

**Dynamics 365 – Vendor Creation**

**Revision 1**

**Revision History**

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| 17/06/2022 | 1 | Initial draft of user manual: Dynamics 365 – Vendor Creation | Prepared | Salman Tahir |
|  |  | Verified |  |
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| 04/11/2022 | 2 | User manual: Dynamics 365 – Vendor Creation | Prepared | Waseem Abbas |
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# 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.

# 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

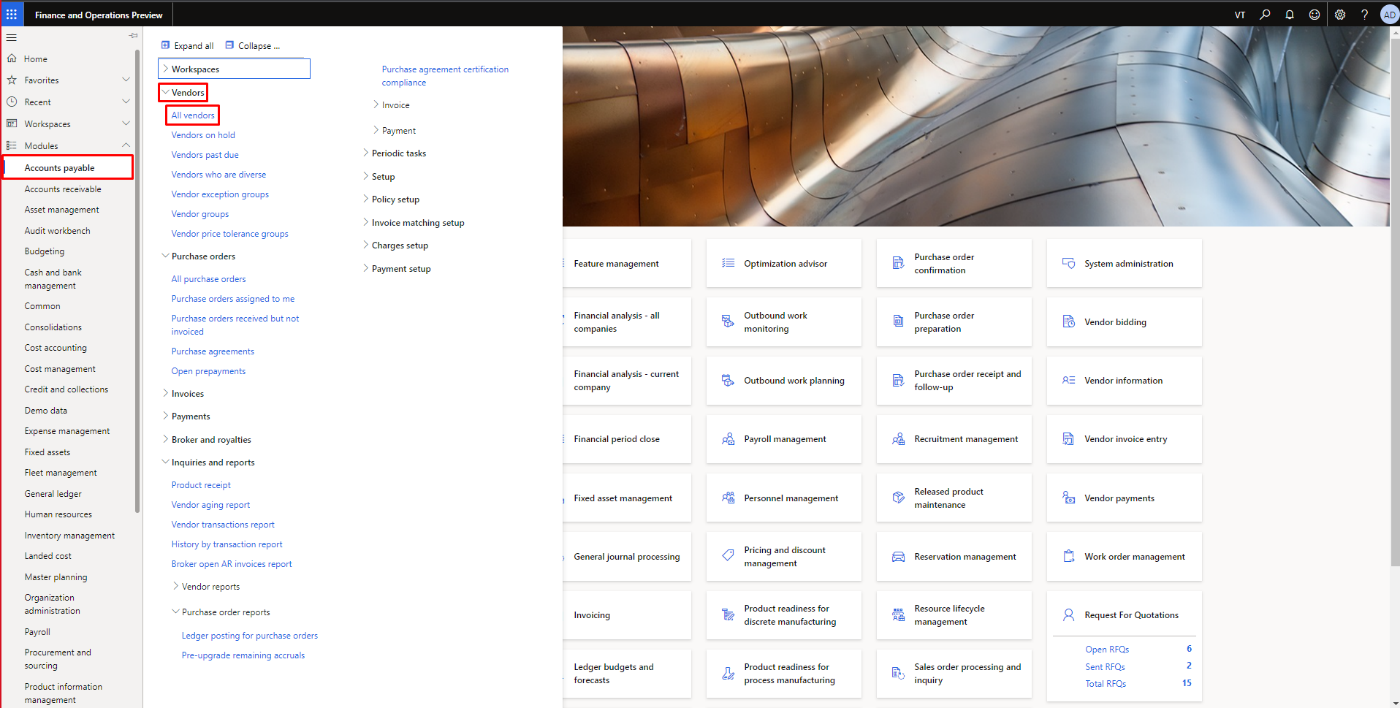


Figure 1 Way to open 'All Vendors' page

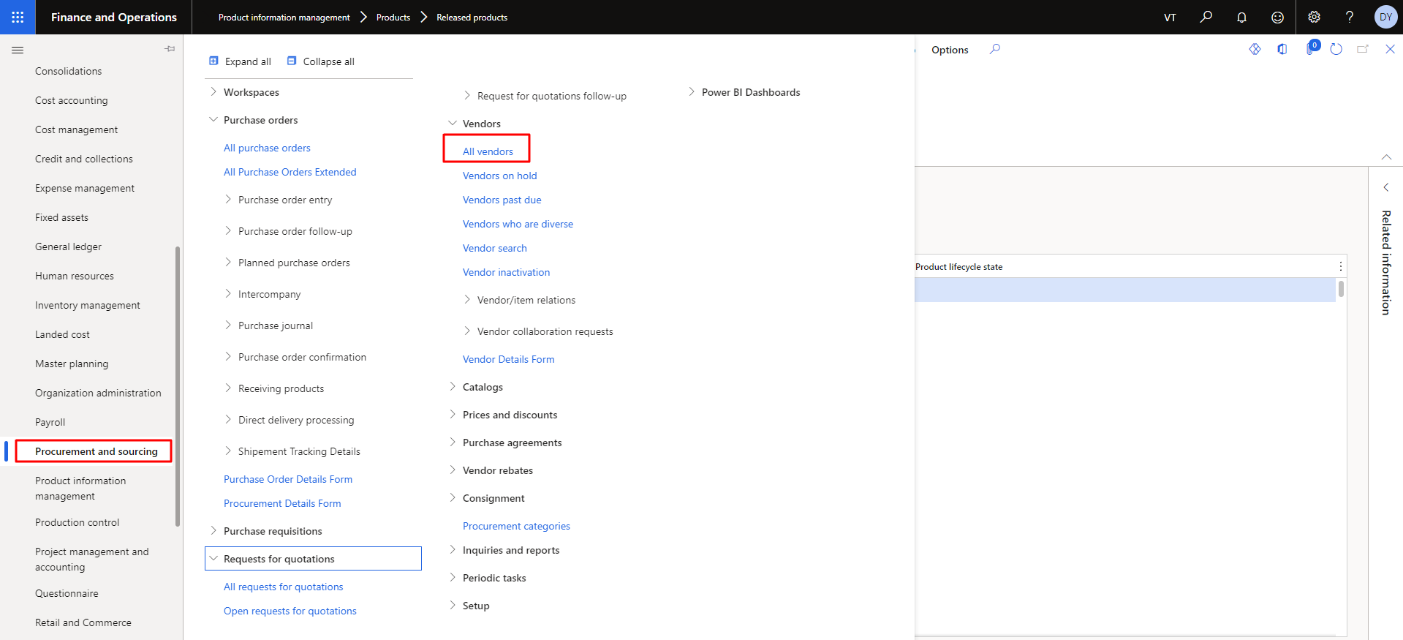


Figure 2 Vendors from Recoupment and Sources

## New Vendor

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

**Navigation**: Vendors > All vendors > New

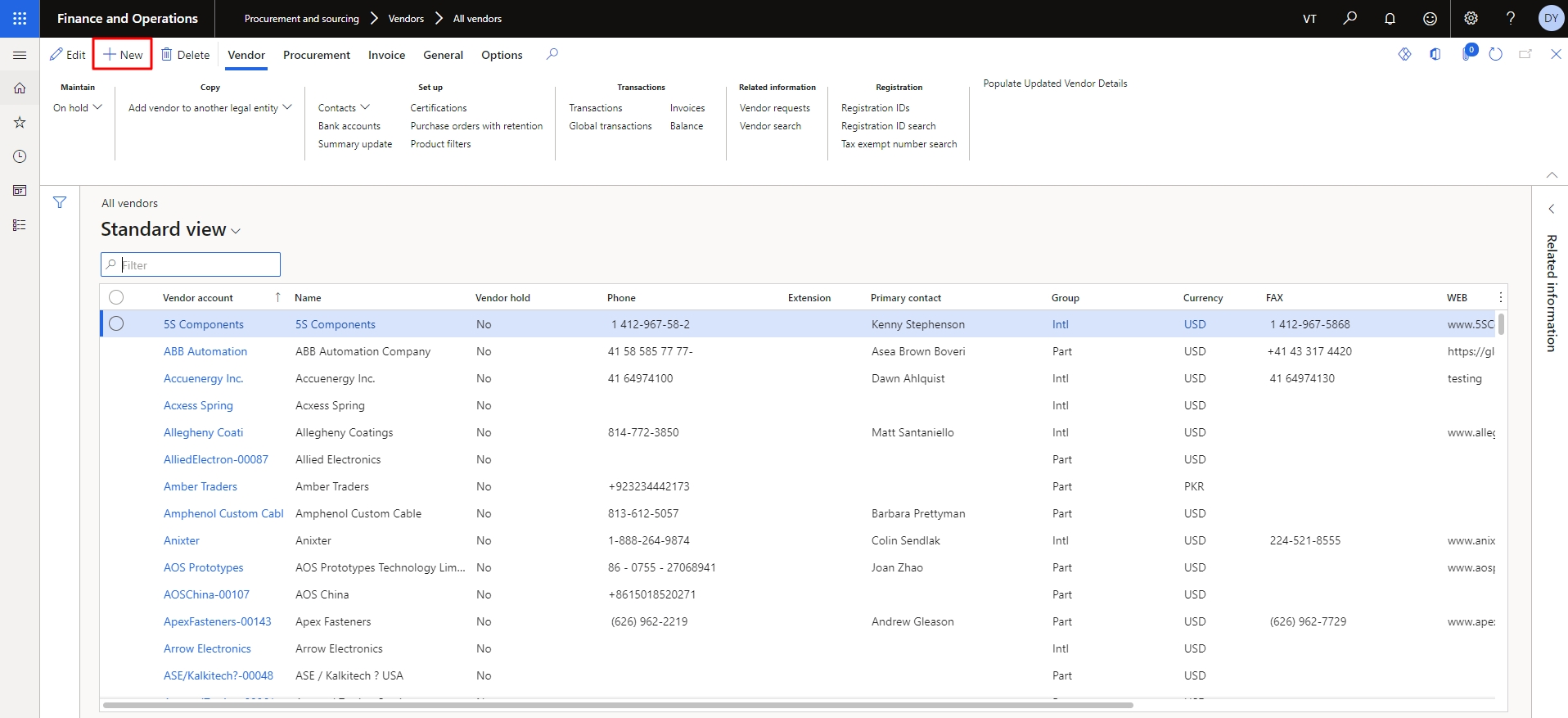


