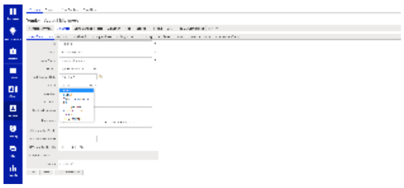
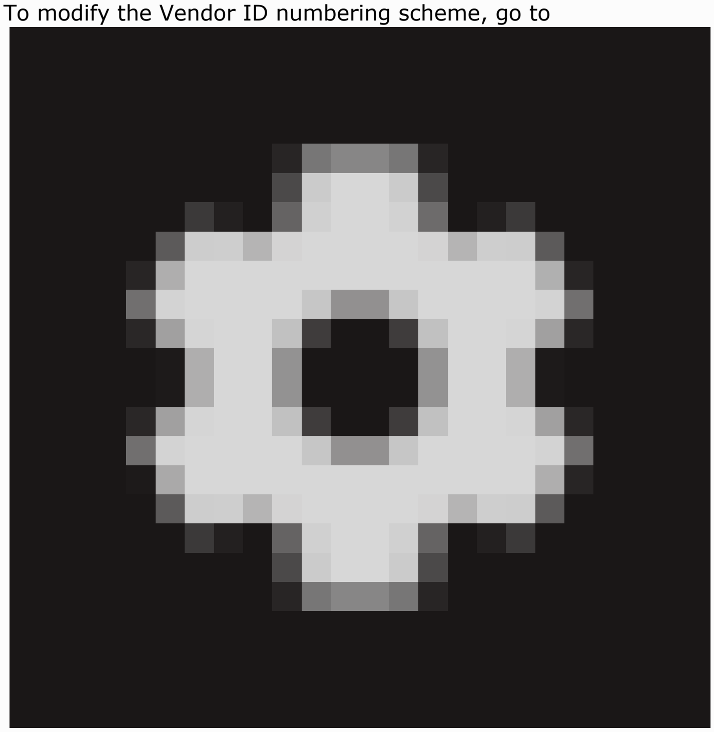
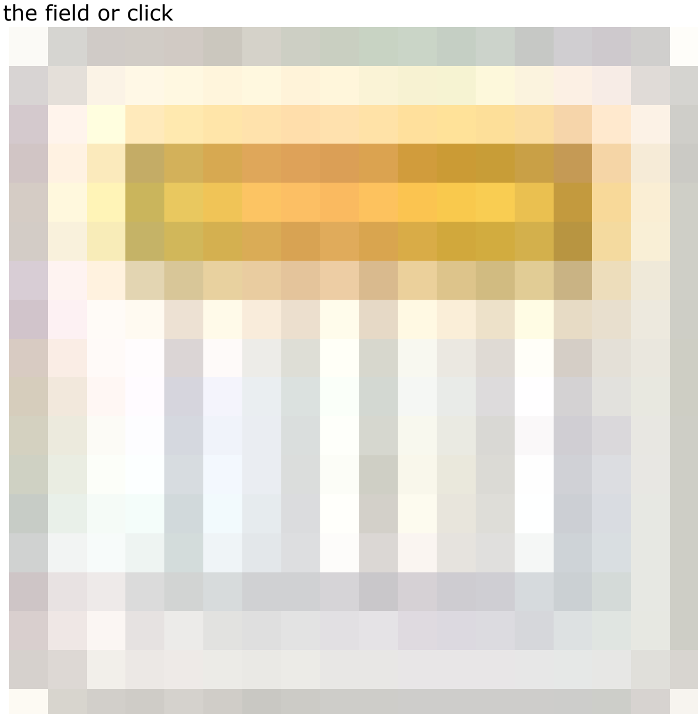
Identification Data - Vendor

	The Identification Data tab includes basic information used to organise Vendors in the database.
ID Number	The individual ID number used to identify your Vendor. If you want to use a custom ID number, enter it into the field. • XTRF can automatically assign an ID number to your Vendor, or you can create a custom one. • To modify the Vendor ID numbering scheme, go to  Configuration > Templates > Numbering Schemes. This field is mandatory.
Name	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"). Enter the text into the field. This field is mandatory.

Legal Name	The Vendor's legal name which appears on the Vendor's invoices (e.g. "Jonathan J. Smith" and not "John Smith UK"). Enter the text into the field. When you enter a name first into the Name field, XTRF automatically copies it into the Full Name field. This field is mandatory.
Branch	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. Click the drop-down list and select a branch. • To create a branch, go to System > Configuration > System Values > Branches.
First Contract Date	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  and select from the calendar.

