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)
 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											
Entity Vendor Ge	neral Locations Contacts Spli	Farm	History Mess	ages	Activities (0)	Atta	chments (0) Audit Log (2) Custom	Crop Ins	urance		
Name 🔸	Test Vendor					Phon	e (571) 144-54	Ì	Entity No	1005362		
Contact Name	Test Vendor Contact	5	uffix	Ema	il testvendo	r@gma	ail.com		Mobile			ð
Entity Type	Vendor ×	_	🖂 Clas	s		~	Contact Information					
	•						+ Insert X Remove	Types				
Location Name 💌	Test Location	P	rinted Name	Test Ve	endor		Type*	Details*				
Search Address	Enter address to search											
Address	Kissimmee Vineland Road					0						
City	Orlando	State	FL									
Zip/Postal	1234	Country	United States			\sim						
Time Zone	(UTC-04:00) Eastern Daylight Time					~						
Document Delivery												
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External ERP ID			Origination D	ate 1	0/9/2017							
Line of Business												
Line of Business							Internal Notes					
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° Purchasing (Accounts Payable) > Select existing vendor record > Contacts tab

Entity - Test Vendor					^ E	×
New Save Search Refresh Delete Undo	Additional • Close					
Entity Vendor General Locations Conta	acts Split Farm History Messag	es Activities (0) Attachments (0)	Audit Log (2) Cu	ustom Crop Insurance		
+ Insert Q. Open X Remove 🖂 Email Log	gin 🗄 View Filter (F3)					К.Я К.У
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		\checkmark
1						

- 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

	iRely LLC											
🖵 Purchasing (A/P) 👖	Purchasing (A/P)											
	Activities Purchase Orders Vender Contact List Vouchers Voucher Bacch Entry Pay Vouchers Pay Pay Vouchers Pay Vouchers Pay	Mainten 1099 Buyers Liens 2 Vendors	Vendor - AP Smoke Test 1 New Save Search Ref	Import Import Vouchers fr Vendor resh Delete Undo A	rom Origin dditional * Close	Reports AP Transactions I Cash Requiremen Check Register	by GL Account	-			~ □	×
	Process Payments		Encity Vendor Gener	al Locations Contac	ts ³ Split Farm His	tory Messages	Activities (0)	Attachments (0)	Audit Log (3) Er	ntity Type		
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			Test Vendor Contact		APSmokeTestVendo	(73-	4) 555-2121		Test Vendor Loca	(UTC-06:00) Central A		~
	Create			Entity Contact -								×
	New Purchase Orders New Youchers New Youchers Patch Entry			New Save Delete	Undo Close 6	dditional Informaiton						
	New Payable New Buyer			Full Name Title	-	Suffix Nickname		Add Photo	User Portal Sett	ings ord 🖂 Email Login		
	New Vendor			Email (username) Phone		J Mobile		J	Portal Access	User Role		
				Location Name Address				×	Portal URL	alhost/PROD173012//21	1	_
				City		State			+ Insert X R	ation amove // Types		
				Zip/Postal		Country			Type"	Details		
				Contact Method		~ Dept						
				Email Distribution		~ Туре		×				
			< ? ᠿ ♡ ⊡ Read	Notes								
				Active	×	Rank 1						
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 $^{\circ}~$ Created contacts will automatically saved on Contacts tab > Grid

Entity - Test Vendor 1							
Entity Vendor General Locations Contacts Split Farm	History Messages Activities (0)	Attachments (0) Audit Log (1)	Custom Crop Insurance				
+ Insert Q. Open X Remove 🖂 Email Login 🔡 View Filter	r (F3)						57
Name Email Distribution	Email (username)	Title Phone	e Mobile	Location Name	Time Zone	Portal Access	Active
Test Vendor 1 Contact	testvendor1contact@gmail.com			Location 1	(UTC-04:00) Eastern Da		\checkmark
Test Vendor Contact 2	testvendor@gmail.com						<

Here are the steps on how to add vendor contacts

- 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)

 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

ntity Vendor Ge	neral Locations Contacts Spl	it Farm	History Me	ssages	Activities (0)	Attac	chments (0)	Audit Log (2)	Custom	Crop Ins	urance	
lame 🔸	Test Vendor					Phon	ie (571) 14	14-54	ð	Entity No	1005362	
Contact Name 🛛 🔻	Test Vendor Contact		Suffix	Emai	testvendo	or@gma	ail.com			Mobile		
ntity Type	Vendor ×	_	🗆 Cla	SS		~	Contact In	formation				
	4	•					+ Insert	× Remove	🖉 Types			
ocation Name 🔻	Test Location		Printed Name	Test Ve	ndor		Туре*		Details [*]			
earch Address	Enter address to search											
ddress	Kissimmee Vineland Road					0						
iity	Orlando	State	FL									
ip/Postal	1234	Country	United States			~						
ime Zone	(UTC-04:00) Eastern Daylight Time					~						
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xternal ERP ID			Origination I	Date 10)/9/2017							
ine of Business												
ine of Business							Internal N	otes				
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 $^\circ~$ Purchasing (Accounts Payable) > Select existing vendor record > Contacts tab