Figure 3 Select 'New' Option

## 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.**

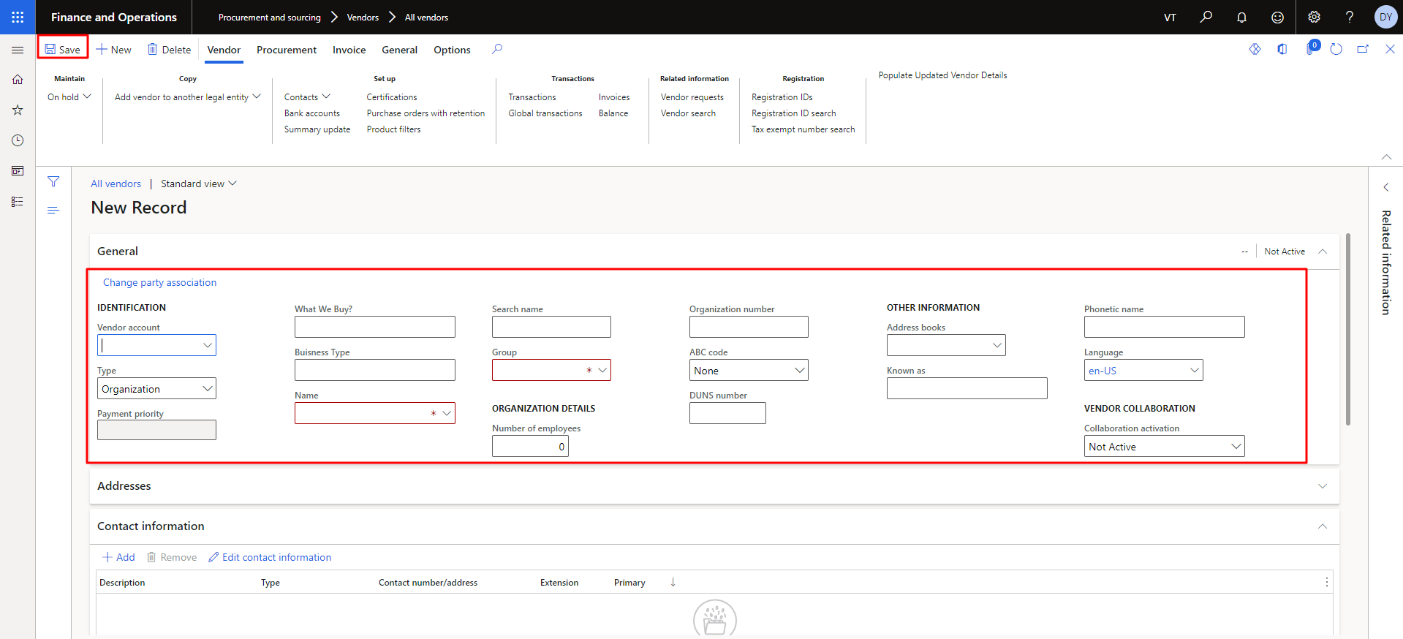


Figure 4 Details in the General Section

## 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.**

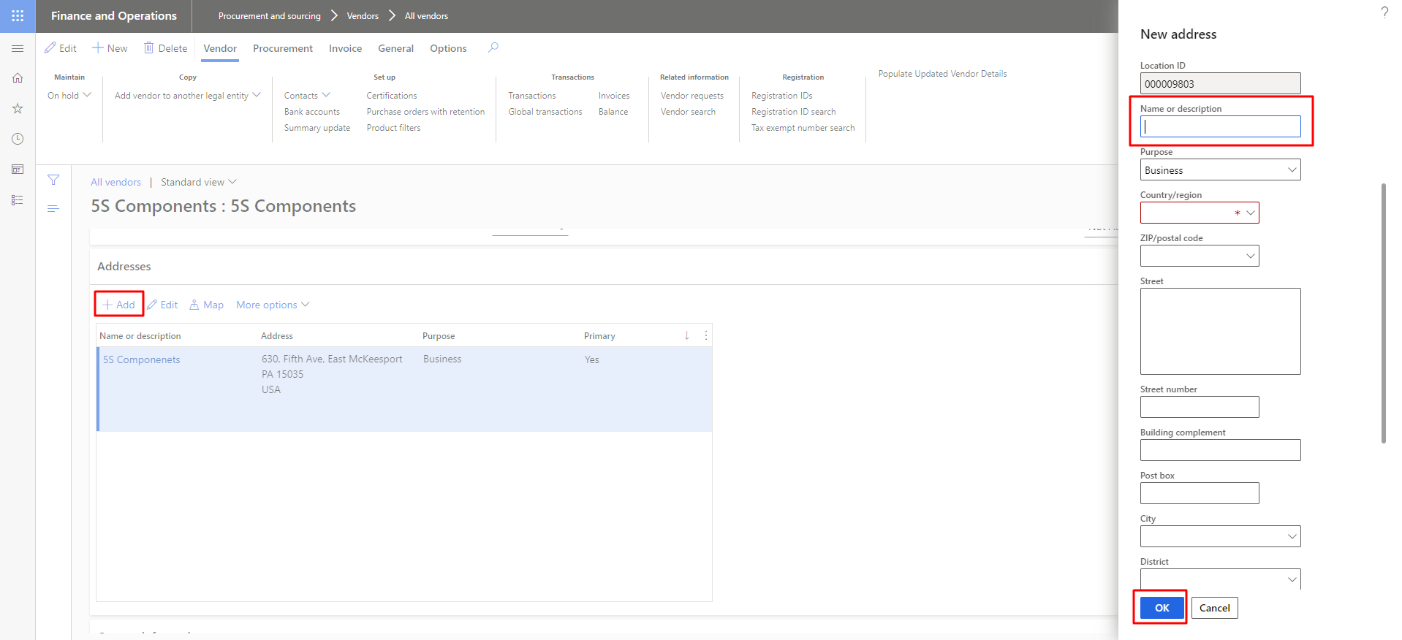


Figure 5 Address Form to Add new Address

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.**

