

ADDING A NEW VENDOR AS YOU ENTER AN INVOICE

Overview

The situation often arises at new installations where a user has begun to enter an invoice and realizes that the vendor has not yet been set up in the Accounts Payable '**Vendor File**' under '**File Maintenance**'. Rather than end the invoices entry task to add the vendor in '**File Maintenance**', you can actually add the new vendor record from within invoices entry itself. This document explains how to do this.

Under '**Accounts Payable**', '**Transactions**', select '**Invoices**' and choose '**Data Entry**' to enter an invoice as usual. At the "**Batch Header**" screen press: <F5> to change to insert mode so you can enter a new invoice. Fill in the header screen details and press: <F2> to proceed to the invoices screen. Assuming you are still in insert mode, "**Transaction 1**" should be displayed and the system should be prompting you for the vendor number.

How to Get to the Vendor File From Invoice Entry

At this point do a search <Ctrl>+<L> (hold down the [Ctrl] key and press: L) on the vendor number even though you know the new vendor hasn't been added yet. This brings up a small box which prompts you for a vendor alpha. Just press <ENTER> here to get to the top of your list of vendors. Now press: <Ctrl>+<G> and an empty vendor record screen appears. You now have access to the '**Vendor**' file. Change to <F5> insert mode and you can enter all the new vendor details. Don't forget that there are actually two (2) screens to fill in when you create a new vendor record. Pressing <F2> when you finish each screen will ensure that your work is saved.

Once the new vendor has been added fully you should be at an empty vendor record screen once again. Press: <ESC> for 6.x sites, to end and you are back at the "**Vendor Alpha Search Box**". You should now be able to find your new vendor in this box. Highlight the vendor and press: <ENTER>. You are returned to the invoices entry screen and the new vendor number is displayed in the vendor number field. Proceed with the rest of the invoice entry as usual.

If you decide not to use the vendor that you have added the system will not save this vendor.

