



Optimize Fleet Productivity

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How to Use Existing Vendor as a Template When Adding a New Vendor

CFAWin includes a template feature when creating new vendors to reduce manual data entry. Templates are useful when adding vendors that have multiple locations or supply similar services to a different vendor.

To Use a Record as a Template:

1. In the Vendor Table, highlight the record to use as a template.
2. Click the **New** (white paper) icon.
3. Enter the **New Vendor Id** and click OK.
4. An Application Message appears asking, "USER, do you want to use Vendor: ##### as a template?"
5. Click **Yes** to proceed.
6. The new vendor record is created as an exact copy of the template.

All vendor table data is copied to the new vendor record and must be edited by the user if different for the new vendor.