

Vendors

Last Modified on 11/07/2016 2:31 pm EST

Accessing Vendors Page

To access a list of your vendors at the dealer level, Click "Vendors" in the upper left corner of the page.

The screenshot shows the top navigation bar of the ABC Company system. The 'Vendors' menu item is circled in purple. Other menu items include Bills, Payments, Purchase Orders, GL, Reports, Setup, and Accounting. The top right corner contains user information for 'Barbie', a 'Support Center' link, an 'AlarmBill' icon, and a 'Logout' button. A search bar for vendors is also visible.

The dealer-level vendor page will appear

The screenshot shows the 'Vendors' page interface. It includes a header with 'Add Vendor' and 'Custom Grid Layouts' buttons. Below the header are 'Available Columns' and 'Export to Excel' options. A table displays vendor data with columns for Name, Account Number, and Open Balance.

Name ^	Account Number	Open Balance
Barbara Savani - 10002	432432432	\$3,597.00
Joes Panels - 10000	1234	\$20.00

New Vendor

To add a new vendor click "Add Vendor" in the upper right corner of the page ([hyperlink to new vendor](#))

This screenshot is identical to the previous one, but the 'Add Vendor' button in the top right corner is circled in purple to highlight it.

Vendor Details Page

Click the blue "Name" hyperlink on the left side of the page to open the vendor details page. This page will give you detailed information about this vendor (hyperlink to vendor details page):

Customers + New Customer

Customers Sites Systems

Available Columns Custom Grid Layouts

Search Customers Master Customers Prospects Terminated Customers

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

Cust #	Name	Address	City	State	Balance Due	Total RMR
5555	A & N Construction, Inc.	ATTN: Tony Chepelev...	Portland	OR	\$990.91	\$3.00
1063	Barker, Henry	55 Main Street	link	AR	\$5,371.29	\$0.00

Add/Remove Column Headers

To add or remove column headers click the "Available Columns" button. A small sorting box will appear beneath the column headings. Scroll to the "Columns" field with your mouse. You will see a list of column headings you can sort by. Check the boxes to the left the column heading(s) you would like to add and uncheck boxes to remove headings.

ABC Company Logout

Vendors Bills Payments Purchase Orders GL Reports Setup Accounting

Vendors Vendor Search: vend

Available Columns

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

Name	Account Number	Balance Due
Barbara Savani - 10002		\$3,597.00
Joes Panels - 10000		\$20.00
Tammy Most - 10001		\$1,750.00

Sort Ascending
Sort Descending
Columns
Filter

Sorting

Click the arrow next to a column heading you want to sort by. Click "Ascending" or "Descending" to sort customers by that category in ascending or descending order. Scroll your mouse over "Filter" and fill out fields to narrow results in that category.

Vendors

Add Vendor

Available Columns

Custom Grid Layouts

Export to Excel

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

Name ^	Account Number	Open Balance
Barbara Savani - 10002		\$97.00
Joes Panels - 10000		\$20.00
Tammy Most - 10001		\$750.00

Sort Ascending
Sort Descending
Columns
Filter

Show items with value that:
Is equal to
And
Is equal to
Filter Clear

Group By Column Heading

If you wish to group vendors by column header(s), click and drag the column header you wish to sort by to the row above

Vendors

Add Vendor

Available Columns

Custom Grid Layouts

Export to Excel

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

+ State

Name ^	Account Number	Open Balance	City	State
Barbara Savani - 10002	432432432	\$3,597.00	Little Rock	AR
Joes Panels - 10000	1234	\$20.00	Arco	OH
Tammy Most - 10001		\$1,750.00	Bainbridge	OH

1 - 3 of 3 items

Vendors will be grouped according to the header(s) you have selected

Export to Excel					
- State x - City x					
Name ^	Account Number	Open Balance	City	State	
State: AR					
City: Little Rock					
Barbara Savani - 10002	432432432	\$3,597.00	Little Rock	AR	
State: OH					
City: Arco					
Joel Panels - 10000	1234	\$20.00	Arco	OH	
City: Bainbridge					
Tammy Most - 10001		\$1,750.00	Bainbridge	OH	

Custom Grid Layout

If you would like to save a customized sorting layout click "Custom Grid Layouts". Type in what you would like to name the layout and click "Save Global Layout". The layout will save in its current format. To reopen a saved custom layout, select an existing layout from the dropdown box and click "Apply Global Layout".

ABC Comp

[mBill](#)
[Logout](#)

[Vendors](#)
[Bills](#)
[Payments](#)

Vendors

Available Columns

Export to Excel

- State x - City x

Name ^	Account Number	Open Balance	City	State	
State: AR					
City: Little Rock					
Barbara Savani - 10002	432432432	\$3,597.00	Little Rock	AR	

Global Grid Layouts

×

Show Global Layouts

Export to Excel

To export your vendor list in its current layout, click "Export to Excel".

Vendor

Available Columns

Custom Grid Layouts

Export to Excel

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

Name ^	Account Number	Open Balance
Barbara Savani - 10002	432432432	\$3,597.00

The vendor list will download as an Excel file to your documents.