# Contents

Purpose ..... 2
Trigger(s) ..... 2
Prerequisites ..... 2
Helpful Hints ..... 2
Definitions ..... 2
Create Approved Supplier ..... 3
Definition ..... 3
Trigger ..... 3
Prerequisites ..... 3
Procedure ..... 3
Access the Supplier ..... 4
Actions to Create the Approved Supplier ..... 6
Add the Approvals for the Supplier ..... 8
Part ..... 12
Operation ..... 13
Class ..... 14
Customer ..... 15
Access the Part ..... 16
Actions to Create the Approved Supplier ..... 17
Add the Approvals for the Supplier ..... 19


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# Purpose

Use this procedure to create and maintain approved suppliers specific to a part, part class or a customer record.

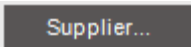
# Trigger(s)

A new purchase part master is created, or you are purchasing an existing part from a new supplier. You are only allowed to purchase from this supplier for specific parts, part class, sub-contract operation, or customer.

# Prerequisites

Supplier has been created and released.
Part has been created and active within the system.
Part class exists if the approval is specific for a part class.
Sub-contract operation exists if the approval is specific for an outside/sub-contract operation.
Customer exists if the approval is going to be that the supplier is approved for any part or operation linked to the customer.

# Helpful Hints

- Remember that you can right click on a field to drill into more details. Right click on the part number to find out on hand inventory, time phase inventory and other information.
- Buttons are used to perform a search for a valid value 

.
- Fields that have a pull down beside them indicate that there is a valid list of values that you can select from. You can enter the value by typing if you already know the value.

- Clicking on the small upside down triangle on the New Icon will provide a pull down menu for creating new portions of the part, such as adding a plant, warehouse or location.
- Remember to use field help to find out more detail about a field that is not defined in this manual. Help ⇨ Field Help

# Definitions

In the table following a screen capture there is a column labeled R/O/D. The value in this column is to inform you if entry in this field is R- Required; O – Optional; D- Display only, you cannot change the value.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# Create Approved Supplier

## Definition

- In this process you will create an approval for a supplier to supply either specific parts, parts of a part class, sub-contract operation parts, or parts for a specific customer. This process will set the approvals that the supplier will have.

## Trigger

- Create an approval for a specific supplier for a:
  - Specific part or parts
  - Specific part class
  - Sub-contract operations
  - Parts for a specific customer.
- New requirement to only allow one of the conditions to exist.

## Prerequisites

- The following must exist if the supplier is going to be approved for that element:
  - Part
  - Part class
  - Operation
  - Customer

## Procedure

- Access the supplier.
- Actions to create the approved supplier.
- Add the approvals for the supplier.
- Access the part
- Actions to create the approved supplier.
- Add the approved supplier for the part


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## Access the Supplier

1. Access the transaction using the menu path.

   Materials Management ⇨ Purchase Management ⇨ Setup ⇨ Supplier
   Material Management ⇨ **Inventory Management ⇨ Setup ⇨ Supplier**
   Material Management ⇨ **Purchase Contracts Management ⇨ Setup ⇨ Supplier**
   Material Management ⇨ **Supplier Relationship Management ⇨ Setup ⇨ Supplier**
   Service Management ⇨ **Expense Management ⇨ Setup ⇨ Supplier**
   Service Management ⇨ **Time Management ⇨ Setup ⇨ Supplier**
   Production Management ⇨ **Job Management ⇨ Setup ⇨ Supplier**
   Production Management ⇨ **Quality Management ⇨ Setup ⇨ Supplier**
   Financial Management ⇨ **Accounts Payable ⇨ Setup ⇨ Supplier**


