



Dynamics 365 – Vendor Creation

Revision 1



Revision History

Date	Revision	Description	Signature / Date	
17/06/2022	1	Initial draft of user manual: Dynamics 365 – Vendor Creation	Prepared	Salman Tahir
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			Approved	
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			Verified	
			Approved	
			Prepared	





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1 About User Manual

This document describes the step-by-step guide for creation of new vendor. It is process to add any vendor which is currently non-existing.

2 All Vendor Page

In order to create a new vendor, select the modules option. Go to the Account payable and select ‘All vendors’ available under the Vendor sub-option.

Navigation: Module> Account payable > Vendors > All vendors

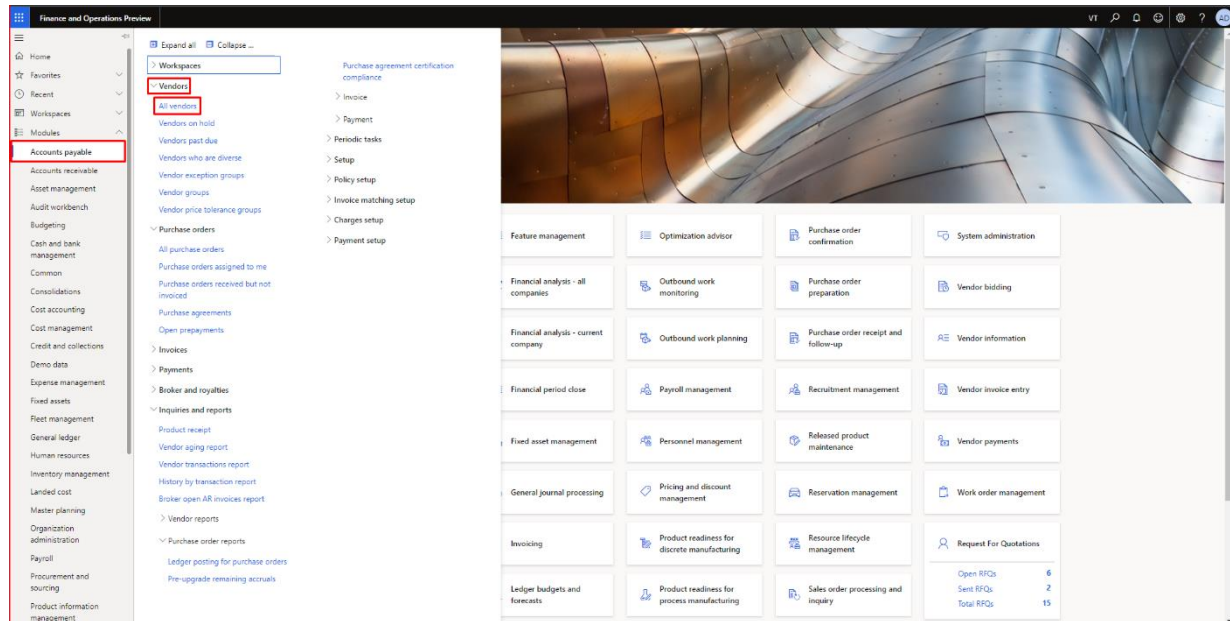


Figure 1 Way to open 'All Vendors' page

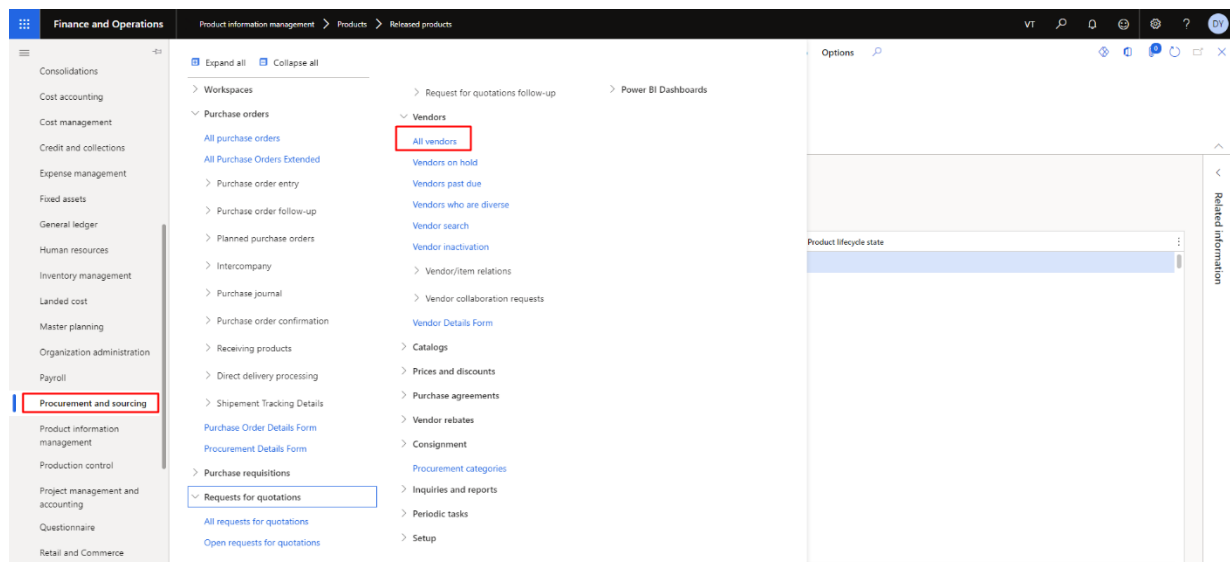


Figure 2 Vendors from Recoument and Sources



2.1 New Vendor

To create new vendor, select the ‘New’ option available on the top.

Navigation: Vendors > All vendors > New

Vendor account	Name	Vendor hold	Phone	Extension	Primary contact	Group	Currency	FAX	WEB
SS Components	SS Components	No	1 412-967-58-2		Kenny Stephenson	Intl	USD	1 412-967-5868	www.SSC
ABB Automation	ABB Automation Company	No	41 58 585 77 77-		Asea Brown Boveri	Part	USD	+41 43 317 4420	https://gl
Accuenergy Inc.	Accuenergy Inc.	No	41 64974100		Dawn Ahlquist	Intl	USD	41 64974130	testing
Access Spring	Access Spring	No				Intl	USD		
Allegheny Coati	Allegheny Coatings	No	814-772-3850		Matt Santaniello	Intl	USD		www.alle
AlliedElectron-00087	Allied Electronics	No				Part	USD		
Amber Traders	Amber Traders	No	+93234442173			Part	PKR		
