Vendor: Add New Screen

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Overview

The **Add New Vendor** screen is used to create a new vendor or supplier record in 1place. It allows you to enter the vendor's basic contact information, purchasing preferences, payment terms, and other details needed when working with the vendor.

The information entered on this screen is used throughout 1place when managing vendors and creating Purchase Orders.

Help Topics

How to Add a New Vendor

1. Open the **Vendors** module.

2. Click the **New** button to open the **Add New Vendor** screen.

3. Enter the vendor's information in the applicable fields:
    - **Vendor #** - The required number assigned to the vendor. This number is automatically generated when a new vendor is created. Record number formatting can be configured under **Settings > System > Record Number Settings**.
    - **Vendor Name** - Enter the name of the vendor or supplier.
    - **Primary Contact** - Enter the vendor's primary representative or contact person.
    - **Title** - Enter the position or designation of the Primary Contact.
    - **Address Info** - Enter the vendor's complete business or mailing address.
    - **Phone & Fax** - Enter the vendor's phone and fax numbers.
    - **Email Address** - Enter the vendor's email address.
    - **Shipped Via** - Select the shipping method or carrier used by the vendor.
    - **Payment Terms** - Select the payment terms used when purchasing from the vendor. Payment Terms can be predefined under **Settings > Sales > General Sales Settings > Payment Terms**.
    - **Account Number** - Enter the account number assigned to your company by the vendor.
    - **Tax ID** - Enter the vendor's Federal Tax Identification Number.
    - **Credit Limit** - Enter the maximum credit amount available from the vendor.

- **Min Discount Amount** - Enter the minimum discount amount applicable to purchases from the vendor.
- **Product / Svcs** - Enter a description of the products or services provided by the vendor.
- **PO Type** - Select the types of Purchase Orders that can be created for the vendor:
    - **All POs** - The vendor can be used for all Purchase Order types.
    - **Local/Special Order POs Only** - The vendor can be used only for Local or Special Order Purchase Orders.
    - **Long Distance/Sea Container POs Only** - The vendor can be used only for Long Distance or Sea Container Purchase Orders.

4. Review the information entered on the **Add New Vendor** screen.
5. Click **Save** to create the new vendor record.