

How To Add Vendor Contacts

Here are the steps on how to add vendor contacts

1. Create a new vendor Or Open an Existing Vendor Record
 - To Create a new Vendor (See [How to Add Vendors](#))
 - Open existing vendor record (Navigate to Purchasing (A/P) > Vendors > Select existing record from Search Screen)
2. During the creation of Vendor Record, Entered Vendor Contact were already set as vendor default contact.
 - Purchasing (Accounts Payable) > Select existing vendor record > Entity tab

The screenshot shows the 'Entity - Test Vendor' form with the 'Entity' tab selected. The form contains various fields for vendor information. A red box highlights the 'Contact Name' dropdown menu, which is currently set to 'Test Vendor Contact'. Other visible fields include Name, Phone, Entity No, Email, Mobile, Location Name, Printed Name, Search Address, Address, City, State, Zip/Postal, Country, Time Zone, Document Delivery, External ERP ID, Origination Date, Line of Business, and Internal Notes.

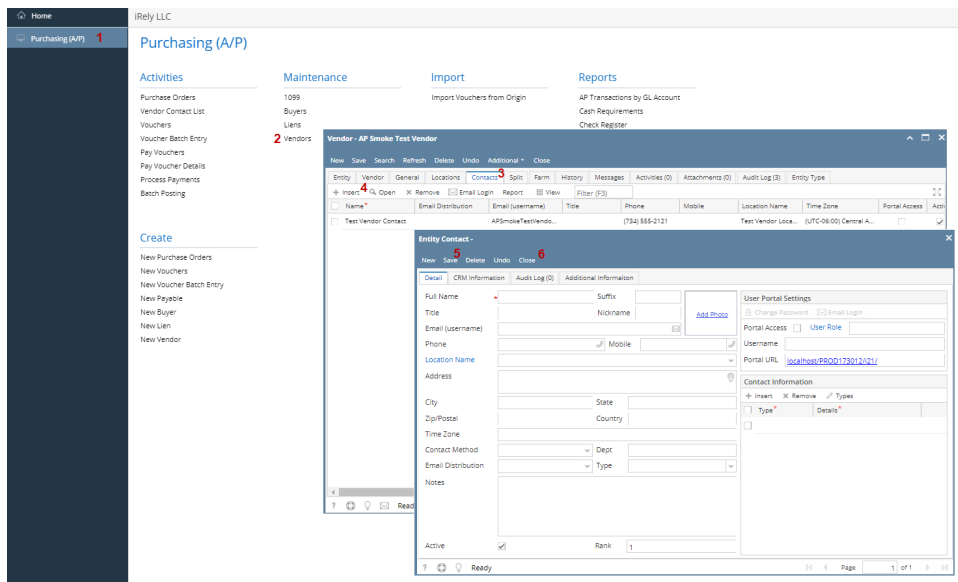
- Purchasing (Accounts Payable) > Select existing vendor record > Contacts tab

The screenshot shows the 'Entity - Test Vendor' form with the 'Contacts' tab selected. The form displays a table of vendor contacts. The table has columns for Name, Email Distribution, Email (username), Title, Phone, Mobile, Location Name, Time Zone, Portal Access, and Action. The first row shows 'Test Vendor Contact' with email 'testvendor@gmail.c...', phone '(571) 144-54', location 'Test Location', and time zone '(UTC-04:00) Eastern ...'. The 'Action' column has a checkmark.

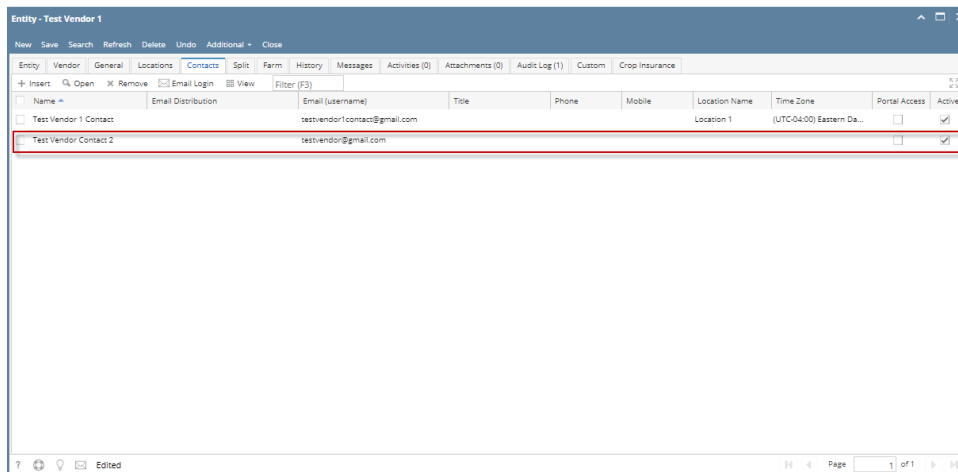
Name	Email Distribution	Email (username)	Title	Phone	Mobile	Location Name	Time Zone	Portal Access	Action
☐ Test Vendor Contact		testvendor@gmail.c...		(571) 144-54		Test Location	(UTC-04:00) Eastern ...	☐	☒

