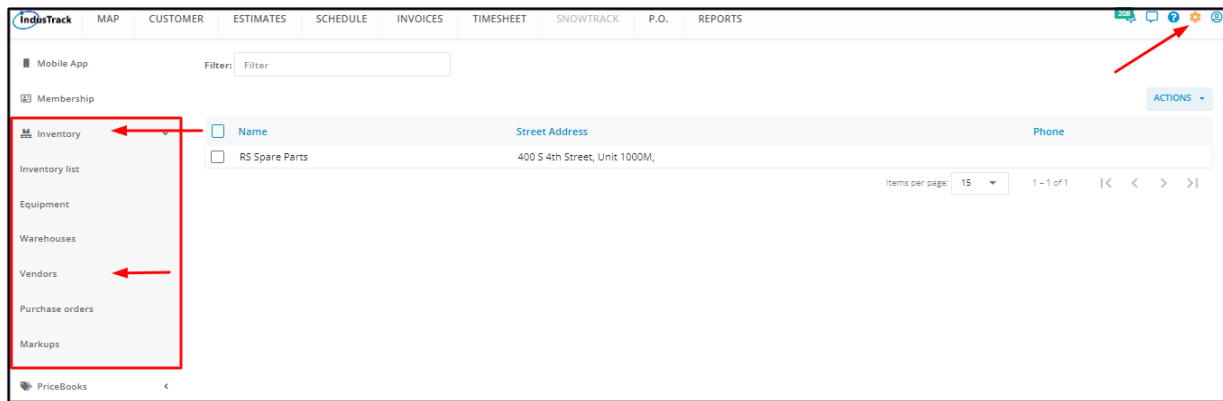


Vendors

Adding Vendors in IndusTrack allows you to easily prepare purchase orders and keep track of your supplies and/or products from the system.

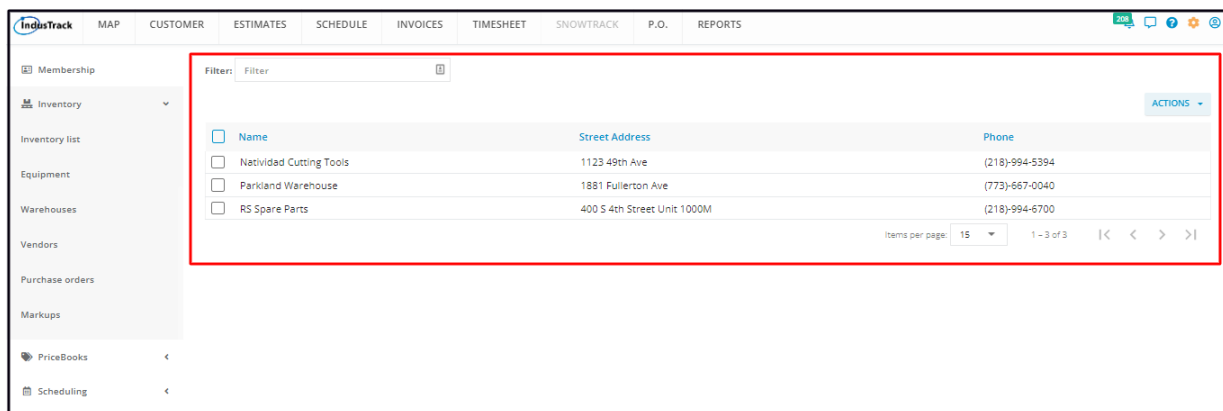
To set up your suppliers go to **Settings > Inventory > Vendors**.

This page makes creating, viewing and managing vendors a lot easier.



Vendors' List

The page defaults to the Vendors' List, presented in table format. Contact information about your suppliers is shown in this table.



The **Vendors' List** has 3 columns.

- **Name** – Refers to the vendor's name or company name.
- **Street Address** – This refers to your vendor's main business address.
- **Phone** – This refers to your vendor's direct phone line.

Filter Bar

Key in the information you are looking for on the **Filter bar** and matching information will populate the vendors' table.

Sort the Vendors' list

Click on the column header to sort the vendors' list according to the selected category.