Amphenol Custom Cabl	Amphenol Custom Cable	No	813-612-5057		Barbara Prettyman	Part	USD		
Anixter	Anixter	No	1-888-264-9874		Colin Sendiak	Intl	USD	224-521-8555	www.anix
AOS Prototypes	AOS Prototypes Technology Lim...	No	86 - 0755 - 27068941		Joan Zhao	Part	USD		www.aosq
AOSChina-00107	AOS China	No	+8615018520271			Part	USD		
ApexFasteners-00143	Apex Fasteners	No	(626) 962-2219		Andrew Gleason	Part	USD	(626) 962-7729	www.apex
Arrow Electronics	Arrow Electronics	No				Intl	USD		
ASE/Kalkitech?-00048	ASE / Kalkitech ? USA	No				Part	USD		

Figure 3 Select 'New' Option

2.2 Include Vendor General Details

Write the authentic vendor details in the general section. Below figure shows the sample vendor account, Name and group fields. The process is also highlighted in the **Figure 04**.

General | Not Active

Change party association

IDENTIFICATION

Vendor account: [Dropdown]

Type: [Organization]

Payment priority: [Dropdown]

What We Buy?: [Text]

Business Type: [Dropdown]

Name: [Text]

Search name: [Text]

Group: [Dropdown]

Organization number: [Text]

ABC code: [None]

DUNS number: [Text]

Number of employees: [Text]

OTHER INFORMATION

Address books: [Dropdown]

Known as: [Text]

Phonetic name: [Text]

Language: [en-US]

VENDOR COLLABORATION

Collaboration activation: [Not Active]

Addresses

Contact information

+ Add | Remove | Edit contact information

Description	Type	Contact number/address	Extension	Primary
-------------	------	------------------------	-----------	---------

Figure 4 Details in the General Section



2.3 Vendor Address Details

Add the address details of the vendor. Below picture contains the sample address details. The process is also highlighted in the **Figure 05**.

