

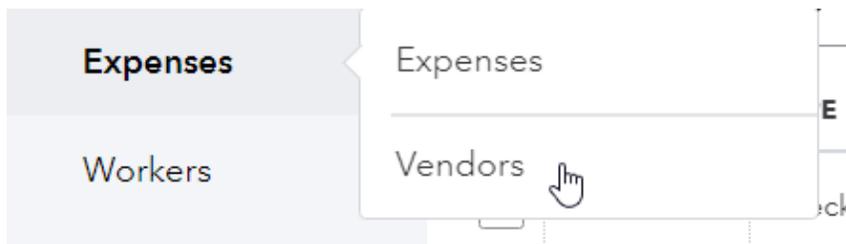
Instructions to Add a New Vendor

PROCESS/PROCEDURE

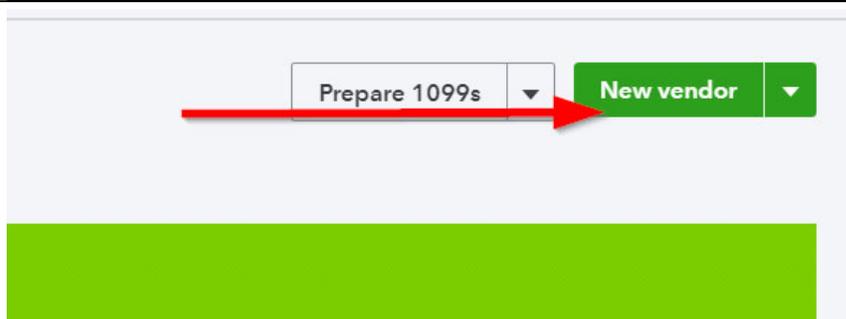
Instructions for adding New Vendors into your County Quickbooks Account.

INSTRUCTIONS

- From the **Dashboard**, hover your mouse over the “Expenses” tab. A submenu will pop-up as shown. Select “Vendors”.



- Select “New Vendor” in the upper right corner of your screen.



- Complete the Vendor information and click **Save**.

Note: Choose/Edit the “Display Name As” box to your preference. This may be advantageous when different checks are written to the same Vendor but may go to a different address (i.e. UK Quarterly Payment checks vs. UK Regulatory services fees)

A screenshot of the 'Vendor Information' form in QuickBooks. The form is titled 'Vendor Information' and has a close button in the top right. It contains several sections:

- Company:** A text input field.
- Title:** A dropdown menu with options: First name, Middle name, Last name, Suffix.
- Display name as:** A dropdown menu with a red asterisk and a 'Use display name' checkbox.
- Print on check as:** A checkbox checked with 'Use display name'.
- Address:** Fields for Street, City/Town, State/Province, ZIP code, and Country.
- Notes:** A text area.
- Attachments:** A link icon and text 'Attachments Maximum size: 20MB'.
- Email:** A text input field with the note 'Separate multiple emails with commas'.
- Phone, Mobile, Fax:** Text input fields.
- Other, Website:** Text input fields.
- Billing rate (/hr):** A text input field.
- Terms:** A dropdown menu with 'Enter Text' as an option.
- Opening balance:** A text input field and a date field set to '01/16/2019'.
- Account no.:** A text input field with the note 'Appears in the memo of all payments'.
- Business ID No.:** A text input field.
- Track payments for 1099:** A checkbox.

 At the bottom, there are 'Cancel' and 'Save' buttons, and a 'Privacy' link.

TIPS & TRICKS

CONTACT INFO

Contact District Support Staff or the Extension Financial Operations team, with any questions or issues.