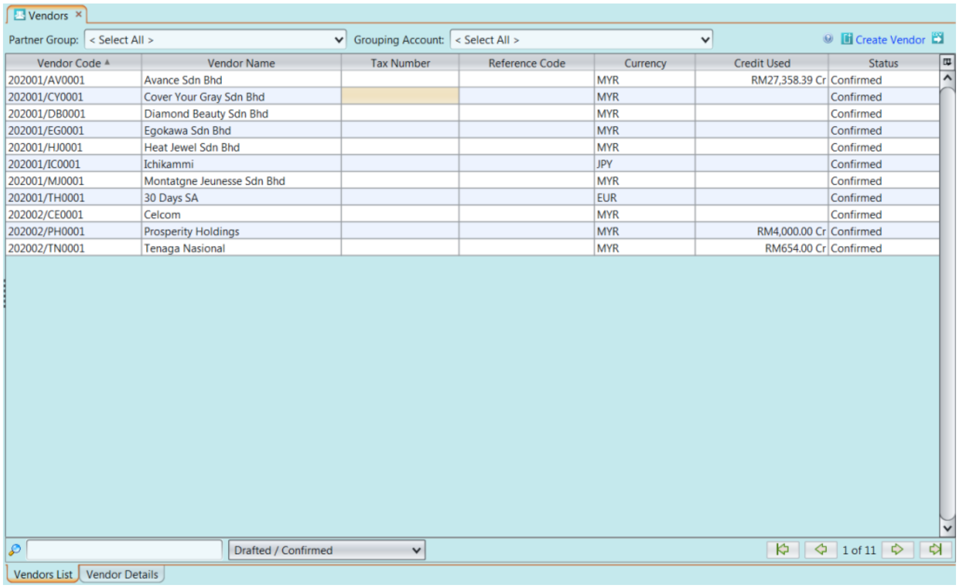
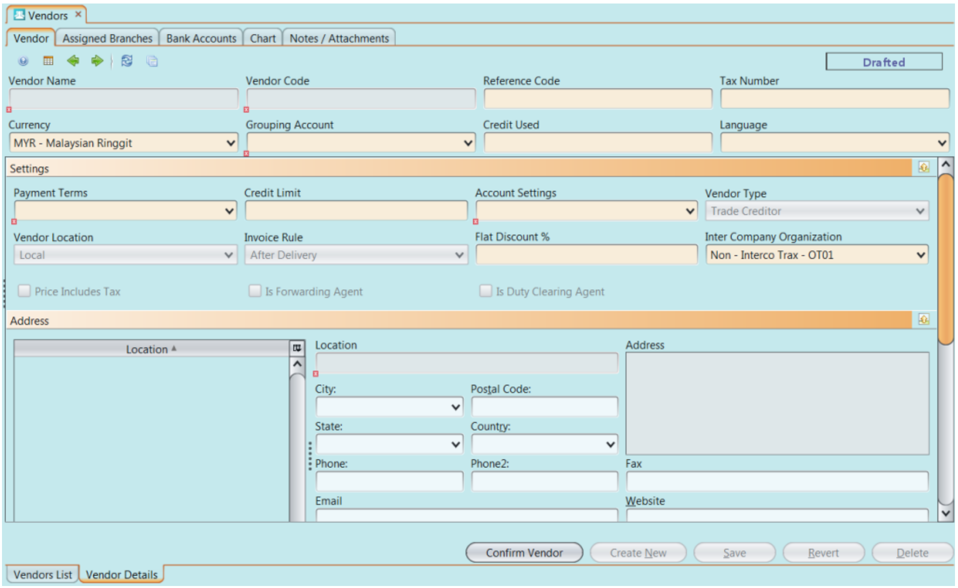
Vendors

Vendors view allows the user to create and manage vendors. Below are available actions for the user from ***"Vendors"*** :

- Create new vendor
- Update vendor details
- Delete vendor
- View and search for vendor details



