

Add & Edit Vendors

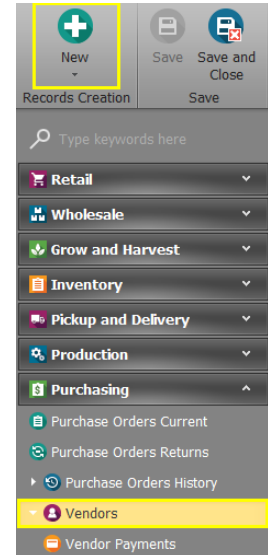
Last Modified on 08/05/2019 12:24 pm MST

Before you can purchase an Inventory Product from a Vendor, you need to add that Vendor to the KLÉR THC system. This article walks you through the steps for adding and editing Vendor information.

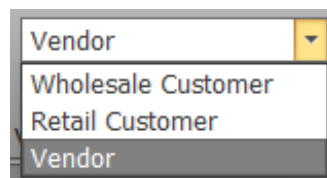
Add a Vendor

To add a Vendor, follow the steps below:

- Step 1 - While in the Purchasing module select **Vendors** in the navigation pane and click the **New** button. This will open up a new Vendor detail window.



- Step 2 - Check that Vendor is selected in the top navigation pull-down.



- Step 3 - Fill in the following Vendor information:
 - **Company** - The name of the company that will become a Vendor.
 - **DBA** - Use this field if the company is "Doing Business As" another identify.
 - **MMJ License** - The unique MMJ License number for this Vendor.
 - **MMJ Expiration** - The expiration date for the MMJ License for this Vendor.
 - **Tax ID** - Enter the Tax ID number for this Vendor, this is optional.
 - **Contact Type** - Ensure you have selected **Vendor** as your contact type.

Vendor	Company:	<input type="text"/>	MMJ License:	<input type="text"/>	Tax ID:	<input type="text" value="00-0000000"/>
	DBA:	<input type="text"/>	MMJ License Expiration:	<input type="text"/>	Contact Type:	<input type="text"/>

- Step 4 - Fill in the Contact Details for the Vendor.

- **Address 1/2** - The street address for this Vendor. The second line is for adding Suite or Unit #.
- **City/State/Zip** - The city/state/zip portions of the Vendor's address.

Contact Detail

Address 1:

Address 2:

City:

State: Zip:

Phone Number: Info: Ok to Text:

Text Capable

Date Created: Exported to QuickBooks

Sales Order History

Status	Invoice	Invoice Date	Sales Person	Total

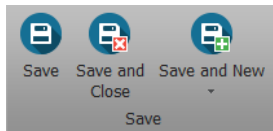
- **Phone Number** - The phone number for the Vendor. This is for the business, specific contact info will be recorded in the Order Contact Info section.
- **Info** - Use this field if there is an extension for the phone number.
- **Ok to Text / Text Capable** - Mark this box if the phone number is able to receive text messages.
- **Date Created** - This field will auto-populate with the date the Vendor was created.
- **Exported to QuickBooks** - If you have integrated QuickBooks with KLÉR THC, check this box to have this Vendor added to QuickBooks.
- **Sales Order History** - As purchases are made from this vendor, they will automatically populate in the Sales Order History field. You can easy access all invoices from this area.

- Step 5 - Fill in the Order Contact Info.

The screenshot shows a web form titled "Order Contact Info". It contains the following sections:

- Point of Contact:** A vertical label on the left. Fields include "Name:" (redacted), "Phone:" (input field), "Ext.:" (input field), "Text Phone" (checkbox), and "Email/Username:" (yellowed input field).
- Delivery Info:** A dropdown menu.
- Related Contacts:** A tab with a person icon.
- File Manager:** A tab with a folder icon, a toolbar with various icons, and a table header with columns: "Full Name", "Nic...", "Ph...", "Em...", "Ag...", "Ag...", and "Dat...".

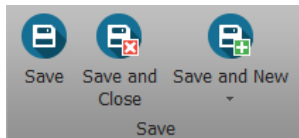
- **Name** - The name of the specific contact person for this Vendor.
 - **Phone /Ext. / Text Phone**- The phone number, extension, and texting availability for the contact person for this Vendor.
 - **Email/Username** - Email address for the Vendor or Username to login to their online ordering.
 - **Delivery Info** - Create specific delivery notes for this Vendor, such as "Delivered on Tuesdays."
 - **Related Contacts** - If there is a contact already created for a Customer related to this Vendor, you can link them together here.
 - **File Manager** - Upload any relevant documents using this tab.
- **Step 6 - Click Save or Save and Close.**



Edit a Vendor

To edit an existing Vendor, follow the steps below:

- Step 1 - From the **Purchasing** module in the Navigation pane, select the **Vendors** section and select the desired Vendor from the list that appears. This will open up that Vendor's detail window.
- Step 2 - Make your necessary edits to the relevant fields.
- Step 3 - Click **Save** or **Save and Close**.



Congrats! You've created and edited a new Vendor in KLÉR THC, so you can purchase Inventory Products from them!

