

Contacts - Supplier (Add-Edit)


This article describes how to Add a new Contact (Supplier). Once a Supplier is added, you can Select/Enter/Edit the Supplier's default Contact Details, Settings and Contact People.

To Add a new Contact (Supplier);

Adding a new Contact (Supplier) is done from the CONTACT Tab's Library.

Quick Flow;

CONTACTS Tab > **[Add]** > **Account Name** > **Supplier** > **Address(s)** > **PRIMARY PERSON** > **[Save]**

1. Press on the **CONTACTS** Tab to display the CONTACTS Library, then press on the **[Add]** button  to display the CONTACT: NEW CONTACT Window



2. From the CONTACT: NEW CONTACT Window Enter an **Account Name** and Tick a Contact Type **Supplier**

Account Name	<input type="text"/>
Customer	<input type="checkbox"/>
Supplier	<input type="checkbox"/>

3. Enter a Street **Address** and/or Postal **Address**

4. Enter the **PRIMARY PERSON** details

NOTE: Fields with a red "*" are compulsory fields. If the Suppliers email address is unknown, enter your Company's email address


5. Scroll to the top of the CONTACT: NEW CONTACT Window and press the **[Save]** button  to save the new Contact and return to the SUPPLIER Window

Having created the Supplier, the next step requires you to Select/Enter/Edit the Supplier's Contact Details and Settings.

To Select/Enter/Edit a Supplier's default Contact Details and Settings;


Selecting/Entering/Editing a Supplier's default Contact Details and Settings is done from a SUPPLIER Editing Window

Quick Flow;**SUPPLIER Window > [Edit] > Contact Details > Contact People > Xero Ledger Code for Purchase > [Save]**

1. From the **SUPPLIER** Window press the **[Edit]** button  to display the CONTACTS Editing Window
2. From the CONTACTS Editing Window Enter/Edit the Supplier's default **Contact Details**

Email	<input type="text"/>
Account Phone	<input type="text"/>
Account Fax	<input type="text"/>
Mobile	<input type="text"/>
Direct Dial	<input type="text"/>
Skype Username	<input type="text"/>


3. Select/Edit the Supplier's default **Contact People**

Primary Contact	Jog Bloggs 
Primary Billing Contact	Jog Bloggs 
Primary Quote Contact	Jog Bloggs 
Primary Job Contact	Jog Bloggs 

NOTE: The entered Primary Person will populate to the Primary Billing, Quote and Job Contacts fields. Other people can be Selected in these fields but must be Entered in to the Contact's PEOPLE Subnav first. See KAT-0314

4. Select/Edit a **Xero Ledger Code for Purchases** from this Supplier

Xero Ledger Code for Purchases	310 - Cost of Goods Sold 
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5. Scroll to the top of the CONTACTS Window and press on the **[Save]** button  to save the Selecting/Entering/Editing