

# 1 Supplier/Vendor Maintenance

## My School Information

Category (Chart of Accounts)  
Demographics  
Program Maintenance  
Supplier/Vendor Maintenance  
Resource Center

The suppliers list is maintained by:

- Importing a list of suppliers
- Manually entering a supplier
- Issuing a check to a supplier and saving the entry
- Using the Update Supplier function in the Issue Checks module

Sequence Buttons  
Option Tabs  
Column Headings  
Selected Record  
Toolbar

Print Find All Import Supplier Data Main Menu

List View Modify Search Deleted Records

Checks: 0

Supplier Name	Address	City	Prov/State	PC/Zip	Country
ABC Bus Co.	555 Green St.	New Haven	TX	75033	
ACREAGE FLORIST, INC	14595 SOUTHERN BLVD	New Haven	TX	75063	
ALL-IN-STITCHES, INC.	14538 94TH STREET N.	New Haven	TX	75063	
AMSTERDAM PRINTING	PO BOX 701	New Haven	TX	75063	
Apperson	13910 Cerritos Corporate Dr.	New Haven	TX	75063	
ARNIE OLIVER	1626 16TH LANE	New Haven	TX	75063	
ARTHUR TEDDER	2524 PEPPERWOOD CR.	New Haven	TX	75063	
Audio Enhancement	14241 South Redwood Road	New Haven	TX	75063	
BALLOON CREATIONS	17202 48TH CT. N.	New Haven	TX	75063	
BAND RIBBONS	415 MYRTLE DRIVE	New Haven	TX	75063	
BARRYS T'S & TROPHIES	4281 10TH AVE N	New Haven	TX	75063	
Bill Thomas	578 SW 23rd Avenue	New Haven	TX	75063	
BOYLAN GOLF CARS	13438 MILITARY TRAIL	New Haven	TX	75063	
Brennan Industries	2035 Riley Road	New Haven	TX	75063	
Broward Medical Supply	P.O. Box 188	New Haven	TX	75063	

Visible Records: 1 - 50 Total Records: 171

Record Indicator

Figure 1: Supplier Maintenance

## 1.1 To Access the Supplier List:

1. From the **Main Menu**
2. Click **Supplier/Vendor Maintenance**

## 1.2 Using the Supplier List:

### Screen Details:

The record indicator in the bottom right corner will indicate the number of supplier's in the supplier list  
Use the scroll icons on the supplier list toolbar to scroll around the list

### To Change The Number Of Records Displayed:






1. Click **Change Paper Size**  icon
2. Enter a new number
3. Click **Save** 



Figure 2: Scroll Toolbar

### To sort the Supplier List:

1. Click **List View**  tab
2. Click any of the field to headings 
3. One click will sort in Ascending order (A to Z)  

4. Second Click will sort in Descending order (Z to A)

### 1.3 Maintaining the Supplier List:

#### To Add A Supplier:




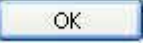
1. Click **Insert**  on the supplier toolbar  
*A new record will insert above the selected row.*
  1. Enter the supplier details
  2. Click **Save** 
- Or
- Click **Cancel** 



