

# How to Add Vendors

Here are the steps on how to add Vendors:

- From the Main Menu, Navigate to Purchasing (Accounts Payable) and click on **Vendors** to open **Search Vendor Screen**
- Upon click of **New** toolbar button, Create New Entity Screen will open.

The screenshot displays the 'Vendors' screen in the software. The top navigation bar includes 'Home', 'Purchasing (A/P)', and 'Vendors'. The left sidebar lists various activities like 'Purchase Orders', 'Vendor Contact List', and 'Vouchers'. The main area shows a table of vendors with columns for Name, Address, City, State, Zip Code, and Active status. A 'Create New Entity' dialog box is open, allowing users to enter details for a new vendor. The dialog box has tabs for 'Entity', 'Vendor', 'General', and 'Locations'. The 'Entity' tab is selected, showing fields for Name, Contact, Location, Phone, Email, Search Address, Address, City, State, Zip/Postal, Country, Time Zone, and Organization. A 'Find Duplicates' button is also present.

Name	Address	City	State	Zip Code	Active *
AP Smoke Test Vendor	Vendor Address 1	Indianapolis	IN	46204	✓
Test Vendor					✓
Test Vendor Checkoff	Kissimmee Vineland Road	Orlando	FL		✓

- Populate fields. Enter values on the fields > Click **Find Duplicates**
  - Name
  - Contact
  - Phone
  - Email
  - Address (City , State, Zip/Postal, Country)
  - Time Zone
  - Person

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

Test Vendor

Contact

Test Vendor Contact

Phone

(571) 144-54

Email

testvendor@gmail.com

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

Person

☐

?

Ready

d. Click **Add**

Duplicate Entities

Add

Merge

Close

Details

X Remove

Open

View

Filter (F3)

<input type="checkbox"/> Entity No.	Name	Contact	Email	Phone	Address	Zip/Postal	Primary	Entity Type
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Ready

e. **Vendor Entity** screen will open with the details entered in Create New Entity screen. Also the Entity screen will be named as Vendor Name

- Enter **Location Name** on entity tab

The screenshot shows the 'Entity - Test Vendor' form with the 'Entity' tab selected. The 'Location Name' field is highlighted with a red box and contains the text 'Test Location'. Other fields include Name, Contact Name, Email, Phone, Address, City, State, Zip/Postal, Country, Time Zone, Document Delivery, External ERP ID, and Origination Date.

f. Click on the Vendor Tab > Detail tab

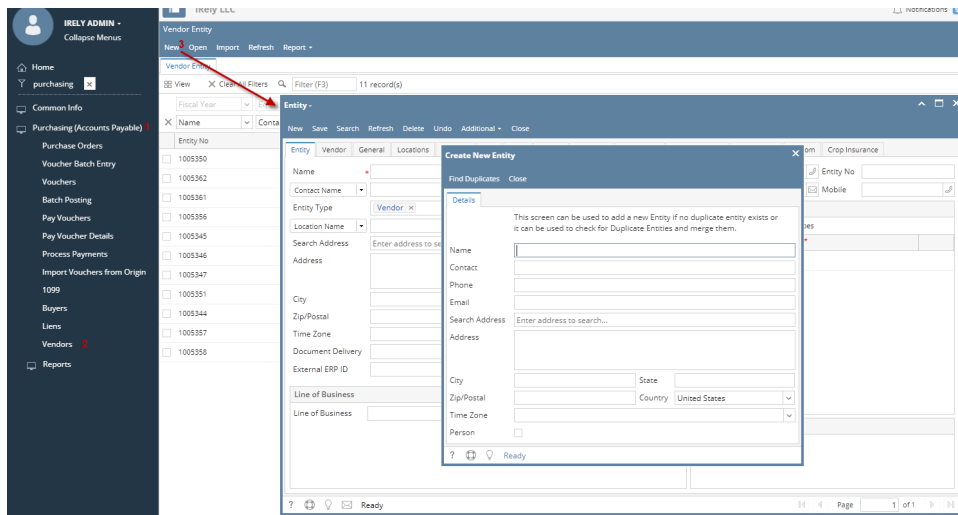
- Select default terms on the dropdown
- Selected value on default terms should also be selected on the specific terms panel
- User can enter multiple terms under specific terms