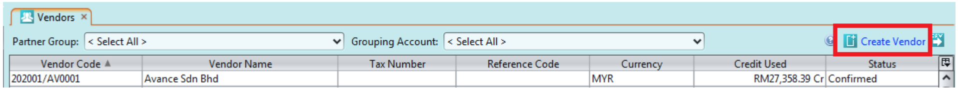


Field Name	Explanations	Mandatory Information
Vendor Name	The name of vendor	Y
Vendor Code	The code for vendor	Y
Reference Code	Code for easy reference search of vendor	N
Tax Number	Taxpayer Identification Number of the vendor	N
Currency	Currency used by vendor for payment purpose	Y
Grouping Account	Sub-ledger / grouping account for vendor	Y
Credit Used	Amount owed to the vendor	N
Language	Language used by vendor	N
Payment Terms	Payment terms for vendor payment	Y
Credit Limit	Credit limit given by the vendor	N
Account Settings	Which purchase account to use	Y
Vendor Type	Type of the vendor	N
Vendor Location	Location of the vendor (local or international)	N
Invoice Rule	Invoice rule for vendor payment	N
Flat Discount %		N
Inter Company Organization		N
Price Includes Tax	Checkbox to indicates whether product pricelist from the vendor includes tax	N
Is Forwarding Agent	Checkbox to indicates whether the vendor is a forwarding agent	N
Is Duty Clearing Agent	Checkbox to indicates whether the vendor is a duty clearing agent	N
Location	Location of vendor	Y
Address	Address of vendor’s location	Y
City	City of vendor’s location	N
Postal Code	Postal code of vendor’s address	N
State	State of vendor’s location	N
Country	Country of vendor’s location	N
Phone	Phone number of vendor’s location	N
Phone2	Secondary phone number of vendor’s location	N
Fax	Fax number of vendor’s location	N
Email	Email of vendor	N
Website	Website of vendor	N
Shipping Address	Tick checkbox if this is vendor’s shipping address	N
Billing Address	Tick checkbox if this is vendor’s billing address	N
Order From Address	Tick checkbox if this is vendor’s address for purchase order	N
Name	Contact name of vendor	Y
Designation	Designation of vendor’s contact	N
Phone	Phone number of vendor’s contact	N
Alt Phone	Alternate phone number of vendor’s contact	N
Fax	Fax number of vendor’s contact	N

Email	Email of vendor’s contact	N
Comments		N
Link to Address	Address of the user	N

Create New Vendor:

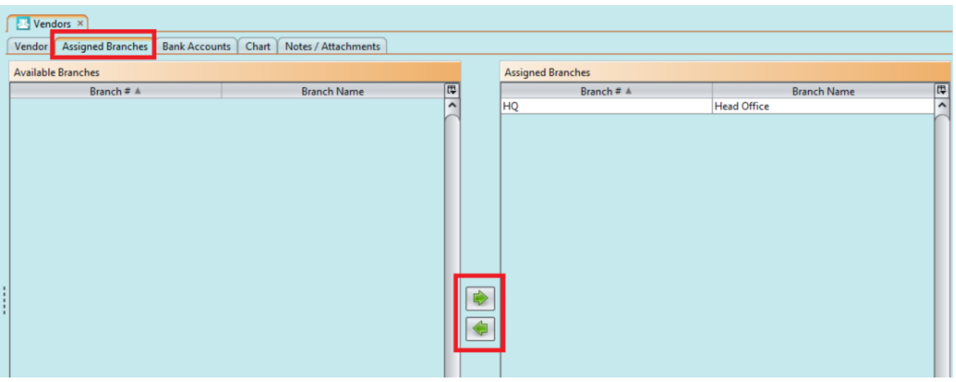
1. Click ***“Create Vendor”*** link on top right of ***“Vendors List”*** tab to create another vendor record, it will open ***“Vendor Details”*** tab with empty form



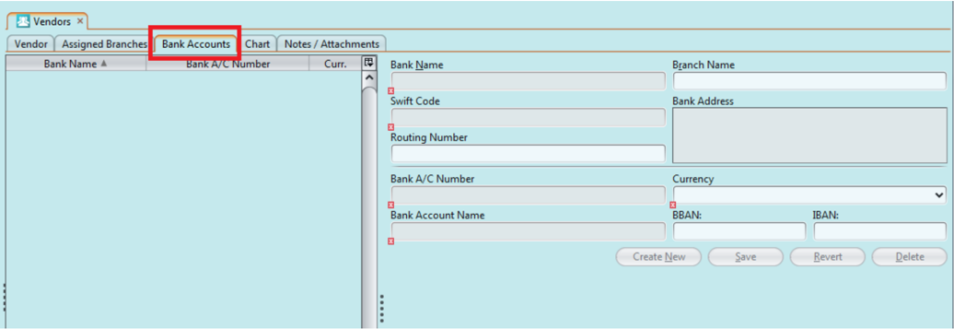
2. Fill up vendor’s information

3. Click ***“Save”*** button at the bottom of screen when done

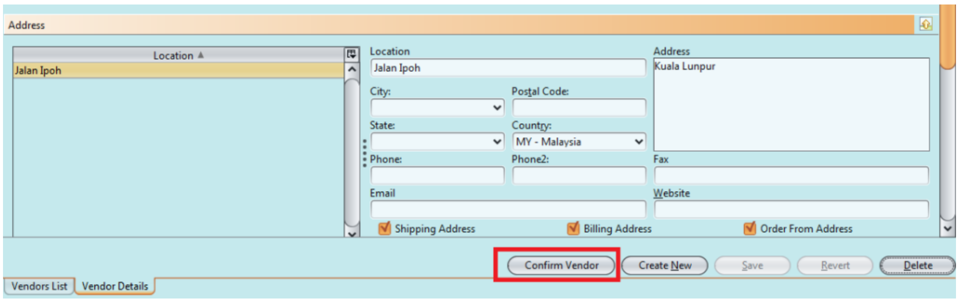
4. On ***“Assigned Branches”*** tab, a default branch (e.g. HQ) has been automatically assigned for the new vendor. To assign another branch for the vendor, select available branch from the bottom left table and click ”  ” button in middle of screen



5. To create bank account record for payment to the vendor, click on ***“Bank Accounts”*** tab, fill up the information, and click ***“Save”*** button.



