

How to Create New Entity

- 1. On the user's menu panel, open an Entity menu (i.e Users, Vendors, Customers, etc)
- 2. On Entity search screen, click **New** button
- 3. Enter details on **Name, Contact, Location, Phone, Email, Address, Organization, and LOB**

Create New Entity

Find Duplicates

Close

Details

This screen can be used to add a new Entity if no duplicate entity exists or it can be used to check for Duplicate Entities and merge them.

Name

irely cust

Contact

con 1

Location

loc 1

Phone

(326) 236-3

Email

irely@irely.com

Search Address

Enter address to search...

Address

Fort Wayne Avenue

City

Indianapolis

State

IN

Zip/Postal

Country

United States

Time Zone

(UTC-04:00) Eastern Daylight Time

Organization

Company

Line of Business

BioFuel

?

Ready

- 4. Click **Find Duplicates** toolbar button
 - a. Duplicate Entities screen will show, displaying a list of possible duplicate entities

Duplicate Entities

Add

Merge

Close

Details

X Remove

Open

Export

View

Filter (F3)

Entity No.	Name	Contact	Location	Email	Phone	Address	Zip/Postal	Primary	Entity Type	Line Of Business
<input type="checkbox"/>	Todd at...	Todd at Custer ...	Todd at Custer ...	twc582...				<input type="checkbox"/>	User	
<input type="checkbox"/>	0001005094	Napole...	Dave	Office	email@...			<input type="checkbox"/>	User	
<input type="checkbox"/>	0001005094	Napole...	Dave	Office	email@...			<input type="checkbox"/>	Customer	
<input type="checkbox"/>	0001005094	Napole...	Dave	Office	email@...			<input type="checkbox"/>	Vendor	
<input type="checkbox"/>	1005316	Global ...	Global Customer	India	kaliraja...			<input type="checkbox"/>	Customer	
<input type="checkbox"/>	1005325	New IR...	George Olney	Chicago	george.... (777) 777-777	4242 Flagstaff...	46815	<input type="checkbox"/>	Prospect	
<input type="checkbox"/>	1005330	A CUST...	CUSTOMS	Doral		1900 Northwe...	33172	<input type="checkbox"/>	Vendor	
<input type="checkbox"/>	1005339	Test cu...	George Olney	Chicago	george.... (773) 619-0245	1739 West Bel...	60657	<input type="checkbox"/>	Prospect	
<input type="checkbox"/>	1005519	Wheat ...	SA Customer	SA customer				<input type="checkbox"/>	Customer	
<input type="checkbox"/>	1005584	Special ...	James Gracey	Fort Wayne	special...	1612 Saint Joe...	46825	<input type="checkbox"/>	Customer	
<input type="checkbox"/>	1005591	Custom...	Customer Erin	1	abd@e...	109 Lincoln Hi...	46774	<input type="checkbox"/>	Customer	

?

Ready

- 5. The user can opt to merge or continue to create the entity by clicking the **Add** button

6. Complete the required fields and save

Ship Via - irely cust

New Save Search Delete Undo Additional Close

Entity Ship Via General Messages Activities Attachments Audit Log Entity Type Custom Crop Insurance

Name: irely cust Phone: (326) 236-3 Entity No: 1005630

Contact Name: con 1 Suffix: Email: irely@irely.com Mobile:

Class:

Location Name: loc 1 Printed Name: irely cust

Search Address: Enter address to search...

Address: Fort Wayne Avenue

City: Indianapolis State: IN

Zip/Postal: Country: United States

Time Zone: (UTC-04:00) Eastern Daylight Tr Language: English

Document Delivery:

External ERP ID: Origination Date: 10/15/2018

Line of Business: BioFuel

Contact Information

+ Insert X Remove Types

Type* Details*

Website: theandersonsinc.co View

Internal Notes

? 2.46s Saved 1 of 1 Refresh

1. On the user's menu panel, open an Entity menu (i.e Users, Vendors, Customers, etc)
2. On Entity search screen, click **New** button

Create New Entity

Add Find Duplicates Close

Details

This screen can be used to add a new Entity if no duplicate entity exists or it can be used to check for Duplicate Entities and merge them.