The screenshot shows the Dynamics 365 Vendor Address Form. The 'New address' form is open on the right, showing fields for Location ID, Name or description, Purpose, Country/region, ZIP/postal code, Street, Street number, Building complement, Post box, City, District, and OK/Cancel buttons. The 'Addresses' table on the left shows one entry for '5S Components' with address '630, Fifth Ave, East McKeesport PA 15035 USA'.

Name or description	Address	Purpose	Primary
5S Components	630, Fifth Ave, East McKeesport PA 15035 USA	Business	Yes

Figure 5 Address Form to Add new Address

The user needs to click on edit button to edit the any selective address of vendor. The process is also highlighted in the **Figure 06**.

The screenshot shows the Dynamics 365 Vendor Address Form with the 'Edit' button highlighted. The 'Addresses' table shows one entry for '5S Components' with address '630, Fifth Ave, East McKeesport PA 15035 USA'.

Name or description	Address	Purpose	Primary
5S Components	630, Fifth Ave, East McKeesport PA 15035 USA	Business	Yes

Figure 6 Address Edit of Vendor



2.4 Contact Information Details

Add the contact details of the vendor. Generally, it contains an email address, phone number and website URL. Follow the sample picture below to get an idea. You can also add the primary contact (if available). After adding the details, press on the save button.

Description	Type	Contact number/address	Extension	Primary	
Email	Email address	testing		<input checked="" type="checkbox"/>	
Web	URL	www.55Components.com		<input checked="" type="checkbox"/>	
Phone	Phone	1 412-967-58-2		<input checked="" type="checkbox"/>	
Fax	Fax	1 412-967-5868		<input checked="" type="checkbox"/>	
Office	Phone	090078601		<input type="checkbox"/>	

Figure 7 Vendor Contact Information Details

The user needs to click on add button to add the new address of vendor. The process is also highlighted in the Figure 08.

Description	Type	Contact number/address	Extension	Primary	
Email	Email address	testing		<input checked="" type="checkbox"/>	
Web	URL	www.55Components.com		<input checked="" type="checkbox"/>	
Phone	Phone	1 412-967-58-2		<input checked="" type="checkbox"/>	
Fax	Fax	1 412-967-5868		<input checked="" type="checkbox"/>	
Office	Phone	090078601		<input type="checkbox"/>	

Figure 8 Vendor Add Contact



The user needs to fill the fields and then click on save button to add the new contact detail of the vendor. The process is also highlighted in the **Figure 09**.

The screenshot shows the 'Contact information' section of the '5S Components : 5S Components' vendor record. The 'Add' button is highlighted with a red box. The table below shows existing contact details.

Description	Type	Contact number/address	Extension	Primary	
	Phone			<input type="checkbox"/>	
Email	Email address	testing		<input checked="" type="checkbox"/>	
Web	URL	www.5SComponents.com		<input checked="" type="checkbox"/>	
Phone	Phone	1 412-967-58-2		<input checked="" type="checkbox"/>	
Fax	Fax	1 412-967-5868		<input checked="" type="checkbox"/>	

Figure 9 Vendor Add New Contact

The user needs to select the specific contact detail to remove. The process is also highlighted in the **Figure 10**.

The screenshot shows the 'Contact information' section of the '5S Components : 5S Components' vendor record. The 'Remove' button is highlighted with a red box. The table below shows existing contact details.

Description	Type	Contact number/address	Extension	Primary	
Email	Email address	testing		<input checked="" type="checkbox"/>	
Web	URL	www.5SComponents.com		<input checked="" type="checkbox"/>	
Phone	Phone	1 412-967-58-2		<input checked="" type="checkbox"/>	
Fax	Fax	1 412-967-5868		<input checked="" type="checkbox"/>	
Office	Phone	090078601		<input type="checkbox"/>	

Figure 10 Vendor Contact Remove



The user needs to click on edit button to edit the selective contact detail of vendor. The process is also highlighted in the **Figure 11**.