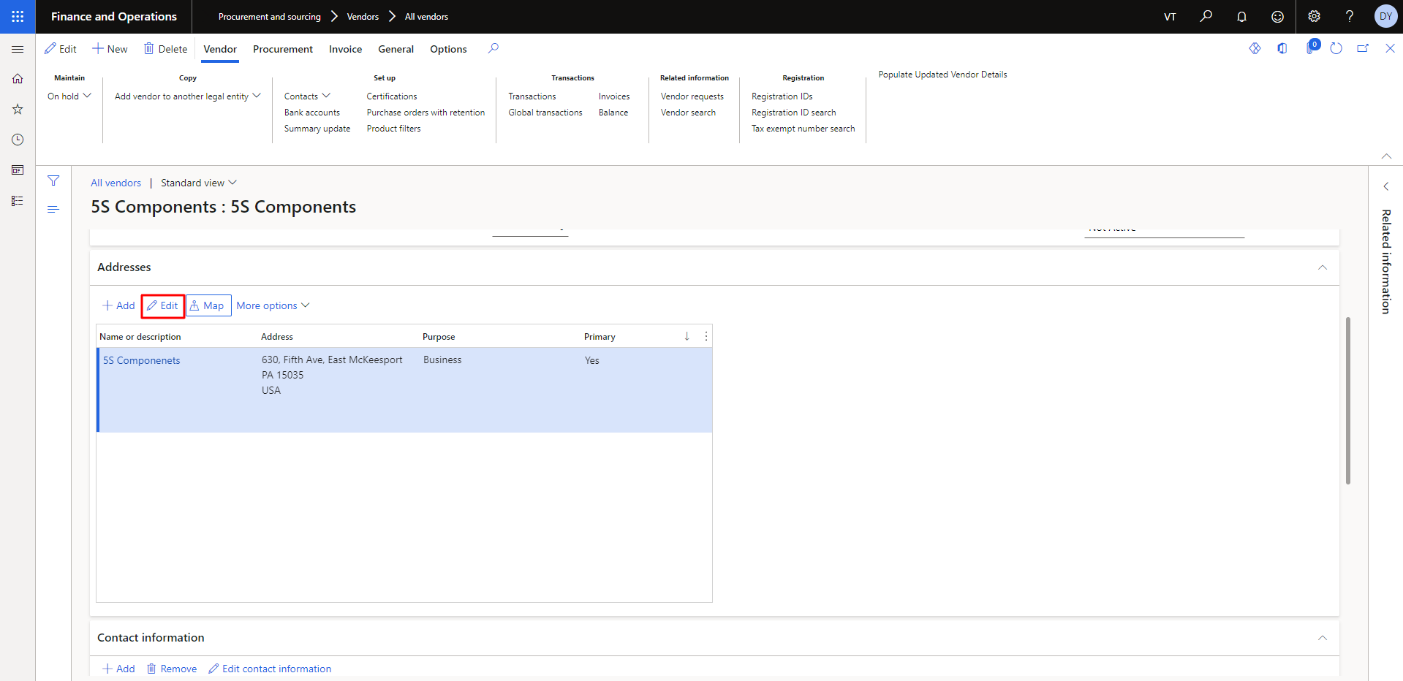


Figure 6 Address Edit of Vendor

## 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.

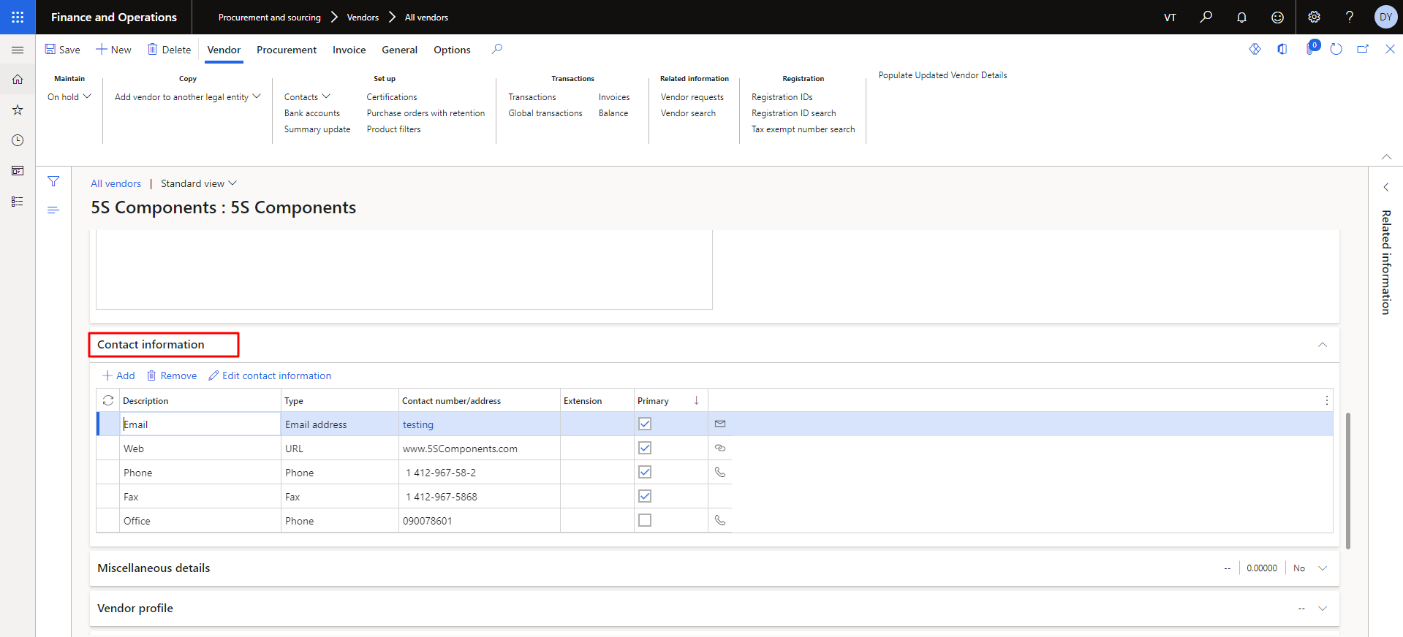


Figure 7 Vendor Contact Information Details

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

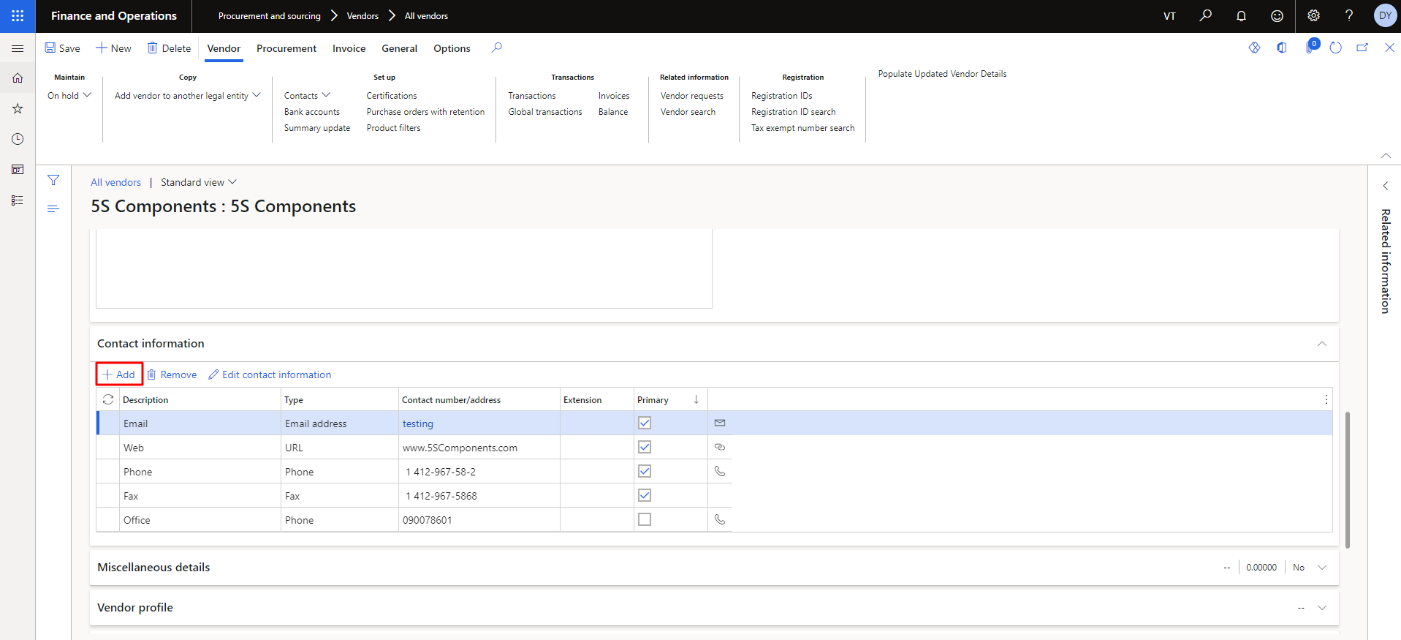


Figure 8 Vendor Add Contact

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.**

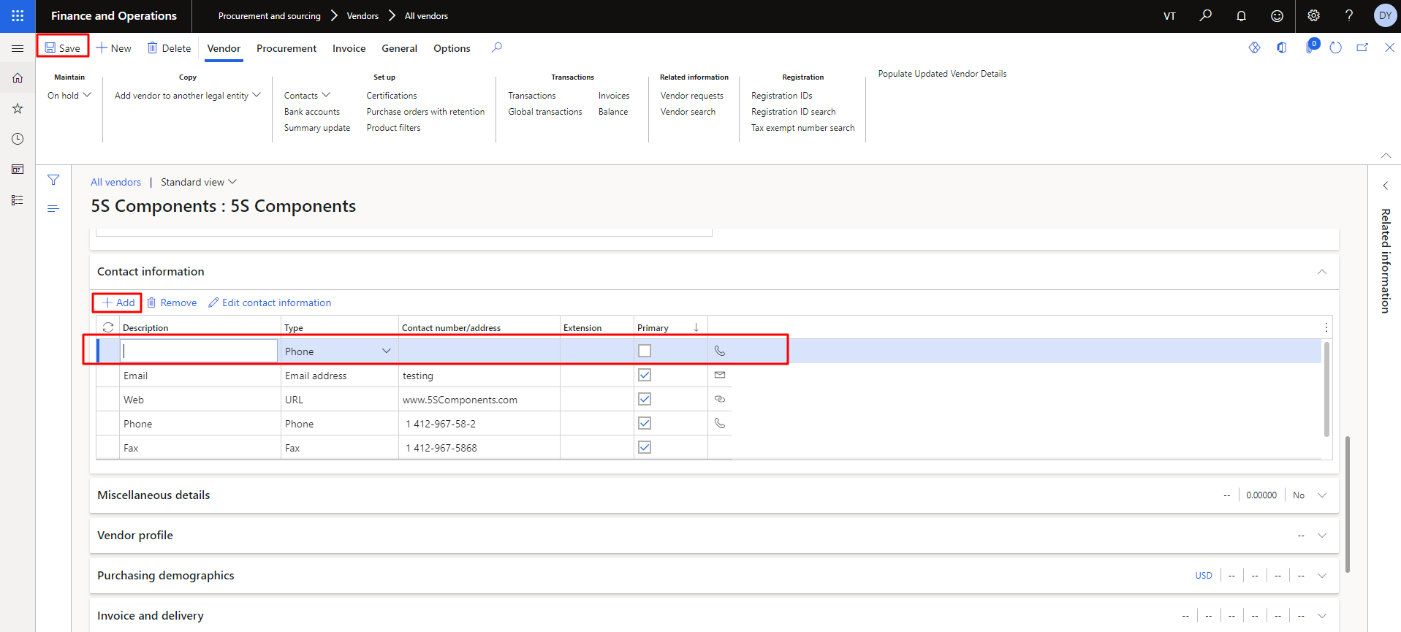


