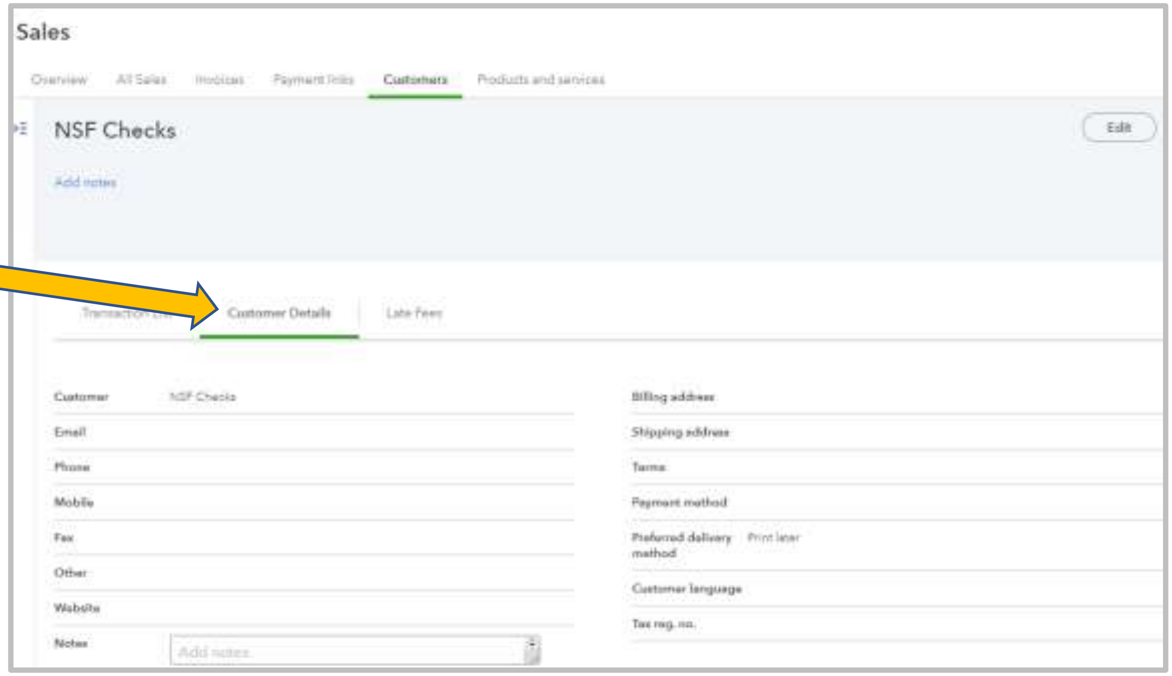
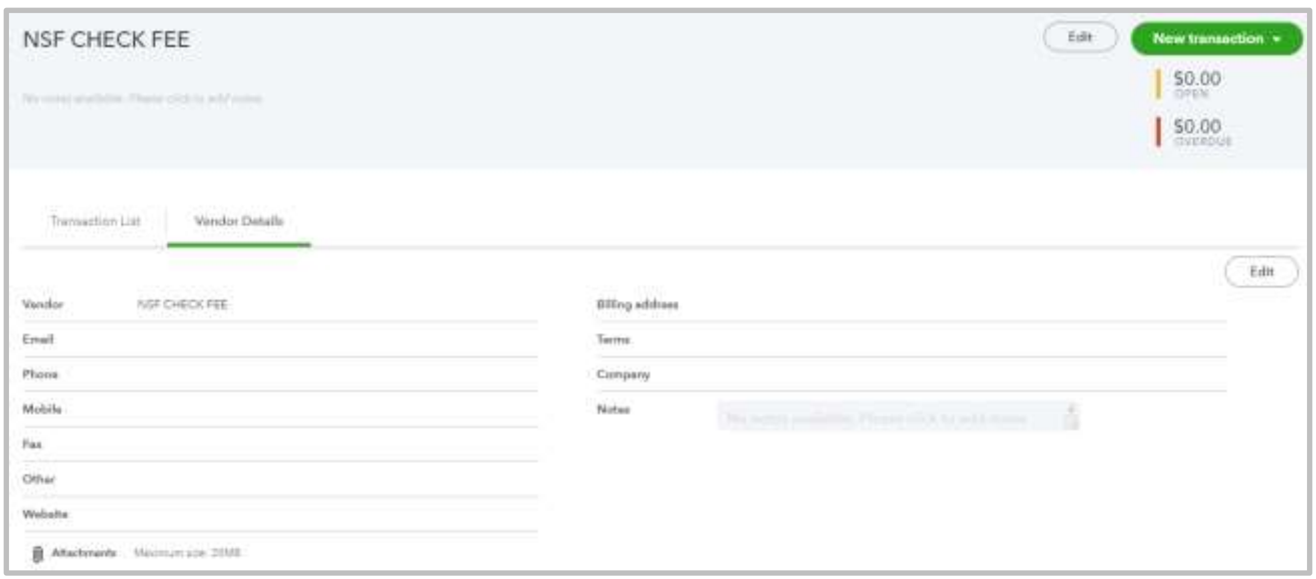
Click the mouse on the words "Customer Details" and the screen changes to information about the Customer.



