

How to Add an Entity Location on any Entity Type

Once an entity is saved, an entity location will be created as well and will become the default location.

Here is how to Add Another Location on Location tab:

- 1. Open the entity record.
- 2. Click the **Location** tab then click the **Insert** button
- 3. Enter the necessary details on the screen. Note that fields with asterisk are required

Entity Location - ABC Loc

NewSaveDeleteUndoAdd as VendorClose

Details1099 OverrideAudit LogAttachments

Location Name

ABC Loc

Location Type

Location

Printed Name

abc1

Active

☒

Description

ABC Loc

Search Address

Enter address to search...

Address

Fort York Boulevard

City

Toronto

State/Province

ON

Zip/Postal

123

Country

Canada

Time Zone

(UTC-04:00) Eastern Daylight Time

County

Toronto Division

Phone

632323

Fax

151651

Currency

USD

Ship Via

Barge

Terms

Net 30

Tax Group

expense tax

Warehouse

0001-Fort Wayne

Tax County

Pricing Level

01

Freight Terms

FOB

Latitude

43.6388363

Longitude

-79.4003053

Notes

Sample location for ABC

Oregon Facility No.

01

1 of 1

Refresh

Fields	Description
Location Name	Enter a name for the entity location
Location Type	Location Farm
Printed Name	Defaults to entity name
Description	Brief description of the location
Address	Address, City, State/Province, Zip/Postal, Country and Time Zone of the location
County	Automatically filled with the County related to the address.
Phone and Fax	Enter Phone and Fax numbers
Currency	Currency that will be used by the location
Ship Via	Ship Via
Terms	Default value will be the same with the entity
Tax Group	Selection of Tax Groups
Warehouse	Selection of company locations
Tax County	County of tax code related to the State
Pricing Level	Pricing Level
Freight Terms	Freight Terms
Latitude and Longitude	Latitude and Longitude related to the address
Notes	Notes
Oregon Facility No.	Accepts up to 30 characters

- Click the **Save** toolbar button. The created location will be available on the selection of default location on **Entity** tab.
- When the created location is selected, **Location Name, Address, Zip/Postal, City, State/Province and Country** fields will be updated as well.

The screenshot shows the 'Customer - abc1' form. The 'Location Name' field is highlighted with a blue box. The form includes various input fields for contact information, address, and business details.

Field	Value
Name	abc1
Phone	
Entity No	1005619
Contact Name	test
Suffix	
Email	beth.delapaz@irely.com
Mobile	
Class	
Location Name	ABC Loc
Printed Name	abc1
Search Address	Enter address to search...
Address	Fort York Boulevard
City	Toronto
State	ON
Zip/Postal	123
Country	Canada
Time Zone	(UTC-04:00) Eastern Daylight Ti
Language	English
Document Delivery	Freight Term* FOB
External ERP ID	
Origination Date	07/31/2018
Line of Business	
Line of Business	Salesperson
Internal Notes	

Here is how to Add Another Location on Location tab:

- Open the entity record.
- Click the **Location** tab then click **Insert** button

The screenshot shows the 'Entity - 107-Ent' form. The 'Locations' tab is selected, and the 'Insert' button is highlighted with a blue box. The table below shows the list of locations.

Location Name	Address	City	State/Province	Zip/Postal Code	Country	Phone	Fax	Pricing Level
108-Ent Location	108-Ent address	MONROE	IN	46772	United States			
107-Ent Location	107-Ent address	MONROE	IN	46772	United States			

3. Enter the necessary details on the screen. Note that **Location Name** field is required

Entity Location - 107b Ent

New Save Refresh Delete Undo Close

Details

Location Name: 107b Ent

Address: DC

Zip/Postal: 20075 City: Washington

State/Province: DC Country: United States

Phone: 444-55-55 Fax: 44547884

Ship Via: Truck Terms Due on Receipt

Tax Group: DUP: IN SST Warehouse:

Pricing Level: 02

Freight Terms: Pickup

County: test

Notes: Test

Active: ☒

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4. Click **Save** toolbar button

5. The created location will be available on the selection of default location on **Entity** tab.

Entity - 107-Ent

New Save Search Refresh Delete Undo Additional Archived Reports API Key 2-Step Verification Close

Entity Vendor Split Farm User Ship Via Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (5)