Status	The current status of the Vendor. It helps determine which Vendors will be suggested for your projects. Click on the drop-down list and select a status. 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.
Individual	The nature of the Vendor. • Select the tickbox if the Vendor is an individual person. • Deselect the tickbox if the Vendor is a company.
In-house	A Vendor directly employed by your company. • Select the tickbox if the Vendor works internally at your company. • Deselect the tickbox if the Vendor works externally.
Contract Number	The number of the contact you have signed with your Vendor. Enter a value into the field.

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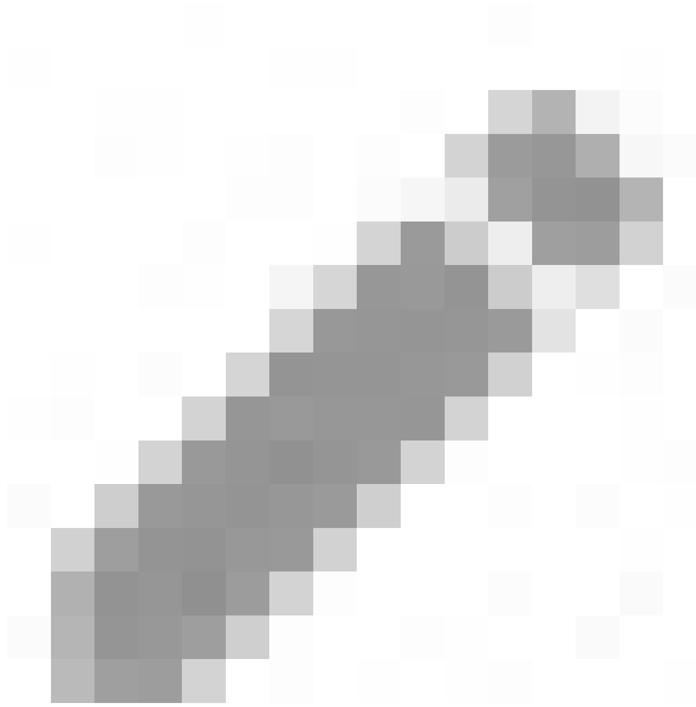
<tr>
<td>Notes</td>
<td>
An additional comment which appears on the Contact Person's Summary.

To add a note, click



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

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</td>
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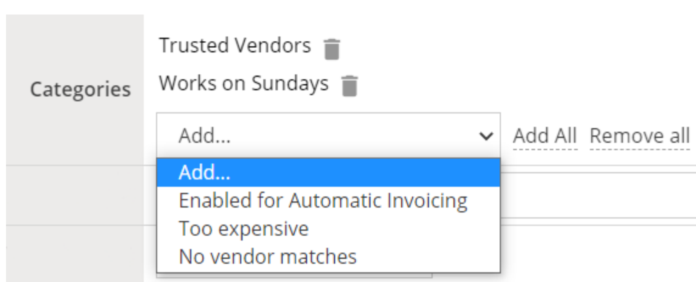
<tr>
<td>Categories</td>
<td>
A label used to organise your Vendors. For example, you create categories which represent a Vendor's cost or efficiency.

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



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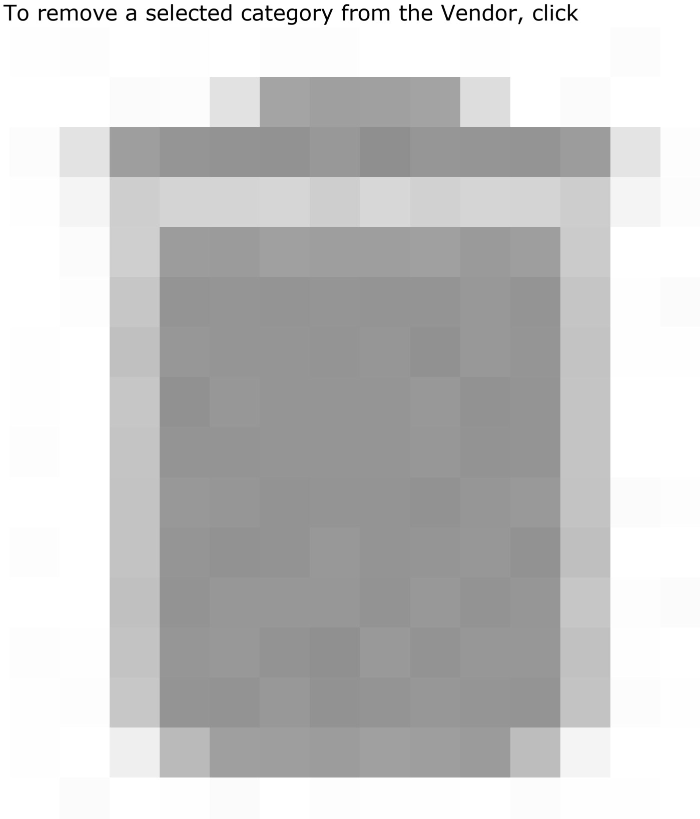
- To remove a selected category from the Vendor, click



