

Compeat Help

[Home](#) > [Settings](#) > [Accounting Settings](#) > [AP Settings](#) > [Create a Vendor](#)

Create a Vendor

Contents

[View Vendors](#)

[Enter Vendor Details](#)

[Vendor Header](#)

[Vendor Info](#)

[Entity Access](#)

[Notes](#)

[Miscellaneous](#)

Vendor records allow you to define and manage vendors from whom you purchase goods and services.

Before creating your first vendor, ensure the [terms of payment](#) and desired [vendor group](#) exist.

You can access vendor records by navigating to **Product Settings > Accounting > Accounts Payable > Vendors (Entity-Specific)** or **Vendors (All Entities)**.

View Vendors

When viewing vendors, you have two options: *Entity-Specific* or *All Entities*.

» **Vendors (Entity-Specific):** Displays all vendors assigned to the current entity.

» **Vendors (All Entities):** Displays all vendors, system-wide.

! Which vendor option should I choose?

Whichever option you choose has no bearing on whether the new vendor is specific to the current entity, or to all entities. You will designate entity assignment on the **Entity Access** tab of the vendor record.

As with all grids, listings, and tables, you have several options when **viewing your data**. These include search, sort, and customizing which columns display in the listing.

Vendors (All Entities)

EXPORT TO EXCEL

Search Hide Inactive Vendor Group...

+ CREATE NEW VENDOR INACTIVATE SELECTED VENDORS COLUMNS

<input type="checkbox"/>	Vendor Name	Vendor Code	Address #1	City	State	Active	Phone #	Vendor Group	Terms Code	
<input type="checkbox"/>	1000BULBS	1000BULBS				<input checked="" type="checkbox"/>		Regression Test	7 days	⌵
<input type="checkbox"/>	1209 W University Ave, LLC	1209WUNIV	1775 Hurricane Harbor Lane	Naples	FL	<input checked="" type="checkbox"/>		RENT	on receipt	⌵
<input type="checkbox"/>	4 INKJETS	4INKJETS				<input checked="" type="checkbox"/>			Net 15	⌵
<input type="checkbox"/>	7-ELEVEN	7ELEVEN	2000	austin	tx	<input checked="" type="checkbox"/>			7 days	⌵
<input type="checkbox"/>	A LOCKSMITH	ALOCKSMITH	9051 TAMiami TRAIL N	NAPLES	FL	<input checked="" type="checkbox"/>			DUE ON 20TH	⌵
<input type="checkbox"/>	A Look From Above, LLC	LOOKABOVE	PO Box 24228	New Orleans	LA	<input checked="" type="checkbox"/>	(626) 383-1412	MISCELLANEOUS	on receipt	⌵
<input type="checkbox"/>	A-Bear Refrigeration	ABEAR	5740 Heebe Street	Harahan	LA	<input checked="" type="checkbox"/>	(504) 733-3600	EQUIPMENT	Net 30	⌵
<input type="checkbox"/>	AA Lock Doc and Security	AA LOCK DOC	219 NORTHWEST 10TH STREET	OCALA	FL	<input checked="" type="checkbox"/>			None	⌵
<input type="checkbox"/>	AAA COOPER TRANSPORTATION	AAACOOPER	P.O. BOX 935003	ATLANTA	GA	<input checked="" type="checkbox"/>			None	⌵
<input type="checkbox"/>	AAA ELEVATORS, LLC	AAA ELEVATOR	2837 PAINTERS STREET	NEW ORLEANS	LA	<input checked="" type="checkbox"/>			None	⌵

1 - 10 of 917 items

» **Ready to create a new vendor?** Select *Create Vendor* at the top of the listing to launch a new record.

» **Need to edit a vendor?** Click anywhere on the vendor's row or select the arrow icon to the far-right of the vendor to view and make changes to the record.

» **Need to delete a vendor?** Once a vendor has historical transactions associated for it (purchasing, invoice, etc.), you cannot delete it. Instead, you can make the vendor inactive. This prevents users from accidentally selecting the vendor for purchase orders or invoices.

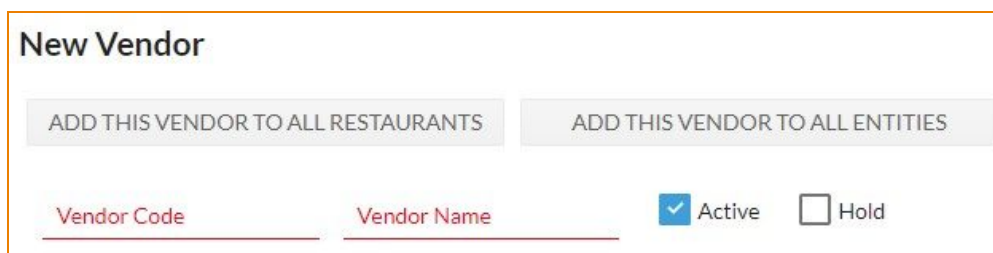
- » **Wish to filter by vendor group?** Simply select that group from the *Vendor Group* dropdown.
- » **Tired of seeing inactive vendors in the listing?** You can quickly hide inactive vendors from the listing by selecting the *Hide Inactive* checkbox.

