

# Add Vendor Documents

Last Modified on 03/28/2025 4:58 pm EDT

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.

**Vendors**

[+ New Vendor](#) [Export to Excel](#) [Custom Grid Layout](#)

Drag a column header and drop it here to group by that column

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

1 - 13 of 13 items [Refresh](#)

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

1.2  
1  
0.8  
0.6  
0.4  
0.2  
0

— Current — 1-30 Days — 31-60 Days — 61-90 Days — 91+

Address PO Box 3255 Los Angeles, CA 90025  
Phone  
Email  
1099 Eligible? X 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 MD Show deleted documents

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

0 - 0 of 0 items Refresh

The Add Document form opens. 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