Actions Button

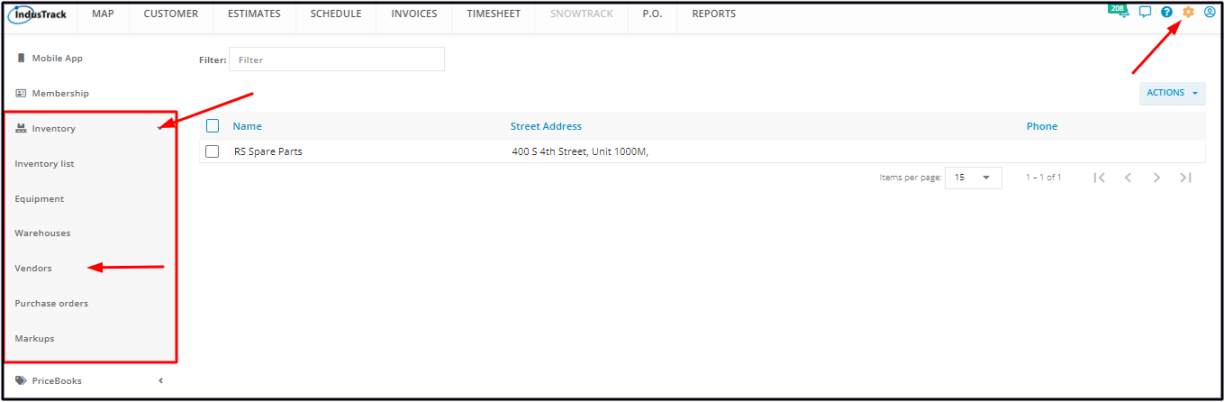
Use this button to add or create new vendor records. Vendor records are also deleted using this button.

List Per Page

At the bottom of the table, select the number of vendors to be displayed per page. Options to choose from are 15, 25, and 50. Use the Previous and Next buttons to move from one page to another (if there is more than one page).

Add a New Vendor

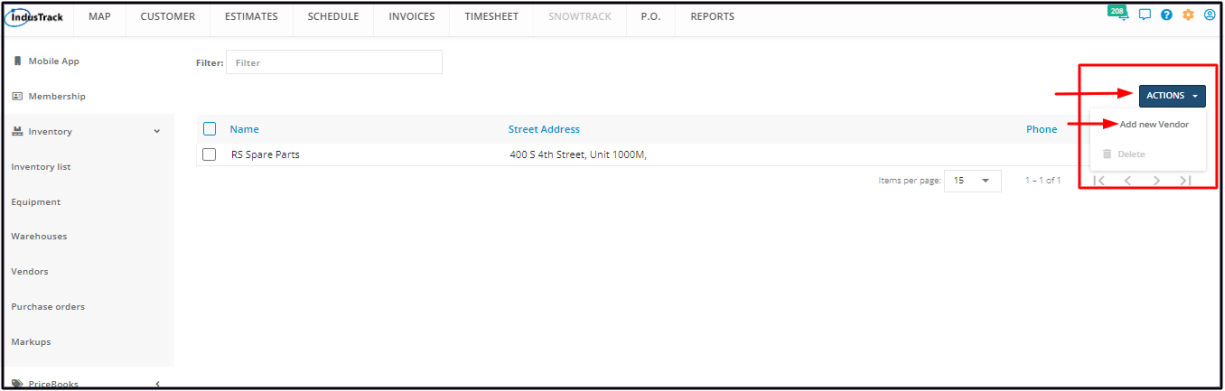
To create a vendor profile, go to **Settings > Inventory > Vendors**.



- A Vendor profile can also be created when preparing a **Purchase Order**.

Before creating a new Vendor, do a search first to determine if their profile still does not exist. This is to avoid creating multiple profiles for a single vendor. Either scroll down the Vendors list or use the Filter or Sort functions.

Go to the **Actions** button and select **+ Add a New Vendor**.