3. To enter a multiple vendor contacts.

- Navigate to Purchasing (Accounts Payable) > Select existing vendor record > Contacts tab > Click Insert > Populate the required fields > Save > Close



- Created contacts will automatically saved on Contacts tab > Grid



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2. During the creation of Vendor Record, Entered Vendor Contact were already set as vendor default contact.
 - Purchasing (Accounts Payable) > Select existing vendor record > Entity tab

Entity - Test Vendor

New Save Search Refresh Delete Undo Additional Close

Entity Vendor General Locations Contacts Split Farm History Messages Activities (0) Attachments (0) Audit Log (2) Custom Crop Insurance

Name * Test Vendor Phone (571) 144-54 Entity No 1005362

Contact Name Test Vendor Contact Suffix Email testvendor@gmail.com Mobile

Entity Type Vendor Class

Location Name Test Location Printed Name Test Vendor

Search Address Enter address to search...

Address Kissimmee Vineland Road

City Orlando State FL

Zip/Postal 1234 Country United States

Time Zone (UTC-04:00) Eastern Daylight Time

Document Delivery

External ERP ID Origination Date 10/9/2017

Line of Business

Line of Business

Contact Information

+ Insert X Remove Types

Type Details

Internal Notes

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- Purchasing (Accounts Payable) > Select existing vendor record > Contacts tab

Entity - Test Vendor

New Save Search Refresh Delete Undo Additional Close

Entity Vendor General Locations Contacts Split Farm History Messages Activities (0) Attachments (0) Audit Log (2) Custom Crop Insurance

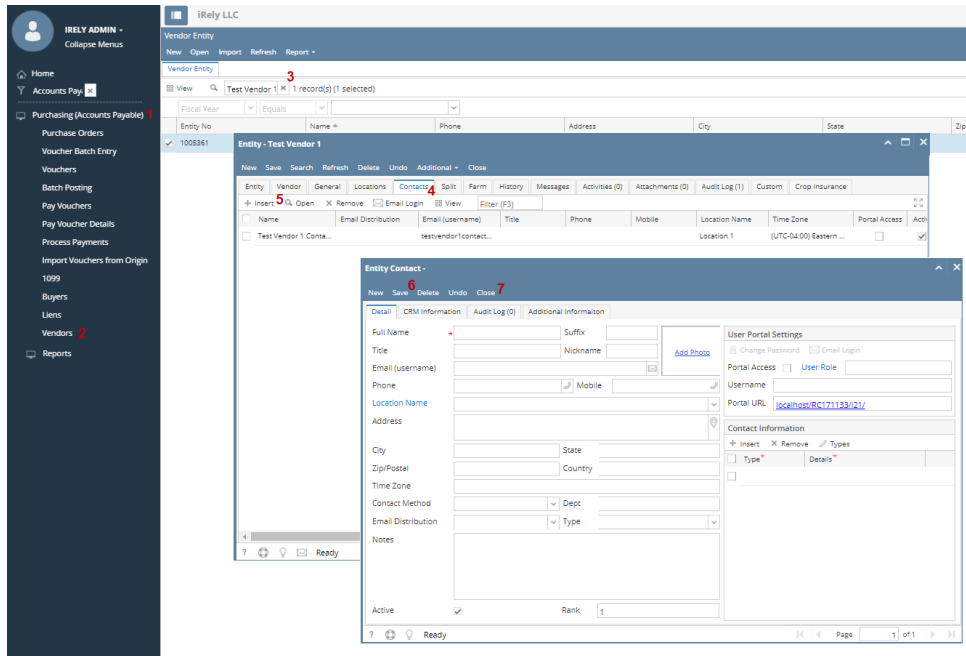
+ Insert Open X Remove Email Login View Filter (F3)

Name	Email Distribution	Email (username)	Title	Phone	Mobile	Location Name	Time Zone	Portal Access	Acti
☐ Test Vendor Contact		testvendor@gmail.c...		(571) 144-54		Test Location	(UTC-04:00) Eastern ...	☐	☒