The screenshot shows the Dynamics 365 interface for editing vendor contact information. The breadcrumb trail is 'Finance and Operations > Procurement and sourcing > Vendors > All vendors'. The left sidebar shows the 'Vendor' tab selected. The main area displays '5S Components : 5S Components'. Below this, the 'Contact information' section is expanded, showing a table of contact details. The 'Edit contact information' button is highlighted with a red box.

Description	Type	Contact number/address	Extension	Primary	
Email	Email address	testing		<input checked="" type="checkbox"/>	
Web	URL	www.5SComponents.com		<input checked="" type="checkbox"/>	
Phone	Phone	1 412-967-58-2		<input checked="" type="checkbox"/>	
Fax	Fax	1 412-967-5868		<input checked="" type="checkbox"/>	
Office	Phone	090078601		<input type="checkbox"/>	

Figure 11 Vendor Contact Edit

The user needs to fill the fields and then click on ok button to update the contact detail of the vendor. The process is also highlighted in the **Figure 12**.

The screenshot shows the Dynamics 365 interface for editing vendor contact information. The breadcrumb trail is 'Finance and Operations > Procurement and sourcing > Vendors > All vendors'. The left sidebar shows the 'Vendor' tab selected. The main area displays '5S Components : 5S Components'. Below this, the 'Contact information' section is expanded, showing a table of contact details. The 'Edit contact information' button is highlighted with a red box. The right sidebar shows the 'Edit contact information' form with fields for Description, Type, Email address, Purpose, Instant message, Primary, and Private. The 'OK' button is highlighted with a red box.

Description	Type	Contact number/address	Extension	Primary	
Email	Email address	testing		<input checked="" type="checkbox"/>	
Web	URL	www.5SComponents.com		<input checked="" type="checkbox"/>	
Phone	Phone	1 412-967-58-2		<input checked="" type="checkbox"/>	
Fax	Fax	1 412-967-5868		<input checked="" type="checkbox"/>	
Office	Phone	090078601		<input type="checkbox"/>	

Figure 12 Vendor Contact Edit Form

2.5 Contact Person

The user can view and add new contact of any vendor. The user needs to click on Contact under vendor tab. As the user clicks on it, the dropdown will appear then user need to click on view contact. The user can see the list of the vendor. The process is also highlighted in the **Figure 13, 14 and 15**.



The screenshot shows the Dynamics 365 interface for Vendor Contact. The 'Contacts' dropdown menu is open, showing options like 'View contacts', 'Add contacts', and 'Add to Microsoft Outlook contacts'. The 'View contacts' option is highlighted. The main table lists various vendors with columns for Vendor account, Name, Vendor hold, Phone, Extension, Primary contact, Group, Currency, FAX, and WEB.

Vendor account	Name	Vendor hold	Phone	Extension	Primary contact	Group	Currency	FAX	WEB
SS Components	SS Components	No	1 412-967-58-2		Kenny Stephenson	Intl	USD	1 412-967-5868	www.SSC
ABB Automation	ABB Automation Company	No	41 58 585 77 77-		Asea Brown Boveri	Part	USD	+41 43 317 4420	https://gl
Accuenergy Inc.	Accuenergy Inc.	No	41 64974100		Dawn Ahlquist	Intl	USD	41 64974130	testing
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Amphenol Custom Cabl	Amphenol Custom Cable	No	813-612-5057		Barbara Prettymann	Part	USD		
Anixter	Anixter	No	1-888-264-9874		Colin Sendiak	Intl	USD	224-521-8555	www.anix
AOS Prototypes	AOS Prototypes Technology Lim...	No	86 - 0755 - 27068941		Joan Zhao	Part	USD		www.aos
AOSChina-00107	AOS China	No	+8615018520271			Part	USD		
ApexFasteners-00143	Apex Fasteners	No	(626) 962-2219		Andrew Gleason	Part	USD	(626) 962-7729	www.apex
Arrow Electronics	Arrow Electronics	No				Intl	USD		
ASE/Kalkitech?-00048	ASE / Kalkitech ? USA	No				Part	USD		

Figure 13 Vendor Contact

The screenshot shows the Dynamics 365 interface for Vendor View Contacts. The 'View contacts' option is highlighted in the 'Contacts' dropdown menu. The main table lists various vendors with columns for Vendor account, Name, Vendor hold, Phone, Extension, Primary contact, Group, Currency, FAX, and WEB.