6. Click ***"Confirm Vendor"*** button and click ***"Yes"*** button to confirm the vendor record



Update Vendor Details:

1. On "***Vendors List***" tab double click on vendor to be updated, it will bring up the details on ***"Vendor Details"*** tab for the selected vendor.

2. Make change(s) on the vendor's information

3. Click on ***"Save"*** button at the bottom of screen when done

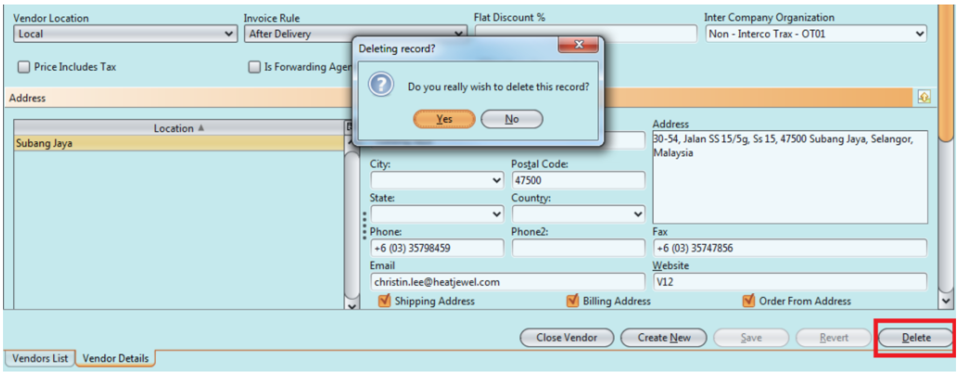
4. Click on ***"Revert"*** button at the bottom of screen or refresh icon at the top of the screen to roll back the changes

Delete Vendor:

1. On ***"Vendors List"*** tab double click on vendor to be deleted, it will bring up the details on ***"Vendor Details"*** tab for the selected vendor

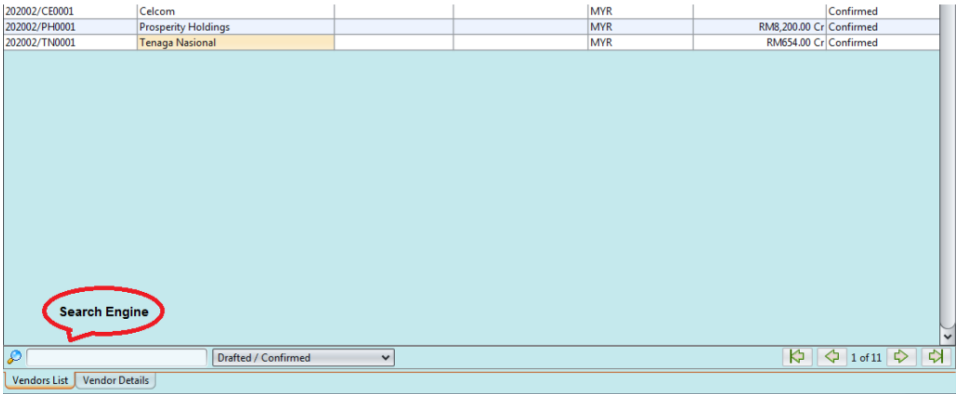
2. Click on ***"Delete"*** button at the bottom of screen

3. Click on ***"Yes"*** button on the pop-up window to confirm record deletion

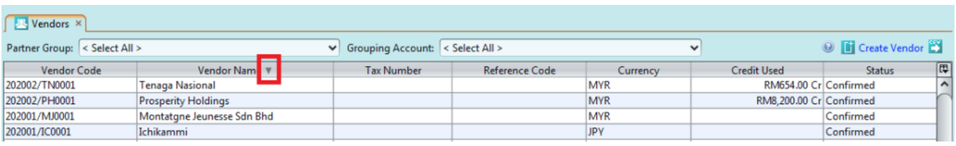


View and Search for Vendor Details:

1. On ***"Vendors List"*** tab enter search parameter to filter the result, i.e. type in name of the partner group in the ***"Partner Group"*** textfield box or select from drop-down lists



2. Result can be sorted alphabetically by clicking the fields' columns



3. Double click on vendor to view full details of the vendor, it will bring up the details on ***"Vendor Details"*** tab for the selected vendor

4. The ***"Chart"*** tab under ***"Vendor Details"*** tab shows

purchase records & chart for the selected vendor