Figure 9 Vendor Add New Contact

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

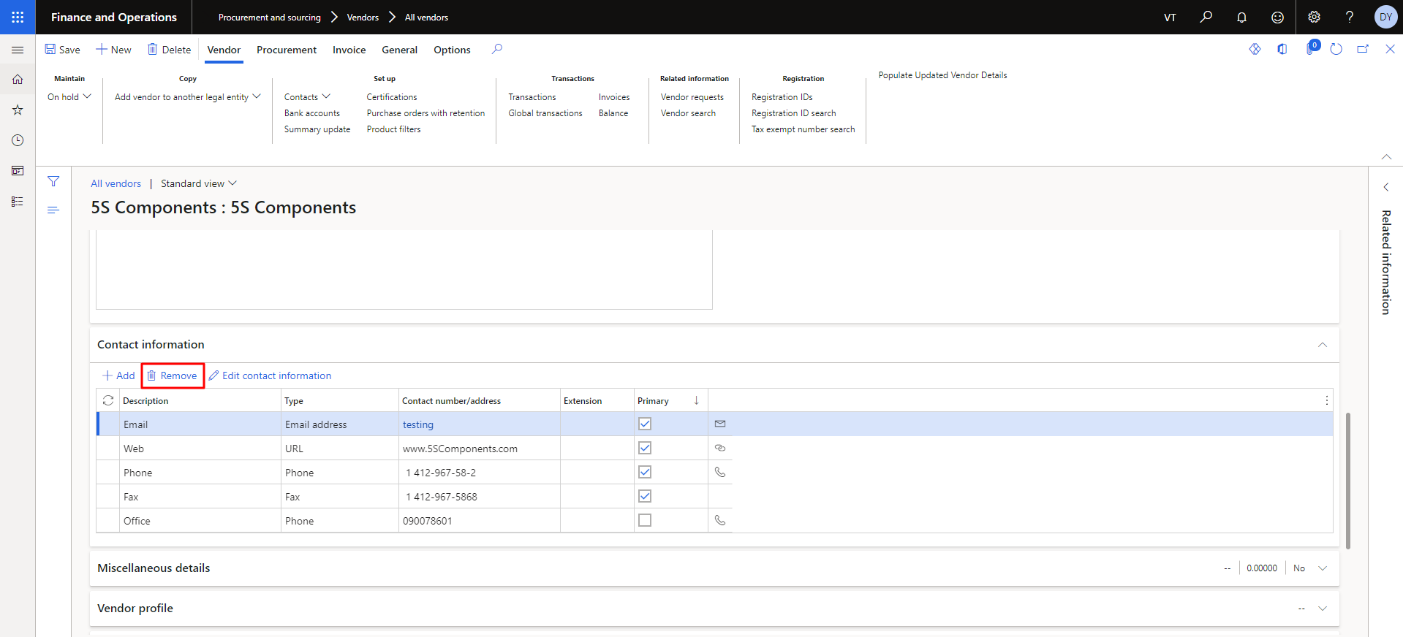


Figure 10 Vendor Contact Remove

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.**

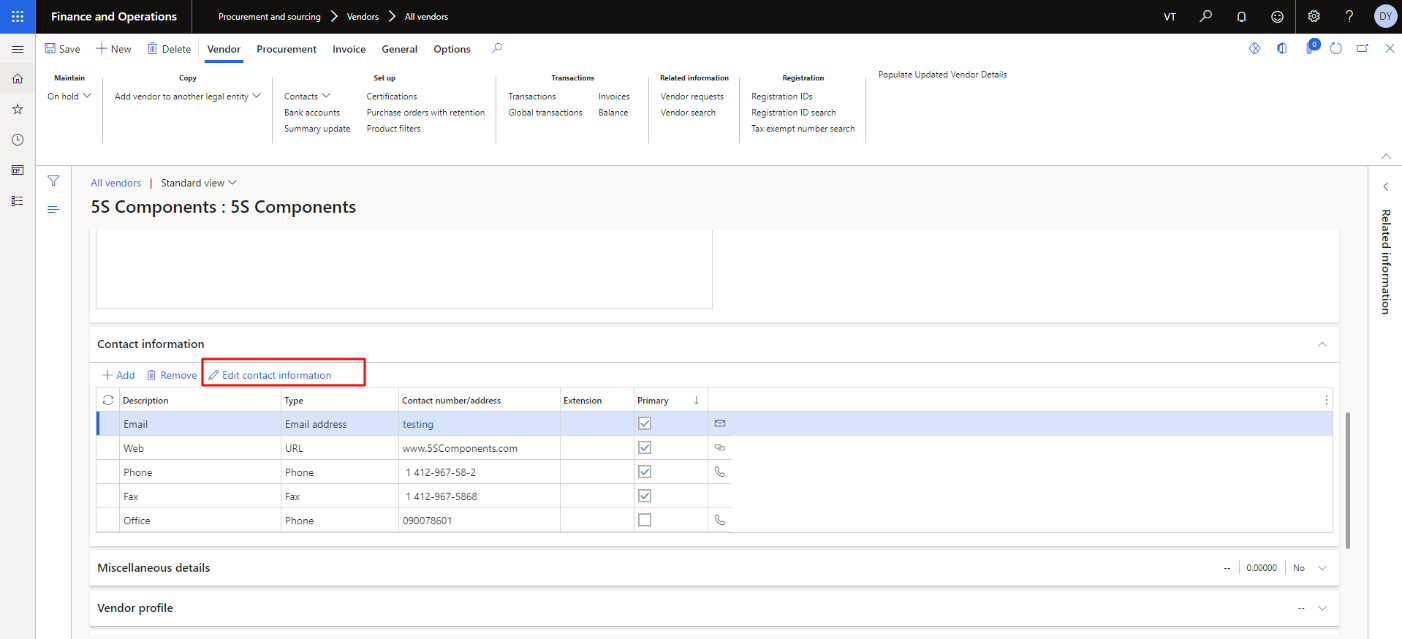


Figure 11 Vendor Contact Edit

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.**

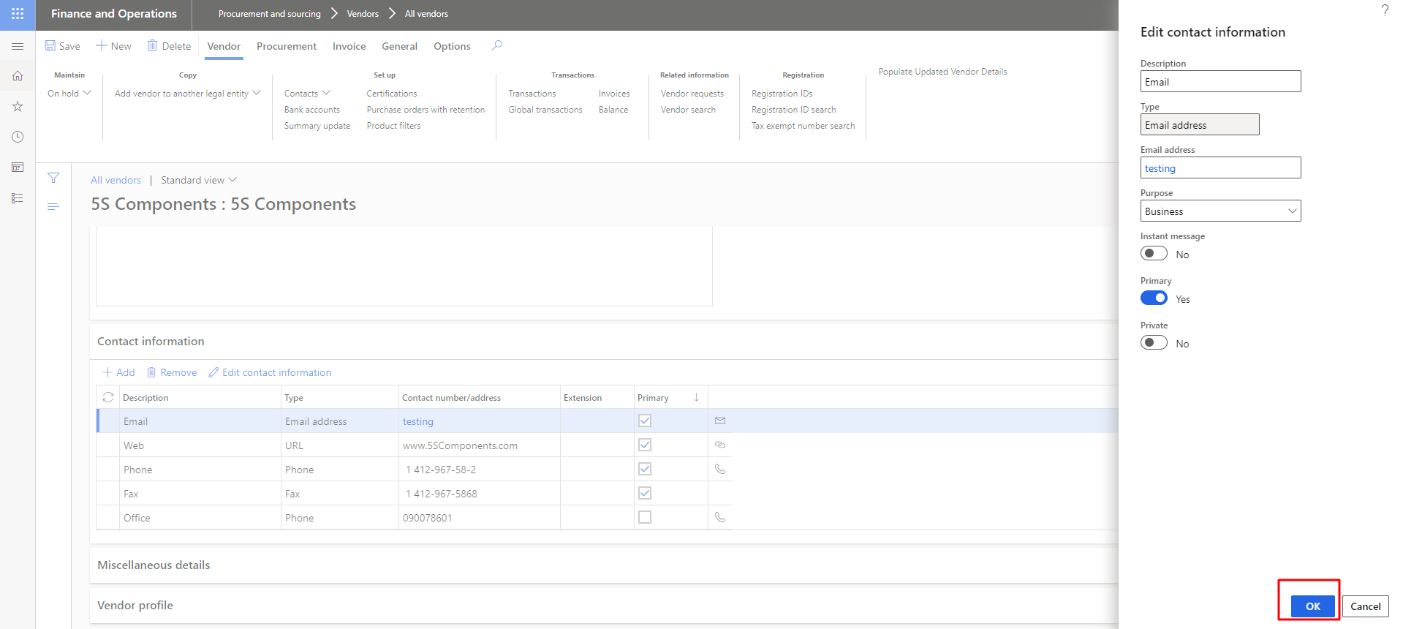


Figure 12 Vendor Contact Edit Form