Vendor account	Name	Vendor hold	Phone	Extension	Primary contact	Group	Currency	FAX	WEB
SS Components	SS Components	No	1 412-967-58-2		Kenny Stephenson	Intl	USD	1 412-967-5868	www.SSC
ABB Automation	ABB Automation Company	No	41 58 585 77 77-		Asea Brown Boveri	Part	USD	+41 43 317 4420	https://gl
Accuenergy Inc.	Accuenergy Inc.	No	41 64974100		Dawn Ahlquist	Intl	USD	41 64974130	testing
Access Spring	Access Spring	No				Intl	USD		
Allegheny Coati	Allegheny Coatings	No	814-772-3850		Matt Santaniello	Intl	USD		www.alle
AlliedElectron-00087	Allied Electronics	No				Part	USD		
Amber Traders	Amber Traders	No	+923234442173			Part	PKR		
Amphenol Custom Cabl	Amphenol Custom Cable	No	813-612-5057		Barbara Prettymann	Part	USD		
Anixter	Anixter	No	1-888-264-9874		Colin Sendiak	Intl	USD	224-521-8555	www.anix
AOS Prototypes	AOS Prototypes Technology Lim...	No	86 - 0755 - 27068941		Joan Zhao	Part	USD		www.aos
AOSChina-00107	AOS China	No	+8615018520271			Part	USD		
ApexFasteners-00143	Apex Fasteners	No	(626) 962-2219		Andrew Gleason	Part	USD	(626) 962-7729	www.apex
Arrow Electronics	Arrow Electronics	No				Intl	USD		
ASE/Kalkitech?-00048	ASE / Kalkitech ? USA	No				Part	USD		

Figure 14 Vendor View Contacts

The screenshot shows the Dynamics 365 interface for Vendor All Contact List with Detail. The 'View contacts' option is highlighted in the 'Contacts' dropdown menu. The main table lists various vendors with columns for Contact ID, Name, Contact for, Telephone, Extension, Inactive, and Vendor collaboration acc...

Contact ID	Name	Contact for	Telephone	Extension	Inactive	Vendor collaboration acc...
VT-000217	Kenny Stephenson	SS Components	1 412-736-5920		No	No

Figure 15 Vendor All Contact List with Detail



2.5.1 Create New Contact

The user needs to click on NEW in tab to create the new contact. As the user click on New tab user pop will appear with fields, user need to fill the fields to create the new contact and then press on save button. The process is also highlighted in the **Figure 16, 17 and 18**.

Contact ID	Name	Contact for	Telephone	Extension	Inactive	Vendor collaboration ace...
VT-000217	Kenny Stephenson	SS Components	1 412-736-5920		No	No

Figure 16 Vendor Create Contact

Create contact

Details

Contact ID: VT-000332

Contact for: SS Components

First name: [Red Box]

Middle name: [Red Box]

Last name prefix: [Red Box]

Last name: [Red Box]

Job title: [Red Box]

Profession: [Red Box]

Department: [Red Box]

Function: [Red Box]

Address

Country/region: USA

City: [Red Box]

ZIP/postal code: [Red Box]

State: [Red Box]

County: [Red Box]

Street: [Red Box]

Address books: [Red Box]

Save Cancel

Figure 17 Fields to Create New Contact



The screenshot shows the Dynamics 365 interface for creating a new contact. The 'Create contact' pane is open on the right, showing fields for First name, Middle name, Last name prefix, Address (Country/region, City, State, ZIP/postal code, Street, Address books), and Contact information (Phone, Fax, Extension, Email address). The 'Contact information' section is highlighted with a red box. The 'Save' button is also highlighted with a red box.

Figure 18 Create New Contact Information

The screenshot shows the Dynamics 365 interface for creating a new contact. The 'Create contact' pane is open on the right, showing fields for Contact ID, Contact for, First name, Middle name, Last name prefix, Address (Country/region, City, State, ZIP/postal code, Street, Address books), and Contact information (Phone, Fax, Extension, Email address). The 'First name' and 'Last name' fields are highlighted with red boxes. The 'Save' button is also highlighted with a red box.

Figure 19 Fill the Fields and Press Save to Create New Contact





2.5.2 Edit Contact

The user can edit the any contact from the list of contact. The user needs to click on edit button then update the fields as per need to update the contact. The process is also highlighted in the **Figure 19 and 20**.