Enter Vendor Details

A vendor record holds all necessary information for a vendor, including contact details, payment terms, and assigned entities.

Vendor Header

The vendor header holds basic information for the vendor, such as the code and name. Compeat highlights required fields in red.



New Vendor

ADD THIS VENDOR TO ALL RESTAURANTS ADD THIS VENDOR TO ALL ENTITIES

Vendor Code **Vendor Name** Active Hold

- » **Unsure about the vendor code?** Compeat uses vendor codes in place of the vendor name in some reports and inquiries, so we recommend you choose a code that clearly indicates the vendor.
- » **Make sure to indicate the vendor's status.** Use the *Active* status to tell Compeat whether you are currently purchasing from the vendor. While you can't enter new invoices for an inactive vendor, you can still pay existing ones.
- » **Is the vendor on hold?** If selected, you cannot pay invoices for the vendor unless you de-select the specific invoice in a payment batch.
- » **Wish to add this vendor to all restaurants:** Selecting the corresponding option makes the vendor available for ordering and invoicing in all restaurant entities.

- » **Wish to add this vendor to all entities:** Selecting the corresponding option makes this vendor available for ordering and invoicing in *all* entities.

Vendor Info

The *Vendor Info* tab stores all contact information for a vendor, as well as 1099 details, payment terms, and vendor group assignments. Compeat highlights required fields in red.

The screenshot shows the 'Vendor Info' tab with the following sections and fields:

- VENDOR INFO** (selected), ENTITY ACCESS, NOTES, MISCELLANEOUS
- Address**: Address 1, Address 2, City, State, Zip
- Attn / Internet**: Attn Name, Order E-mail, Payment E-mail, Web
- Phone / Fax**: Phone, Fax
- 1099**: Gets 1099, Sole Proprietor, Fed. Tax ID Type, Default Type, Miscellaneous, Default Box, Fed. Tax ID #, State Tax ID #
- Default Electronic Distributors**: Order Guides, Sending Orders, Invoice Imports
- Vendor Group / Terms**: Vendor Group, **Terms Code** (highlighted in red), Expense Acct #

- » **Is your vendor a 1099 vendor?** If so, select *Gets 1099* and complete the following fields:
 - » **Sole Proprietor:** Select this checkbox if the business is a sole proprietorship.
 - » **Proprietor Name:** If you selected *Sole Proprietor*, enter the business owner's name. This name appears in the *Recipient Name* box when you export 1099 details.
 - » **Tax ID Type:** Select the correct Tax ID (TIN) from the drop-down. Options include Employer Identification Number (EIN) and Social Security Number (SSN).
 - » **Default Type:** Select the type of 1099 the vendor receives. You can override this on individual invoices in AP Invoices.

- » **Default Box:** Select the box type that best fits the vendor and their *Default Type*.
- » **Fed Tax ID #:** Enter the taxpayer identification number (TIN) for the vendor. Compeat validates the ID against the required specifications when saving.
- » **State Tax ID #:** Enter the vendor's state tax ID, if applicable. Vendors that operate within states with a state withholding should provide this ID to you.
- » **Do you email orders and payments to the vendor?** You can enter default order and payment email addresses in the corresponding fields of the *Attn/Internet* section. You can define entity-specific address on the **Entity Access** tab, which will override the default addresses entered here.
- » **Don't forget to set your payment terms!** Compeat requires that you select **payment terms** for the vendor before you can save the record. Payment terms determine invoice due dates and any necessary discounts.
- » **Have a default expense account?** Enter it in the corresponding field. When processing items for this vendor, the GL detail will default to this accounting unless you use inventory line item detail. In that case, Compeat uses the inventory item's GL account number.

Default Electronic Distributors

Please do not select or make changes to any of the drop-downs in the Default Electronic Distributors section of the vendor record. Compeat's Vendor Management Solutions (VMS) team sets and manages these settings depending on any interfaces you have with the vendor.