The screenshot shows the 'Entity - Test Vendor' form with the 'Vendor' tab selected and the 'Detail' sub-tab active. The 'Default Terms' dropdown is highlighted with a red box and shows 'Net 30'. The 'Specific Terms' panel below it also shows 'Net 30' selected.

g. Click Save

Here are the steps on how to add Vendors:

- From the Main Menu, Navigate to Purchasing (Accounts Payable) and click on **Vendors** to open **Search Vendor** Screen
- Upon click of **New** toolbar button, Create New Entity Screen will open.



c. Populate fields. Enter values on the fields > Click **Find Duplicates**

- Name
- Contact
- Phone
- Email
- Address (City , State, Zip/Postal, Country)
- Time Zone
- Person

**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: Test Vendor

Contact: Test Vendor Contact

Phone: (571) 144-54

Email: testvendor@gmail.com

Search Address: Enter address to search...

Address: Kissimmee Vineland Road

City: Orlando State: FL

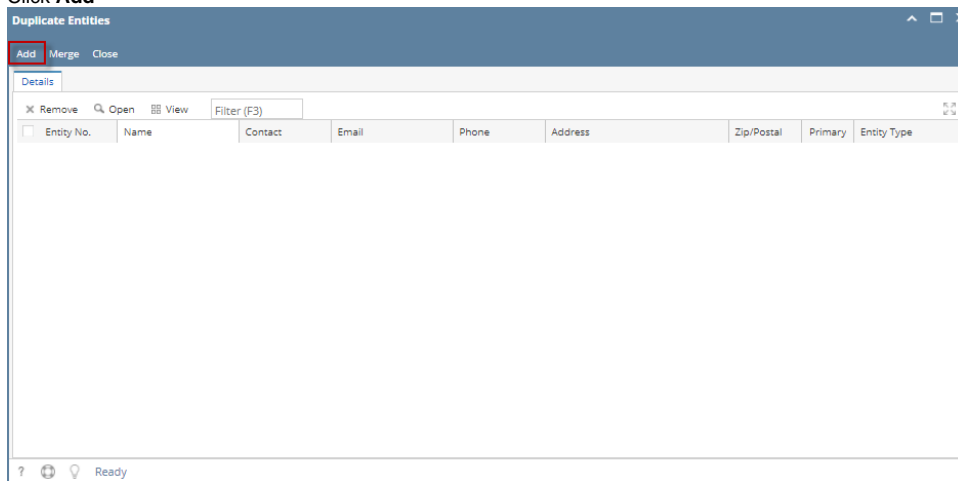
Zip/Postal: 1234 Country: United States

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

Person: ☐

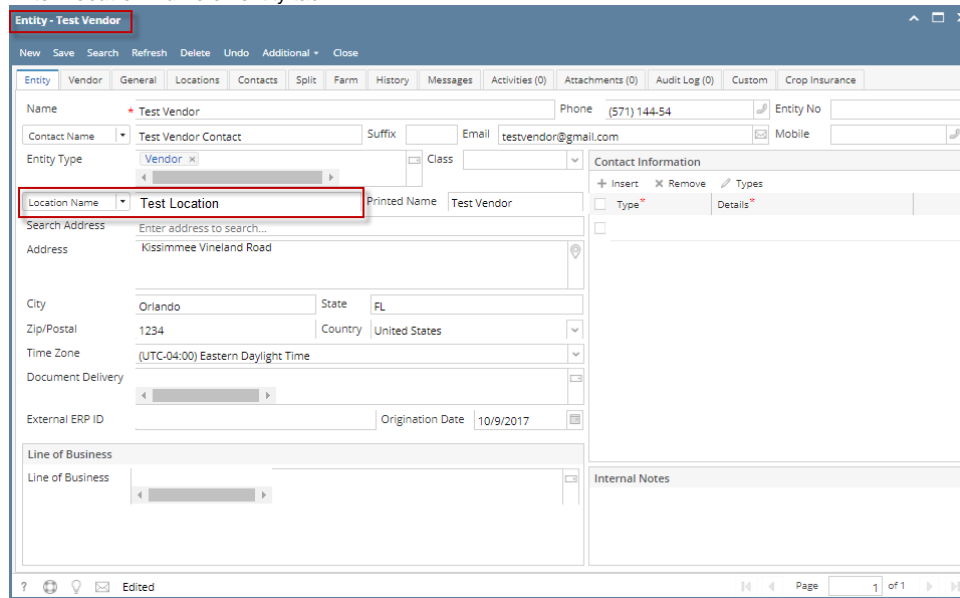
? ? ? Ready

d. Click **Add**



e. **Vendor Entity** screen will open with the details entered in Create New Entity screen. Also the Entity screen will be named as Vendor Name

