

Trading Partner

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

The screenshot shows a web-based form titled "New trading partner (customer, supplier)". The form is divided into several sections with labels in blue and bold text, indicating mandatory fields. The fields include:

- Trading partner name**: A text input field.
- Alias name (short / common name)**: A text input field.
- Customer**: A dropdown menu.
- Supplier**: A dropdown menu.
- Status**: A dropdown menu with "Open" selected.
- Address**: A large text input field.
- Postcode**: A text input field.
- City**: A text input field.
- Country**: A dropdown menu with "Great Britain (GB)" selected.
- State/Province**: A dropdown menu.
- E-mail**: A text input field with a note: "(Note: - Add multiple emails separated by comma and no spaces)".
- Web**: A text input field.
- Phone**: A text input field.
- Fax**: A text input field.
- Registration Number**: A text input field.
- Sales tax is used**: A dropdown menu with "Yes" selected.
- Sales tax ID**: A text input field with a "Check" button.
- Trading partner type (supplier)**: A dropdown menu.
- Assigned to sales representative**: A dropdown menu with "Dwight" selected.
- Customers tags/categories**: A text input field.
- Currency**: A dropdown menu with "GB Pounds ..." selected.

The left sidebar contains a navigation menu with categories like "Trading partner", "Contacts/Addresses", "Customers tags/categories", and "Suppliers tags/categories". The top navigation bar includes "Home", "Trading Partners", "Products", "Commercial", "Billing | Payment", "Bank/Cash", "Accountancy", "Tools", "DocEdit", and "Quick shipment".

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).

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