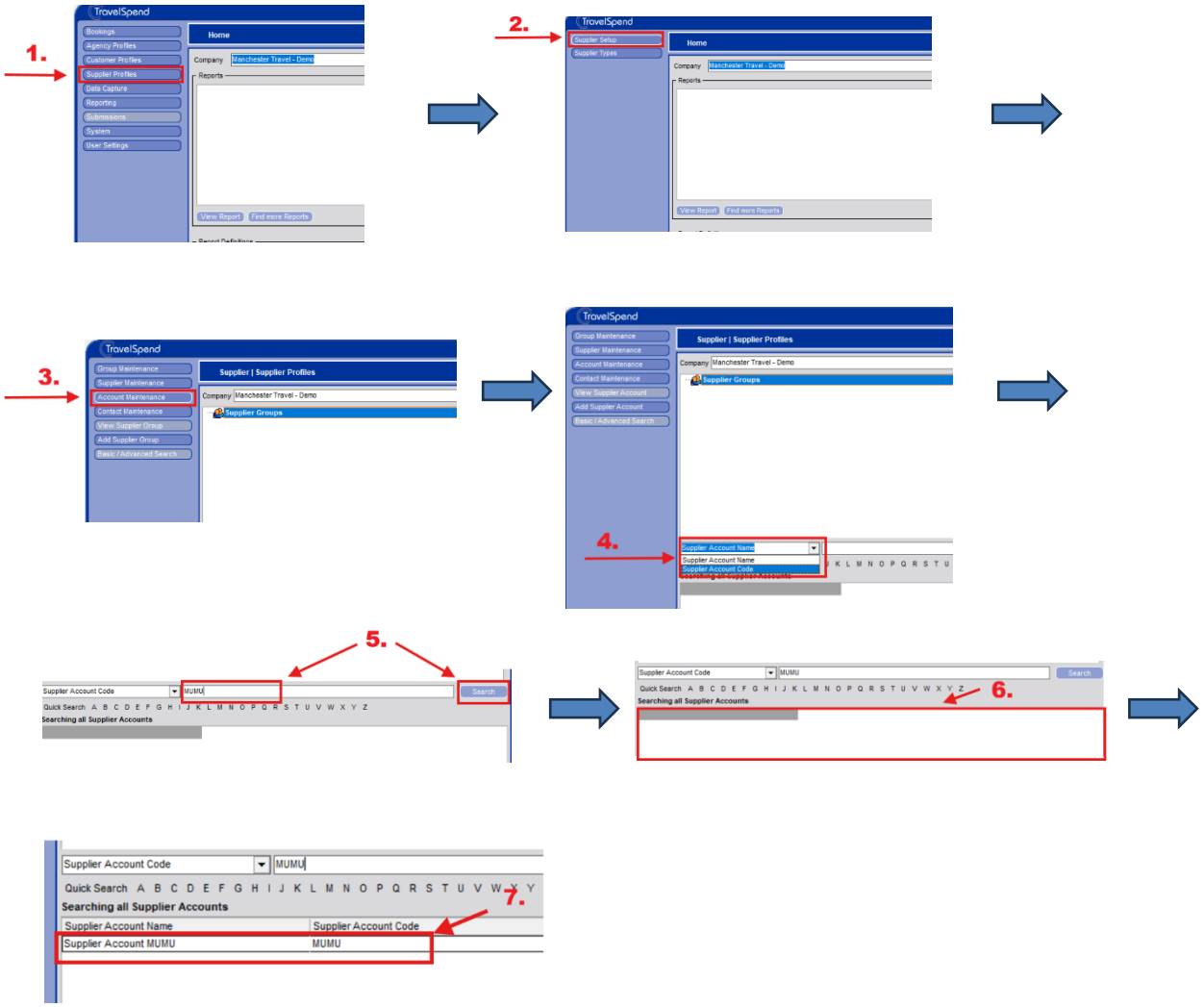
Supplier Setup

This document will lead you step by step through setting up a new Supplier in the TravelSpend Database. The document will cover setting up Suppliers that have already had booking data imported into TravelSpend as well as those that have not yet been seen by the database.