Entity - Test Vendor													□ ×
New Save Search Refres	h Delete U	ndo Addi		Close									
Entity Vendor General	Locations	Contacts	Split	Farm	History	Messages	Activities (0)	Attachments (0)	Audit Log (2)	Custom	Crop Insurance		
+ Insert Q Open X Re	move 🖂 Em	ail Login	88 View	Filte	r (F3)								K M
Name E	mail Distributio	n Em	hail (usern	iame)	Title		Phone	Mobile	Location Name	Tin	ne Zone	Portal Acces	s Activ
Test Vendor Contact		tes	tvendor@	gmail.c			(571) 144-54		Test Location	(UT	C-04:00) Eastern		\checkmark
4												_	Þ
? 🔘 🖓 🖂 Ready										$\ \cdot \ $	Page	1 of 1	

- 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

	iRely LI	LC								
IRELY ADMIN -	Vendor Entity									
	New Open Imp	port Refresh Report •								
☆ Home	Vendor Entity	3								
Y Accounts Pay 🗙	III View Q 1	Test Vendor 1 × 1 record(s) (1 sel	ected)							
Purchasing (Accounts Pavable)	Fiscal Year	Y Equals Y	~							
Purchase Orders	Entity No	Name 🔺	Phone		Address	City		State		Zip
Voucher Batch Fotov	2 1005361	Entity - Test Vendor 1								⊐ ×
Vouchers		New Save Search Refresh								
Batch Posting		Entity Vendor General	Locations Contacts Solit	Farm History Messa	zes Activities (0) Attaci	ments (0) Audit	Log (1) Cust	om Crop Insurance		
Pay Vouchers		+ Insert 5 Q. Open X Remo	ive 🖂 Email Login 🔠 View	Filter (F3)						53
Pay Youcher Details		Name Ema	il Distribution Email (usern	name) Title	Phone Mobil	e Locat	tion Name	Time Zone	Portal Access	Activ
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Import Vouchers from Origin										
1099			Entity Contact -							~ X
Rivers			New Save Delete Und	o Close 7						
Liens			Detail CRM Information	Audit Log (0) Addition	I Information					
Vendors 2			Full Name		Suffix		User Destal	Cathlana		_
			Title		Nickname	Add Photo	A Change P	assword 🖂 Email Lo		
ц керопз			Email (username)			AND PROCE	Portal Acces	s User Role		
			Phone		J Mobile	: ا	Username			
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			Address			0				
							Contact Info	ormation		
			City		State		Type*	Details*		
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		2 C O D Date	Notes							
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$^{\circ}~$ Created contacts will automatically saved on Contacts tab > Grid

Seve Search Refreih Delete Lindo Additional - Close / Vendo / General Locations Contacts Split Farm History Messages Adivides(0) Additiog(1) Cuttom Crop Insurance art G. Open X Remove C Enail Operations are = Enail Operations Enail Operations Enail Operations Enail Operations Estimated Contact 2 Est	ntity - Test Vendor 1							
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Seen X Remove Email Login Elver (5) Jame * Email Login Email Lo	Entity Vendor General Locations Contacts Sp	lit Farm History Messages Activities (0)	Attachments (0) Audit Log (1) Custo	n Crop Insurance				
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est Vendor Contast 2 testvendor@gmail.com	Test Vendor 1 Contact	testvendor1contact@gmail.com			Location 1	(UTC-04:00) Eastern Da		~
	Test Vendor Contact 2	testvendor@gmail.com						~
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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.

ew Save Search Refresh	Delete Undo Additional - Cle							
Entity Vendor Split Farm	Locations Contacts Comr	nents (0) History /	Attachments (0) Custom					
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Name Email	(usomamo) Titla	Dhoor						
New Save Refresh	Delete Lindo Close							
Detail Audit Log (0)								
Full Name:								
Email (username): 🖂			Add Photo					
Title:								
Phone:		Mobile:						
Alt Phone:		Alt Email:						
Contact Method:	~	Fax:						
Location Name:			~					
Active:	Department:							
Portal Access:	Timezone:		~					
Type:			~					
Notes:								
Email Distribution:								
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nter contact de	etails and click	Save.						
ose Entity Co	ntact screen.	Newly add	ed vendor cor	ntact will be	displayed of	on the arid.		
ity Vendor Split	Farm Locations Cor	tacts Comment	s (0) History Attach	ments (0) Custom	Audit Log (2)			
Insert Q Open X	Remove 🖂 Email Login	멾 Layout C	Filter Records (F3)					
Name	Email (username)	Title	Phone	Mobile	Location Name	Timezone	Portal Acce	Ac
Cracked Mug	apsamplevendor@gmail.co	m			Cracked Mug		~	
	-				-			

Here are the steps on how to add vendor contacts:

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

Entity - AP's	Sample Vendor					
New Save	Search Refresh Und	o Additional C	با Close			
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lame	Email (username)	Title	Ph	one	Mobile	Locatio
P's Con	C Entity Contact -		700	1756	11 100 1000	AD'e Le
	New Save Refresh	Delete Undo	Close			
	Detail					
	Full Name:				-	
	Email (username): ()				Add Ph	oto
	Title:					
	Phone:		Mot	oile:		
	Alt Phone:		Alt	Email:		
	Contact Method:		Y Fax			_
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000	Portal Access:	Timezone:				*
	Notes:					
	🥝 🔮 🏆 Ready		R	4 Page	1 of 1	

3. Enter contact details and click Save.

Entity Contact - AP's C	ontact 1				× ×
New Save Refresh	Delete Undo	Close			
Detail					
Full Name:	AP's Contact 1				
Email (username): 🕼	test1@example.c	om			
Title:	staff				
Phone:	755-4587		Mobile:	+1 256 4587	
Alt Phone:	755-4521		Alt Email:	alttest1@example.c	om
Contact Method:	Email or Phone	*	Fax:	755-8952	
Location Name:	AP's Location				*
Active:	Department:	Mfg			
Portal Access:	📃 Timezone:	(UTC-08	3:00) Pacific	Time (US & Canada)	*
Notes:	this is a test				
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4. Close Entity Contact screen. Newly added vendor contact will be displayed on the grid.

🕽 Entity - AP's Sample	e Vendor							* • ×
New Save Searc	h Refresh Undo A	dditional Close						
Entity Vendor L	Locations Contacts	Notes History	Attachments C	ustom				
📀 Insert 🔍 View	😑 Remove 🕡 Email L	ogin 🛛 🚟 Layout 👻	💡 Filter Record	s (F3)				
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	V	V
AP's Contact 1	test1@example.com	staff	755-4587	+1 256 4587	AP's Location	(UTC-08:00) Pa		V
5								

Here are the steps on how to add vendor contacts:

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

New Save Se	arch Delete	Undo	Print	Additional	Close
Detail Locations	Contacts	History	Attach	ments	
🔇 Insert 📝 Edit	😑 Remove	Filter:			×
V Name	Title		Loc	ation Name	Dep
01	staff		179	33	Adm
Enter contact detai	ls and save.				
Vendor Contacts					8
Detail	Contact 01-2				
Detail Full Name: Email (usemame):	Contact 01-2 test1-2@email.co	om		_	0
Detail Full Name: Email (username): (jj.3 Title:	Contact 01-2 test1-2@email.co staff	om			2
Detal Full Name: Email (usemame): (i) Title: Phone:	Contact 01-2 test1-2@email.co staff 211-211-3121	om	Mobile:	00-1-312-31	3-0317
Detal Full Name: Email (usemanne): (ji) Title: Phone: Alt Phone:	Contact 01-2 test1-2@email.co staff 211-211-3121 211-211-3122	om	Mobile: Alt Email:	00-1-312-31 test1-2@abs	3-0317 email.com
Detal Full Name: Email (usemame): (ij) Title: Phone: Alt Phone: Contact Method:	Contact 01-2 best1-2@email.or staff 211-211-3121 211-211-3122 Email or Phone	om	Mobile: Alt Email: Fax:	00-1-312-31 test1-2@akt 211-211-312	3-0317 email.com
Detail Full Name: Email (usemame): (i) Title: Phone: Alt Phone: Contact Method: Location Name:	Contact 01-2 test1-2@email.co staff 211-211-3121 211-211-3122 Email or Phone 01	om	Mobile: Alt Email: Fax:	00-1-312-31 test1-2@ake 211-211-312	3-0317 email.com 13
Detail Full Name: Email (usemame): Title: Phone: Alt Phone: Contact Method: Location Name: Department:	Contact 01-2 test1-2@email.co staff 211-211-3122 Email or Phone 01	om v	Mobile: Alt Email: Fax:	00-1-312-31 test1-2@akt 211-211-312	3-0317 email.com 13
Detail Full Name: Email (usemame): (i) Title: Phone: Alt Phone: Contact Method: Location Name: Department: Timezone:	Contact 01-2 test1-2@email.co staff 211-211-3121 211-211-3122 Email or Phone 01	om	Mobile: Alt Email: Fax:	00-1-312-31 test1-2@ake 211-211-312	3-0317 smal.com 13
Detail Full Name: Email (usemanne): (i)3 Title: Phone: Alt Phone: Contact Method: Location Name: Department: Timezone: Notes:	Contact 01-2 test1-2@email.co staff 211-211-3121 211-211-3122 Email or Phone 01 sample note 2	om	Mobile: Alt Email: Fax:	00-1-312-31 test1-2@ake 211-211-312	3-0317 smail.com 3 v

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

Here are the steps on how to add vendor contacts:

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



3. Enter contact details.

Vendor Contacts - SAM	APLE VENDOR	CONTACT				â X
🔓 💋 🛃 Save Undo Cose						
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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- Click Save and Close buttons.
 Newly added vendor contact will be displayed on the grid.

R	Notice 1	Title	Location Name	Department	Phone	Nobie	Enal	NOBI
14	GL	Hanager		Operations Dep.	180-980-2982		tell@rampieco.com	The bia sample .
14	Sampla Vander C	Assistanti		Operations Dap	WD-980-3855		telli (sanglace.e	This is a sample -