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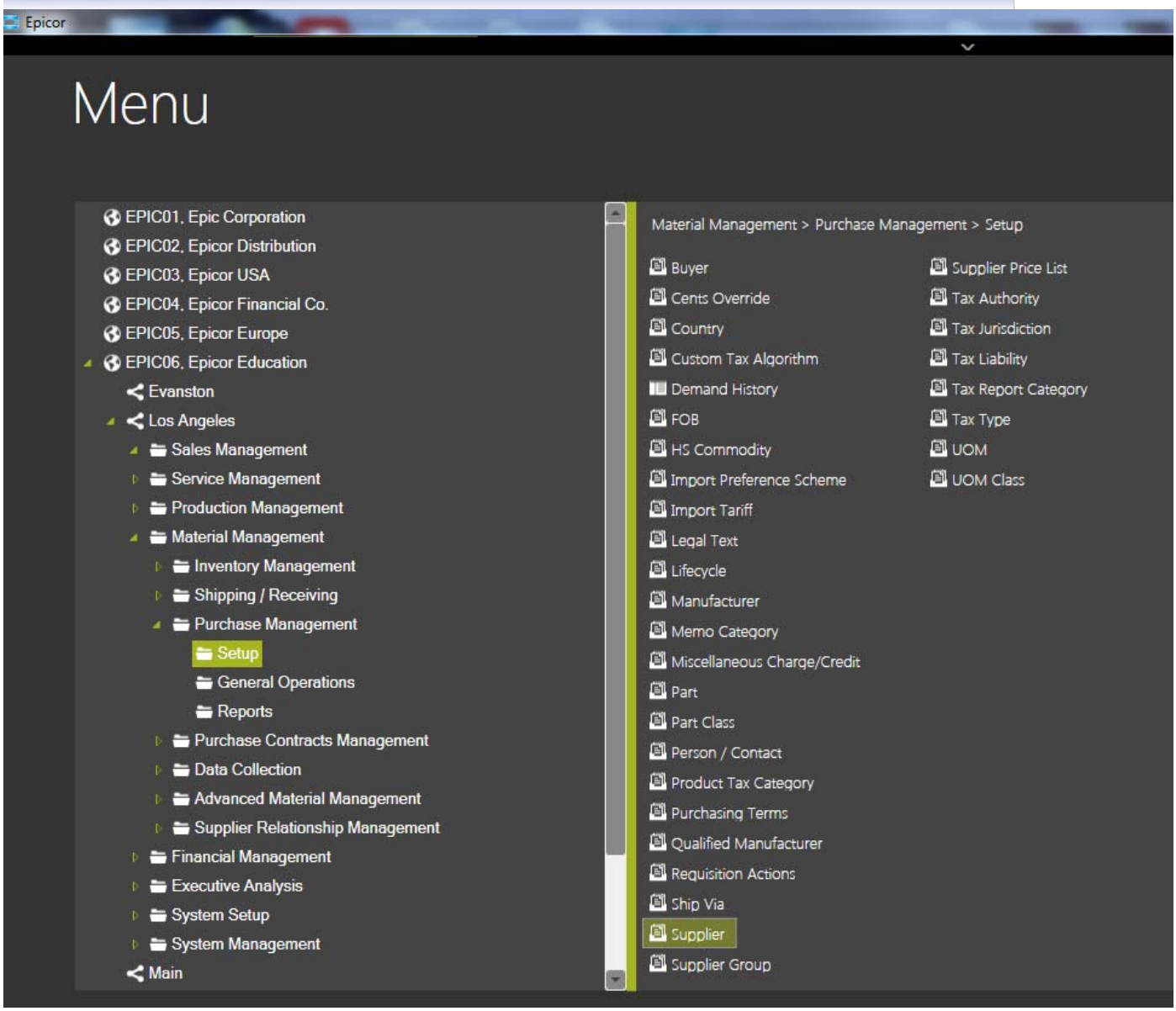



