Vendors

Overview

A **purchase order** (PO) is a commercial document and first official offer issued by a buyer to a seller, indicating types, quantities, and agreed prices for products or services. It is used to control the **purchasing** of products and services from external suppliers. There are several ways of generating a Purchase Order in Order Time.

Add a New Vendor

Before a PO can be generated, a Vendor needs to be established in your system to set general information and PO parameters. When a Vendor is set up, the following information should be entered:

- Vendor general information (i.e. Address, Primary Contacts, Notes)
- Establish the type of vendor. (i.e. Consultant, Service Provider, Re-seller, Supplier)
- Set accounting defaults for the vendor.
- Establish a credit limit for this Vendor, Tax ID, and Name to be used on the checks.

To create a Vendor, open the side menu and click on the Create New drop-down menu. Select Vendor from the menu. On the Vendor screen, enter the following information:

- Add the Name and Company.
- If needed, set a Proxy* for the Vendor.
- Vendor's address and contact information.
- Under the Defaults tab, set accounting preferences.
- Add notes to identify vendor's special needs/requests.
- Set Customs setting for the Vendor. (See Custom Fields article for more details.)
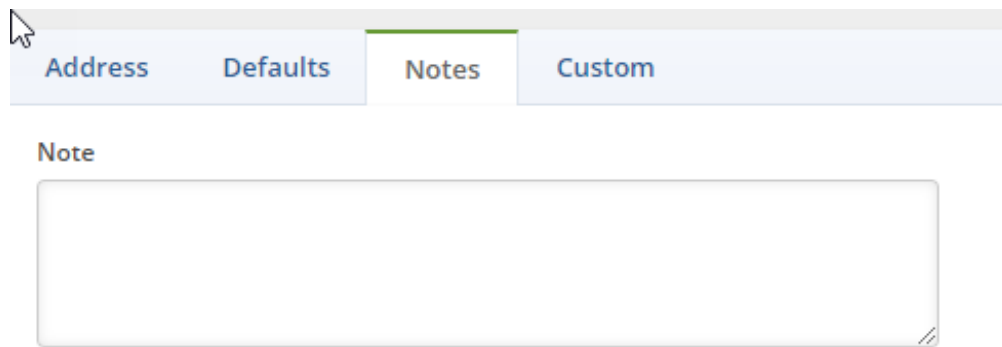
> 💡 The system allows you to link a Purchase Order to existing sales orders, generate special orders, drop ship items directly to your customers and keep track of drop shipments.

On the Default Tab you can enter the Vendor's Payment information:

- Set the type of Vendor (i.e. Consultant, Service Provider, Supplier, Supplies, Re-seller)
- The Terms (i.e. Consignment, Due on Receipt, Partial Payment etc.)
- Currency
- Name on the Check
- Credit Limit
- Tax ID
- Set if the Vendor is eligible for 1099

Under the Notes tab, write specific information about the Vendor that you would like to view each time the Vendor is used.

Address	Defaults	Notes	Custom

Note

Click **Save** when done.

*Proxy set up

🔔 *For customers, vendors and items, OrderTime allows you to use 'Proxies' (aka as Aliases).   A proxy is a record in QuickBooks that will be used by OrderTime to record a transaction. For example, you have a website but you do not want to create every customer in QuickBooks. You first set up a customer called 'Web Customer' which is in both QuickBooks and Order Time. When you create a new customer in OrderTime you select 'Web Customer' in the Proxy drop down. When an invoice is generated in QuickBooks you will not see the name of the customer but rather 'Web Customer'. The same approach can be taken with items and vendors.