- Enter **Location Name** on entity tab



f. Click on the Vendor Tab > Detail tab

- Select default terms on the dropdown
- Selected value on default terms should also be selected on the specific terms panel
- User can enter multiple terms under specific terms

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 (0) Custom Crop Insurance

2 Detail Credit Card Reconciliation Taxing Pricing Lien Holder Store

Type Company

Vendor Account No

GL Account

Currency + USD

Credit Limit 0.0

Parent Vendor

Payment Method

Ship From Test Location

Pay To Address Test Location

Ship Via

Default Terms + Net 30

Specific Terms

+ Insert X Remove View Filter (F3)

Terms

Net 30

Net 15

Tax No

Tax State

Tax Code

Withholding

FLO Id

Legacy Vendor ID

Payment Control

☒ Active ☐ Hold

☐ Always Discount ☐ One voucher per payment

Exposure Inquiry

Risk Indicator

Business Volume 0

UOM

Setup

☐ Transport Terminal

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g. Click Save

- Here are the steps on how to add vendors:
  - From **Main Menu**, expand **Purchasing** and then click on **Vendors** to open **Search Vendor** screen.
  - Click on **New** button. **Create New Entity** screen will open

TEST USER - Collapse All Menus

Home Filter... Purchasing

Purchase Orders Voucher Batch Entry Vouchers Recurring Transactions Batch Posting Pay Vouchers Pay Voucher Details Process Payments Vendor Expense Approval Import Vouchers from Originals

1099

Vendors

Reports Sales Payroll

More Available

i21 Source Company

Vendor Entity

New Open Import Refresh Export + Close

Layout Filter Records (F3) 53 records

Entity - Create New Entity

Name: Add Find Duplicates Close

Contact Details

Location

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:

Phone:

Address:

Zip/Postal:

Internal ? ? ? Ready

- Enter **Name**, **Contact**, **Email**, **Phone**, **Address** and select **Zip Code**.
- Click **Add** 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: SAMPLE VENDOR

Contact: SAMPLE VENDOR

Email: SAMPLEVENDOR@TESTEMAIL.COM

Phone: 755-8957

Address: 123 TEST ADDRESS

Zip/Postal: 46204

? ? ? Ready

- Vendor Entity screen will open with the details entered in Create New Entity screen.

- Enter details on **Entity Tab** specially the required fields like **Location**.
- Do the same on the **VendorTab**. Required fields on this tab are **GL Account** and **Terms**.
- Navigate to **Locations Tab**. Location entered on the Entity Tab together with its details will be displayed on the grid. Add more locations if necessary by clicking **Insert** button.

Location Name	Address	City	State/Province	Zip/Postal Code	Country	Phone	Fax	Pricing Level
SAMPLE VENDOR	123 TEST ADDRESS	Indianapolis	IN	46204	United States			

- Navigate to **Contacts Tab**. Contact entered on the Entity Tab together with its details will be displayed on the grid. Add more contacts if necessary by clicking **Insert** button.

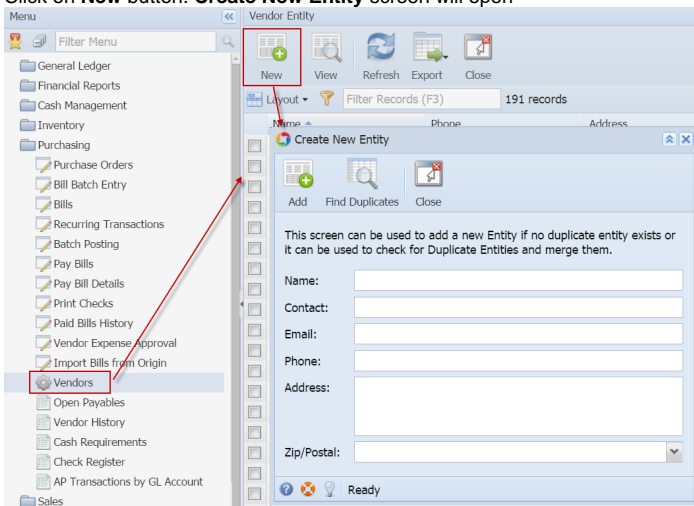
Name	Email (username)	Title	Phone	Mobile	Location Name	Timezone	Portal Acce...	Active
SAMPLE VENDOR	SAMPLEVENDOR@TESTEMAIL...		755-8957		SAMPLE VENDOR			<input checked="" type="checkbox"/>

