

Company

How Do I Add a Trading Partner?

Where is New Trading Partner Located?

- **Company > Start a Task > New Trading Partner**

About New Trading Partner

Add a new Trading Partner and select a category for this business partner using the New Trading Partner function. Use New Trading Partner to add a new grower, customer, transporter, brokerage, supplier, or misc to Envio. Customize the partner's information so that forms will autofill.

How to Make a New Trading Partner

1. **Company > Start a Task > New Trading Partner**

Company



3. Enter an **Account Code**. The code must be 10 alphanumeric characters or less.
4. If accounting software is already connected, you may add the **Customer** and **Payable Account ID** from the drop down list. If accounting is not connected these fields will be gray.
5. Fill in any other optional fields.
6. The box beside **Is Active** must be checked to see this trading partner in the Envio system.
7. Choose the Relationships this trading partner has with your company
 - Reference the Topic [Trading Partner Definitions](#) for assistance deciding which relationships apply.
8. For each checkbox you select, a tab will appear with the same title.
9. Save your changes, then click the **Addresses** tab.

Addresses

11. Two blue address lines appear. Click in the **Address Line 1** field and delete **<New Address>**. Type in the address for this trading partner.
12. Continue to type in Address Line 2 (if needed), City, and Zip Code. Select the correct State and Country.
13. Once the address is entered, select if this is the **Billing** address, **Shipping** address, or both.
14. If another address is required, repeat steps 10 through 13.
 - There is no restriction to the number of addresses you may have in a trading partner record, but only one may be selected for billing.
15. **Save** your work if you wish to continue on to customize other tabs.
16. Enter the Trading Partner's Company name into the required yellow field.
17. Click **New** to add an address.
18. Click **Is Active** checkbox is selected for the partner to be active.
19. **Save and Close** if you are finished.

Troubleshooting & Tips

- Use proper capitalization and standard formatting. These addresses will populate all documents exactly as they are recorded in the trading partner record.

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