Name:

Contact:

Email:

Zip/Postal:

Country: Philippines

Phone:

Address:

? Ready

3. Enter details on **Name, Contact, Email, Zip/Postal, Country, Phone** and **Address**

Name: cust-1

Contact: cust-1

Email: cust-1@irely.com

Zip/Postal: 12241

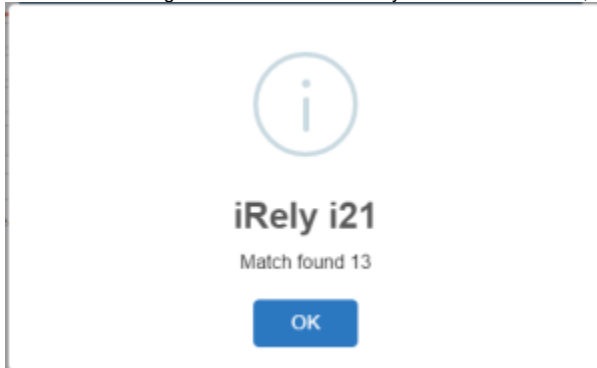
Country: United States

Phone: 123456748

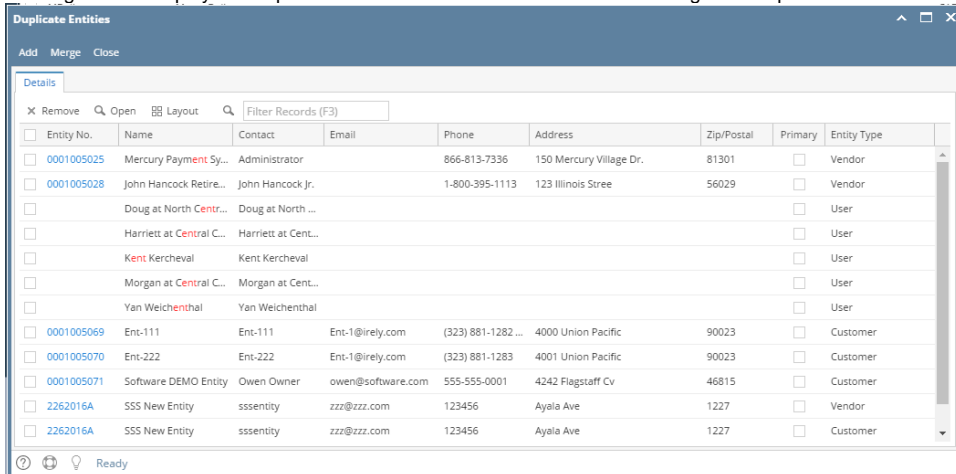
Address: Test

4. Click **Add** toolbar button

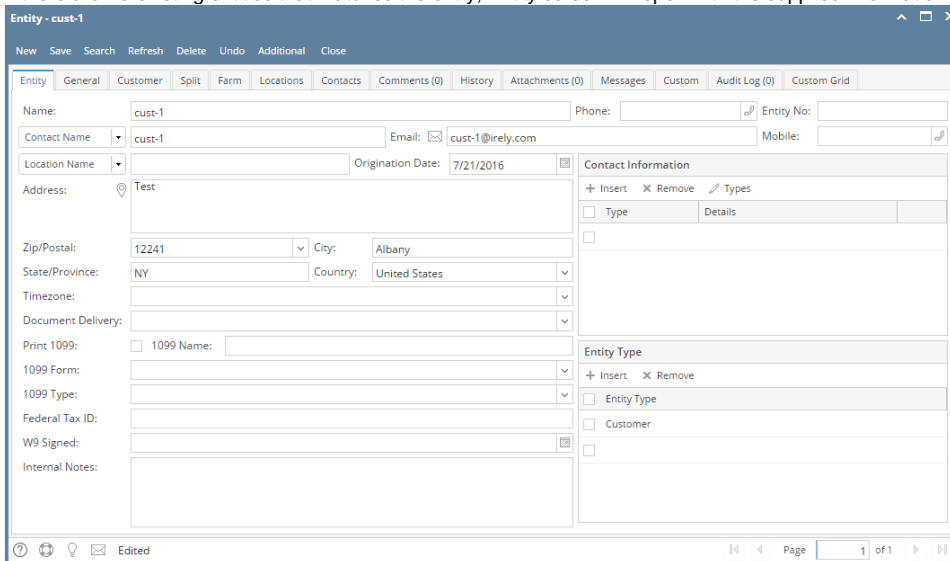