From the TravelSpend Client Home page:

1. Click on **Supplier Profiles**
2. Click on **Supplier Setup**
3. Click on **Account Maintenance**
4. Change the Search Criteria to Supplier Account Code
5. Enter the Account code to be created on the database into the Search function box and click on **Search**
6. If no data is returned, follow the steps in Section A
7. If data is returned, follow the steps in Section B

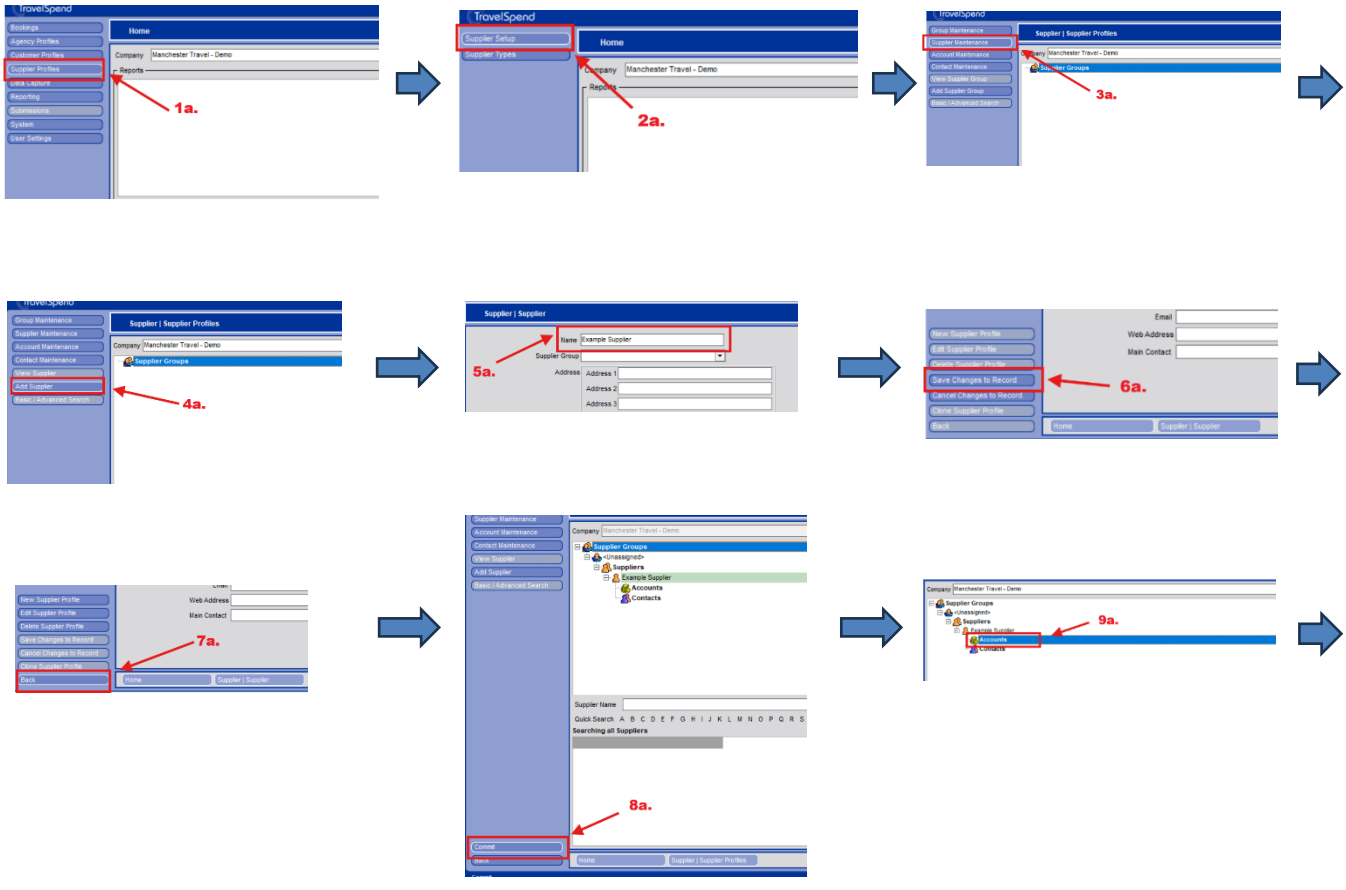


support@TravelSpend.com – 01932 598800

Section A – No Data returned on the initial search

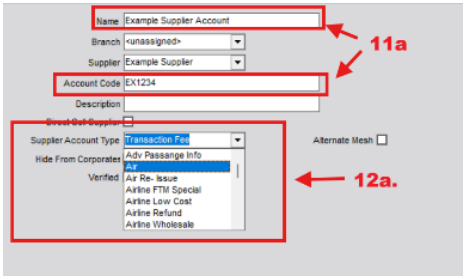
1. Click on **Supplier Maintenance**
2. Click on **Supplier Set Up**
3. Click on **Supplier Maintenance**
4. Click on **Add Supplier**
5. Enter Supplier Name in the 'Name' Field
6. Click on **Save Changes to Record**
7. Click on **Back**
8. Click on **Commit**
9. Click on the Account line under the newly created Supplier
10. Click on **Add Supplier Account**
11. Enter the **Supplier Account Name** and **Account Code**
12. Use the Drop-down function to select the **Supplier Account Type**
13. Fill in the Supplier Type Specific additional information required (Appendix 1)
14. Click on Save Changes to Record
15. Click on Back
16. Click on Commit

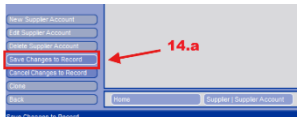
If you need to add more than one Account to a Supplier, repeat steps 9 -16



