

## How to Create a New Business Partner

**1<sup>st</sup> Step:** Fill out Primary Information and define type of Business Partner and assign BP code.

The screenshot shows the 'Business Partner Master Data' form. Numbered callouts point to the following fields:

- 1:** BP Code dropdown menu.
- 2:** Business Name (or DBA) text field.
- 3:** Legal Name text field.
- 4:** Group dropdown menu (currently set to 'Administrative').
- 5:** Currency dropdown menu (currently set to 'US Dollar').
- 6:** Federal Tax ID text field.
- 7:** Owner text field.

The form includes tabs for General, Contact Persons, Addresses, Payment Terms, Payment Run, Accounting, Properties, Remarks, and Attachments. The General tab is active, showing fields for Tel 1, Tel 2, Mobile Phone, Fax, E-Mail, Web Site, Shipping Type, Password, Factoring Indicator, BP Project, Customer Type, and Business Partner Type. There are also sections for Hours of Operation, Delivery Notes, and a status section with radio buttons for Active, Inactive, and Advanced. At the bottom, there are 'Add' and 'Cancel' buttons, and a 'You Can Also' dropdown menu.

- 1) Type of BP:** Choose either Customer or Vendor. Lead is not in use at the moment.
- 2) BP Code:** Assign a BP Code based on the last Customer or Vendor created. Customer codes start with C and Vendor codes start with V. Search for last code used per type and add 1 more #.
- 3) Business Name:** Business name the company is known for or doing Business as (advertised as).
- 4) Legal Name (optional):** Fill out only if the Business name (dBA) is different than its legal name (registered at Sunbiz.org or Sales Tax Name).
- 5) Group:** Choose either Administrative, Central Florida, East Coast, Exports, Web Customer or West Coast. Administrative is used for special use by sales manager only.
- 6) Federal Tax ID (optional):** EIN (Employer Identification Number) located in W-9 Form
- 7) Owner:** leave blank