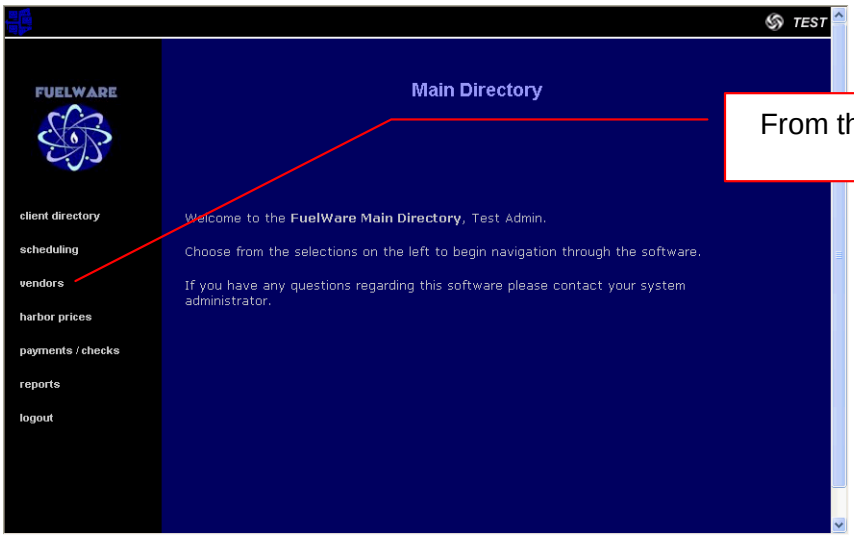
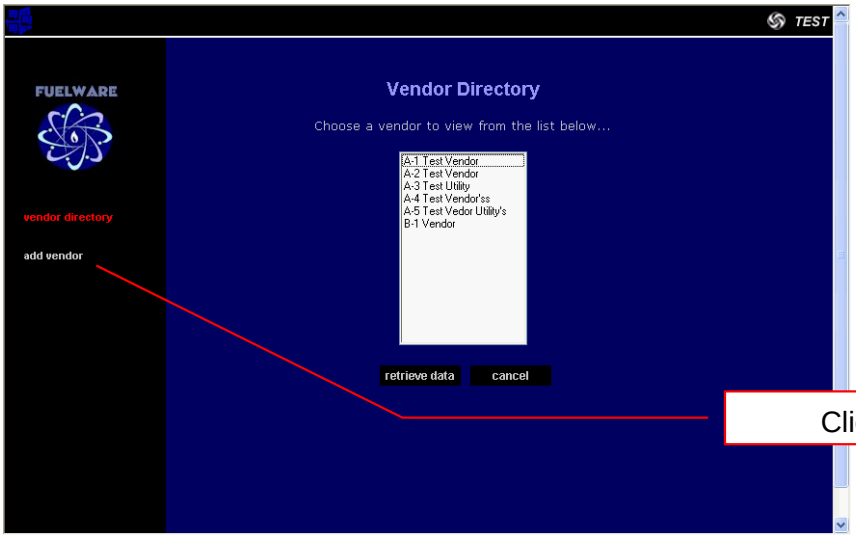
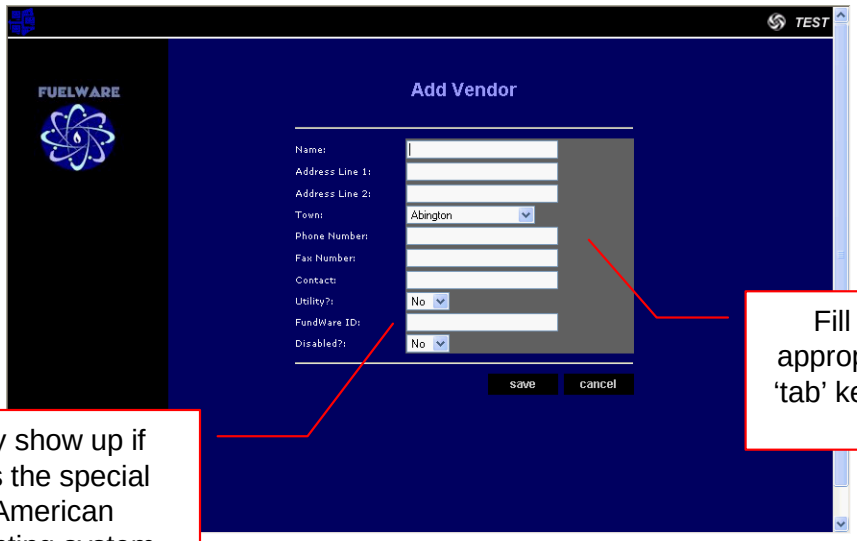
How to Add a Vendor