- a. If there are existing entities that matches any of the fields entered, this message will pop up



- b. Clicking **OK** will display the Duplicate Entities screen with the entities matching the setup

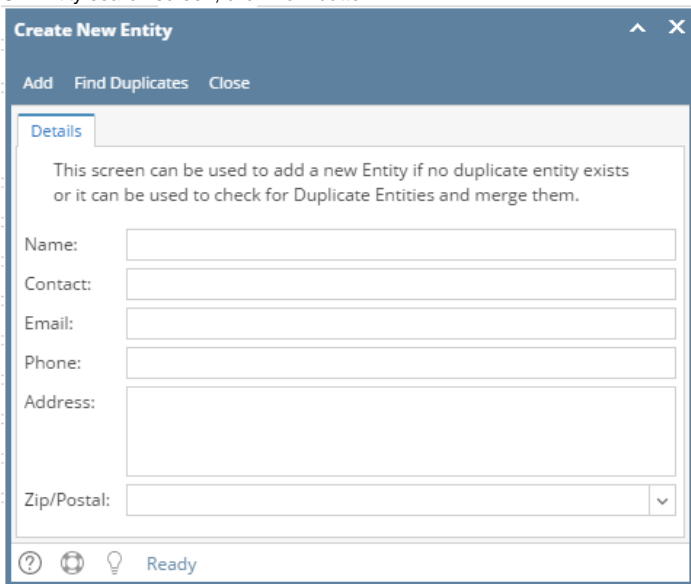


5. If there are **no** existing entities that matches the entry, Entity screen will open with the supplied information



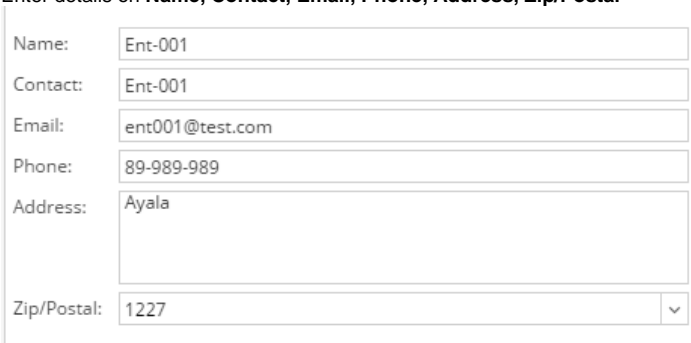
1. On the user's menu panel, open an Entity menu (i.e Users, Vendors, Customers, etc)