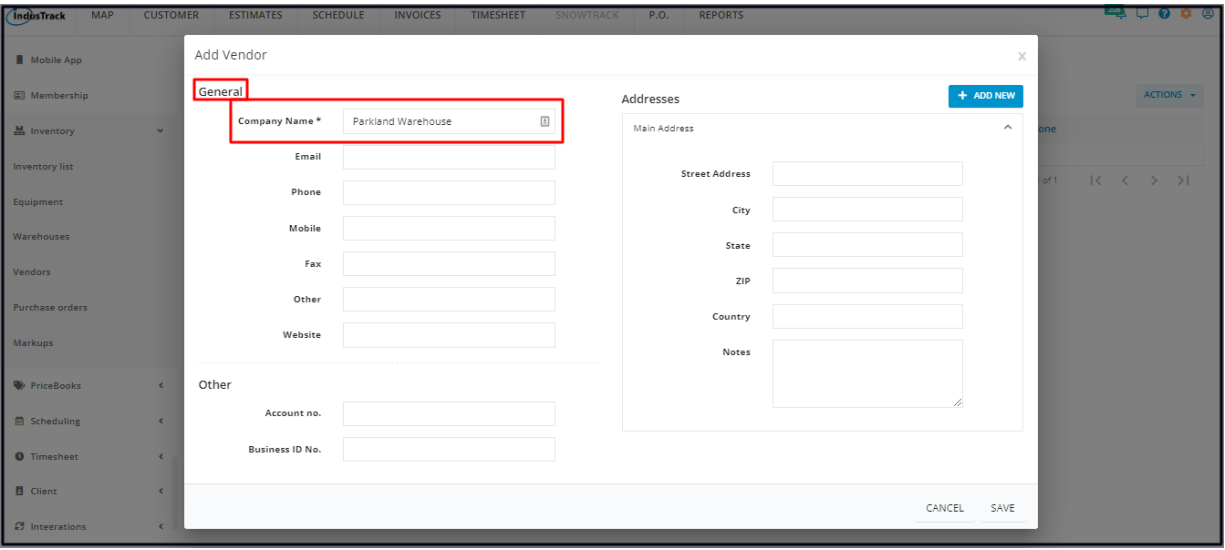


Fill in the item details on the **Add Vendor window**. Fields with (*) are required.

General Information

Company Name*

- Key in the supplier's name/company name.



Email

- For ease of placing and monitoring Purchase Orders, use your contact person's or the Sales department's company email address.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHET SNOWTRACK P.O. REPORTS

Mobile App Membership Inventory Inventory list Equipment Warehouses Vendors Purchase orders Markups PriceBooks Scheduling Timesheet Client Interactions

Add Vendor

General

Company Name * Parkland Warehouse

Email sales@parkland.com

Phone

Mobile

Fax

Other

Website

Other

Account no.

Business ID No.

Addresses + ADD NEW

Main Address

Street Address

City

State

ZIP

Country

Notes

CANCEL SAVE

Phone

- Similar to the email address, use your contact person's or the Sales department's direct line.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHET SNOWTRACK P.O. REPORTS

Mobile App Membership Inventory Inventory list Equipment Warehouses Vendors Purchase orders Markups PriceBooks Scheduling Timesheet Client Interactions

Add Vendor

General

Company Name * Parkland Warehouse

Email sales@parkland.com

Phone (773)-667-0040

Mobile

Fax

Other

Website

Other

Account no.

Business ID No.

Addresses + ADD NEW

Main Address

Street Address

City

State

ZIP

Country

Notes

CANCEL SAVE

Mobile

- The contact person's mobile number.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHET SNOWTRACK P.O. REPORTS

Mobile App Membership Inventory Inventory list Equipment Warehouses Vendors Purchase orders Markups PriceBooks Scheduling Timesheet Client Interactions

Add Vendor

General

Company Name * Parkland Warehouse

Email sales@parkland.com

Phone (773)-667-0040

Mobile (312)-766-6968

Fax

Other

Website

Other

Account no.

Business ID No.

Addresses + ADD NEW

Main Address

Street Address

City

State

ZIP

Country

Notes

CANCEL SAVE

Fax

- The company's fax number.

Add Vendor

General

Company Name * Parkland Warehouse

Email sales@parkland.com

Phone (773)-667-0040

Mobile (312)-766-6968

Fax (312)-820-6989

Other

Website

Other

Account no.

Business ID No.

Addresses

Main Address

Street Address

City

State

ZIP

Country

Notes

CANCEL SAVE

Other

- Use this field for any other contact information other than those indicated above.

Add Vendor

General

Company Name * Parkland Warehouse

Email sales@parkland.com

Phone (773)-667-0040

Mobile (312)-766-6968

Fax (312)-820-6989

Other

Website

Other

Account no.

Business ID No.

Addresses

Main Address

Street Address

City

State

ZIP

Country

Notes

CANCEL SAVE

Website

- Indicate the URL of the company's website.