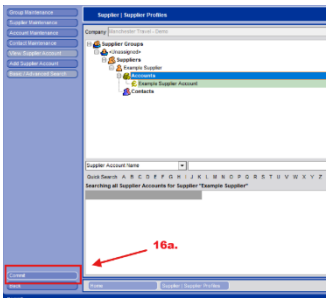
support@TravelSpend.com – 01932 598800







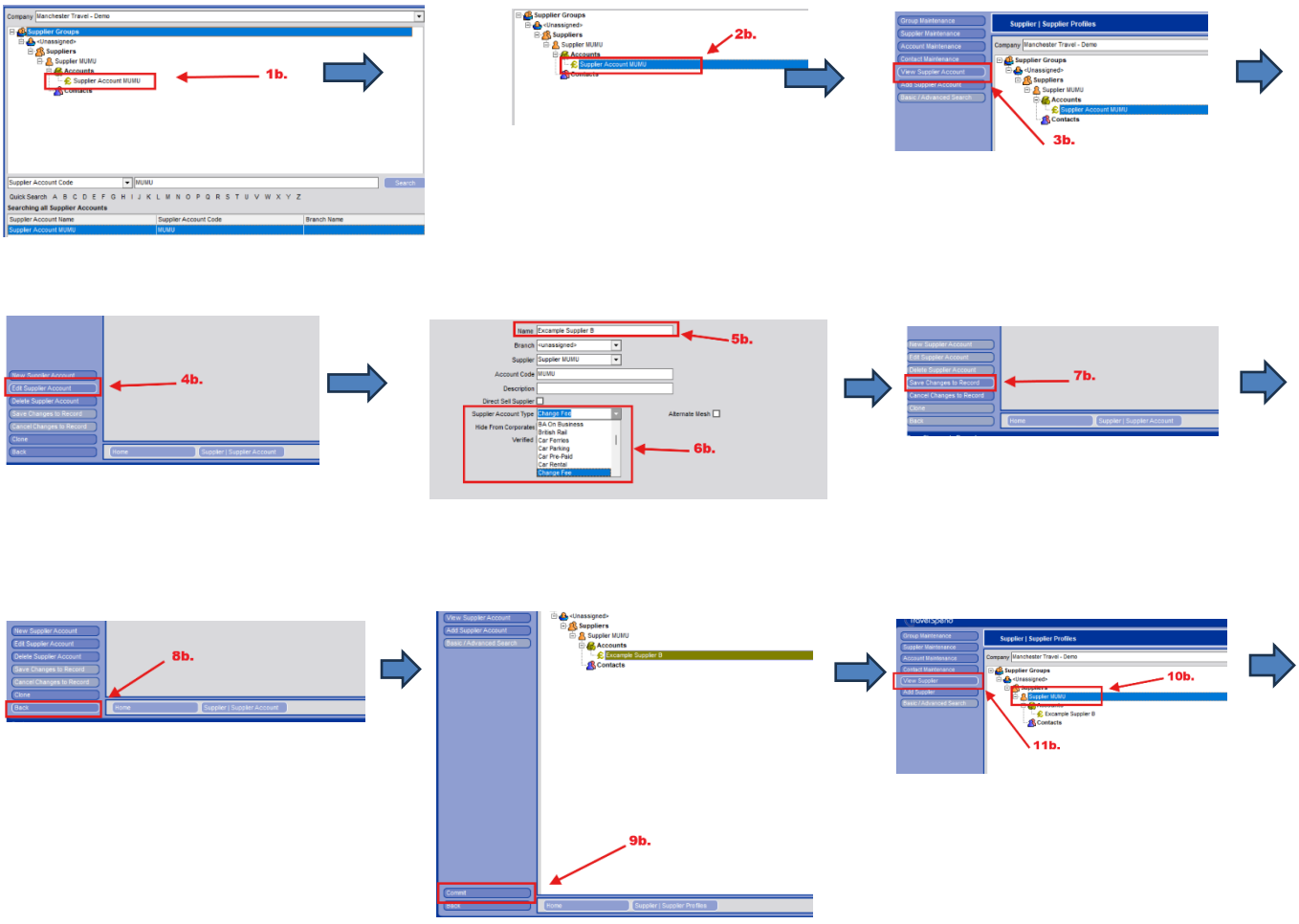