## 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.**

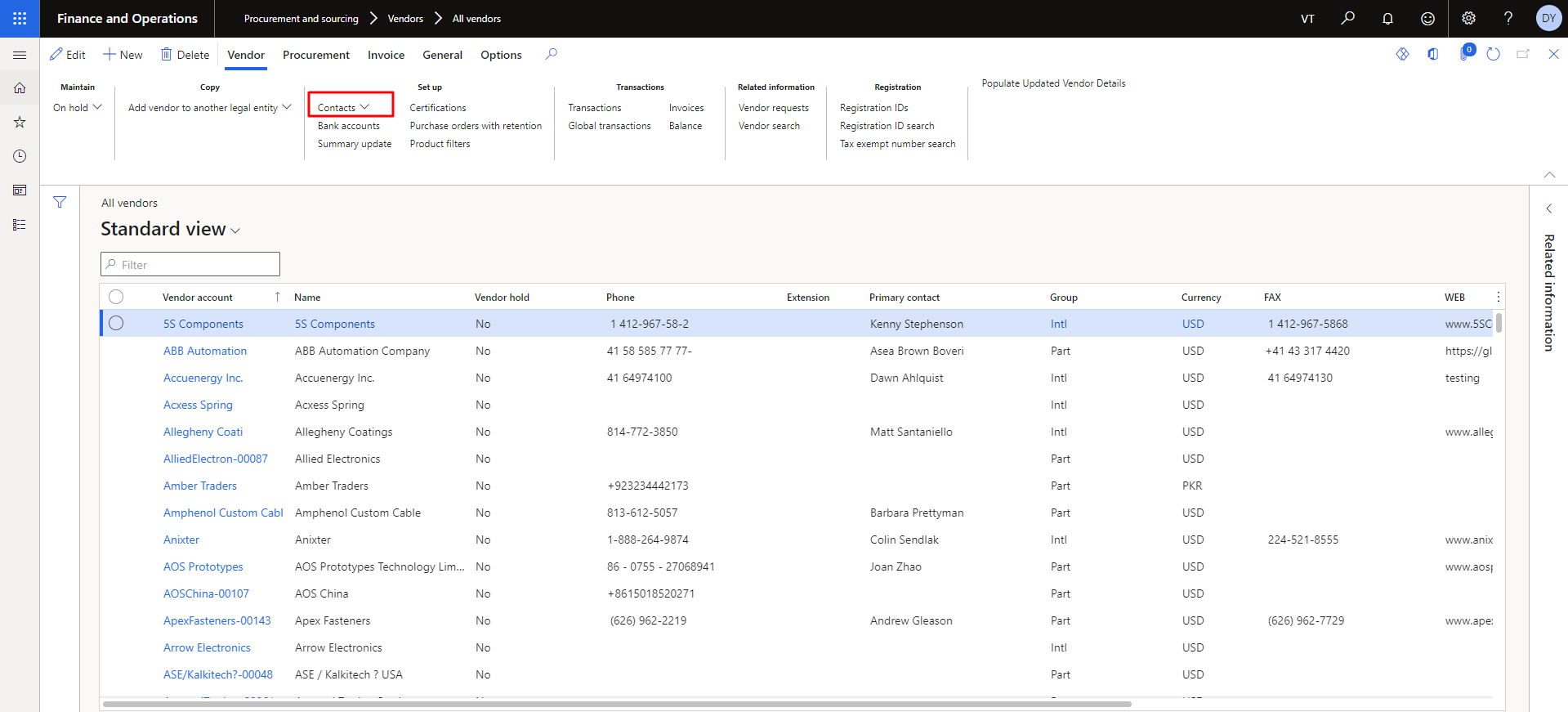


Figure 13 Vendor Contact

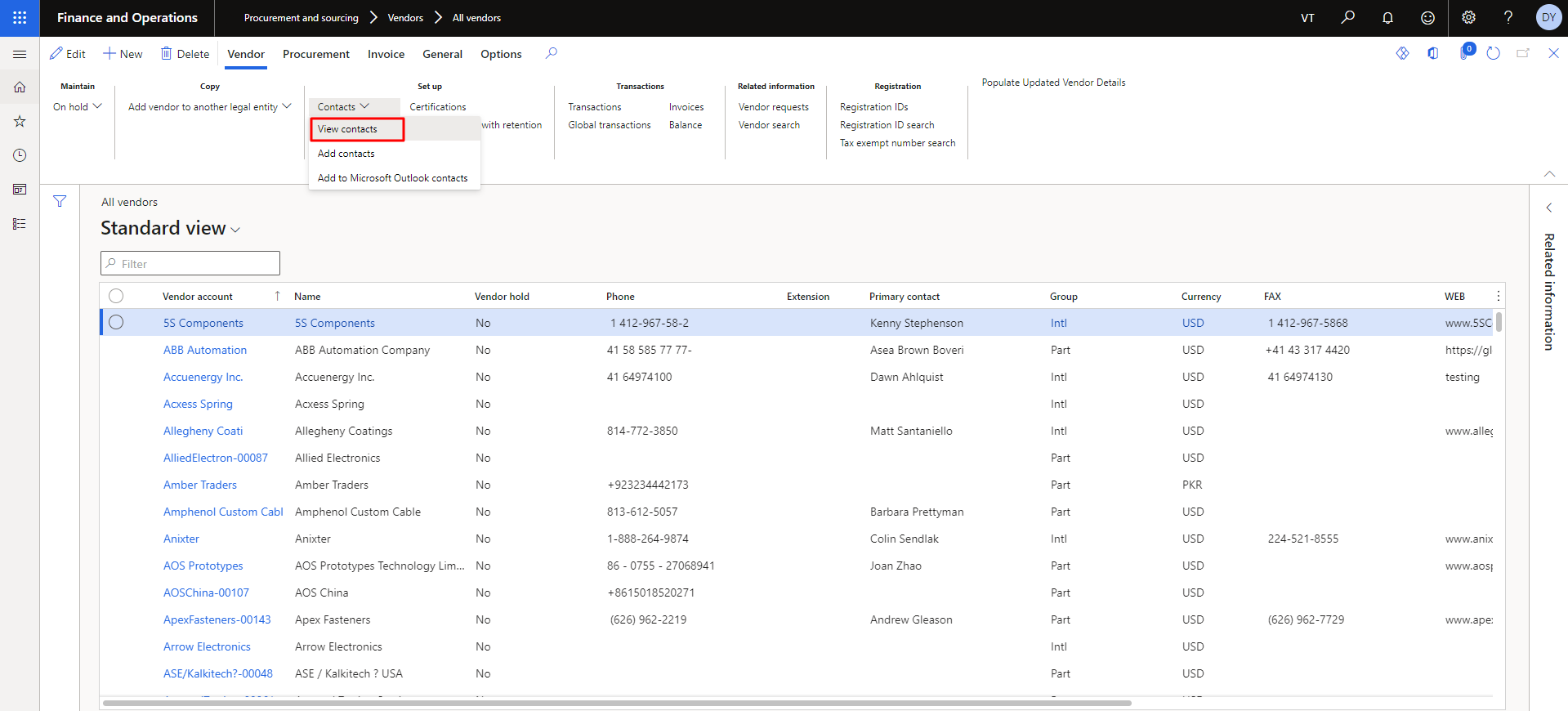


Figure 14 Vendor View Contacts

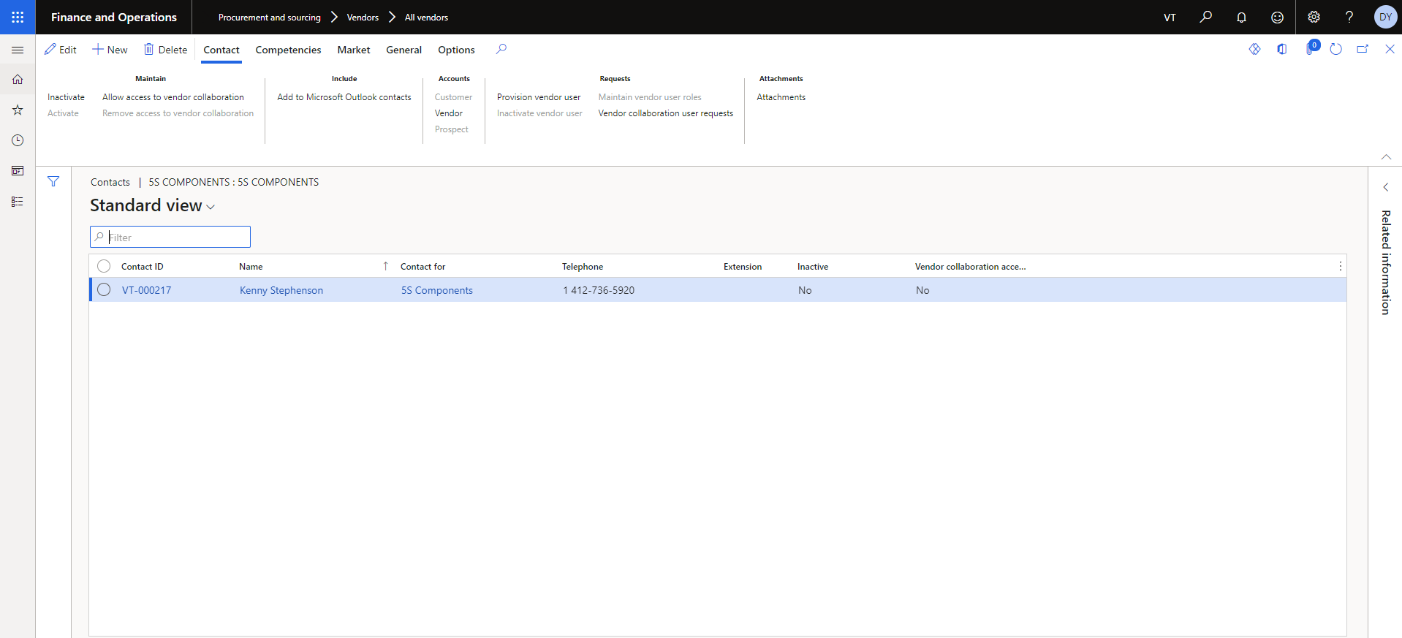


Figure 15 Vendor All Contact List with Detail

### ***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.**

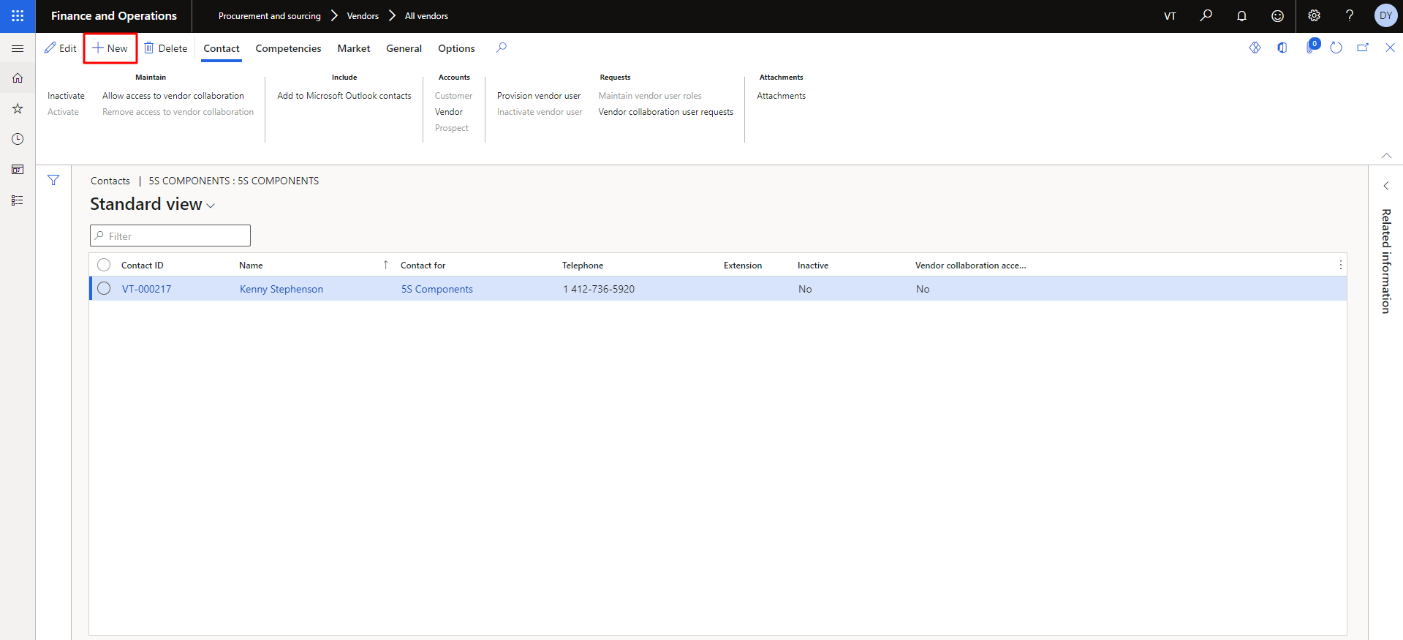


Figure 16 Vendor Create Contact