- Click **Save** toolbar button to save newly created vendor. However **Entity No** is entered (manually or system-generated), whatever is entered on this field will also be the vendor's **Legacy Vendor ID**.

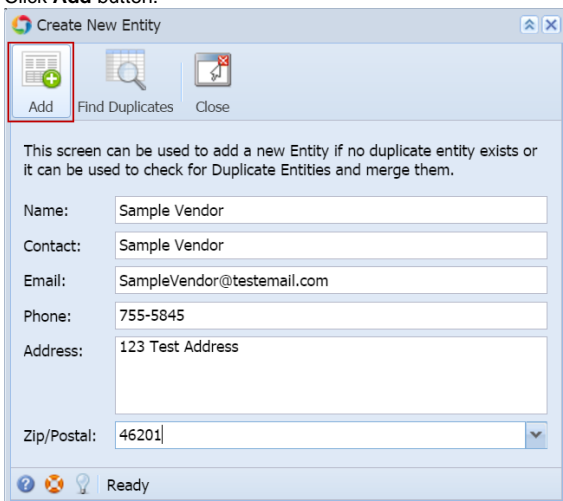
Here are the steps on how to add vendors:

- From **Main Menu**, expand **Purchasing** and then click on **Vendors** to open **Search Vendor** screen.

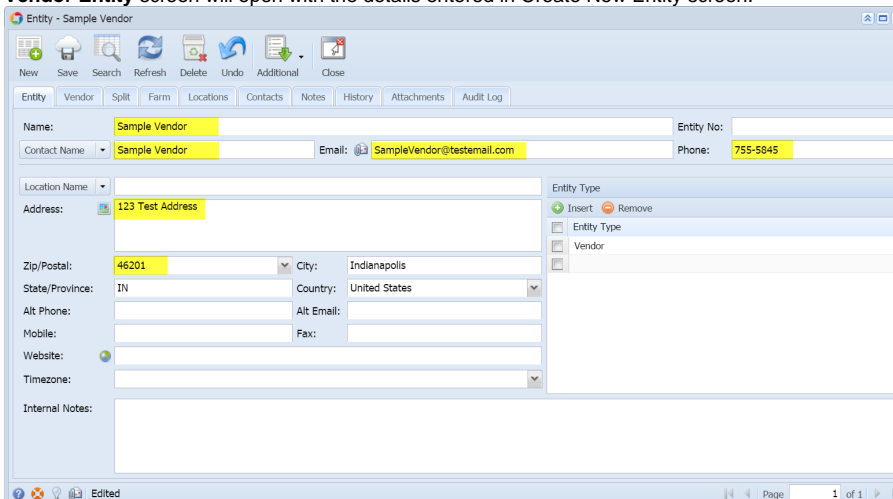
- Click on **New** button. **Create New Entity** screen will open



- Enter **Name**, **Contact**, **Email**, **Phone**, **Address** and select **Zip Code**.
- Click **Add** button.



- Vendor Entity** screen will open with the details entered in Create New Entity screen.



- Enter details on **Entity Tab** specially the required fields like **Location**.
- Do the same on the **VendorTab**. Required fields on this tab are **GL Account** and **Terms**.



- Navigate to **Locations Tab**. Location entered on the Entity Tab together with its details will be displayed on the grid. Add more locations if necessary by clicking **Insert** button.

Location Name	Address	City	State/Province	Zip/Postal Code	Country	Phone	Fax	Pricing Level
Sample Vendor	123 Test Address	Indianapolis	IN	46201	United States			

- Navigate to **Contacts Tab**. Contact entered on the Entity Tab together with its details will be displayed on the grid. Add more contacts if necessary by clicking **Insert** button.