Add Vendor

General

Company Name * Parkland Warehouse

Email sales@parkland.com

Phone (773)-667-0040

Mobile (312)-766-6968

Fax (312)-820-6989

Other

Website www.parklandwarehouse.com

Other

Account no.

Business ID No.

Addresses

Main Address

Street Address

City

State

ZIP

Country

Notes

CANCEL SAVE

Addresses

Main Address

Key in the address or the provided fields.

- Street Address
- City
- State
- ZIP
- Country
- Notes – Key in notes related to the vendor’s location such as landmarks.

The screenshot shows the 'Add Vendor' form in the IndusTrack application. The 'Addresses' section is highlighted with a red box. The form includes the following fields:

- Company Name * (Parkland Warehouse)
- Email (sales@parkland.com)
- Phone ((773)-667-0040)
- Mobile ((312)-766-6968)
- Fax ((312)-820-6989)
- Other
- Website (www.parklandwarehouse.com)
- Account no.
- Business ID No.

The 'Addresses' section is expanded, showing the 'Main Address' fields:

- Street Address (1881 Fullerton Ave)
- City (Chicago)
- State (Illinois)
- ZIP (60614)
- Country (USA)
- Notes

A '+ ADD NEW' button is visible in the upper right corner of the 'Addresses' section.

If the vendor has more than one location or has satellite offices or warehouses, add another set of address fields.

- Click on the **+ Add New** button at the upper right-hand corner of the window. The **Additional Address** field will come up below the Main Address field.

The screenshot shows the 'Add Vendor' form in the IndusTrack application. The 'Additional Address #1' field is highlighted with a red box. The form includes the following fields:

- Company Name * (Parkland Warehouse)
- Email (sales@parkland.com)
- Phone ((773)-667-0040)
- Mobile ((312)-766-6968)
- Fax ((312)-820-6989)
- Other
- Website (www.parklandwarehouse.com)
- Account no.
- Business ID No.

The 'Addresses' section is expanded, showing the 'Main Address' fields:

- Street Address (1881 Fullerton Ave)
- City (Chicago)
- State (Illinois)
- ZIP (60614)
- Country (USA)
- Notes

A '+ ADD NEW' button is visible in the upper right corner of the 'Addresses' section. A red arrow points to this button. Another red arrow points to the 'Additional Address #1' field, which is highlighted with a red box.

- Use the arrows at the upper right-hand corner of the address boxes to either collapse or expand the fields.

- Key in the address of the additional location on the new fields.
- To quickly remove an additional location, click on the **Delete** button and the information will be immediately removed. Unlike the additional addresses, the Main Address fields can not be deleted.

Other

Account no.

- The Account No. is a Vendor Code that you provide to quickly identify a supplier and for ease of documentation.

Business ID No.

Save the new supplier. This will be added to the Vendors' List.

Add Vendor

General

Company Name * Parkland Warehouse

Email sales@parkland.com

Phone (773)-667-0040

Mobile (312)-766-6968

Fax (312)-820-6989

Other

Website www.parklandwarehouse.com

Other

Account no. VD - 7379

Business ID No.

Addresses + ADD NEW

Main Address

Additional Address #1 DELETE

Street Address 64 W 43rd St

City Chicago

State Illinois

ZIP 60609

Country USA

Notes Satellite warehouse

CANCEL SAVE

Vendors List

Name	Street Address	Phone
<input type="checkbox"/> Parkland Warehouse	1881 Fullerton Ave	(773)-667-0040
<input type="checkbox"/> RS Spare Parts	400 S 4th Street, Unit 1000M,	

Items per page: 15 1 - 2 of 2

Update a Vendor's Record

To modify the vendor's profile, go to **Settings > Inventory > Vendors**.