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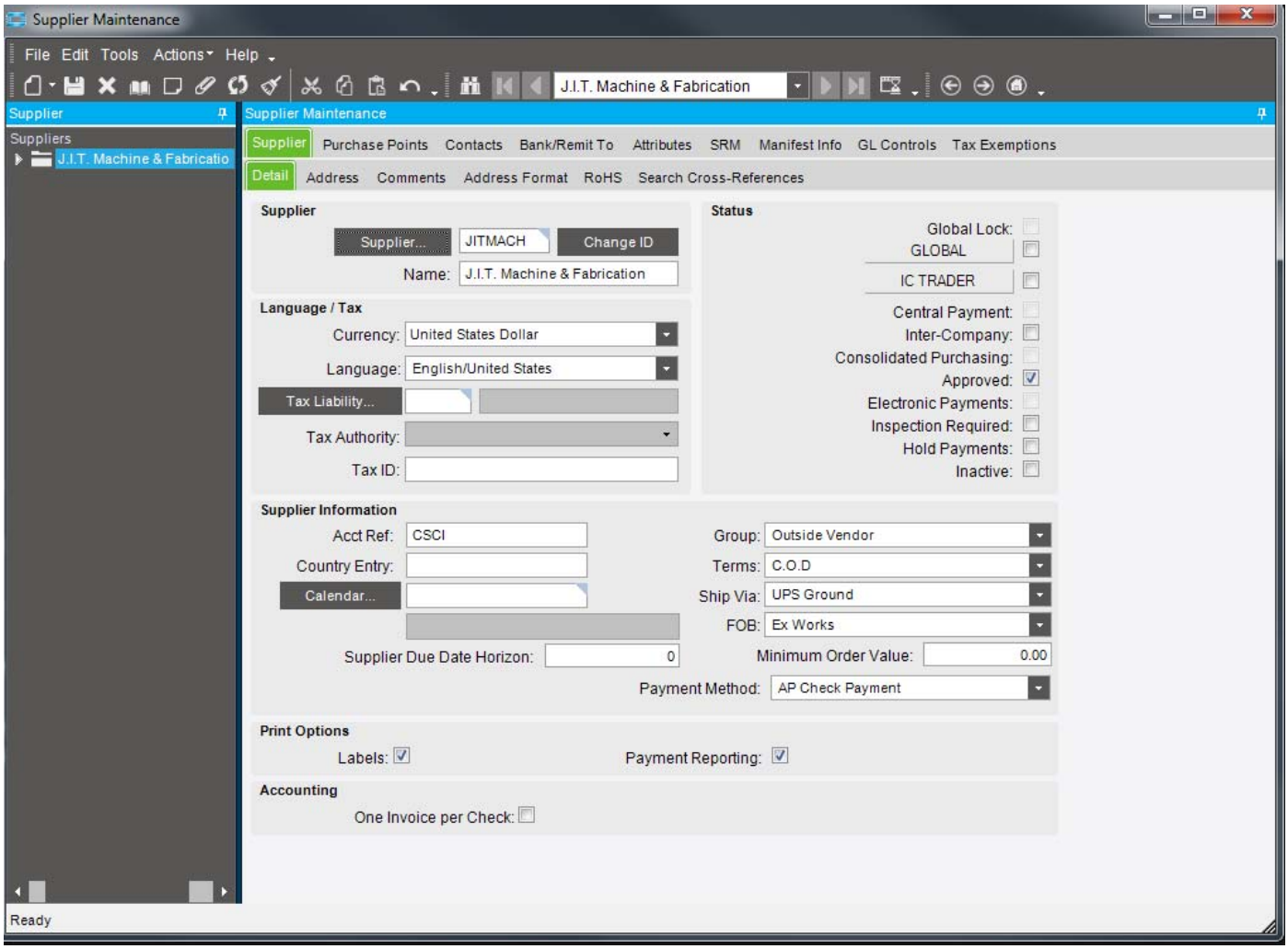
On the main screen enter the Supplier ID and press TAB. If you do not know the supplier ID you can click on the Supplier... button to search for the supplier.




## Actions to Create the Approved Supplier

Click on the Actions menu Actions and select Approved Suppliers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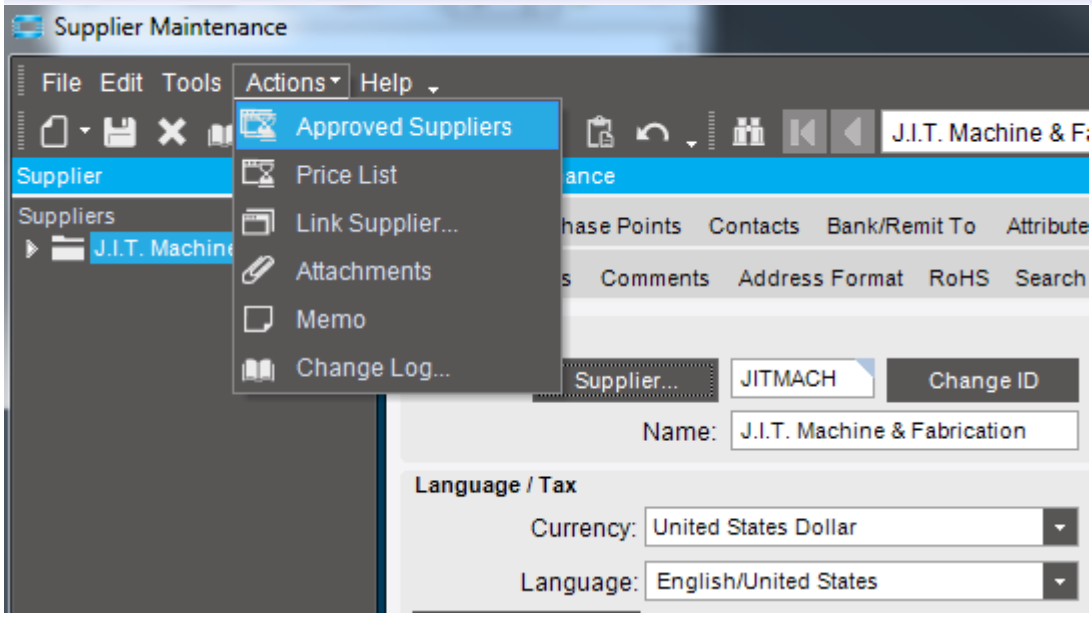


The Approved Supplier Maintenance window will display.


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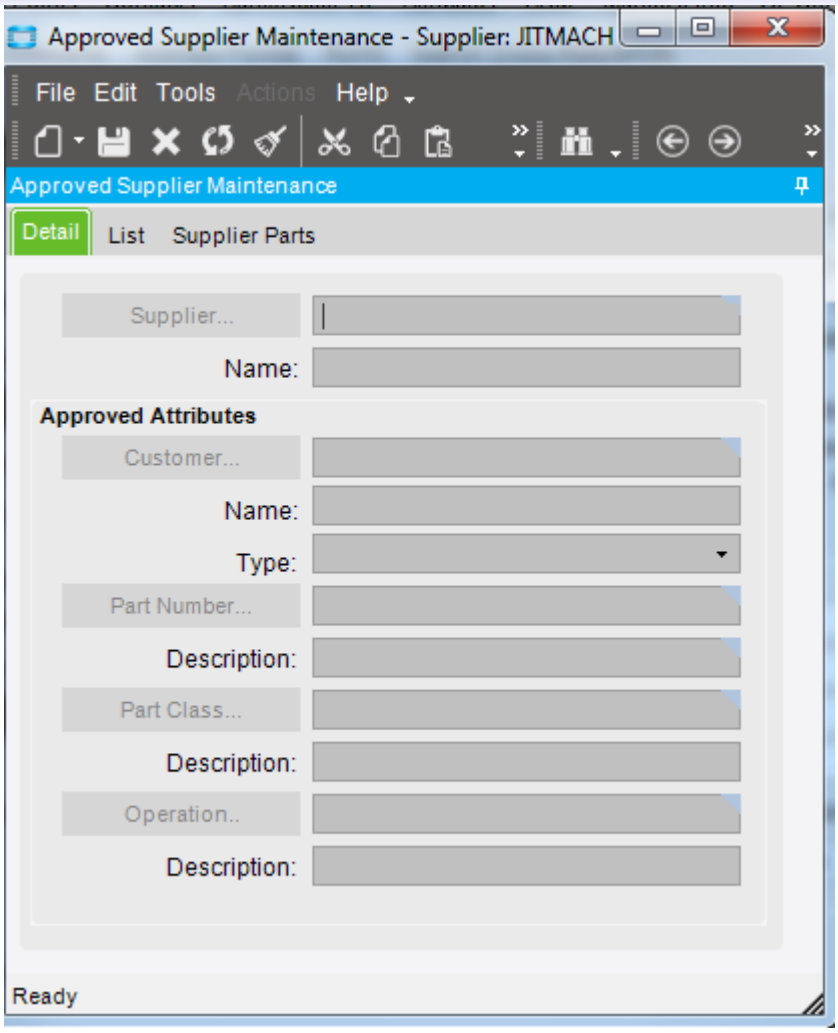


## Add the Approvals for the Supplier

If there are no approvals for this supplier already, create a new one.

Follow the Menu Path:

New ⇨ New Approved Supplier:


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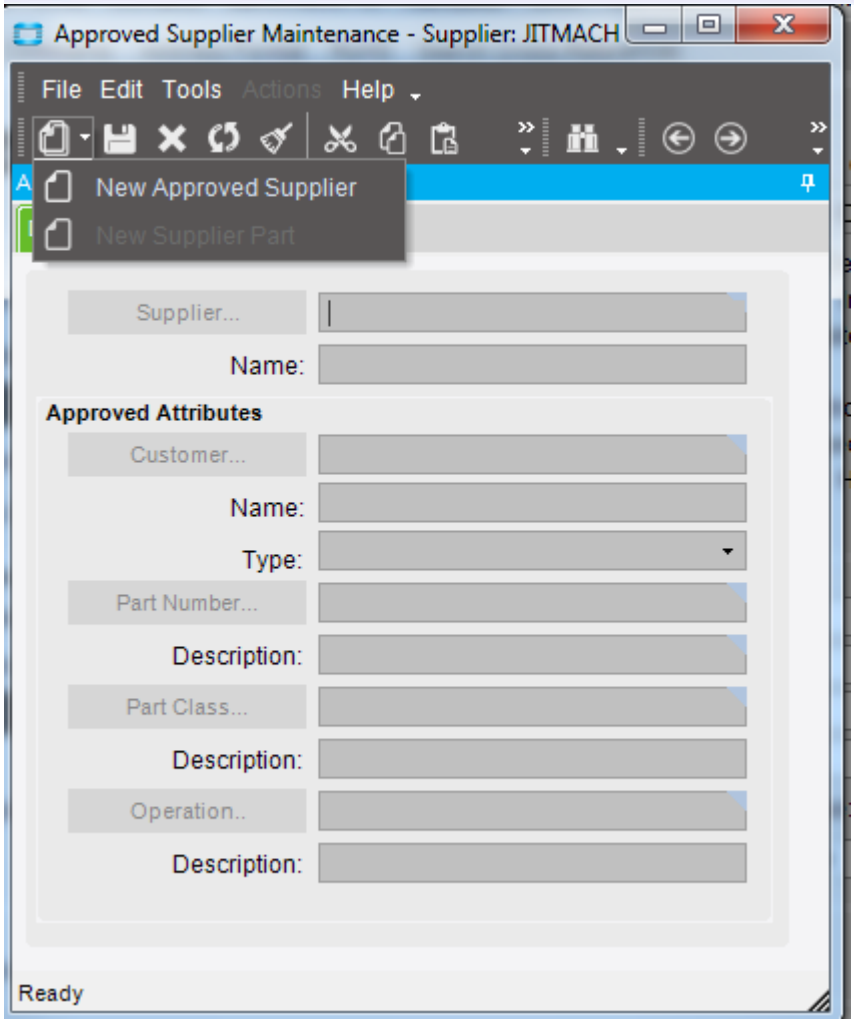



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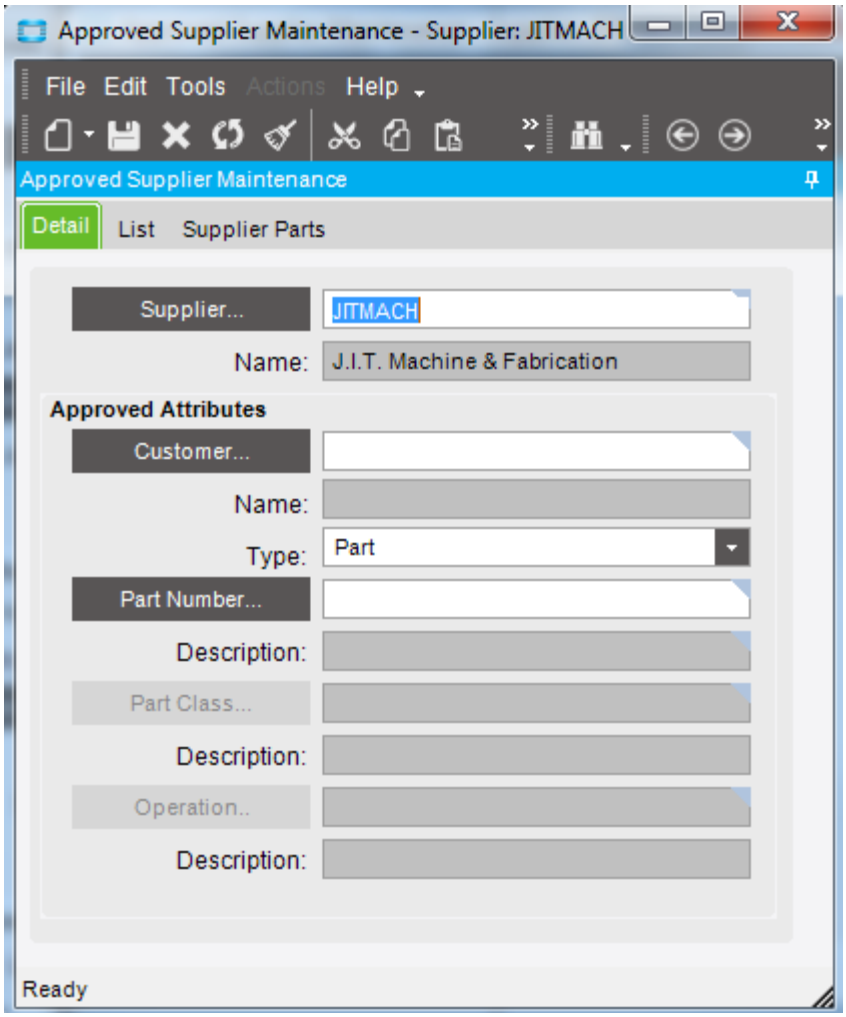
Approved Supplier initial ADD screen after selecting New Approved Supplier:





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| Field Name | R/O/D | Description |
|---|---|---|
| Supplier | R | The Supplier ID for whom you are creating the Approvals. |
| Name | D | The Name of the Supplier. |
| Customer | O/R | If the Type selected is Customer then this field is required and identifies the Customer ID that this supplier is approved to have parts purchased for that are specific to the customer. |
| Name | D | The display of the full name of the customer |
| Type | R | Specifies the Approval type that you are setting up on this specific supplier. Approval types are:<br>• Part<br>• Operation<br>• Class<br>• Customer |
| Part Number | O/R | If the Type is Part then this field is required and identifies the part that this supplier is approved for. |
| Description | D | If the Type was Part and the part number is entered this will be a display of the part numbers description from the part master. |
| Part Class | O/R | If the Type is Part Class then this field is required and identifies the part class that this supplier is approved to purchase materials that are associated to the class. |
| Description | D | This is the description of the part class that has been selected if the Type selected is Part Class. |
| Operation | O/R | If the Type is Operation then this field is required and identifies the operation that this supplier is approved to purchase items in for. |
| Description | D | This is the description of the operation that has been selected if the Type selected is Operation. |

Samples of output with each different type filled in:


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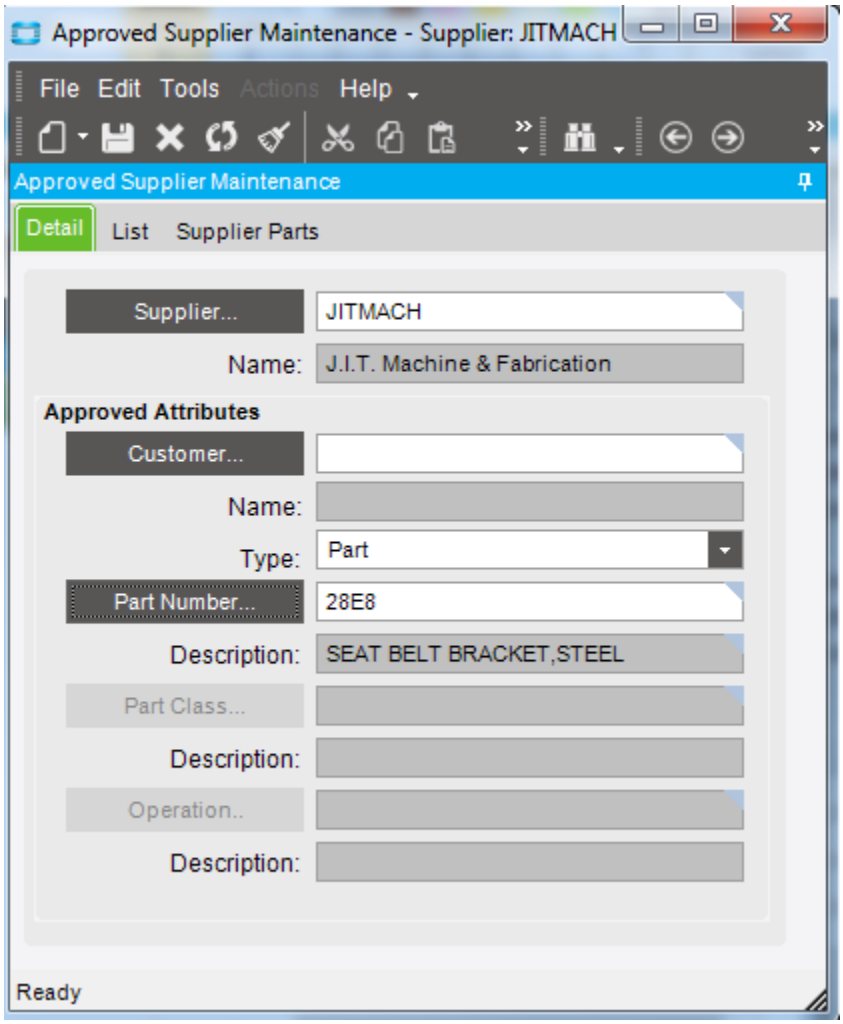
*Part*





