



**Breakthrough Solutions, LLC**  
Providing solutions to help your business succeed!

• phone / fax 920-759-1660

• [www.breakthroughsolutionsllc.com](http://www.breakthroughsolutionsllc.com)

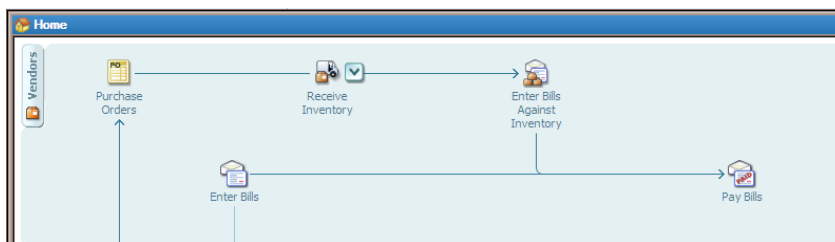
New Vendor

## Procedure for Creating a Vendor

**Vendors** – are those businesses or individuals you write checks to (Account Payables).

Although there are several ways to add and/or change the profile of vendors, only one is included in this document.

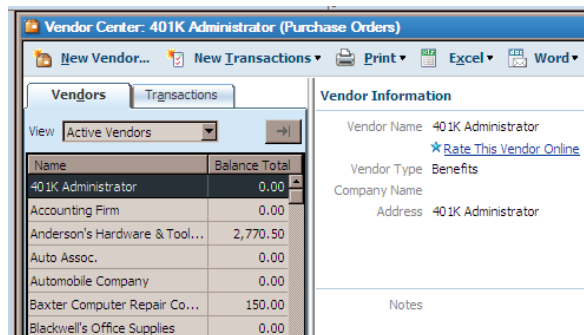
From the home page in QuickBooks®, click on “Vendors” on the Vendor Center.



(Image 1)

The Vendor Center holds all of your vendor information, including bill, credits, checks written, and bills paid.

To add a new vendor, click on New Vendor...



(Image 2)



## New Vendor

The screenshot shows the 'New Vendor' dialog box with the 'Address Info' tab selected. The 'Vendor Name' field is at the top. Below it is the 'Opening Balance' field with a date of '12/15/2007'. The 'Address Info' section contains fields for 'Company Name', 'Contact', 'Mr./Ms./...', 'First Name', 'Last Name', 'Name and Address', 'Phone', 'FAX', 'Alt. Phone', 'Alt. Contact', 'E-mail', 'Cc', and 'Print on Check as'. There are buttons for 'OK', 'Cancel', 'Next', and 'Help'. A checkbox 'Vendor is inactive' is also present.

(Image 3)

The above screen opens. The vendor name can be a name, abbreviation, or number. Whatever your business uses to identify your vendors is what you should use in the Vendor Name box.

If the Vendor name is the same as the business or individuals' name, start in the Company Name field on the Address Info tab. Doing this step alleviates you having to type the name several times.

You can enter as much or as little information for your vendor as you would like. If you are not printing checks from QB, you do not necessarily need to address fields completed. If you are using QB as your contact manager you will want to complete more of the fields.

The next screen shows the Additional Info tab.

The screenshot shows the 'New Vendor' dialog box with the 'Additional Info' tab selected. The 'Account No.' field is at the top. Below it is the 'Billing Rate Level' dropdown. The 'Categorizing and Defaults' section contains 'Type' and 'Terms' dropdowns. There are fields for 'Credit Limit' and 'Tax ID'. A checkbox 'Vendor eligible for 1099' is present. There is a 'Define Fields' button and a checkbox 'Vendor is inactive'.

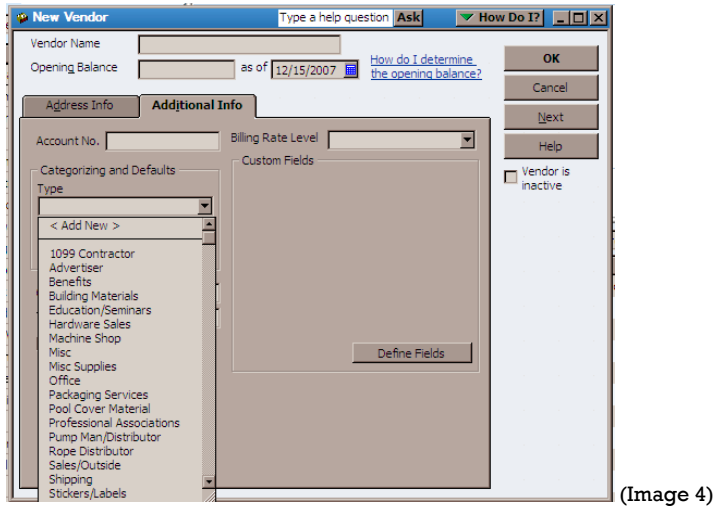
(Image 4)

On this screen you can enter the Account No. that the vendor assigns to your business.



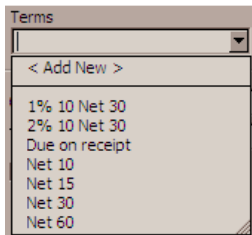
## New Vendor

Shown on the next screen is a sample list of vendor types.



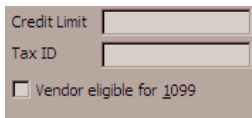
(Image 4)

Shown below is a sample list of terms for your vendors.



(Image 5)

You can enter a credit limit for the vendor and enter a Tax ID if you have checked the "Vendor eligible for 1099" box.



(Image 6)



## New Vendor

Shown below are samples of “Defined” fields that can be used.

Label	To be used for			OK
	Customers:Jobs	Vendors	Employees	
Last Review Date	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Help
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Special Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Ship Method	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ship Vendor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ship Account #	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

(Image 7)

Below you will see a description of “defined” fields. This is confusing because on the screens you see the words “Define Fields” and in the Help screens it calls the fields “Custom name fields”.

### Add custom name fields

You can add up to seven custom fields to each Customers list, Vendors list, or Employees list. Overlapping fields count as one field on each list. For example, if you add the same field to all three lists, you can still add six other fields to each list.

You can add custom fields you’ve set up for customers to any sales form. Likewise, you can add custom fields you’ve set up for vendors to the purchase order form. If you want information you’ve entered in the custom fields to appear on a form, you **must** add the fields to the form.

#### [Why should I use custom fields?](#)

Custom fields let you add to the information that QuickBooks tracks about your customers, vendors, and employees, and the items that you purchase and sell.

When you set up custom fields for items, QuickBooks adds your custom fields to the fields you work with when you set up new items or make changes to existing items.

You can also add your custom fields, which appear as additional columns, to your customized forms. The information you enter in a custom field transfers automatically to any customized form in which the custom field appears.

For instance, if the custom field is named "Color" and you entered "navy blue" as the color of a particular item, the Color field on your customized form prefills to "navy blue" each time you enter a sale of the custom item.

(Image 8)

After you have completed entering all of the vendor information for this vendor, you can either click on the OK or the Next button.

(Image 9)