Contact ID	Name	Contact for	Telephone	Extension	Inactive	Vendor collaboration access...
VT-000217	Kenny Stephenson	SS Components	1 412-736-5920		No	No

Figure 20 Vendor Edit Contact

General

CONTACT

Contact ID: VT-000217

Contact for: SS Components

First name: Kenny

Middle name:

Last name prefix:

Last name: Stephenson

Search name: Kenny Stephenson

Personal title:

Personal suffix:

OTHER INFORMATION

Address books:

Language: en-US

NAME DETAILS

Display as: FirstMiddleLast

PERSONAL INFORMATION

Gender:

Marital status: None

STATUS

Inactive: No

VENDOR COLLABORATION

Vendor collaboration access allowed: No

Show more fields

Addresses

Contact information

Employment information

Miscellaneous details

Figure 21 Update fields to Edit Contact



2.5.3 Delete Contact

The user can delete the any selected contact by clicking on delete button. The process is also highlighted in the **Figure 21**

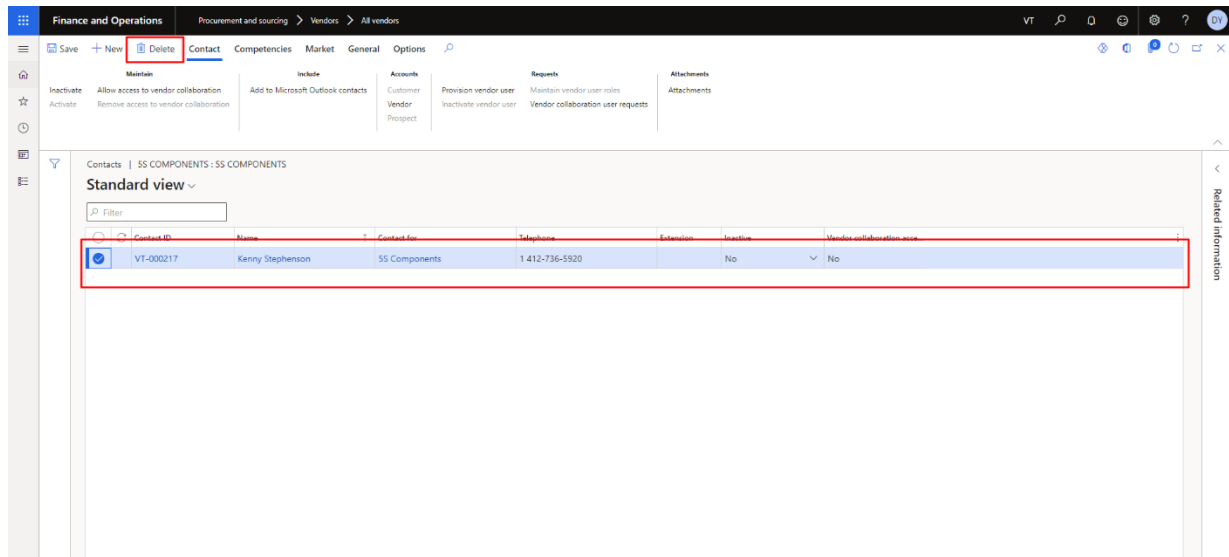


Figure 22 Delete Selected Contact

2.6 Primary Contact

To add the primary contact, create the contact information in the ‘**All Contacts**’ page first. Follow the steps shown in pictures.

