
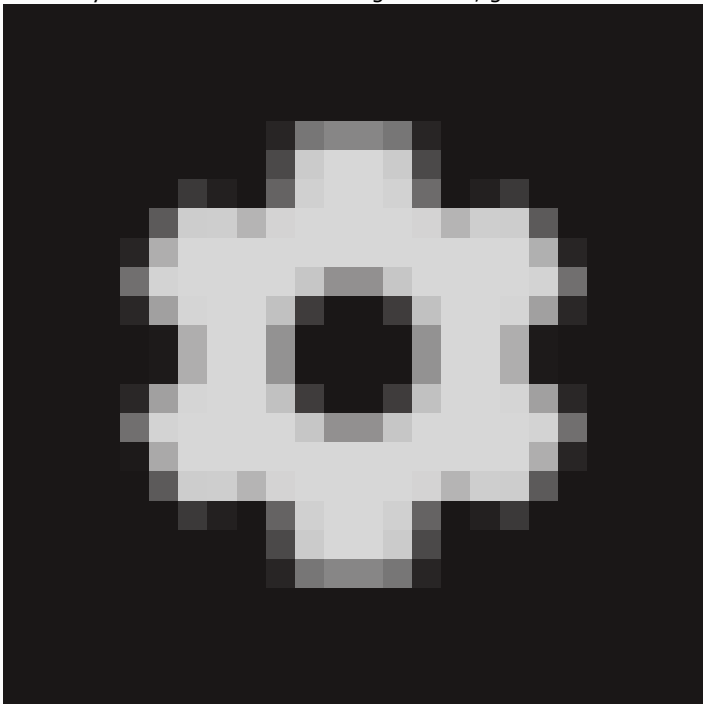



# Identification Data - Vendor

	<p>The Identification Data tab includes basic information used to organise Vendors in the database.</p>
<p>ID Number</p>	<p>The individual ID number used to identify your Vendor.</p> <p>If you want to use a custom ID number, enter it into the field.</p> <ul style="list-style-type: none"><li>• XTRF can automatically assign an ID number to your Vendor, or you can create a custom one.</li><li>• To modify the Vendor ID numbering scheme, go to</li></ul> <div data-bbox="678 724 1377 1423"></div> <p>Configuration &gt; Templates &gt; Numbering Schemes.</p> <div data-bbox="557 1501 1498 1585" style="border: 1px solid orange; padding: 5px; text-align: center;">This field is mandatory.</div>
<p>Name</p>	<p>The name of the Vendor used in the system. The name can be short but must be unique (e.g. "John Smith UK" for "Jonathan J. Smith").</p> <p>Enter the text into the field.</p> <div data-bbox="557 1749 1498 1833" style="border: 1px solid orange; padding: 5px; text-align: center;">This field is mandatory.</div>

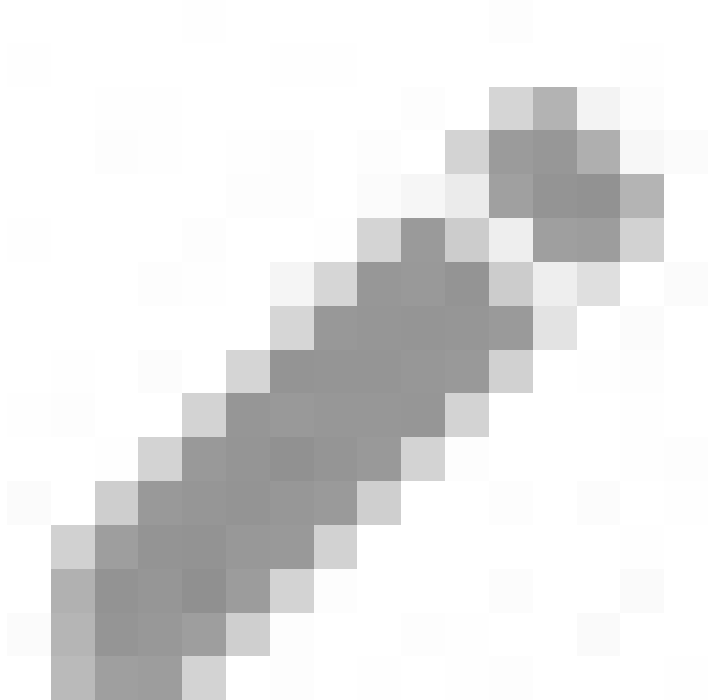
<p>Legal Name</p>	<p>The Vendor's legal name which appears on the Vendor's invoices (e.g. "Jonathan J. Smith" and not "John Smith UK").</p> <p>Enter the text into the field.</p> <div data-bbox="558 317 1498 411" style="border: 1px solid #ccc; padding: 5px;"><p>When you enter a name first into the Name field, XTRF automatically copies it into the Full Name field.</p></div> <div data-bbox="558 432 1498 516" style="border: 1px solid #ffc107; padding: 5px;"><p>This field is mandatory.</p></div>
<p>Branch</p>	<p>The department, affiliate, subsidiary or regional office of your company for which the Vendor performs services. A branch's ideal purpose is to serve as an organisational tool because you associate users and partners to it. Whenever you want to quickly locate such information as a specific quote, project or report, simply select the related branch.</p> <p>Click the drop-down list and select a branch.</p> <div data-bbox="558 726 1498 821" style="border: 1px solid #ffc107; padding: 5px;"><ul style="list-style-type: none"><li>• To create a branch, go to System &gt; Configuration &gt; System Values &gt; Branches.</li></ul></div>
<p>First Contract Date</p>	<p>The date of the contract first agreed upon by you and your Vendor. Manually enter the date in the appropriate date format set in System Configuration into the field or click</p> <div data-bbox="558 940 1260 1640" style="border: 1px solid #ccc; padding: 10px;"></div> <p>and select from the calendar.</p>

<p>Status</p>	<p>The current status of the Vendor. It helps determine which Vendors will be suggested for your projects.</p> <p>Click on the drop-down list and select a status.</p> <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;"> <p>To select Vendors with a particular status for a Job, click on the Vendors tile in the left menu, and in the Vendor browsing view apply the Status filter. You can click to select a qualifier: 'is any of', 'is all of' or 'is none of'. Then from the drop-down list, select the statuses to filter by.</p> </div>
<p>Individual</p>	<p>The nature of the Vendor.</p> <ul style="list-style-type: none"> <li>• Select the tickbox if the Vendor is an individual person.</li> <li>• Deselect the tickbox if the Vendor is a company.</li> </ul>
<p>In-house</p>	<p>A Vendor directly employed by your company.</p> <ul style="list-style-type: none"> <li>• Select the tickbox if the Vendor works internally at your company.</li> <li>• Deselect the tickbox if the Vendor works externally.</li> </ul>
<p>Contract Number</p>	<p>The number of the contact you have signed with your Vendor.</p> <p>Enter a value into the field.</p>

Notes

An additional comment which appears on the [Contact Person's Summary](#).

To add a note, click



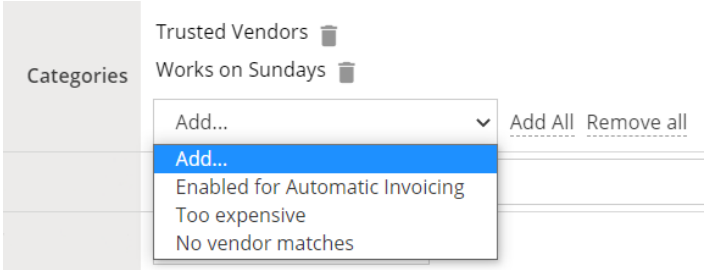
. A window with a text box appears. Enter the text into the text box and click



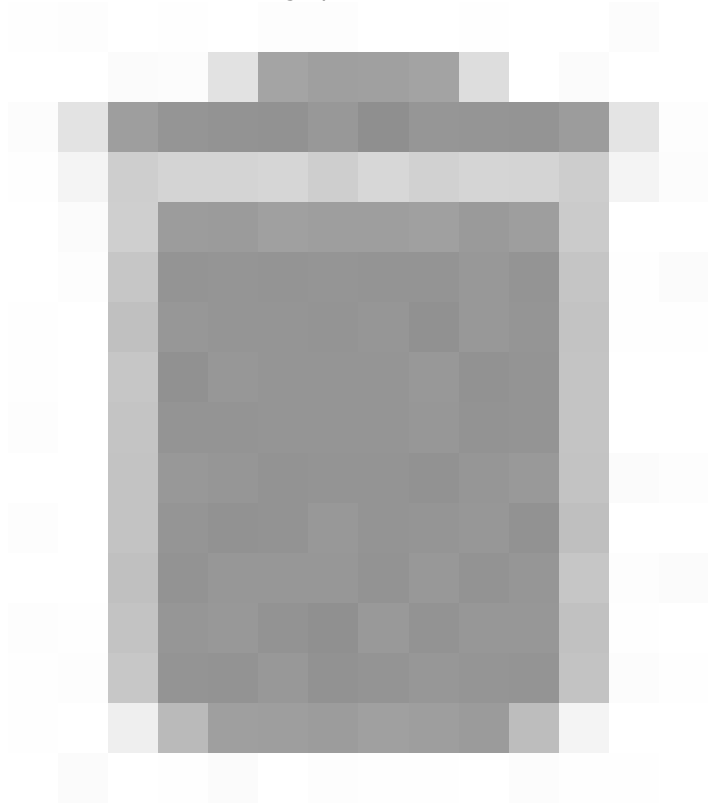
Categories

A label used to organise your Vendors. For example, you create categories which represent a Vendor's cost or efficiency.