Name	Email (username)	Title	Phone	Mobile	Location Name	Timezone	Portal Access	Active
Sample Vendor	SampleVendor@testemail.com		755-5845		Sample Vendor		<input type="checkbox"/>	<input type="checkbox"/>

- Click **Save** toolbar button to save newly created vendor. However **Entity No** is entered (manually or system-generated), whatever is entered on this field will also be the vendor's **Legacy Vendor ID**.

Entity: Vendor Split Farm Locations Contacts Notes History Attachments Audit Log

Name: Sample Vendor Entity No: 0001005088

Contact Name: Sample Vendor Email: SampleVendor@testemail.com Phone: 755-5845

Detail Credit Card Reconciliation

Type: Company

Vendor Account No:

GL Account: 6010-16-000

Currency: USD

Credit Limit: 0.00

Pay To:

Payment Method:

Terms: Net 45

Ship Via:

Bill To: Sample Vendor

Ship From: Sample Vendor

Legacy Vendor ID: 0001005088

Here are the steps on how to add vendors:

- From **Main Menu**, select **Purchasing** and then click on **Vendors**. If there's an existing record, docked **Search Vendor** screen will open. Otherwise, blank Vendor screen will open.
- If Search Vendor screen opens, click on **New** button to open blank Vendor screen.

iReby i21 - iReby Grain and Ag Co

Menu: Vendor Entity

Filter Menu

Favorites

System Manager

Common Info

Dashboard

General Ledger

Financial Reports

Cash Management

Credit Card Reconciliation

Inventory

Purchasing

Purchase Orders

Bill Batch Entry

Bills

Recurring Transactions

Batch Posting

Pay Bills

Pay Bill Details

Print Checks

Paid Bills History

Vendor Expense Approval

Import Bills from Origin

Vendors

Open Payables

Vendor History

Cash Requirements

Check Register

AP Transactions by GL Account

Sales

Payroll

Notes Receivable

Grain

Contract Management

Risk Management

Scale

New View Refresh Close

Filter Records (F3) 1,786 records

Name Address City State

Entity -

New Save Search Refresh Undo Additional Close

Entity Vendor Locations Contacts Notes History Attachments Custom

Name: Entity No:

Contact Name: Email: Phone:

Location Name: Address: Entity Type: Insert Remove

Zip/Postal: City: Entity Type: Vendor

State/Province: Country: United States

Alt Phone: Alt Email:

Mobile: Fax:

Website:

Timezone:

Internal Notes:

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- Default Entity type will be Vendor but you can still add other entities if necessary. If Customer or Salesperson is added, tabs for these entities will be added too.

Entity - test

New Save Search Refresh Undo Additional Close

Entity Customer Vendor Salesperson Locations Contacts Notes History Attachments Messages Custom

Name: test Entity No:

Contact Name: 1 Email: Phone:

Location Name: 1 Address:

Zip/Postal: City:

State/Province: Country: United States

Alt Phone: Alt Email:

Entity Type

Insert Remove

Entity Type

☒ Vendor

☐ Customer

☐ Salesperson

- Enter entity details on **Detail** tab. Required fields are **Name, Contact Name, Location Name**.
- On **Vendor** tab, enter vendor details specially on required fields like: **GL Account** and **Terms**.
- Navigate to **Locations** tab. location entered on the Detail tab together with its details will be displayed on the grid. Add more locations if necessary by clicking **Insert** button.

Entity - AP's Sample Vendor

New Save Search Refresh Undo Additional Close

Entity Vendor Locations Contacts Notes History Attachments Custom

Name: AP's Sample Vendor Entity No:

Contact Name: AP's Contact Email: test@sample.com Phone: 755-1256

Location Name: AP's Location Address:

Zip/Postal: 12193 City: Westerlo

State/Province: NY Country: United States

Alt Phone: 755-1258 Alt Email: alttest@sample.com

Entity Type

Insert Remove

Entity Type

☒ Vendor

☐ Customer

☐ Salesperson

Entity - AP's Sample Vendor

New Save Search Refresh Undo Additional Close

Entity Vendor Locations Contacts Notes History Attachments Custom

Insert View Remove Layout Filter Records (F3)

<input checked="" type="checkbox"/>	Location Name	Address	City	State/Province	Zip/Postal Code	Country	Phone	Fax	Pricing Level
<input checked="" type="checkbox"/>	AP's Location	AP's St. Cor 100...	Westerlo	NY	12193	United States			

- Navigate to **Contacts** tab, contact entered on the Detail tab together with its details will be displayed on the grid. Add more contacts if necessary by clicking **Insert** button.