2. On Entity search screen, click **New** button



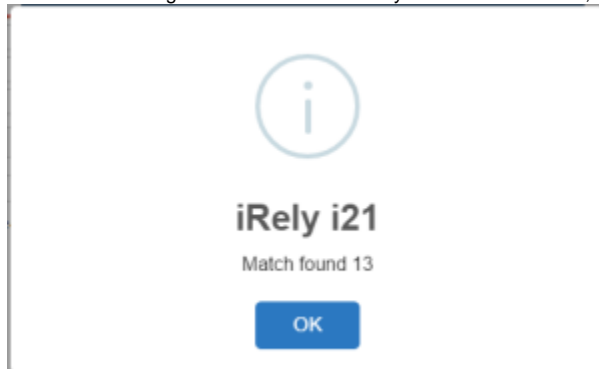
The 'Create New Entity' dialog box has a title bar with a maximize button and a close button. Below the title bar is a toolbar with three buttons: 'Add', 'Find Duplicates', and 'Close'. The 'Details' tab is selected, showing a text area with instructions: 'This screen can be used to add a new Entity if no duplicate entity exists or it can be used to check for Duplicate Entities and merge them.' Below the text area are input fields for 'Name:', 'Contact:', 'Email:', 'Phone:', 'Address:', and 'Zip/Postal:'. The 'Zip/Postal' field has a dropdown arrow. At the bottom of the dialog is a status bar with icons for help, settings, and a lightbulb, followed by the text 'Ready'.

3. Enter details on **Name, Contact, Email, Phone, Address, Zip/Postal**

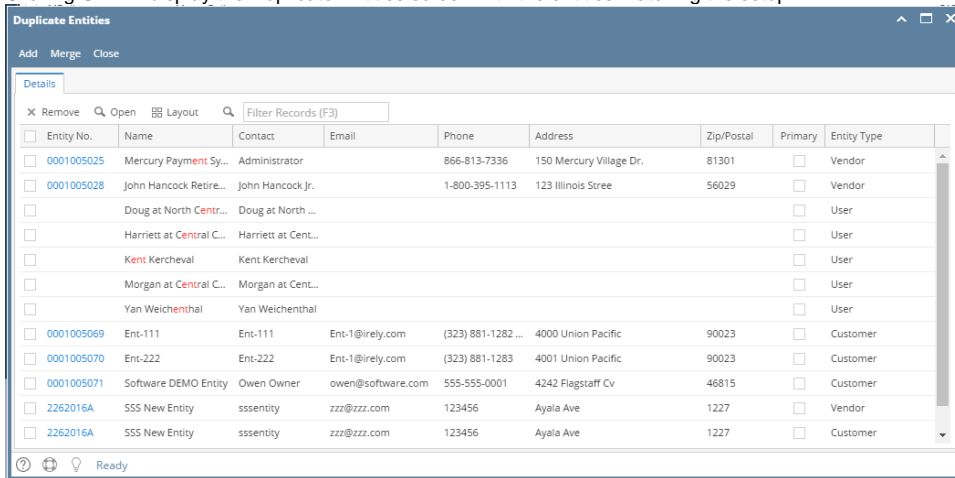


The form contains the following data: Name: Ent-001, Contact: Ent-001, Email: ent001@test.com, Phone: 89-989-989, Address: Ayala, Zip/Postal: 1227.

4. Click **Add** toolbar button
 - a. If there are existing entities that matches any of the fields entered, this message will pop up



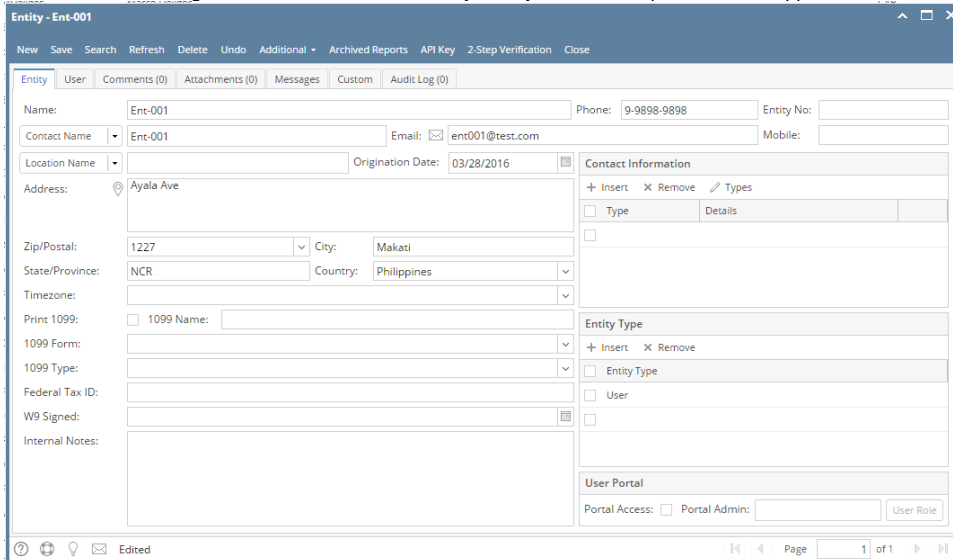
b. Clicking **OK** will display the Duplicate Entities screen with the entities matching the setup