Click the drop-down list and select a category. The selected category appears above the drop-down list.

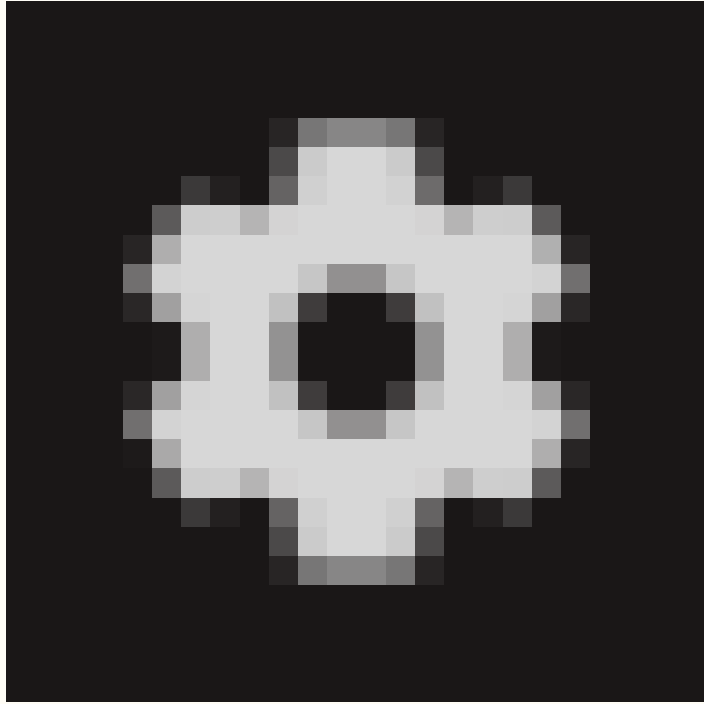


- To remove a selected category from the Vendor, click



- To add all the available categories, click Add all. Now all categories are assigned to the provider.
- To remove all the selected categories, click Remove all. Now no category is assigned to the provider.

To create a category, go to



Configuration > System Values (Advanced) > Categories.

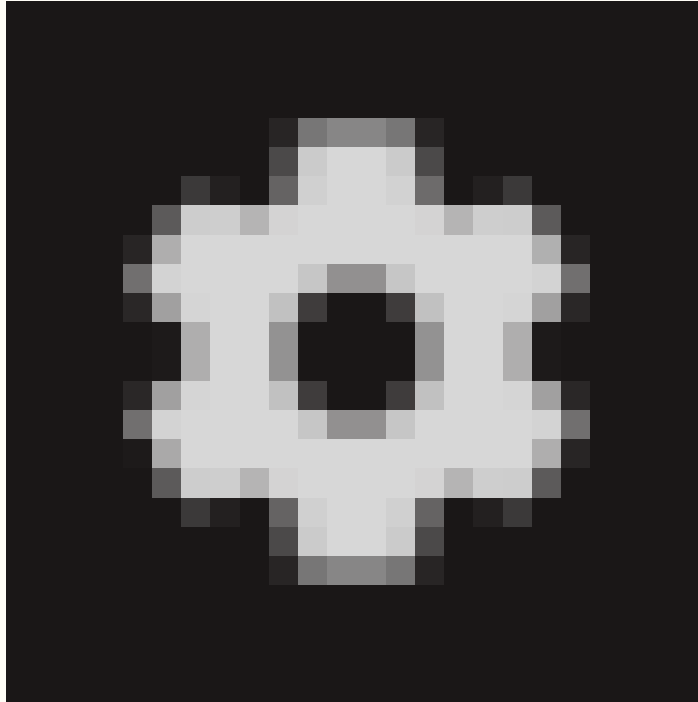
Automatic Action

The assignment to a selected automated activity action. Whenever the selected automated activity action appears in a workflow, the system will automatically assign the activity to the Vendor.

To assign an automated activity action to this Vendor, click on the drop-down list and select an action.

All activities require a Vendor. Therefore, a Vendor assigned to an automated activity action is likely not an actual person, but a component to the automation.

To create an automated activity action, go to



Configuration > Projects and Quotes > Automatic Actions (Classic).

Edit

Click to modify the tab.

Cancel

Click to terminate the modification process.