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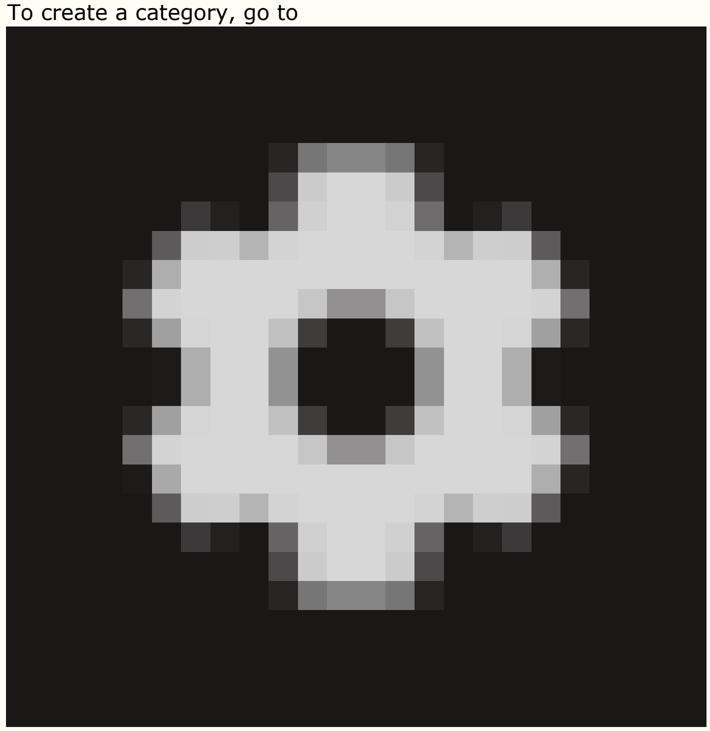
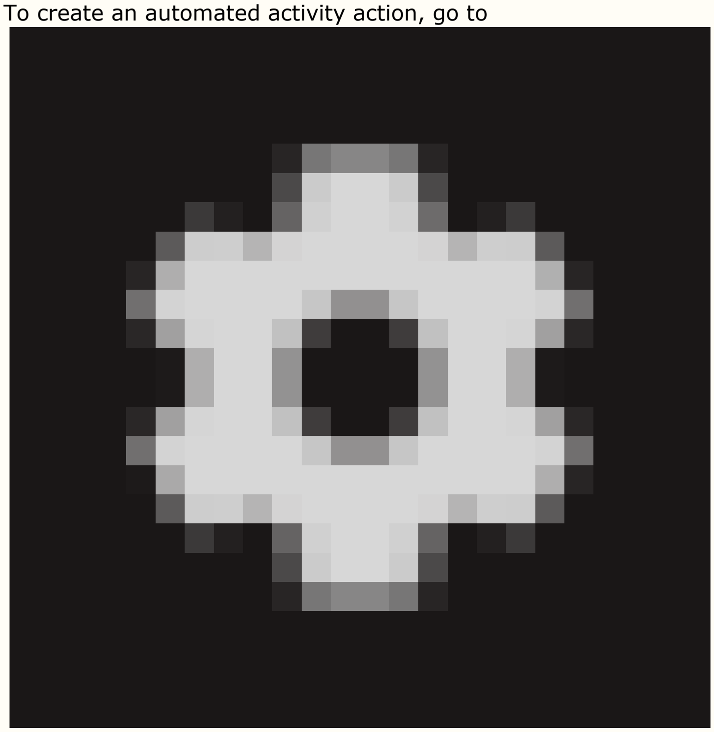
- To add all the available categories, click Add all. Now all categories are assigned to the provider.
- To remove all the selected categories, click Remove all. Now no category is assigned to the provider.

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.