The 'Duplicate Entities' window displays a table of entities. The table has columns for Entity No., Name, Contact, Email, Phone, Address, Zip/Postal, Primary, and Entity Type. The data is as follows:

Entity No.	Name	Contact	Email	Phone	Address	Zip/Postal	Primary	Entity Type
<input type="checkbox"/> 0001005025	Mercury Payment Sy...	Administrator		866-813-7336	150 Mercury Village Dr.	81301	<input type="checkbox"/>	Vendor
<input type="checkbox"/> 0001005028	John Hancock Retire...	John Hancock Jr.		1-800-395-1113	123 Illinois Sree	56029	<input type="checkbox"/>	Vendor
<input type="checkbox"/>	Doug at North Centr...	Doug at North ...					<input type="checkbox"/>	User
<input type="checkbox"/>	Harriett at Central C...	Harriett at Cent...					<input type="checkbox"/>	User
<input type="checkbox"/>	Kent Kercheval	Kent Kercheval					<input type="checkbox"/>	User
<input type="checkbox"/>	Morgan at Central C...	Morgan at Cent...					<input type="checkbox"/>	User
<input type="checkbox"/>	Yan Weichenthal	Yan Weichenthal					<input type="checkbox"/>	User
<input type="checkbox"/> 0001005069	Ent-111	Ent-111	Ent-1@irely.com	(323) 881-1282 ...	4000 Union Pacific	90023	<input type="checkbox"/>	Customer
<input type="checkbox"/> 0001005070	Ent-222	Ent-222	Ent-1@irely.com	(323) 881-1283	4001 Union Pacific	90023	<input type="checkbox"/>	Customer
<input type="checkbox"/> 0001005071	Software DEMO Entity	Owen Owner	owen@software.com	555-555-0001	4242 Flagstaff Cv	46815	<input type="checkbox"/>	Customer
<input type="checkbox"/> 2262016A	SSS New Entity	sssentity	zzz@zzz.com	123456	Ayala Ave	1227	<input type="checkbox"/>	Vendor
<input type="checkbox"/> 2262016A	SSS New Entity	sssentity	zzz@zzz.com	123456	Ayala Ave	1227	<input type="checkbox"/>	Customer

5. If there are no existing entities that matches the entry, Entity screen will open with the supplied information



The 'Entity - Ent-001' form displays the following information:

Name: Ent-001 Phone: 9-9898-9898 Entity No:

Contact Name: Ent-001 Email: ent001@test.com Mobile:

Location Name: Origination Date: 03/28/2016

Address: Ayala Ave

Zip/Postal: 1227 City: Makati

State/Province: NCR Country: Philippines

Timezone:

Print 1099: ☐ 1099 Name:

1099 Form:

1099 Type:

Federal Tax ID:

W9 Signed: ☐

Internal Notes:

Contact Information

+ Insert X Remove Types

☐ Type Details

Entity Type

+ Insert X Remove

☐ Entity Type

☐ User

User Portal

Portal Access: ☐ Portal Admin: User Role: