

Add Vendor Documents

Last Modified on 03/04/2024 4:36 pm EST

To add a Vendor Document, navigate to Accounts Payable > Vendors.

In the Vendor list, locate the desired vendor, and then click on the hyperlink of the vendor in the Vendor # column.

Vendor # ↑	Name	Account #	Open Balance	Phone 1
1000	Perennial Software	1000	\$390.00	(440) 247-5602
1001	ADI		\$4,070.00	(888) 245-3653
1002	DCS	1456123	\$260.00	(905) 760-3000
1003	Bold Group Software	0123456789	\$0.00	
1004	Joseph & Joseph Attorneys	11222	\$0.00	
1005	Acme Alarm Services		\$0.00	
1234	Bosch		\$0.00	4405490304
1235	A1 Testing Labs		\$0.00	4405490304
1236	Ace Hardware		\$3,753.50	(888) 555-2222
2500	Bosch Security Systems	32558	\$0.00	
2501	Tri-Ed	FES10225	\$0.00	
2503	DMP	102245	\$0.00	2135551010
2504	Phillips Electric	123	\$0.00	(123) 455-1233

On the Vendor page, click on the Documents tab, and then click the **Add Document** button.

Tri-ed - 2501

[Edit](#)
[Tasks](#)
[History](#)

Open Receipts \$0.00 Open Bills \$0.00 Open Credits \$0.00 Open Balance \$0.00

Vendor Aging

Address PO Box 3255 Los Angeles, CA 90025
 Phone
 Email
 1099 Eligible? **No**
 Remit To Address -.
 Customer # FES10225
 Term Net 45

Purchase Orders 1 Receipts 0 Bills 0 Payments 0 Credits 0 Checks 0 Parts 1 Notes 0 Docs 0 Part Ledger 0

+ Add Document Show deleted documents

File Name	Type	Security	Modified Date	
Vendor Agreement - Rev01.pdf	Other	Customer	Apr 24, 2022, 8:31:49 PM	Replace Download

0 - 0 of 0 items [Refresh](#)

The Add Document form is displayed. There are two methods for uploading a document:

1. Click the Select Files button: the Windows File Explorer opens for you to select one or multiple documents from the same folder.
2. With the Windows file explorer open to the location of the document(s), drag and drop the file(s) into the gray box to the right of the Select Files button. You may select multiple documents at the same time.

Select a **Document Type** and an **Access Level**. When finished, click the **Save** button.

Add Document



Select file •

Select files...

Drop files here to select

*Max file
size 150MB

Document Type

Access Level

Save

Cancel