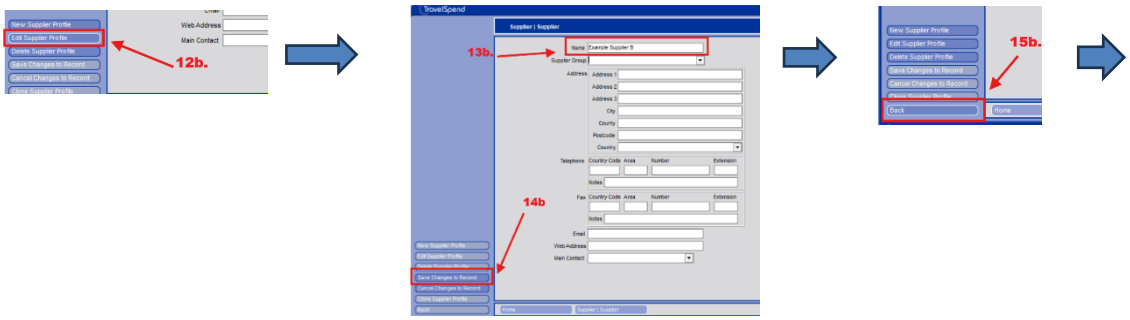
support@TravelSpend.com – 01932 598800

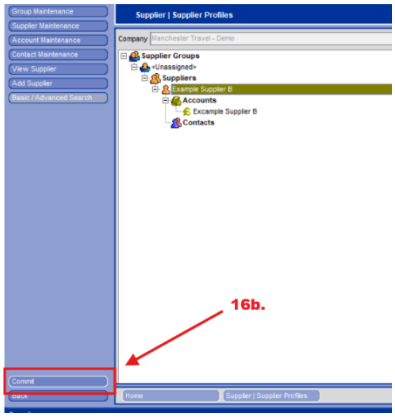
Section B - Data returned on the initial search