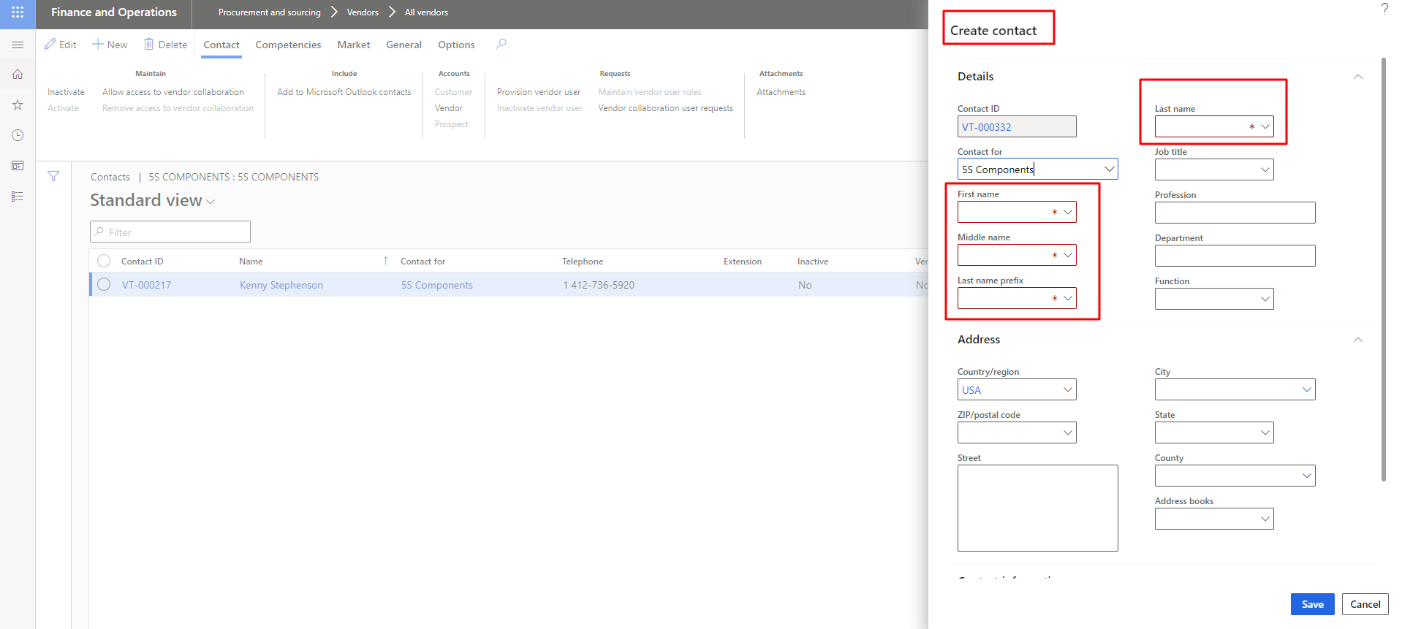


Figure 17 Fields to Create New Contact

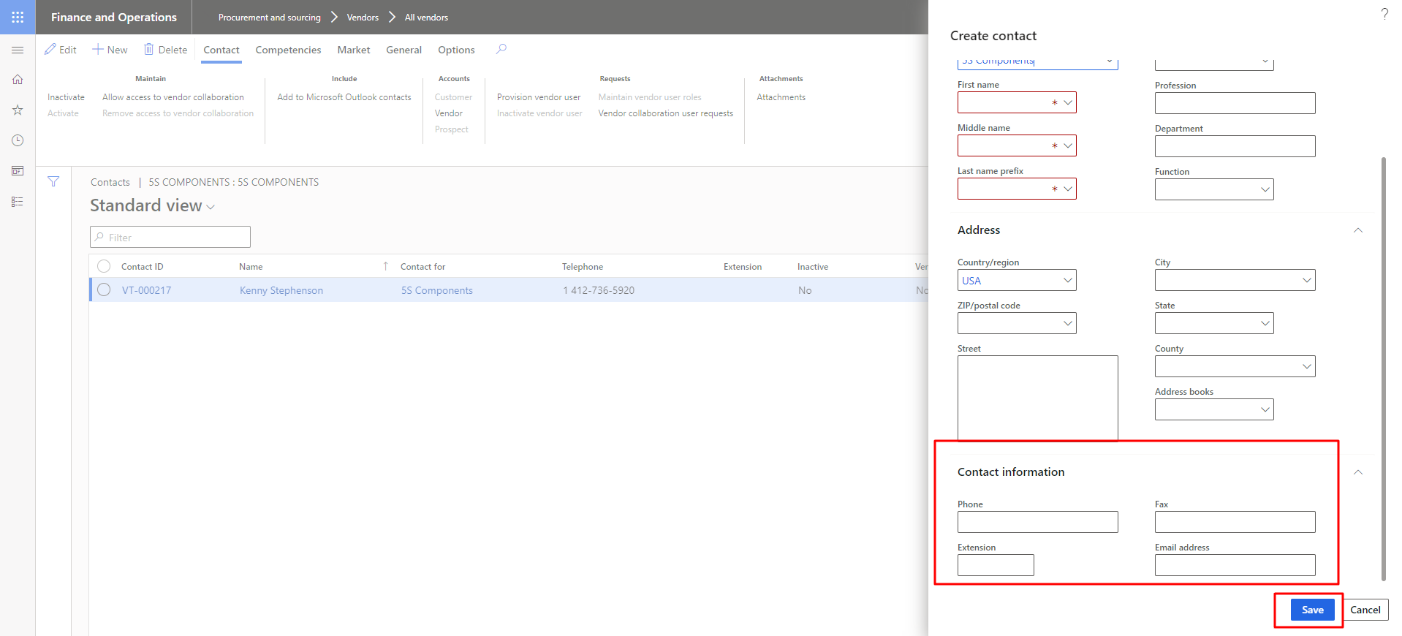


Figure 18 Create New Contact Information

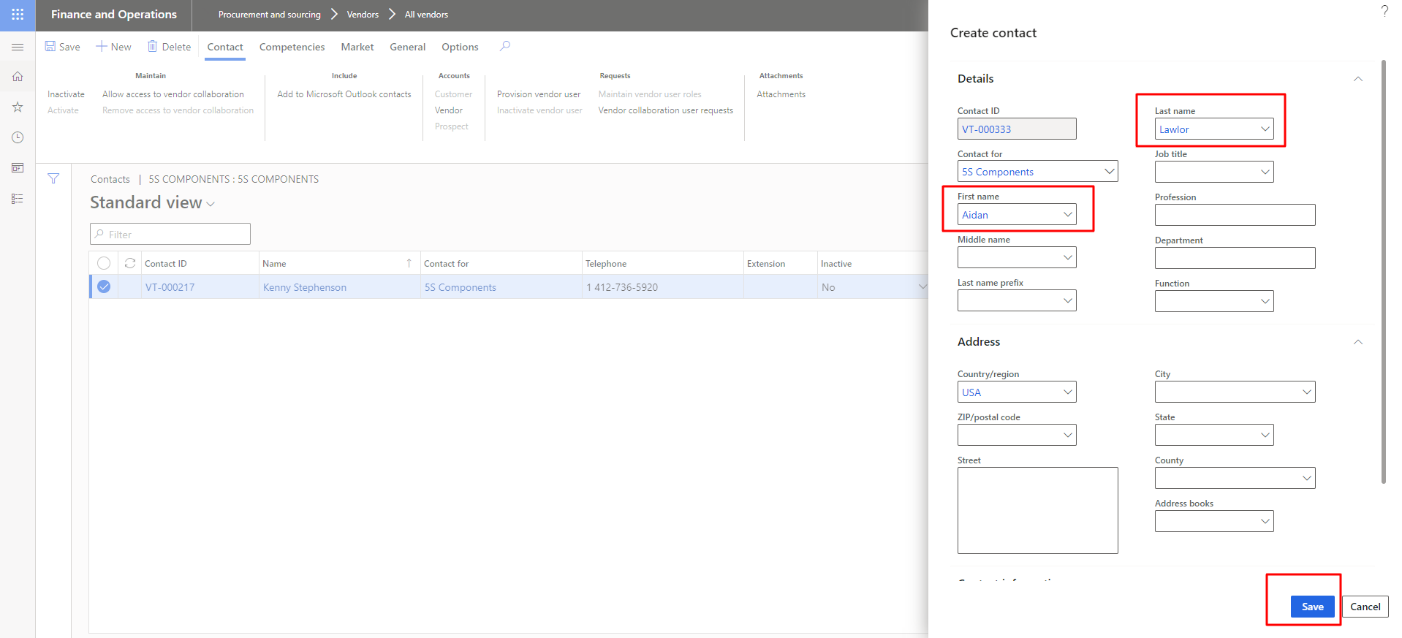


Figure 19 Fill the Fields and Press Save to Create New Contact

### 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.**

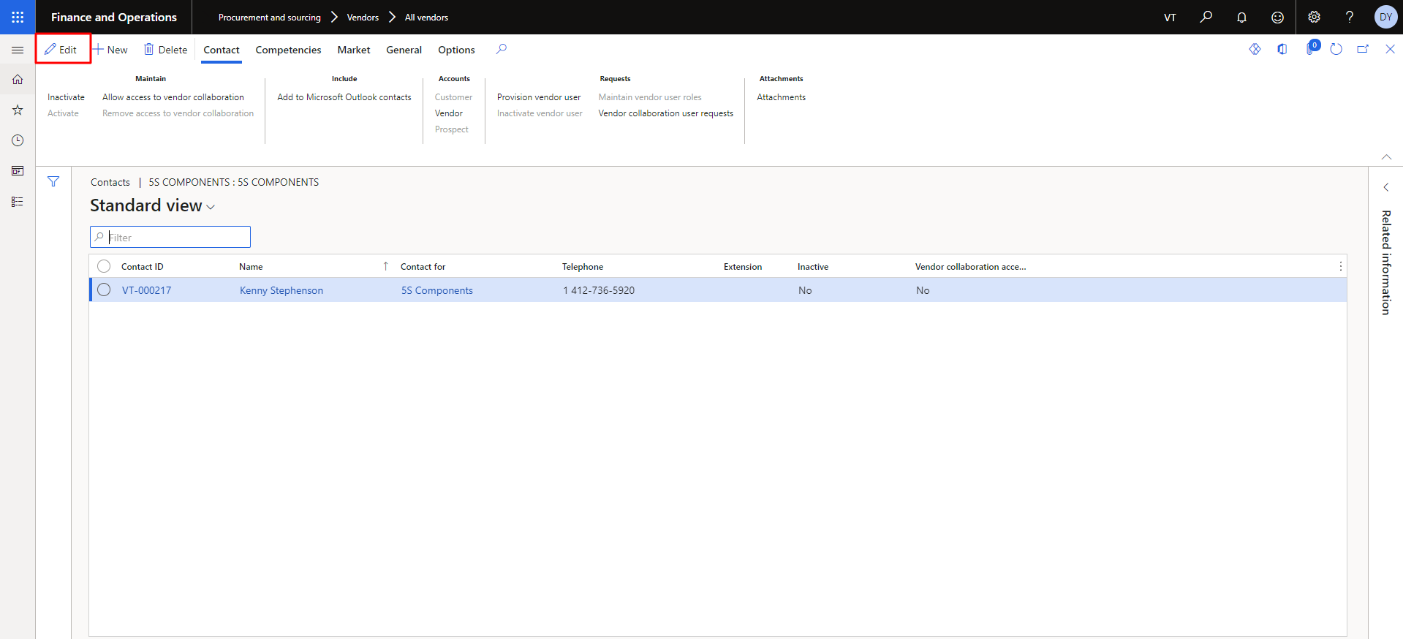


Figure 20 Vendor Edit Contact

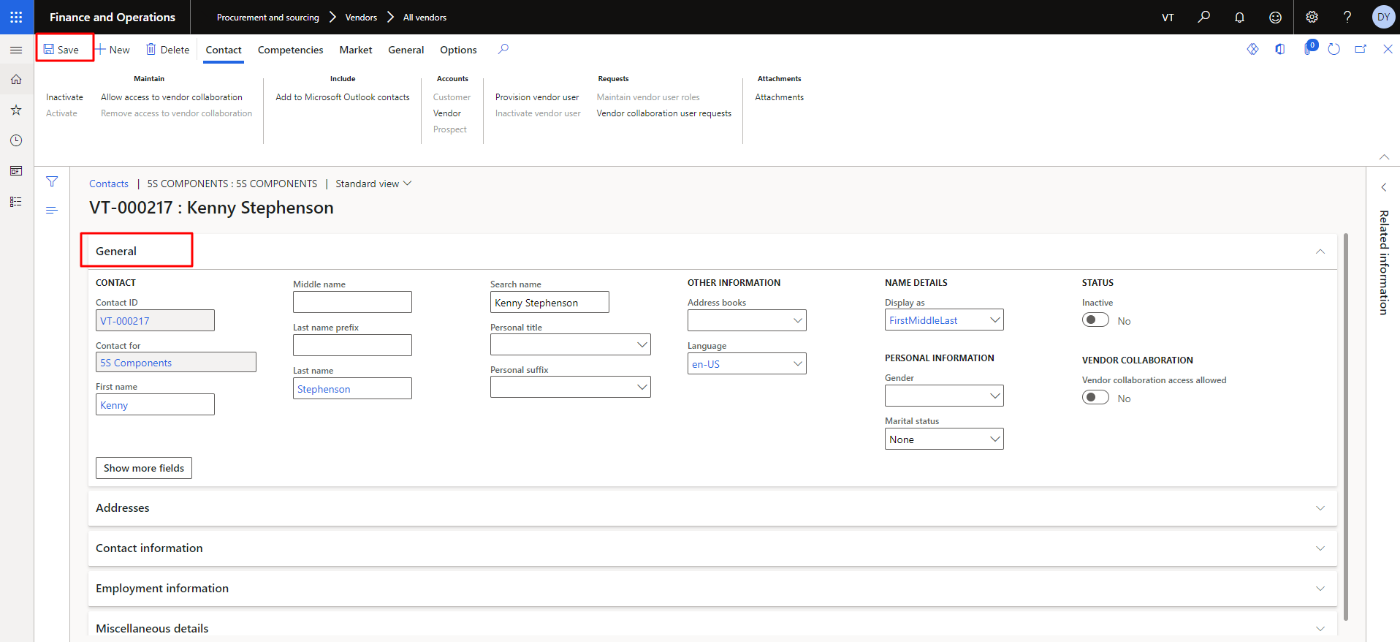


Figure 21 Update fields to Edit Contact

### Delete Contact

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

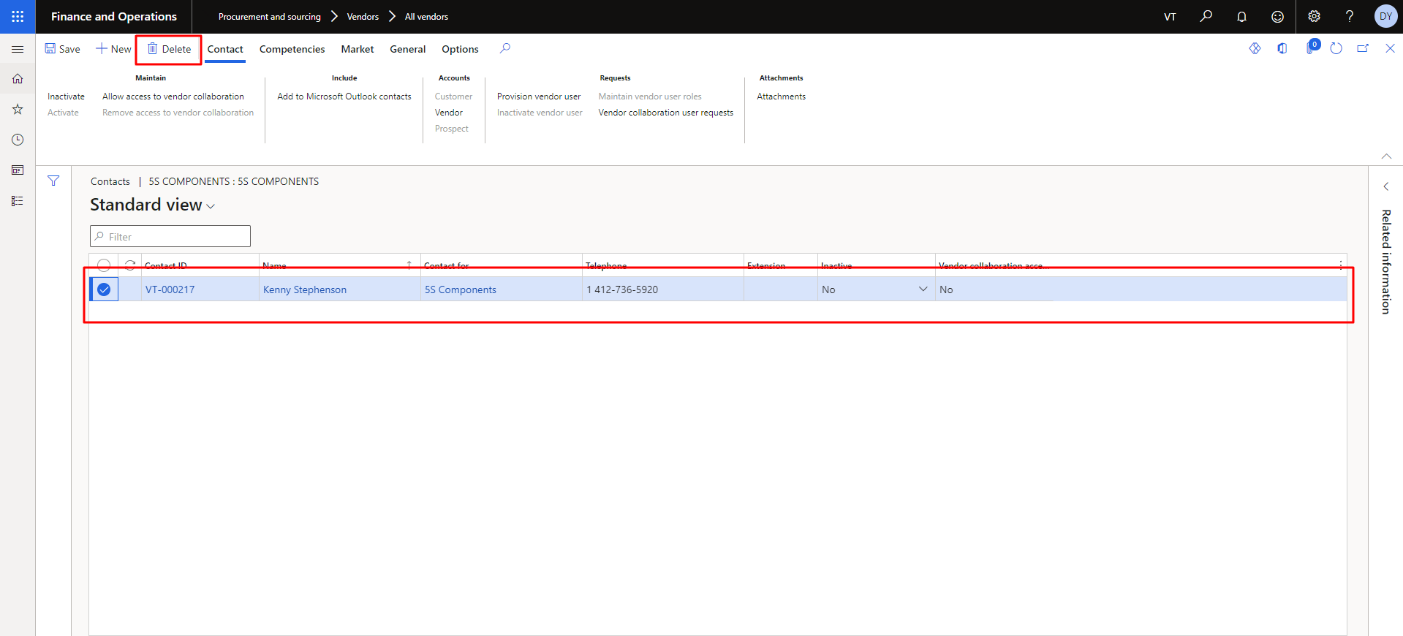


Figure 22 Delete Selected Contact

## 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

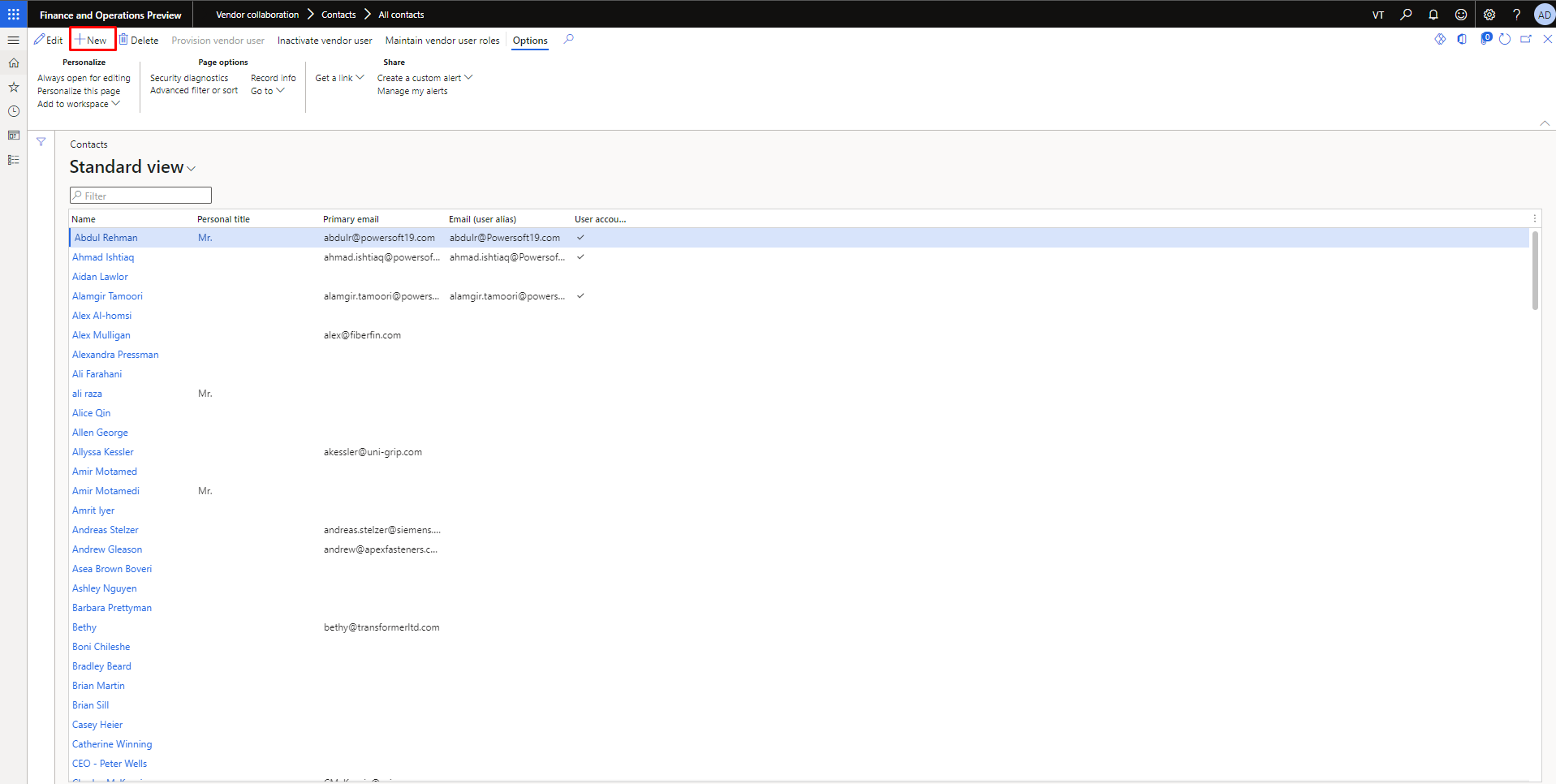


Figure 23 All Contacts page

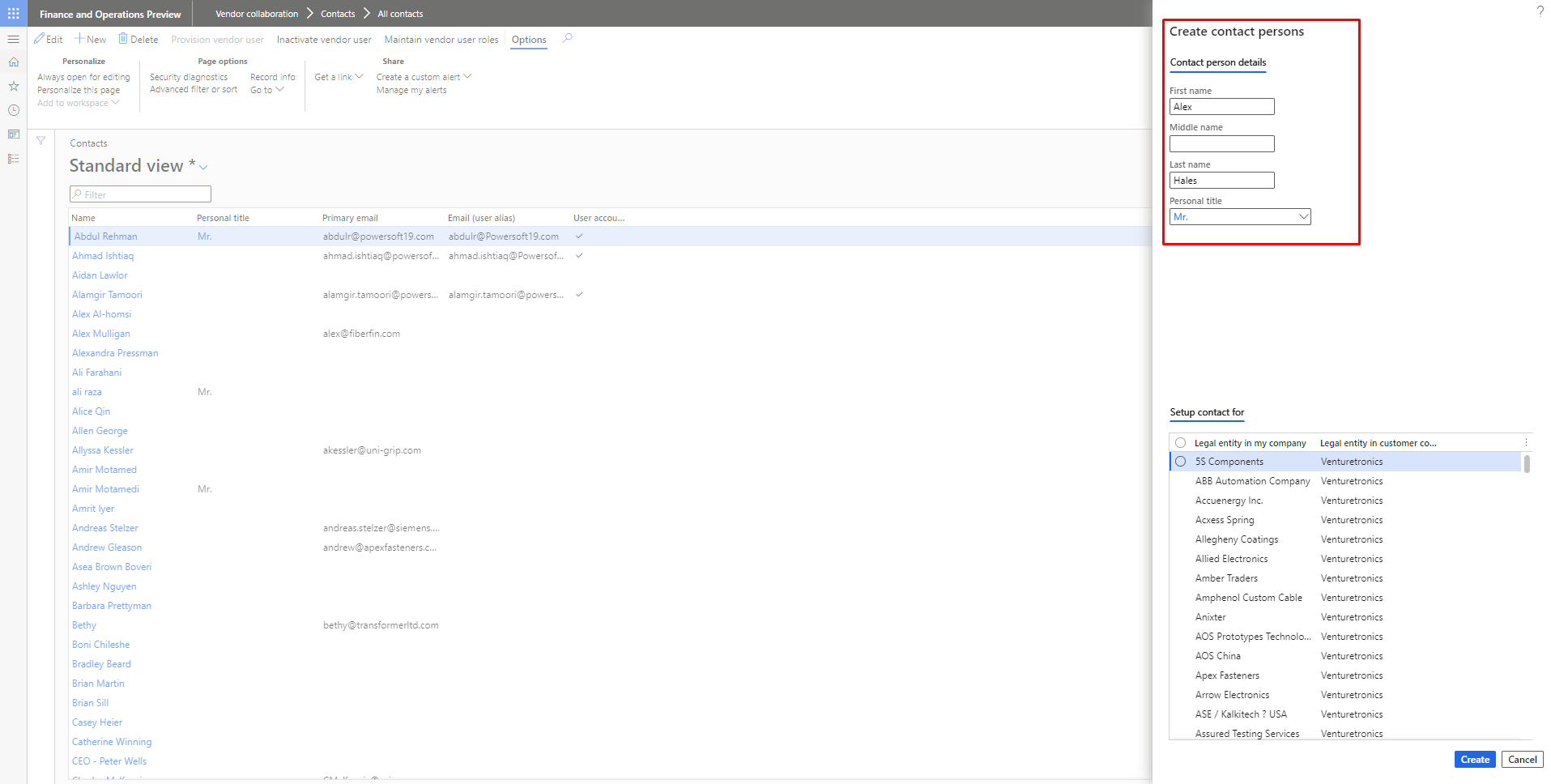


Figure 24 Contact Creation