

Vendors
This menu lets you manage each company or individual that you will be purchasing from. Each vendor will need to be set up in this menu.

Search
Search for vendors and filter by **Inactive** or **Active** vendors.

Vendors ⓘ

Showing: Active Vendor

[+](#) Add

Vendor Code ▲	Vendor Name	Tax ID
12	Mary Smith	321125689
321123	Van Winkle Houses	123456789
ABC	ABC School Supply	123456789

Help Files
Click the information icon to access step-by-step instructions for this particular menu.

Add
Click the **Add** link to add a new vendor.

Add Vendor

Fill in the required fields to proceed.

Vendor Code	Attn to	Country	
<input type="text"/>	<input type="text"/>	US - UNITED STATES ▼	
Vendor Name	Address 1	Address 2	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Tax ID	City	State	Zip
<input type="text"/>	<input type="text"/>	▼	<input type="text"/>

General
This tab is used to manage general information about vendors.

Vendor Info
Enter vendor information here, including **Status** and **Method of Payment**.

Tax Rate Info
This information is populated from **Payroll > Administration > Tax Tables**.

Direct Deposit Info
Enter direct deposit information here.

Vendor Code: 321123
Status: Active

Vendor Name: Van Winkle Houses
Federal Tax ID: 123456789

Official Name:
Website:
Purchasing Category:
 EFT Email PO Print 1099
1099 Box:
Tax Type | State Rate | County Rate | Local Rate
Goods | 0.00 % | 0.00 % | 0.00 %
Services | 0.00 % | 0.00 % | 0.00 %
Food | 0.00 % | 0.00 % | 0.00 %
Direct Deposit Info
Bank: Chase (021000022)
Account Type: Checking
Account Number: 12160000000000000000

General **Addresses** Sites Invoices Purchase Orders

Order Address

County Code

Attn to

Country

Address 1

Address 2

City

State

Zip

Email

Phone

Fax

Remit Address [Same as Order Address](#)

Attn to

Country

Address 1

Address 2

City

State

Zip

Addresses
This tab is used to manage vendor addresses, including the **Order Address** and **Remit Address**.

Order Address
Enter the **Order Address** information here.

Same as Order Address
Click this link if the **Remit Address** information is the same as the **Order Address** information.

Remit Address
Enter the **Remit Address** information here.

General | Addresses | **Sites** | Invoices | Purchase Orders

Available to All Sites

5 selected

Site Name	<input type="checkbox"/>
Site - Name	<input checked="" type="checkbox"/>
Site 001 - Name	<input checked="" type="checkbox"/>
Site 002 - Name	<input checked="" type="checkbox"/>
Site 12345678 - Name	<input checked="" type="checkbox"/>
Site 999 - Name	<input checked="" type="checkbox"/>
12172019 Test	<input type="checkbox"/>
Site 003 - Name	<input type="checkbox"/>
test	<input type="checkbox"/>

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All Sites
Check this box if all sites can order from this vendor.

Sites
This tab is used to manage the sites that can order from this vendor.

Select Sites
Check these boxes if only select sites can order from this vendor.

Filter
Filter invoices by **Status**, **Fiscal Year**, and **Date Range**.

Invoices
This tab is used to view invoices by vendor.

The screenshot shows the 'Invoices' tab selected in a navigation menu. Below the menu are filter fields for Status (Unpaid), Fiscal Year (2020), and Date Range (From and To). A table below displays invoice data with columns for Invoice#, Bank, Amount, PO#, and Site. The first row shows an invoice for Bank of USA with an amount of \$1,916.26. The interface also shows 'Page 1' at the bottom.

Invoice# ▲	Bank	Amount	PO#	Site
789456123-2(R)	Bank of USA	\$1,916.26		Site 001 - Name

View Invoice
Click a link in the **Invoice#** column to view the attached invoice.

Filter
Filter purchase orders by **Status**, **Fiscal Year**, and **Date Range**.

Purchase Orders
This tab is used to view purchase orders by vendor.

The screenshot shows the 'Purchase Orders' tab selected in a navigation menu. Below the menu are filter fields for 'PO Status' (set to 'All'), 'Fiscal Year' (set to '2020'), and 'Date Range' (with 'From' and 'To' date pickers). Below the filters is a table with the following data:

PO# ▲	Deliver Date	Amount	Paid	Status	Site
1011	08/02/2019	\$12,500.00		Open	Site 001 - ...

Below the table, it indicates 'Page 1'.

View Purchase Order
Click a link in the **PO #** column to view the attached purchase order.