Figure 3: Inserted Row

#### To Delete A Supplier:

1. Select the required supplier from the list
2. Click **Delete** icon on the supplier list toolbar
3. Click **OK** 

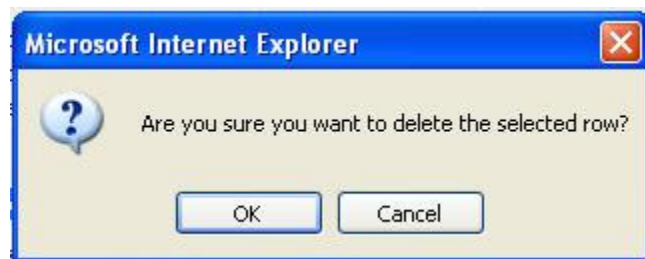


Figure 4: Delete Row

**NOTE:** If a supplier has been referenced in the program, it is not possible to delete the record.



Figure 5: Reference Warning

#### To Modify A Supplier:







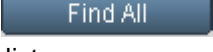
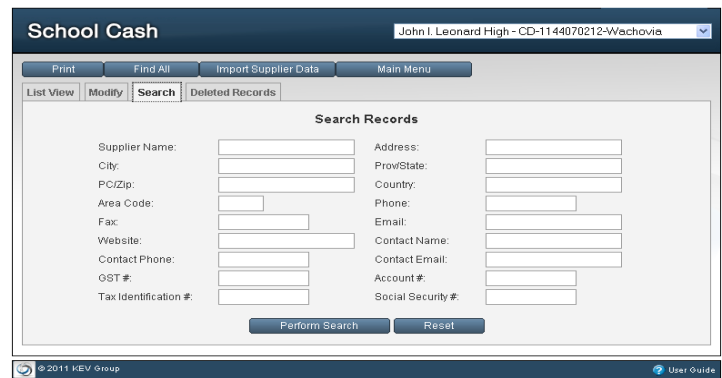



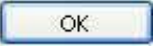


1. Select the required supplier
  2. Click **Modify**  tab
  3. Edit any of the supplier details
  4. Click **Save** 
- Or
5. Click **Cancel** 

Figure 6: Modify Tab

**To Search For A Supplier:**

1. Click **Search**  tab
2. Enter any known details
3. Click **Perform Search** 
4. The supplier will be displayed in the list view
5. Click **Reset**  to change search criteria
6. Click **Find All**  to display the entire supplier list

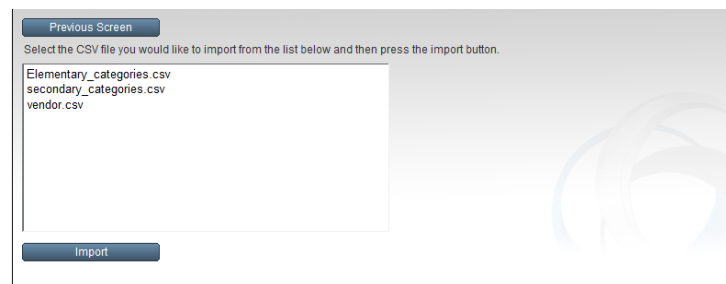

**Figure 7: Search Tab****To Print A List Of Suppliers:**

1. Click **Print** 
2. Click **Print**  icon on the report toolbar
3. Click **Printer**  icon in the Adobe window, to actually print the report
4. Click **OK**  in the printer dialog box
5. After printing is completed, **Close**  the Adobe window
6. Click **Previous Screen**  in the report window, to generate the next report

Supplier Name	Address	City	Prov/State	Country	Area Code	Phone	Fax	Contact Name	Contact Phone
Attention Getters	556 O'Connor Drive	Kingston	ON						
GST #	Social Security #	Tax Identification #							

**Figure 8: Printed Supplier List****To Import a Supplier List:**

1. Click **Import Supplier Data**
- The supplier list must be TAB delimited and saved in .CSV format  
For further assistance with this feature please contact KEV Software.

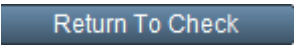

**Figure 9: Import Supplier****1.4 To Access Supplier Maintenance from Issue Checks Module:**

1. In the **Issue Checks** screen, click **Update**

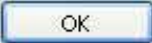
**Suppliers** 

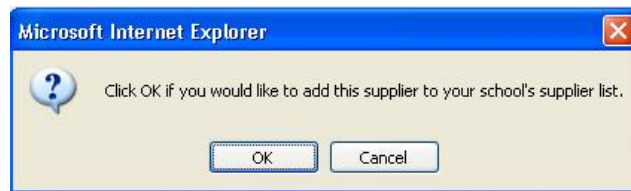
*The supplier maintenance screen will open.*

2. Maintain the supplier list as outlined above

3. Click **Return to Check**  to return to the **Issue Checks** module

**To Add a Supplier from Issue Checks Module:**

1. Click **Pay To the Order Of:** field
2. Enter the name of the new supplier
3. Click **OK** 
- *The supplier details will be automatically saved to the Supplier List.*
- *Suppliers added using this method will be available for future use and can be maintained using the methods outlined above.*

**Figure 10: Add Supplier****1.5 To Exit Supplier Maintenance:**

Click **Main Menu**  to exit the Supplier Maintenance screen.