

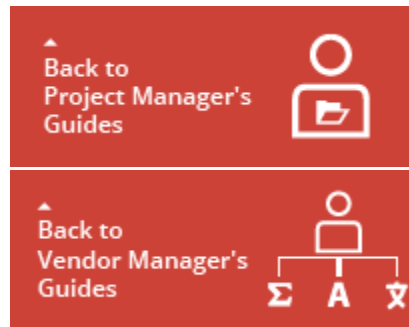
Adding a New Vendor Profile to the Database

Target audience: Project Managers, Vendor Managers

License Agreement

This article presents the features available in the Ultimate plan of XTRF Translation Management System. Please keep in mind that your access to the described options might be limited due to your license agreement. If you would like to change your plan of XTRF Translation Management System and gain access to the additional features, contact your [XTRF Customer Success Manager](#).

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- Tips and Tricks



Overview

You may add a new vendor's profile to your database manually, or you may use for this purpose the Import Data function.

The following guide covers the manual entity creation, to learn more about how to import your data go to: [Import Guide](#).

Manual Creation vs Import

We recommend manual creation in case of small number of vendors (1-3). If you want to add more vendors to your database it would be more efficient to use the Import Data function.

Before Reading this Tutorial

- The steps without any marking are mandatory to perform because they ensure carrying on a proper function of the Home Portal.
- The steps marked with the (Optional) label give you information about settings useful for you in terms of fulfilling specific requirements for your projects, but if you skip them it will have no negative effect on the function of the Home Portal.

I. Add a New Vendor Profile

To add a new vendor to your Home Portal, perform the following steps:

| | |
|---|--|
| 1 | Sign in to the Home Portal of XTRF Platform. |
| 2 | Click the Vendor module icon. |

3 Click the +Create button.

4 In the Name field provide the name of the vendor. The name must be unique and without any special characters. It is only used internally for the purpose of the Home Portal.

5 In the Legal Name field provide the official name of the vendor. The Legal name may be the same as the Name of the vendor with special characters. It is used on all documents generated by the Home Portal.

6 In the E-mail Address field provide the main contact e-mail address of your vendor.

The e-mail address is very important because the e-mail notifications are the prime form of contact in the Home Portal.

7 (Optional) From the Country drop-down menu select the country where your vendor is registered.

8 The Individual checkbox:

- Leave the checkbox unselected if this vendor is a translation agency.
- Select the checkbox if this is an individual vendor. With the individual vendors the contact person for this profile is created automatically and additional fields appear:
 - a. In the First Name field provide the first name of the new vendor.
 - b. (Optional) In the Last Name field provide the last name of the new vendor.
 - c. (Optional) From the Gender drop-down menu select the vendor's gender.
 - d. (Optional) In the Position field specify the position of this contact person, for example CEO for one man companies.

The screenshot shows the 'Create Vendor' form with the following fields and values:

- Name: The SwedishTranslator *
- Legal Name: The SwedishTranslator Ltd *
- E-mail Address: officce@theswedishtranslator.com *
- Country: Sweden [SE]
- Individual:
- First Name: Alexander *
- Last Name: Gustafsson
- Gender: Unspecified
- Position: CEO

Buttons: Continue, Cancel

9 Click the Continue button. You have added new vendor profile to your Home Portal.

The screenshot shows the 'Create Vendor' form with the following fields and values:

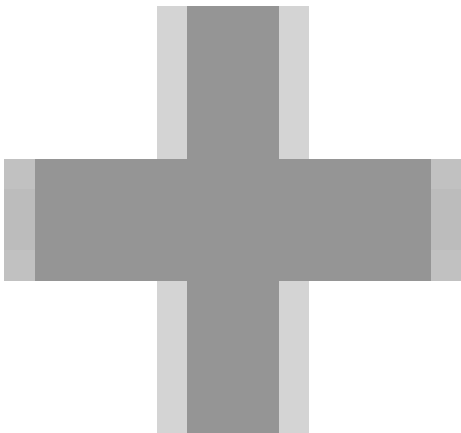
- Name: The SwedishTranslator *
- Legal Name: The SwedishTranslator Ltd *
- E-mail Address: officce@theswedishtranslator.com *
- Country: Sweden [SE]
- Individual:

Buttons: Continue, Cancel

II. Add a New Contact Person

The Contact Person is required for most of the operations performed in the Home Portal, especially when you deal with the translation agencies.

To add a Contact Person to the vendor's profile, perform the following steps:

| | |
|---|---|
| 1 | In the Vendor's profile go to the Summary tab and click the Edit button. |
| 2 | Click the  button. The Create Contact Person pop-up window appears. In the window provide the basic information about the new contact person. |
| 3 | In the First Name field provide the first name of the new contact person. |
| 4 | (Optional) In the Last Name field provide the last name of the new contact person. |
| 5 | In the E-mail Address field provide the e-mail address of the new contact person. The e-mail address must be unique because it is used to sign in to the Vendor Portal. <div data-bbox="181 1570 935 1692" style="border: 1px solid #FFD700; padding: 10px; margin: 10px 0;">The e-mail address is very important because the e-mail notifications are the prime form of contact in the Home Portal.</div> |
| 6 | (Optional) In the Phone field provide the phone number to the new contact person. |

- 7 Click the Create button. You have added new contact person to the vendor's profile.

The screenshot shows a vendor profile page for 'The SwedishTranslator Ltd'. The page has a navigation bar with tabs: Summary, Main Data, Competencies & Rates, Evaluation, Jobs, Feedback, Vacation, CRM, and Files & Qualifications. The main content area is divided into two columns. The left column contains fields for Name (The SwedishTranslator), Phone, Cell Phone, E-mail Address (office@theswedishtranslator.com), Preferred Social Media Account, and Notes. The right column contains an Address field with the value 'The SwedishTranslator Ltd' and a country code 'SWE'. A dialog box titled 'Create Contact Person' is open in the foreground, containing input fields for First Name, Last Name, E-Mail Address, and Phone, with 'Create' and 'Cancel' buttons at the bottom. Below the main content area, there is a search bar and a message: '0 contact persons in 0 departments. It seems The SwedishTranslator has no contact persons yet...Click the plus button'. A large plus button is visible, and 'Save' and 'Cancel' buttons are at the bottom left of the page.

First Contact Person

With the Individual vendors the first contact person is added automatically when the new vendor profile is created.

Tips and Tricks

More vendor related information you may find in the: [Vendor Module](#).