1. Double click data returned in the search area so that 'moves' to the active (top) section
2. Click on the Account that needs renaming, so that the Search Area disappears
3. Click on **View Supplier Account**
4. Click on **Edit Supplier Account**
5. Change the name of the Supplier Account to be the required Name
6. Use the drop-down function to select the **Supplier Account Type**
7. Click on **Save**
8. Click on **Back**
9. Click on **Commit**
10. Click on the Supplier Name that needs amending
11. Click on **View Supplier**
12. Click on **Edit Supplier**
13. Change the name of the Supplier to the required name
14. Click on **Save**
15. Click on **Back**
16. Click on **Commit**



support@TravelSpend.com – 01932 598800


12b.
13b.
14b
15b.

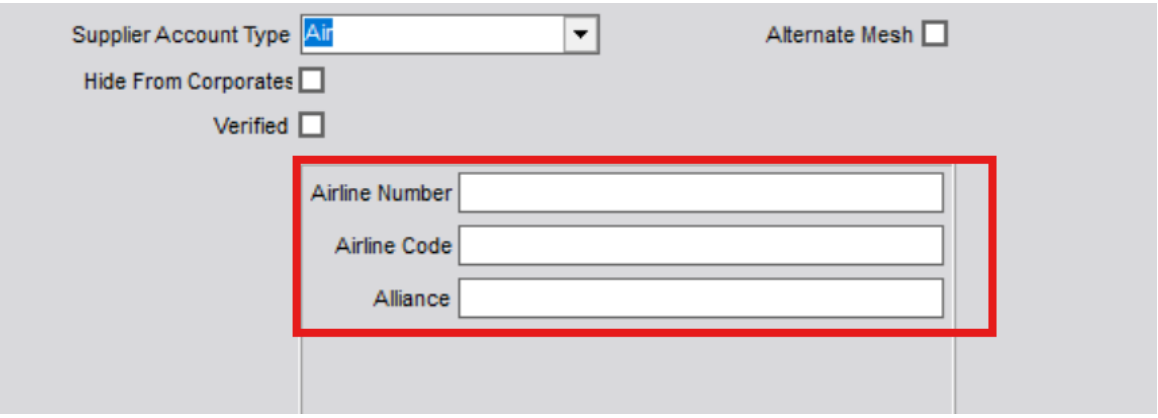

Supplier | Supplier Profiles
16b.

Appendix 1 – Supplier Type Additional Detail

So that some items import correctly into TravelSpend, some additional information is required against the Supplier in the database. When you apply the Supplier Account Type, using the drop down, you'll see that Air, Rail and Hotel Items require the additional information.

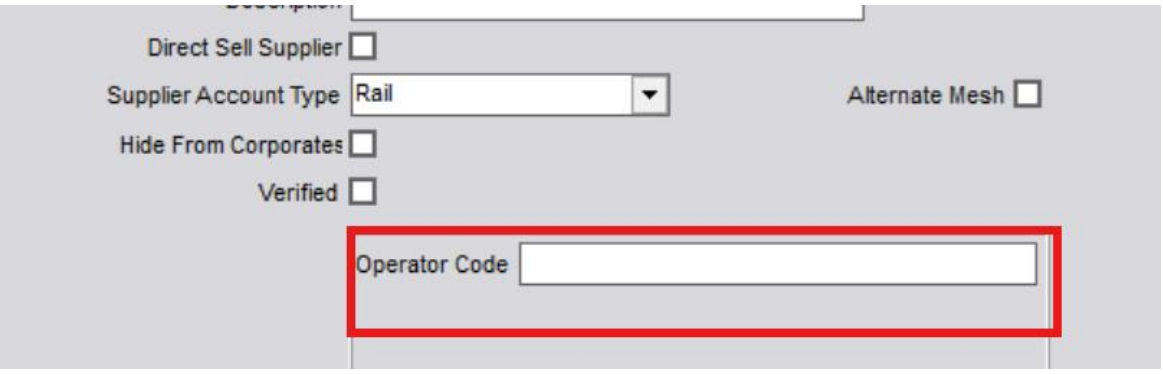
Air Suppliers:

