



QuickStart Guide

Adding New Vendors

October 2004

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ARKONA QuickStart Guide

Use this QuickStart Guide for help setting up a new A/P vendor or anyone you need to write a check to.

1. Verify the vendor does not already exist as a customer or vendor.

- a. Take option **42=Vendors** from the General Ledger menu to display all the vendors and charge customers.
- b. Key the first few characters of the company or last name in the Position To field and press [ENTER].
 - Customers show up in blue, inactive accounts show up in yellow.
 - **If you find the company or person as a customer**, take the following steps to convert them to a vendor:
 1. Take option **2=Change** by their customer number to display the Vendor screen.
 2. Position to the Status line and hit F4.
 3. Take option **1=Select** by Both Charge Customer and Vendor and press [ENTER] twice to save; or
 4. If you know the status code, you don't have to hit F4; you can just set Status = B and press [ENTER] twice.

2. Add the new vendor.

- a. Use function **F6=Add** to add a new vendor.
- b. Key in the vendor's phone number and press [FIELD EXIT].
 - This step is very important because the vendor is likely already in the name database and it will pull their address information in for you.
 - **If the phone number is found and it is tied to the vendor you are adding**, take option **1=Select** by the vendor name to pull in their address information.
 - **If the phone number is found and it is tied to a different customer**, use function **F6=Add New Customer** to pull the phone number into the Vendor screen.
 - **If the phone number is not found**, continue adding the vendor information.
- c. Enter the Vendor Number.
 - This step will not be required if your preference is to have the system assign customer and vendor numbers.
- d. Leave the Status = V.

- e. Use function **F5=Individ** if necessary to convert the screen to accept personal information rather than business information.
- f. Enter the vendor profile information.
- g. **To change the vendor type**, take the following steps:
 - 1. Position to the Vendor Type* field and hit F4.
 - 2. Take option **1=Select** by the vendor type.
- h. **To change the Payment Terms**, take the following steps:
 - 1. Position to the Payment Terms* field and hit F4.
 - 2. Take option **1=Select** by the payment terms.
- i. **To change the 1099 Vendor Type**, take the following steps:
 - 1. Position to the 1099 Vendor* field and hit F4.
 - 2. Take option **1=Select** by the 1099 type.
- j. Press [ENTER] to save the changes and assign the new vendor number.