From the Main Directory, click ‘vendors’



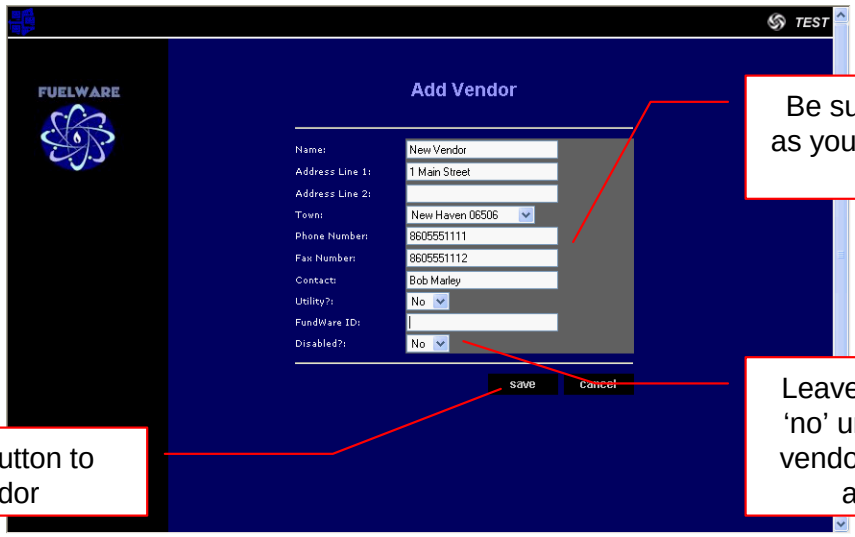
Click ‘add vendor’



Fill in all the fields with the appropriate information – hit the ‘tab’ key after each field to get to the next one

This field will only show up if your agency uses the special export for the American FundWare accounting system

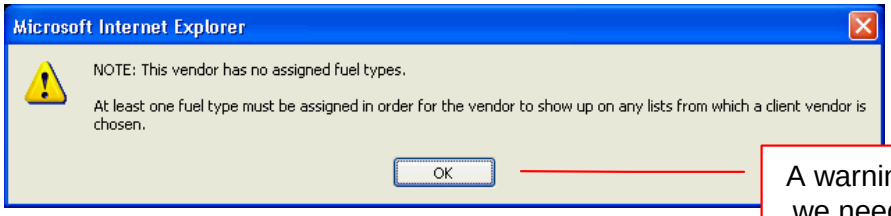
How to Add a Vendor (continued)



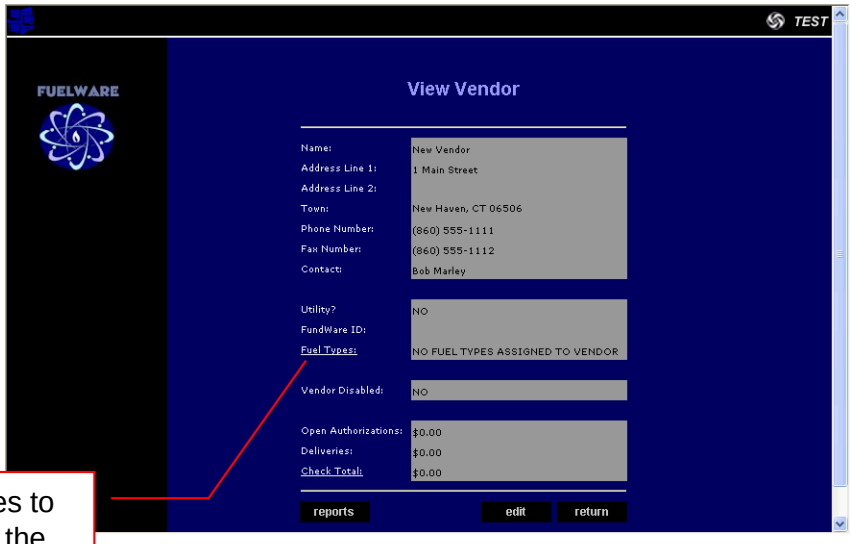
Be sure to fill in as many fields as you can, as most are required to save the record

Leave the 'Disabled' field set to 'no' unless you do not want the vendor to appear in any lists for assignment to a client