Navigation: Vendor collaboration > Contacts > All contacts

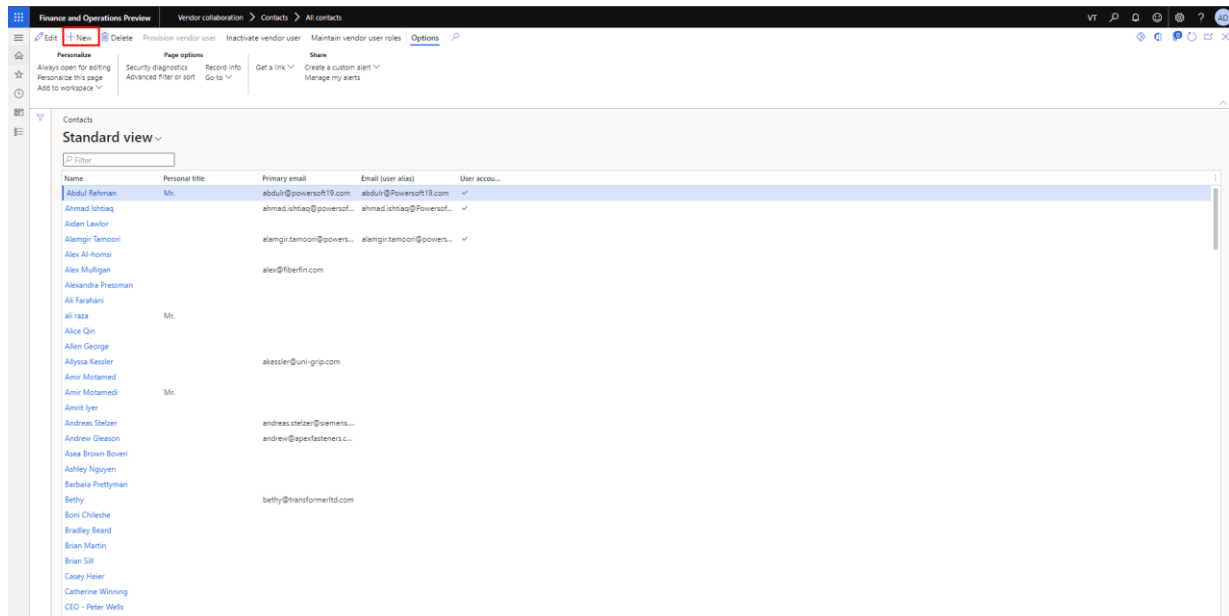


Figure 23 All Contacts page



Finance and Operations Preview

Vendor collaboration > Contacts > All contacts

Edit

New

Delete

Provision vendor user

Inactivate vendor user

Maintain vendor user roles

Options

Personalize

Always open for editing

Personalize this page

Add to workspace

Security diagnostics

Record info

Advanced filter or sort

Go to

Get a link

Create a custom alert

Manage my alerts

Contacts

Standard view

Filter

Name	Personal title	Primary email	Email (user alias)	User accou...
Abdul Rehman	Mr.	abdulr@powersoft19.com	abdulr@Powersoft19.com	✓
Ahmad Shitaj		ahmad.shitaj@powersof...	ahmad.shitaj@Powersof...	✓
Ajlon Lanker				
Alamgir Tamooni		alamgir.tamooni@powers...	alamgir.tamooni@powers...	✓
Alex Al-Homsi				
Alex Mulligan		alex@fibein.com		
Alexandra Pressman				
Ali Farahani				
Ali Raza	Mr.			
Alice Qin				
Allen George				
Alyssa Kessler		akessler@uni-grip.com		
Amir Mohamed	Mr.			
Amir Mohamed				
Amir Iyer				
Andreas Stelzer		andreas.stelzer@siemens...		
Andrew Gleason		andrew@apexfasteners.c...		
Ausa Brown Boveri				
Aubrey Nguyen				
Barbara Prettyman				
Betty		bethy@transformerhd.com		
Boni Chileshe				
Bradley Beard				
Brian Martin				
Brian Gill				
Carry Hiler				
Catherine Winning				
CEO - Peter Wells				

Create contact persons

Contact person details

First name

Alex

Middle name

Last name

Hales

Personal title

Mr.

Setup contact for

Legal entity in my company

Legal entity in customer co...

55 Components

Venturetronics

ABB Automation Company

Venturetronics

Accuenergy Inc.

Venturetronics

Access Spring

Venturetronics

Alleghevy Coatings

Venturetronics

Allied Electronics

Venturetronics

Amber Traders

Venturetronics

Amphenol Custom Cable

Venturetronics

Anixter

Venturetronics

AOS Prototypes Technolo...

Venturetronics

AOS China

Venturetronics

Apex Fasteners

Venturetronics

Arrow Electronics

Venturetronics

ASE / Kalkitech ? USA

Venturetronics

Assured Testing Services

Venturetronics

Create

Cancel

Figure 24 Contact Creation