Navigation Path: Settings > Inventory > Vendors

Vendors List:

Name	Street Address	Phone
<input type="checkbox"/> Natividad Cutting Tools	1123 49th Ave	(218)-994-5394
<input type="checkbox"/> Parkland Warehouse	1881 Fullerton Ave	(773)-667-0040
<input type="checkbox"/> RS Spare Parts	400 S 4th Street Unit 1000M	(218)-994-6700

Items per page: 15 1 - 3 of 3

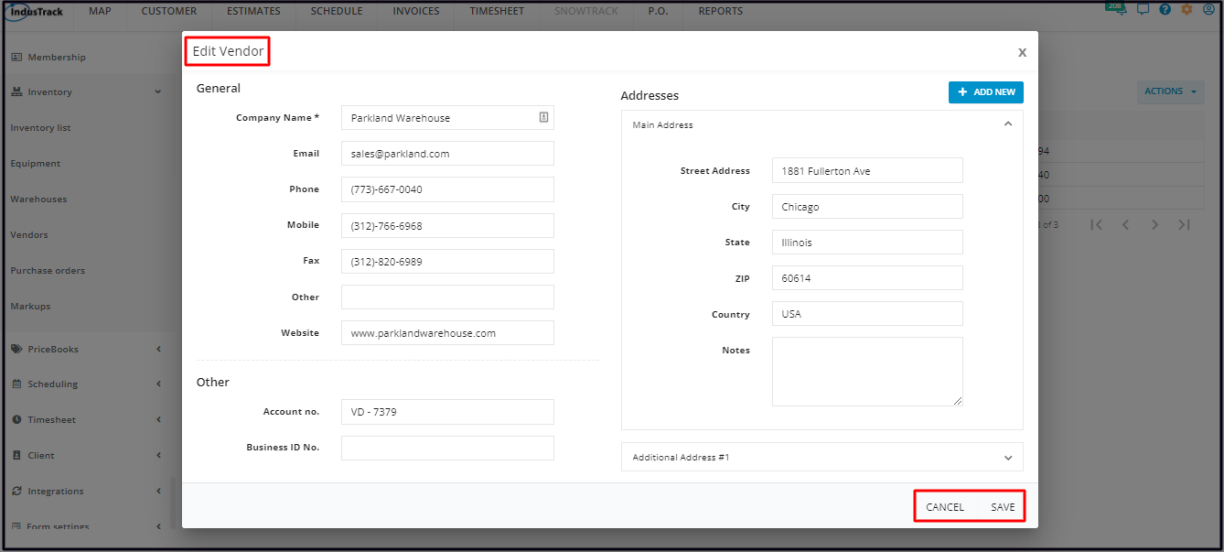
Find the vendor from the list and click on it to open the profile in edit mode.

Vendors List:

Name	Street Address	Phone
<input type="checkbox"/> Natividad Cutting Tools	1123 49th Ave	(218)-994-5394
<input type="checkbox"/> Parkland Warehouse	1881 Fullerton Ave	(773)-667-0040
<input type="checkbox"/> RS Spare Parts	400 S 4th Street Unit 1000M	(218)-994-6700

Items per page: 15 1 - 3 of 3

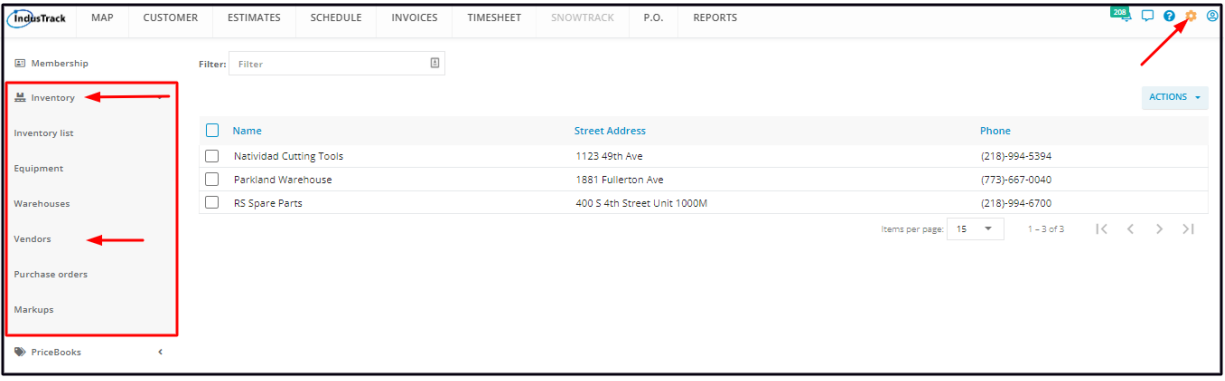
Edit the vendor details as may be needed. Once done, save the changes.