Click the 'save' button to save the vendor

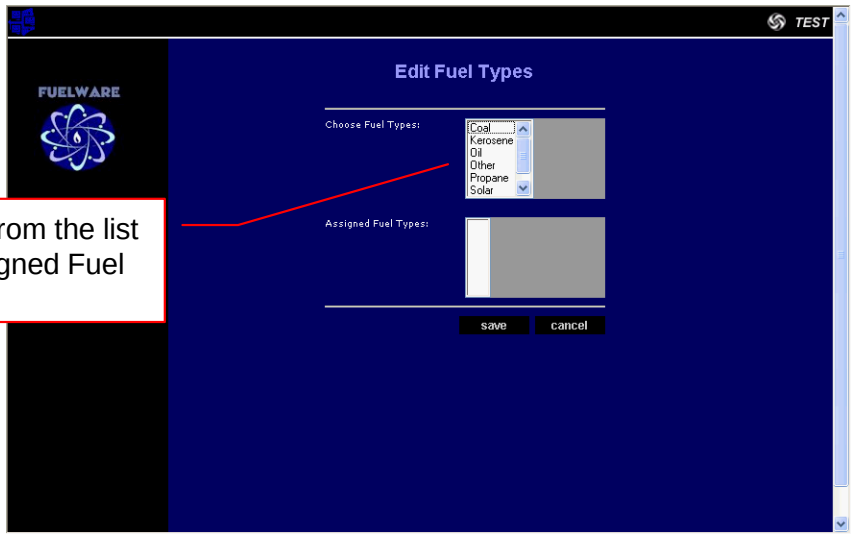


A warning will pop up stating that we need to add fuel types to the vendor we just added. Click the OK button to continue.

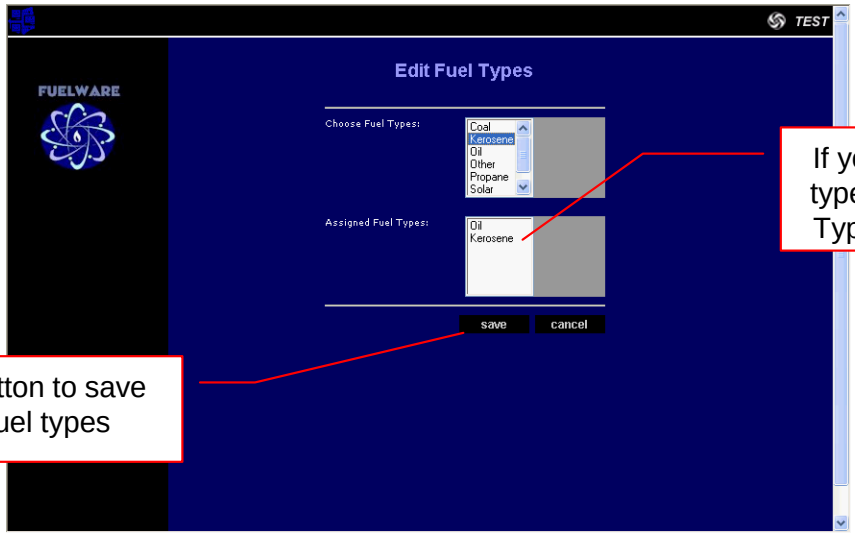


Click on Fuel Types to add fuel types for the vendor

How to Add a Vendor (continued)

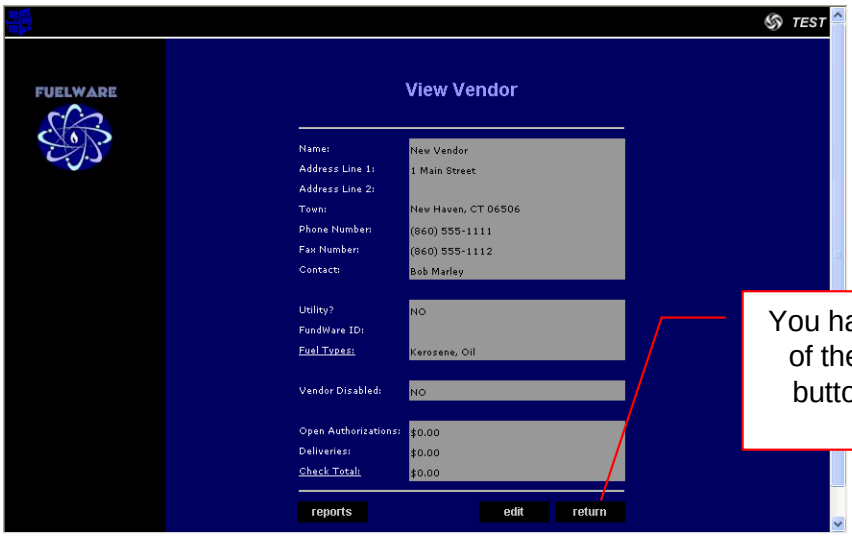


Click on a fuel type from the list to add it to the Assigned Fuel Types list



If you want to remove a fuel type from the Assigned Fuel Types list, double-click on it

Click the 'save' button to save your assigned fuel types



You have completed the addition of the vendor. Click the return button to go back to the main Vendor Directory