Air Suppliers must have an 'Airline Code', and if applicable, and Airline Number. The 'Airline Code' is the two-character code normally used for the supplier code.



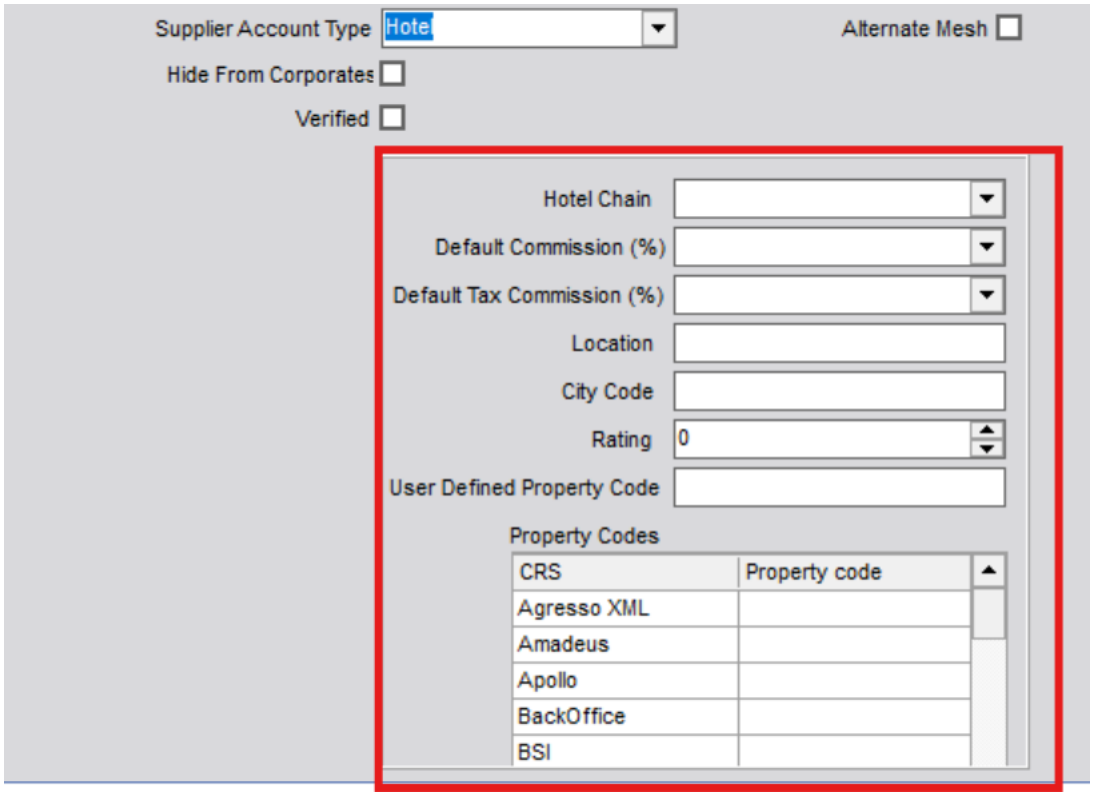
Rail Suppliers:

Rail Suppliers must have the Operator Code added.



Hotel Suppliers:

Hotels will need to be associated to a Hotel Chain, using the drop down available. And the three-letter city code against the Location and City Code. All these fields are needed for the TravelSpend Dashboards and reports.



support@TravelSpend.com – 01932 598800