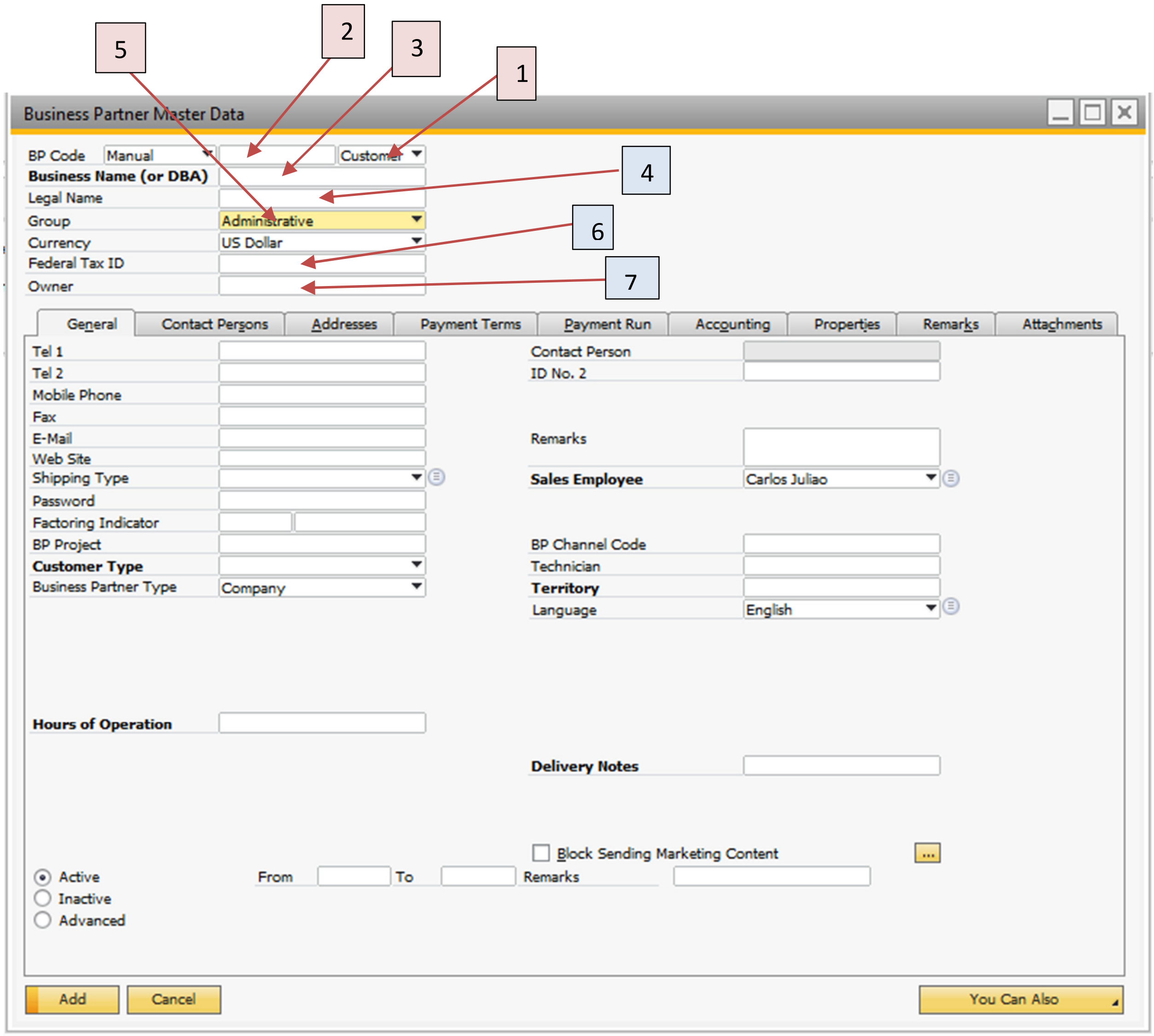
How to Create a New Business Partner

1st Step: Fill out Primary Information and define type of Business Partner and assign BP code.



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