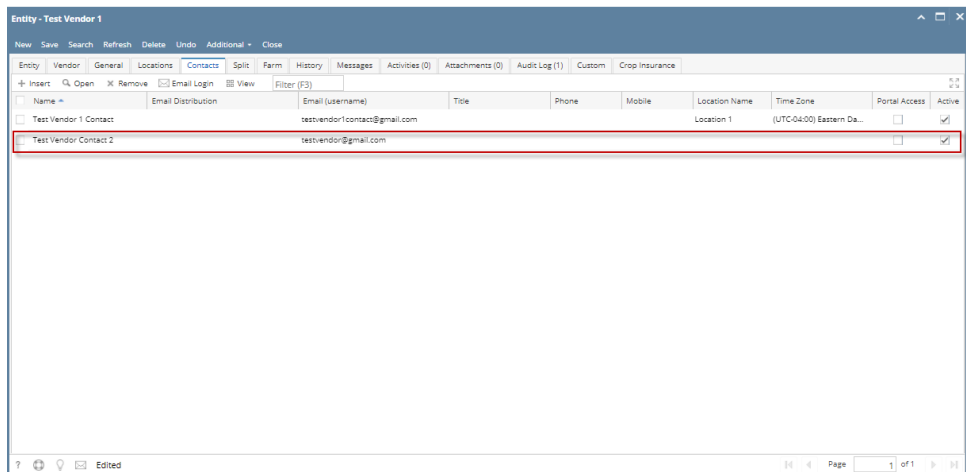
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3. To Enter a multiple vendor contacts.

- Navigate to Purchasing (Accounts Payable) > Select existing vendor record > Contacts tab > Click Insert > Populate the required fields > Save > Close



- Created contacts will automatically saved on Contacts tab > Grid



Here are the steps on how to add vendor contacts:

1. Create new vendor (see [How to Add Vendors](#)) or open an existing vendor record from **Purchasing > Vendors**.

2. Navigate to **Contacts** tab and click **Insert** action button to open blank **Entity Contact** screen.

The screenshot shows a software window titled 'Entity - Cracked Mug'. It has a menu bar with 'New', 'Save', 'Search', 'Refresh', 'Delete', 'Undo', and 'Additional'. Below the menu is a tab bar with 'Entity', 'Vendor', 'Split', 'Farm', 'Locations', 'Contacts', 'Comments (0)', 'History', 'Attachments (0)', and 'Custom'. The 'Contacts' tab is selected. In the 'Contacts' tab, there is a toolbar with buttons: '+ Insert' (highlighted with a red box), 'Open', 'Remove', 'Email Login', 'Layout', and 'Filter Records (F3)'. Below the toolbar is a list of contacts with columns: Name, Email (username), Title, Phone, Mobile, Location Name, Timezone, Portal Access, and Active. The list contains two entries: 'Cracked Mug' and 'Contact 2'. The 'Entity Contact' form is also visible in the background, showing fields for Full Name, Email (username), Title, Phone, Mobile, Alt Phone, Alt Email, Contact Method, Location Name, Active, Department, Portal Access, Timezone, Type, Notes, and Email Distribution.

3. Enter contact details and click **Save**.
4. Close **Entity Contact** screen. Newly added vendor contact will be displayed on the grid.

Entity	Vendor	Split	Farm	Locations	Contacts	Comments (0)	History	Attachments (0)	Custom	Audit Log (2)
+ Insert	Open	Remove	Email Login	Layout	Filter Records (F3)					
Name	Email (username)	Title	Phone	Mobile	Location Name	Timezone	Portal Access	Active		
☐ Cracked Mug	apsamplevendor@gmail.com				Cracked Mug		☒	☒		
☐ Contact 2	Contact2@testemail.com	Staff	755-8547		Cracked Mug		☐	☒		

Here are the steps on how to add vendor contacts:

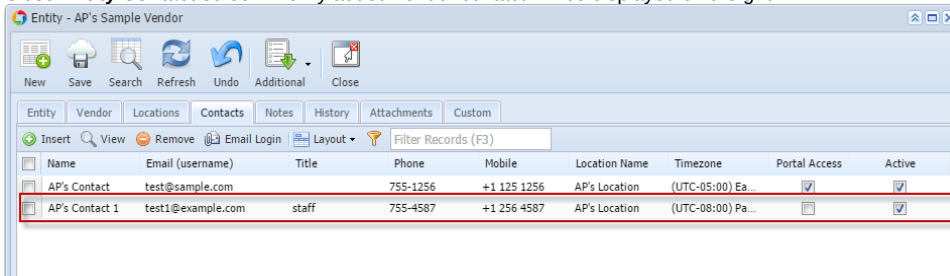
1. Create new vendor (see [How to Add Vendors](#)) or open an existing vendor record from **Purchasing > Vendors**.
2. Navigate to **Contacts** tab and click **Insert** action button to open blank **Entity Contact** screen.