Entity Access

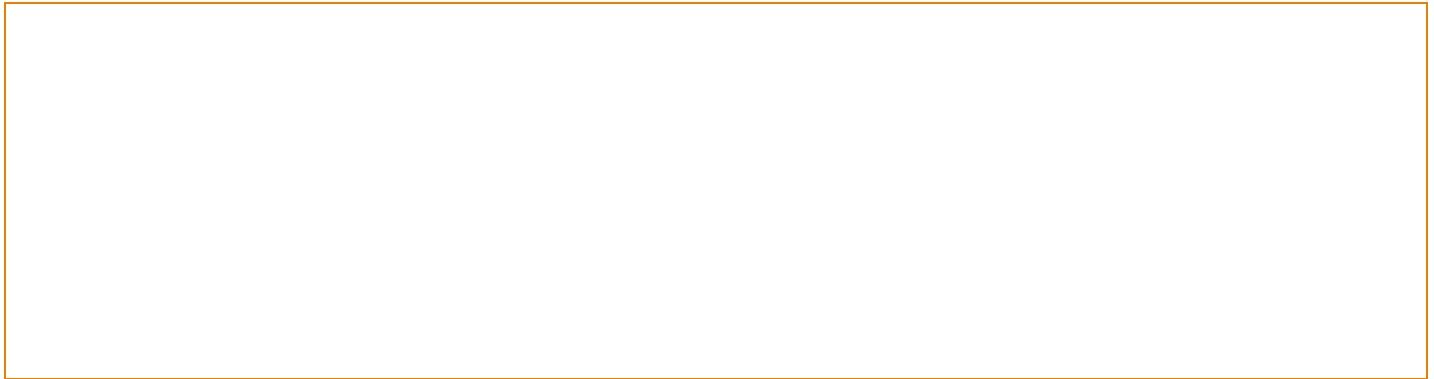
The *Entity Access* tab displays those entities that use the specified vendor. On this tab, you can add, edit, or remove entities from the vendor record.

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- » **Need to add an entity?** Select *Add Entity* at the drop of the listing to enter entity details:
 - » **Account #:** Specify the account number the vendor uses for this entity. If specified, this number prints on the stub of each check produced for this vendor.
 - » **EFT:** Select this checkbox if you do not intend to print checks for this vendor via **Payment Processing Batches**.
 - » **Order Email:** Enter the entity-specific email address used for purchase orders. This overrides the default email entered on the Vendor Info tab.
 - » **Payment Email:** Enter the entity-specific email address for ACH payment summaries. This overrides the default email entered on the Vendor Info tab.
 - » **Quote Invoices:** Select this checkbox to ensure Compeat notes the last posted AP invoice price on the **Vendors** tab of the inventory item record, and use this price when creating purchase orders for all non-bid items for the respective entity and vendor. This setting is entity and vendor-specific.
 - » **Invoice Imports:** If you have an entity-specific invoice imports interface, select it from the listing. This overrides the default invoice imports interface defined on the **Vendors** tab.
 - » **Reconcile Imports:** Select this checkbox to enable the reconciliation feature for imported invoices.
 - » **Delivers On:** Select the checkbox that corresponds with the day(s) of the week that the vendor makes deliveries. When you create new orders for this vendor, the due date defaults to the first day of the week that you marked for delivery.
 - » **Need to edit a listed entity?** Select the three-dot icon to the far-right of the entity, then select *Edit Entity* from the options provided.

» **Need to remove a listed entity?** Select the three-dot icon to the far-right of the entity, then select *Remove Entity from Vendor* from the options provided.

Notes

The *Notes* tab allows you to enter any notes you wish to associate with this vendor. Notes also appear on the Vendor Listing report for this vendor.



Miscellaneous

The *Miscellaneous* tab contains additional settings and notes for the vendor as they pertain to orders, vouchers, and ACH configuration.

- » **Want items to prefill when creating new orders for the vendor?** Select this option to have orders to prefill with items previously ordered for the vendor.
- » **Want to enforce minimum amounts and/or quantities when ordering from the vendor?** Enter the desired values in each field. Select *Enforce* if you wish to prevent a user from submitting the order if these values are not met. If left unselected, Compeat displays a warning and will log a users bypassing action in the Audit Log.
- » **Want to limit changes to item codes when posting invoices?** Selecting *Do not update item codes when posting invoices* prevents Compeat from updating the item code on the Vendor Info tab of the inventory item record if changes to the vendor code exist on imported invoices.
- » **Submitting electronic payments to the vendor?** Ensure you enter the correct ACH and banking information for the vendor.
 - » **External Vendor Code:** Displays any alternative vendor code used for third-party systems. This is useful when exporting to those systems.
 - » **Entity this vendor will represent:** This field is used for inter-store transfers. If you intend to transfer inventory between restaurants, you must set up *both* restaurants as

vendors by entering a vendor name and code, terms code, and select the appropriate entity from this drop-down.

- » **Enable ACH:** Specifies whether you use ACH electronic payments for AP items. You must configure ACH in the entity's Other Definitions record.
- » **Bank Account #:** Indicates the vendor bank account number to which electronic payments should be made.
- » **ABA Routing #:** Indicates the routing number for the bank account entered. Select *Check ABA* to have Compeat check whether the number is a valid format.

Updated on March 9, 2021

Tagged: 1099 vendor inactive vendor