Name: 107-Ent Phone: 123-456 Entity No: 0001005131

Contact Name: 107-Ent Email: 107-Ent@irely.com Mobile:

Location Name: 107-Ent Location Origination Date: 04/14/2016

107b Ent 107-Ent address

108-Ent Location

107-Ent Location

Zip/Postal: 46772 City: MONROE

State/Province: IN Country: United States

Timezone: (UTC-11:00) Coordinated Universal Time-11

Print 1099: ☐ 1099 Name:

1099 Form:

1099 Type:

Federal Tax ID:

W9 Signed:

Contact Information

+ Insert X Remove Types

Type Details

Entity Type

+ Insert X Remove

Entity Type

6. When the created location is selected, **Location Name, Address, Zip/Postal, City, State/Province and Country** fields will be updated as well.

The screenshot shows the 'Entity - 107-Ent' form. The 'Location Name' field is set to '107b-Ent' and the 'Address' field is set to 'DC'. The 'Zip/Postal' field is set to '20075' and the 'City' field is set to 'Washington'. The 'State/Province' field is set to 'DC' and the 'Country' field is set to 'United States'. The 'Timezone' field is set to '(UTC-11:00) Coordinated Universal Time-11'. The 'Print 1099' field is set to 'None'. The '1099 Form' field is set to 'None'. The '1099 Type' field is set to 'None'. The 'Federal Tax ID' field is empty. The 'W9 Signed' field is empty. The 'Internal Notes' field contains the text 'Test'. The 'Contact Information' section shows a table with columns 'Type' and 'Details'. The 'Entity Type' section shows a table with columns 'Entity Type' and 'Details'. The 'User Portal' section shows a table with columns 'Portal Access', 'Portal Admin', and 'User Role'.

Here is how to Add Another Location on Contacts tab:

1. Open the entity record.
2. Click the **Location** tab then click **Insert** button

The screenshot shows the 'Entity - 115-Ent' form with the 'Locations' tab selected. The 'Insert' button is highlighted with a red box. The table below shows the location records.

Location Name	Address	City	State/Province	Zip/Postal Code	Country	Phone	Fax	Pricing Level
115-Ent Location	115-Ent address	MONROE	IN	46772	United States			
115b-Ent	115b-Ent	Washington	DC	20078	United States	444-5656	232-565665	01

3. Enter the necessary details on the screen. Note that **Location Name** field is required

Entity Location - 115b-Ent

New Save Refresh Delete Undo Close

Details

Location Name: 115b-Ent

Address: 115b-Ent

Zip/Postal: 20078 City: Washington

State/Province: DC Country: United States

Phone: 444-5656 Fax: 232-565665

Ship Via: Truck Terms 15th of Month

Tax Group: Warehouse:

Pricing Level: 01

Freight Terms: Pickup

County:

Notes: Test

Active: ☒

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4. Click **Save** toolbar button

5. The created location will be available on the selection of default location on **Entity** tab.

Entity - 115-Ent

New Save Search Refresh Delete Undo Additional Close

Entity Customer Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Audit Log (1)

Name: 115-Ent Entity No: 0001005008

Contact Name: 115b-Ent Email: 115b-Ent@test.com Phone: 444-55-55

Location Name: 115-Ent Location

115-Ent Location 115-Ent address

115b-Ent

Zip/Postal: 46772 City: MONROE

State/Province: IN Country: United States

Alt Phone: 444-55-56 Alt Email: test@test.com

Mobile: 09061234567 Fax:

Entity Type

+ Insert X Remove

☐ Entity Type

☐ Customer

6. When the created location is selected, **Location Name, Address, Zip/Postal, City, State/Province and Country** fields will be updated as well.

Entity - 115-Ent

New Save Search Refresh Delete Undo Additional ▾ Close

Entity Customer Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Audit Log (1)

Name: 115-Ent Entity No: 0001005008

Contact Name: 115b-Ent Email: 115b-Ent@test.com Phone: 444-55-55

Location Name: 115b-Ent

Address: 115b-Ent

Zip/Postal: 20078 City: Washington

State/Province: DC Country: United States

Alt Phone: 444-55-56 Alt Email: test@test.com

Mobile: 09061234567 Fax:

Website:

Timezone: (UTC-11:00) Coordinated Universal Time-11

Internal Notes:

Entity Type

+ Insert X Remove

☐ Entity Type

☐ Customer

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