

Vendor Detail Screen - How To's

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Help Topics

Overview of the Vendor Details Screen

Vendor Details Screen - Common Tasks

How to Add a New Vendor Record

How to Add a New Vendor 'Contact' Record

How to Edit a Vendor Record

How to Find a Vendor Record

How to Find Various Lists of Vendors

How to Delete Vendor(s) Record

Vendor Records and Reports

How to Create & Generate Vendor Report(s)

How To Create & Save Vendor Reports (as a Report Template)

How to Print, Email, and Download Vendor Report(s) & Record(s)

Vendor Details Screen Tabs

Dashboard (tab)

Contacts (tab)

Tasks (tab)

Purchase Orders (tab)

Financial Info (tab)

AP Bills (tab)

Custom Fields (tab)

Bills Payments (tab)

Remit To (tab)

Notes (tab)

Document Management (tab)

Audit Log (tab)

How Do I Setup New GL Accounts For Suppliers or Vendors?

- How Do I Create A New GL Account In My Chart Of Accounts?

How to Handle a Refund from a Supplier or Vendor

- 2 Options for Handling a Refund from a Supplier / Vendor

'Vendor Details' is a comprehensive screen that stores and displays every significant information for each of your Vendors. 1place has designed this screen to simplify your Vendor Management processes as all (including Vendor-related transactions) can be done or initiated on one screen.

The **Vendor Details** screen is divided into three (3) main sections to organize data and functions:

Main Fields (section)

Vendor Name - Vendor or Supplier Name

Primary Contact - Vendor's Representative / Contact Person

Title - Vendor's Representative / Contact Person

Address Line 1

Address Line 2

City

State

Zip Code

Country

Vendor # - This is a required number code autogenerated everytime you add a new vendor.

Main Phone

Active - Check if active. Note: Orders can only be created for Active Vendors.

Fax

Account number - The Vendor's account number which you have assigned.

Product & Services - Products/services offered by Vendor

Company Email

Shipped Via - The shipping method.

PO Type - The Purchase Order Type

Payment Terms - Payment terms and conditions in agreement with your Vendor.

To Sync (QBO) - (checkbox) gets checked automatically each time a new Vendor record is created in 1place then syncs with QuickBooks Online (QBO) when the record is saved.

Resync Flag - (checkbox) gets checked when a Vendor record is changed in 1place then syncs with QBO.

Last Synced - Date & time last synced with QuickBooks Online

Tabs (section) - *see below*.

Footer (section)

Add New Vendor (button) - To create a new Vendor record.

Delete Vendor (button) - To delete that Vendor.

Save (button) - To save the actions/changes made on that screen.

Help (button) - Leads you to self-help articles about the **Vendor Details** screen.

Close (button) - To close that screen.

Shortcut Key: **Ctrl + F4**, or

On the **Quick Start** Menu, click the **+** icon and select **Vendor**, or

Click the **New** button on the lower left part of the **Vendor List** screen, or

Click the **Add New Vendor** button on the lower left part of the **Vendor Details** screen, or

On any of the **Purchase Order** screens: When typing in a **Vendor name** that is not found in the **Drop down** list, click **+ Add New** (lowest part of the drop down list) to add a new Vendor record, or

On any of the **Item Details** screens (under **Vendors** tab): When typing in a **Vendor name** that is not found in the **Drop down** list, click **+ Add New** (lowest part of the drop down list) to add a new Vendor record.

Each Vendor record can have an unlimited number of related 'Contact' records.

To add a Contact record to a Vendor record:

- Click on the **Contacts** tab (on the particular **Vendor Details** screen).
- Type in the Name and other details on the last blank row then click **Commit Contact** and **Save**.

On the **Vendor Details** screen, make the necessary changes then click **Save** (lower right part of the screen).

Another option to edit a Vendor Record is:

- On the **Vendor List** screen, click the **Edit** button and click on any particular Customer record that you prefer to edit (Note: Any changes made will be automatically saved).

- Using **Shortcut Key: F4**, or
- On the **Quick Start** Menu, click the **Search (Magnifying Glass)** icon then select **Vendors**, or
- (If already on the **Vendor List** screen) use the **Search** feature (**Magnifying Glass icon**) to type the Vendor Name or any information/keywords to filter multi search, or
- From a **Purchase Order** screen: Click on the **Magnifying Glass** button next to the selected Vendor.

Shortcut Key: **Shift+F4**, or

On the **Quick Start** Menu, click the **List** button and select **Vendors**, or

On the **Main Menu Bar**, click **Vendors**.

On the **Vendor List** screen, check the box/es (first column on the left) to select one or more records then click **Batch Actions** button and select **Delete Selected**, or

Click the first box (topmost, on the fields row) to either select all records on a page or all records on the entire list then proceed with deletion.

(Note: To preserve the integrity of the database, you cannot delete any Vendor record that has been used on any of the Purchase Order screens).

On the **Main Menu Bar**, click on **Reports > Vendors**.

Click on the **drop down icon** to select the Vendor under the **Report Criteria** section.

Click on **Run Report**.

- Note1: There is an option to further customize your Report by clicking the **Gear** (gray) icon to make the **Report Lists Settings** popup screen appear. Check or uncheck box(es) of the column(s) that you prefer to show/hide.
- Note2: At this point, you may choose to **Print**, **Email** or **Download** your Report copy.

After doing the instructions above, click on the **Customize** (blue) button to further modify and save your newly created Report.

On the **Customize Report** popup screen:

(Optional) Select the **Min Access Level** from the **drop down** icon.

(Required) Type in the **Report Name** (whatever you want to call your Report).

(Optional) Type in any **Report Description**.

(Optional) Check the box if you want to **Make Report Private** and/or **Favorite**. Check or uncheck box(es) of the column(s) that you prefer to show/hide.

Click on **Save**.

Note1: This Report will appear on the list of **Custom Reports** and on **My Favorites** (if you checked the **Favorite** box).

Note2: You can always edit or update any Custom Reports. Go to **Reports > Custom Reports** and click on the **Pencil** icon (under **Actions** column). Do the necessary changes and click on **Update**.

Note3: Click on the **X** button to permanently delete any Custom Report from the list.

Note: You have the option to **Email**, **Print** or **Download** a Report copy (see instructions below).

On the **Vendor List** screen:

- Select the record(s) by checking the box(es) .
- Click the



button to **Print** and



to **Download** (in Excel form).

- There is also an option to **Share**



record(s) and this feature will be available in the future.

For Vendor Reports, go to **Main Menu Bar > Reports > Vendors**, create your Report (*see previous instructions) then click on the



button (upper right).

The **Print Preview** popup screen will appear.

DOWNLOAD COPY: Click on



button (upper right) to download the Report. Save in your PC.

EMAIL COPY: Click on

Send Email

button (lower right) to send a copy of the Report through email. Create the body of the Email and input other necessary details on the left side of the **Email popup** screen. Click on

Send Email

button (lower right).

PRINT COPY: Click on



button (upper right) to print the Report. Adjust Print Settings then click on

Print

button (lower right).

You can enable (or disable) various *tabs* of information on the **Vendor Details** screen by clicking the Gear button (located on the same row of the tabs) and checking to select tabs. The following is a list of the tabs that can be used to enter or view additional information related to the Vendor record that you are on:

- (Screen is still under Construction.)

You can **track** as many individual contacts related to the Vendor as you would like using the **Contacts** tab.

To Add a Contact record:

- Type in the Contact details on the last available empty row then click **Commit Contact** to save.

To Edit a Contact record:

- Click the **Edit** button (**Magnifying Glass** icon) under the **Action** column on the same row of that particular Contact record to display the **Contact Information** screen then edit the fields as necessary.
- Click **Save**.

To Delete a Contact record:

- Click the **Delete** button ('X' icon) under the **Action** column on the same row of that particular Contact record then select **Yes**.

To Create a Task for a Contact:

- Click the **Add New Task** button (**Bullet List** icon) under the **Action** column on the same row of that particular Contact record then type in the necessary details.
- Click **Save**.

- Another way is to simply **right-click** on any of the fields on the same row for that Contact record then select **Add New Task**.
 - Note: The only difference between **Adding New Task** and **Adding New Completed Task** is whether or not the **Task** is checked or not (on the **Add New Task** screen).

To **send an email** to a Contact:

- **Right-click** on the Contact and select **Send Email**.

The **Tasks** tab displays all tasks related to the Vendor record that you are viewing.

To view a task related to a Vendor:

Find that Vendor (type **F4** then search).

On the **Vendor Details** screen, click on **Tasks** tab.

You can use the **Search** filter (above, left of the Task record table) to easily find the task.

To create a task related to that particular Vendor:

- Click the **Add New Task** button on the lower left part of the screen.
- Type in the necessary details and click **Save**.
- Another way is to simply **right-click** on any of the fields on the Task record table then select **Add New Task**.
 - Note: The only difference between **Adding New Task** and **Adding New Completed Task** is whether or not the **Task** is checked or not (on the **Add New Task** screen).

To edit an existing task:

- **Right-click** on the task record row and select **Edit Task** then make the necessary changes. Click **Save**.
- Another way is to click the **Edit** button (**magnifying glass** icon) under the **Action** column on the same row of the particular task record.

Optional Preferences:

You have the option to activate prompt messages when posting completed tasks:

on a date other than the date of the Task, and
to reschedule another follow up Task.

To do this, click on the **gear icon** on the top right corner of the screen then select **Settings**.

Under the **Settings Type** select **Tasks** then check the box of your selected task preference/s.

You can activate **Auto Create New Task From Email** when the Email Subject has the assigned Prefix (created by you). To do this, click on the **gear icon** on the top right corner of the screen then select **Settings**. Under the **Settings Type** select **Tasks** then type in the assigned Prefix on the fillable text box after the description.

You can hide the **Tasks** tab (so it does not appear on the **Vendor Details** screen). To do this, click the gear icon (on the rightmost part of the tabs row) then uncheck the **Show Tasks tab**.

- **Purchase Orders Tab:** displays all of the Purchase Orders that are related to this Vendor.
 - **PO#:** This shows all of the Purchase Order Numbers associated with the Vendor.
 - **PO Date:** Shows the date of each PO.
 - **Supplier:** Shows the name of the Supplier or Vendor.
 - **Ship To:** Delivery address.
 - **Total:** Shows the PO total.
 - **Received:** Shows if this PO has been received
 - **Paid:** Shows if the PO has been Paid
- **PO Line Items Tab:** displays all of the Purchase Order Line Items that are related to this Vendor.
 - **PO#:** Shows all of the Purchase Order numbers with associated PO Line Items that are related to this Supplier or Vendor.

- **Line#:** The Line numbers of POs associated with the Vendor.
- **Item#:** The specific Item number of each item in the Purchase Orders.
- **Description:** Any necessary description for the item.
- **Price:** The cost price of the item.
- **Qty:** The quantity ordered for that item.
- **Qty Rcv:** The quantity received for that item.
- **Rcvd:** Checked box indicates that the quantity ordered for this particular item has been completely received or fulfilled.
- Clicking on the **row of a particular PO#** whether you are on the **Purchase Orders** tab or **PO Line Items** tab will let you open/view the **Purchase Order** screen of that particular PO#.

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- Financial Info Tab: will display all of the financial information related to this Supplier or Vendor
- Payment Terms: This is where you can set the payment terms that you have with this Supplier or Vendor
- Credit Limit: This is where you can set the Credit Limit that you have with this Supplier or Vendor
- Minimum Discount Amount: This is where you can set the minimum amount that you need to order to get the discount that you have with this Supplier or Vendor
- Discount Notes: This is where you can put any notes that you need in regards to this Supplier or Vendor
- Federal Tax ID: This is where you can put the Supplier or Vendors Tax ID (1099 Purposes).
- State Tax ID: This is where you can put the Supplier or Vendors Tax ID (1099 Purposes).
- Shipped Via: This is how they will ship items to you by default
- Added Cost Template: This is where you set up the know costs of doing business with a supplier. If you are importing sea containers from Asia you will need to include all of the associated cost of getting the shipment to your warehouse. <http://osskb.host4kb.com/article/AA-01931> (See this KBA for more details).
- Default Inventory Account: when setting up a supplier the Default Inventory and Discount Accounts need to be selected, (These will be Asset Accounts).

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- Remit To: Shows where you need to send Payments or Bills to for Suppliers or Vendors.
- Notes: Type in your memos to record important notes related to this Vendor.

You can store various documents of different types (spreadsheets, presentations, etc.) related to a Vendor.

To store a document:

Click on **Add New Document** button (top, right side of the documents table list).

On the **Create New Document** popup screen, enter **Document Name** then select the **Document Type** from the drop down arrow list.

Click on **Create**.

The **Search** button (above left) is a multi-search filter that searches for keywords across all fields to help you easily find a document.

All changes made on the **Vendor Detail** screen are automatically recorded on this Audit Log. This tab shows the following details:

Updated By - Name of the specific User who made the update.

Date - The exact date and time the update was made.

Item Number - Specific number of an inventory.

Change Type - Type of update made (edit, delete, etc.)

Column Name - The title of the text field where the update was made.

Old Value - The recorded value/information before the update.

New Value - The newly entered value/information

- [Click Here](#)

FIRST (Better Paper Trail)

You will create an RMA (return merchandise authorization) and mark the RMA received which will take the inventory back out of stock.

You may have already done this when you sent it back.

Then you can create an AP Bill for the RMA which would create a negative Bill/Credit. The Credit should be crediting the inventory account or I am assuming it is.

Then when you make the deposit for the Check that they sent you back you will use the Inventory account or whatever account you used for the credit as the credit account on the deposit.

To clear the Credit out of your Bills, you will need to create a positive Bill for the exact amount and then use the paybills one supplier and using the zero payment option apply the credit bill to the positive bill.

SECOND

Go into the inventory item and make an adjustment to take the items out of stock. This will create an inventory adjustment in the GL for the items being removed from inventory account and cost of goods sold.

Go to the banking and deposit the check using the Cost of Goods sold account as the GL on the deposit.