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

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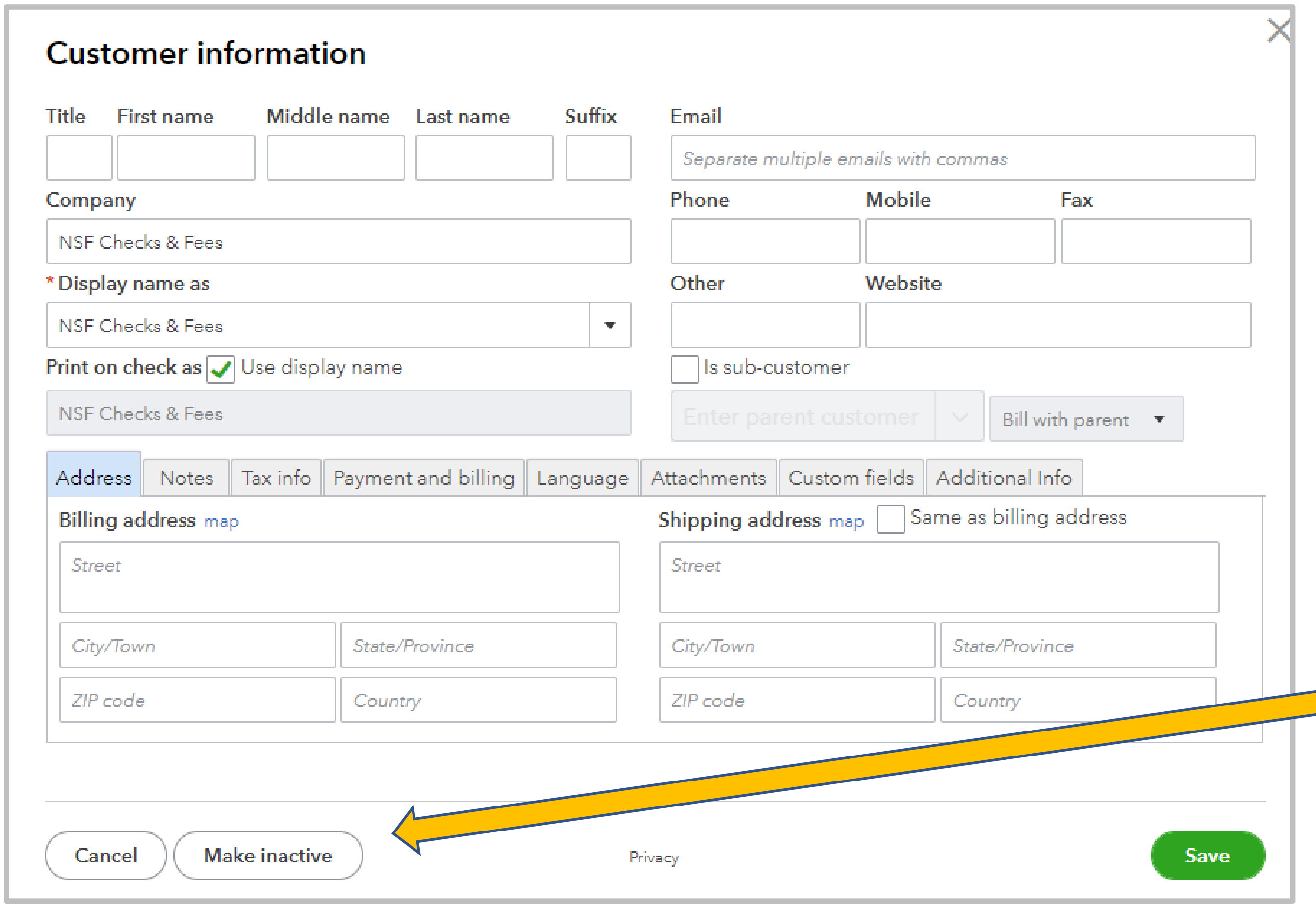
HINT: Entering the information on the Customer into the "**Company**" field and clicking the TAB key will automatically populate the "**Display Name as**" and "**Print on Check**" sections of the screen. When the "**Quick Add**" button is clicked in the "**Enter Sales Receipt**" screen the only fields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



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

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Same goes for the Vendor information Screen.

<u>HINT:</u> 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.