The top screenshot shows the 'Entity - AP's Sample Vendor' form with the 'Contacts' tab selected. The 'Entity No' field is empty. The 'Contact Name' field is 'AP's Contact', 'Email' is 'test@sample.com', and 'Phone' is '755-1256'. The 'Location Name' field is 'AP's Location', 'Address' is 'AP's St. Cor 100 Test Drive', 'Zip/Postal' is '12193', 'City' is 'Westerlo', 'State/Province' is 'NY', 'Country' is 'United States', 'Alt Phone' is '755-1258', 'Mobile' is '+1 125 1256', 'Fax' is '755-1257', 'Website' is empty, and 'Timezone' is '(UTC-05:00) Eastern Time (US & Canada)'. The 'Entity Type' section shows 'Entity Type' and 'Vendor' as options.

The bottom screenshot shows the 'Entity - AP's Sample Vendor' form with the 'Contacts' tab selected. The 'Entity No' field is 'V100'. The 'Contact Name' field is 'AP's Contact', 'Email' is 'test@sample.com', and 'Phone' is '755-1256'. The 'Location Name' field is 'AP's Location', 'Address' is 'AP's St. Cor 100 Test Drive', 'Zip/Postal' is '12193', 'City' is 'Westerlo', 'State/Province' is 'NY', 'Country' is 'United States', 'Alt Phone' is '755-1258', 'Mobile' is '+1 125 1256', 'Fax' is '755-1257', 'Website' is empty, and 'Timezone' is '(UTC-05:00) Eastern Time (US & Canada)'. The 'Entity Type' section shows 'Entity Type' and 'Vendor' as options. The 'Contacts' table shows the following data:

Name	Email (username)	Title	Phone	Mobile	Location Name	Timezone	Portal Access	Active
AP's Contact	test@sample.com		755-1256	+1 125 1256	AP's Location	(UTC-05:00) Ea...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Click **Save** toolbar button to save newly created vendor. However **Entity No** is entered (manually or system-generated), whatever is entered on this field will also be the vendor's **Legacy Vendor ID**.

The top screenshot shows the 'Entity - AP's Sample Vendor' form with the 'Entity' tab selected. The 'Entity No' field is 'V100'. The 'Contact Name' field is 'AP's Contact', 'Email' is 'test@sample.com', and 'Phone' is '755-1256'. The 'Location Name' field is 'AP's Location', 'Address' is 'AP's St. Cor 100 Test Drive', 'Zip/Postal' is '12193', 'City' is 'Westerlo', 'State/Province' is 'NY', 'Country' is 'United States', 'Alt Phone' is '755-1258', 'Mobile' is '+1 125 1256', 'Fax' is '755-1257', 'Website' is empty, and 'Timezone' is '(UTC-05:00) Eastern Time (US & Canada)'. The 'Entity Type' section shows 'Entity Type' and 'Vendor' as options.

The bottom screenshot shows the 'Entity - AP's Sample Vendor' form with the 'Vendor' tab selected. The 'Legacy Vendor ID' field is 'V100'. The 'Type' field is 'Company', 'Approval List' is 'Admin List', 'Payment Control' is 'Active', 'Vendor Account No' is empty, 'Tax No' is empty, 'GL Account' is '93000-0000', 'Tax State' is empty, 'Currency' is 'USD', 'Tax Code' is empty, 'Credit Limit' is '0.000000', 'Print 1099' is 'No', 'Pay To' is empty, '1099 Name' is empty, 'Payment Method' is empty, '1099 Form' is empty, 'Terms' is '3% 5 Net 15', '1099 Type' is empty, 'Ship Via' is 'UPS Ground', 'Federal Tax ID' is empty, 'Bill To' is 'AP's Location', 'W9 Signed' is empty, 'Ship From' is 'AP's Location', and 'Withholding' is checked.

