

Setting Up

- [Trading Partner](#)
- [Contacts / Addresses](#)

Trading Partner

You can create your Trading Partner by clicking **Trading Partner** > **New Trading Partner** from the menu areas.

The screenshot shows the 'New trading partner (customer, supplier)' form. The form is divided into two main sections: 'Customer' and 'Supplier'. The 'Customer' section includes fields for 'Trading partner name' (mandatory, blue), 'Alias name (short / common name)' (non-mandatory, black), 'Customer code' (mandatory, blue), and 'Status' (mandatory, blue). The 'Supplier' section includes fields for 'Supplier code' (mandatory, blue), 'Address' (mandatory, blue), 'Postcode' (mandatory, blue), 'City' (mandatory, blue), 'Country' (mandatory, blue), 'State/Province' (mandatory, blue), 'E-mail' (mandatory, blue), 'Web' (mandatory, blue), 'Phone' (mandatory, blue), 'Fax' (mandatory, blue), 'Registration Number' (mandatory, blue), 'Sales tax is used' (mandatory, blue), 'Trading partner type (supplier)' (mandatory, blue), 'Assigned to sales representative' (mandatory, blue), 'Customers tags/categories' (mandatory, blue), and 'Currency' (mandatory, blue). The form also includes a 'Check' button for the 'Sales tax ID' field. The sidebar on the left shows the navigation menu with 'Trading partner' selected. The top bar shows the user 'Dwight'.

Once you have filled in the screen with the data you wish to store press Create Trading Partner at the bottom of the screen to store the record.

Note mandatory fields are coloured blue and are bold (for example **Trading Partner Name**). Non-mandatory fields are black (for example Postcode).

Contacts / Addresses

You can create individual contacts / addresses by clicking **Trading Partner > New Contact/Address** from the menu areas

The screenshot shows the 'Create contact/address' form in the Agri-ERP system. The form is divided into several sections: 'Name / Label', 'Trading partner', 'Address', 'Postcode / City', 'Country', 'State/Province', 'Work Phone', 'Mobile', 'Email', 'Instant messaging', 'Visibility', 'Tags/categories', 'Division', 'Xero contact', 'Delivery address', and 'Personal data'. A red arrow points to the 'Trading partner' dropdown menu, which is currently set to 'Great Britain (GB)'. The 'Email' field has a note: 'Email (Note:- Add multiple emails separated by comma and no spaces)'. The 'Personal data' section is at the bottom. The form has 'Add' and 'Cancel' buttons at the bottom right. The left sidebar contains a menu with 'Trading partner' and 'Contacts/Addresses' sections. The top navigation bar includes 'Home', 'Trading Partners', 'Products', 'Commercial', 'Billing / Payment', 'Bank/Cash', 'Accountancy', 'Tools', 'DocEdit', and 'Quick shipment'.

Agri-ERP (c4f5dba 31072024) 7.0.0

These could be individuals at the Trading Partner, or different braches of the Trading Partner.

You can associate it with the appropriate Trading Partner from the drop down indicated in the screen above