The screenshot shows a software window titled 'Entity - AP's Sample Vendor'. It has a menu bar with 'New', 'Save', 'Search', 'Refresh', 'Undo', 'Additional', and 'Close'. Below the menu is a tab bar with 'Entity', 'Vendor', 'Locations', 'Contacts', 'Notes', 'History', 'Attachments', and 'Custom'. The 'Contacts' tab is selected. In the 'Contacts' tab, there is a toolbar with buttons: '+ Insert' (highlighted with a red box), 'View', 'Remove', 'Email Login', 'Layout', and 'Filter Records (F3)'. Below the toolbar is a list of contacts with columns: Name, Email (username), Title, Phone, Mobile, Location Name, Timezone, Portal Access, and Active. The list contains two entries: 'AP's Contact 1' and 'AP's Contact 2'. The 'Entity Contact' form is also visible in the background, showing fields for Full Name, Email (username), Title, Phone, Mobile, Alt Phone, Alt Email, Contact Method, Location Name, Active, Department, Portal Access, Timezone, Type, Notes, and Email Distribution.

3. Enter contact details and click **Save**.

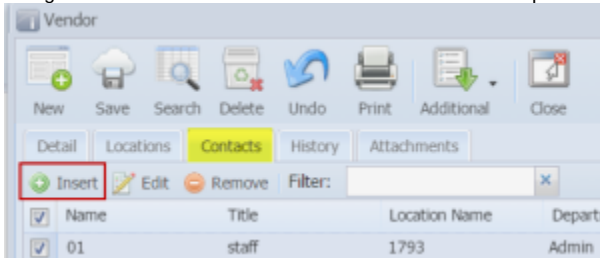
The screenshot shows a software window titled 'Entity Contact - AP's Contact 1'. It has a menu bar with 'New', 'Save', 'Refresh', 'Delete', 'Undo', and 'Close'. Below the menu is a tab bar with 'Detail'. The 'Detail' tab is selected. The form contains the following fields: Full Name (AP's Contact 1), Email (username) (test1@example.com), Title (staff), Phone (755-4587), Mobile (+1 256 4587), Alt Phone (755-4521), Alt Email (alttest1@example.com), Contact Method (Email or Phone), Fax (755-8952), Location Name (AP's Location), Active (checked), Department (Mfg), Portal Access (unchecked), Timezone ((UTC-08:00) Pacific Time (US & Canada)), and Notes (this is a test). There is also a small icon of a person next to the Title field.

4. Close **Entity Contact** screen. Newly added vendor contact will be displayed on the grid.



Here are the steps on how to add vendor contacts:

1. Create new vendor (see [How to Add Vendors](#)) or open an existing vendor record from **Accounts Payable > Maintenance > Vendor**.
2. Navigate to **Contacts** tab and click **Insert** action button to open blank **Vendor Contacts** screen.



3. Enter contact details and save.

Full Name: Contact 01-2

Email (username): test1-2@email.com

Title: staff

Phone: 211-211-3121 Mobile: 00-1-312-313-0317

Alt Phone: 211-211-3122 Alt Email: test1-2@altemail.com

Contact Method: Email or Phone Fax: 211-211-3123

Location Name: 01

Department:

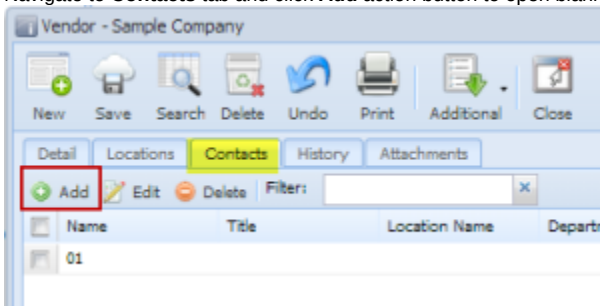
Timezone:

Notes: sample note 2

4. Click **Close** button. Newly added vendor contact will be displayed on the grid.

Here are the steps on how to add vendor contacts:

1. Create new vendor (see [How to Add Vendors](#)) or open an existing vendor record from **Accounts Payable > Maintenance > Vendor**.
2. Navigate to **Contacts** tab and click **Add** action button to open blank **Vendor Contacts** screen.



3. Enter contact details.

Vendor Contacts - SAMPLE VENDOR CONTACT

Save Undo Close

Detail

Full Name: Sample Vendor Contact

Email (username): test1@sampleco.com

Title: Assistant

Phone: 163-980-2855 Mobile:

Alt Phone: Alt Email:

Contact Method: Fax:

Location Name:

Department: Operations Department

Portal Access: Timezone: (UTC-06:00) Central Time (US & Canada)

Notes: This is a sample note.

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4. Click **Save** and **Close** buttons.

5. Newly added vendor contact will be displayed on the grid.

	Name	Title	Location Name	Department	Phone	Mobile	Email	Notes
✓	01	Manager		Operations Dep	360-980-2863		test@sampleco.com	This is a sample
✓	Sample Vendor C...	Assistant		Operations Dep	163-980-2855		test1@sampleco.c...	This is a sample