Delete a Vendor's Record

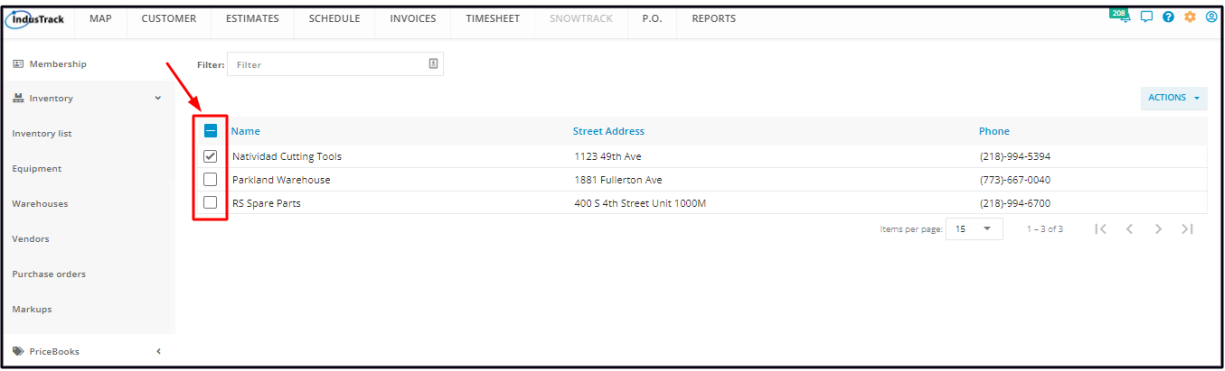
If you are no longer doing business with a supplier, you can delete their profile from the system. Deleting a vendor from the system will remove it from your IndusTrack account permanently, so exercise caution when using this function.

To remove the vendor's profile, go to **Settings > Inventory > Vendors**.

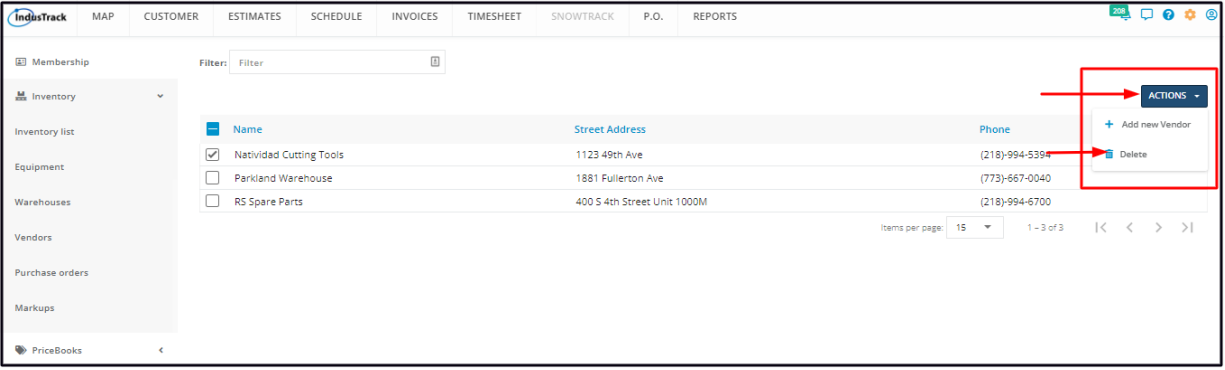


Find the Vendor name to be deleted from the list. Tick the checkbox to its left.

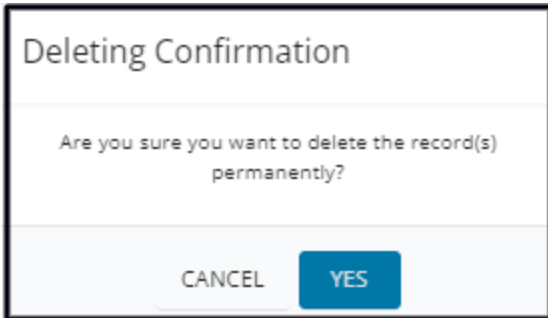
- To delete multiple vendors from the list, tick the checkboxes to the left of all. If all items will be deleted, just tick the checkbox of the Name header.



Go to the **Actions** button and select **Delete**.



A warning window will come up. Click the **Yes** button to continue with the deletion and **Cancel** to abandon the action.



The vendor will be removed from the list.