Here are the steps on how to add vendors:

- From **Main Menu**, select **Account Payables > Maintenance** and then click on **Vendors**. If there's an existing record, **Search Vendor** screen will open. Otherwise, Vendor screen will open.

- If Search Vendor screen opens, click on **New** button to open blank Vendor screen.

- Enter vendor details on **Detail** tab. Required fields are **Vendor No**, **Name**, **Type**, **Contact**, **Location**, **GL Account**, **Ship Via** and **Terms**.

- On **Locations** tab, location entered on the Detail tab is also displayed. Adding more locations is possible but this is only available when **Origin Integration** is turned OFF.

Location Name	Address	City	State/Province	Zip/Postal Code	Phone	Fax
01	01 Test Drive	Edison	OH	43320	2111-2111-2112	2111-2111-2113

- On **Contacts** tab, contact entered on the Detail tab is also displayed. Click Add button to add more contacts for this vendor.

Name	Title	Location Name	Department	Phone	Mobile	Email	Notes
01	staff	630	admin	2111-2111-2111	+1 212 222 1111	test1@email.com	

- Click **Save** toolbar button to save newly created vendor.

Here are the steps on how to add vendors:

- From **Main Menu**, select **Account Payables > Maintenance** and then click on **Vendors**. If there's an existing record, **Search Vendor** screen will open. Otherwise, Vendor screen will open.

- If Search Vendor screen opens, click on **New** button to open blank Vendor screen.

The image shows the 'Search Vendor' window with the 'New' button highlighted. Below it is the 'Vendor -' window, which is a form for entering vendor details. The form has tabs for 'Detail', 'Locations', 'Contacts', 'History', and 'Attachments'. The 'Detail' tab is active, showing fields for Vendor No., Name, Type, Contact, Location, Address, Zip/Postal Code, City, State/Province, Country, Alt Phone, Alt Email, Mobile, Fax, Website, Bill To, Ship From, Internal Notes, Payment Control, Pay To, Currency, Credit Limit, Payment Method, Expense ID, Account No., Tax No., Ship Via, Terms, Tax State, Tax Code, Print 1099, 1099 Name, 1099 Form, 1099 Type, Federal Tax Id, W9 Signed, and Withholding.

- Enter vendor details on **Detail** tab. Required fields are **Vendor No, Name, Type, Contact, Location, Expense ID, Ship Via** and **Terms**.

The image shows the 'Vendor -' window with the 'Detail' tab selected. The form is filled with sample data for a vendor named 'Sample Company'. The 'Detail' tab is highlighted, and the form contains the following data:

Vendor No:	000000001	Name:	Sample Company	Type:	Company
Contact:	01	Phone:	1234565789	Email:	test@sampleco.com
Location:	01	Payment Control:	<input checked="" type="checkbox"/> Active <input type="checkbox"/> Always Discount <input type="checkbox"/> EFT <input type="checkbox"/> Hold		
Address:	Test Address		Pay To:	Sample Company	
Zip/Postal Code:	43321	City:	Fulton	Currency:	USD
State/Province:	OH	Country:	United States	Credit Limit:	500,000
Alt Phone:		Alt Email:		Payment Method:	Check
Mobile:		Fax:		Expense ID:	66600-9099
Website:		Ship Via:		Account No.:	
Bill To:	01	Terms:	Due on Receipt	Tax No.:	
Ship From:	01	Tax State:		Tax Code:	
Internal Notes:			Print 1099:	No	1099 Name:
			1099 Form:		1099 Type:
			Federal Tax Id:		W9 Signed:
			Withholding:	<input type="checkbox"/>	

- On **Locations** tab, location entered on the Detail tab is also displayed. Adding more locations is possible but this is only available when **Origin Integration** is turned OFF.

Location Name	Address	City	State/Province	Zip/Postal Code	Phone	Fax	Email
01	Test Address	Fulton	OH	43321			

- On **Contacts** tab, contact entered on the Detail tab is also displayed. Click Add button to add more contacts for this vendor.

Name	Title	Location Name	Department	Phone	Mobile	Email	Notes
01				123456789		test@sampleco.com	

- Click **Save** toolbar button to save newly created vendor.