Export your vendor list from Acumatica

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Pull a supplier report and 12-month payment history from Acumatica to bring your vendors into Invicepay.

These steps pull a supplier report and payment history from Acumatica so you can bring your vendors into Invicepay.

Supplier report with detailed information

1. Go to the Finance tab, select Accounts Payable, and look for reports or inquiries related to vendors.
2. If a pre-built report such as Vendor Details or Supplier Information exists, use it. Otherwise, create a custom report.
3. To create a custom report, use the Generic Inquiry designer under System Management. Select the Vendor (or Supplier) table and specify the fields you need: Vendor Name, Address, Phone Number, Email, Contact Name, Vendor ID, and EIN.

Configure the report

1. In the Generic Inquiry designer, add the required fields by dragging them into the layout or specifying them in the inquiry setup.
2. Filter the vendors as needed, or leave the criteria open to include all suppliers.
3. Include all necessary address fields (which may require joins with the address table) and contact information.

View or export

1. Once your inquiry is set up, view the results in Acumatica or export them to Excel.

Payments to suppliers in the last 12 months

1. Look for a report under Accounts Payable that details payments made to vendors, such as Vendor Payments.
2. If no pre-built report fits, create a custom inquiry that includes Payment Date, Vendor Name, Vendor ID, Payment Amount, and Payment Type.
3. In the report settings, set a date filter to include only records from the last 12 months.
4. View the report in Acumatica or export it.

Tips

- Access rights: make sure you have permission to access financial reports and vendor information.
- Custom fields: if a field like EIN isn't available directly, check whether it's stored as a custom attribute.

Bring these vendors into Invicepay

Once you've exported your vendor list, bulk import it on the Vendors tab — upload your file and map its columns to Invicepay's vendor field. Then send your export to sales@Invicepay or your account executive and the team will import it for you.