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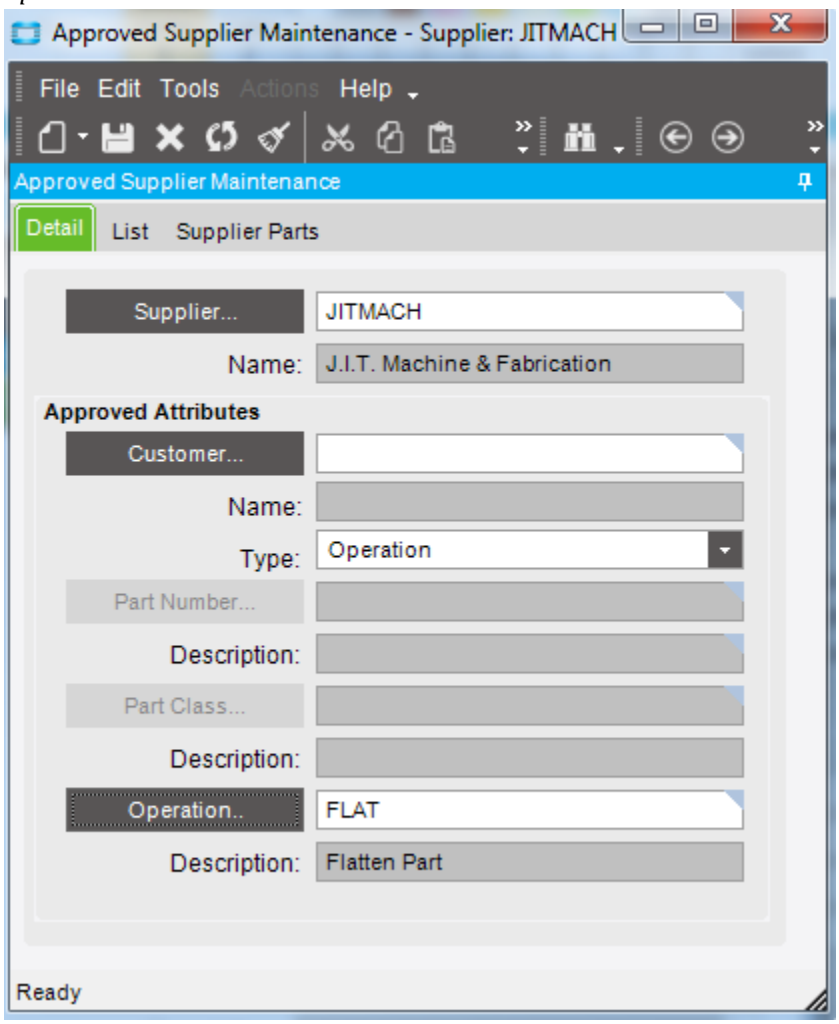
*Operation*





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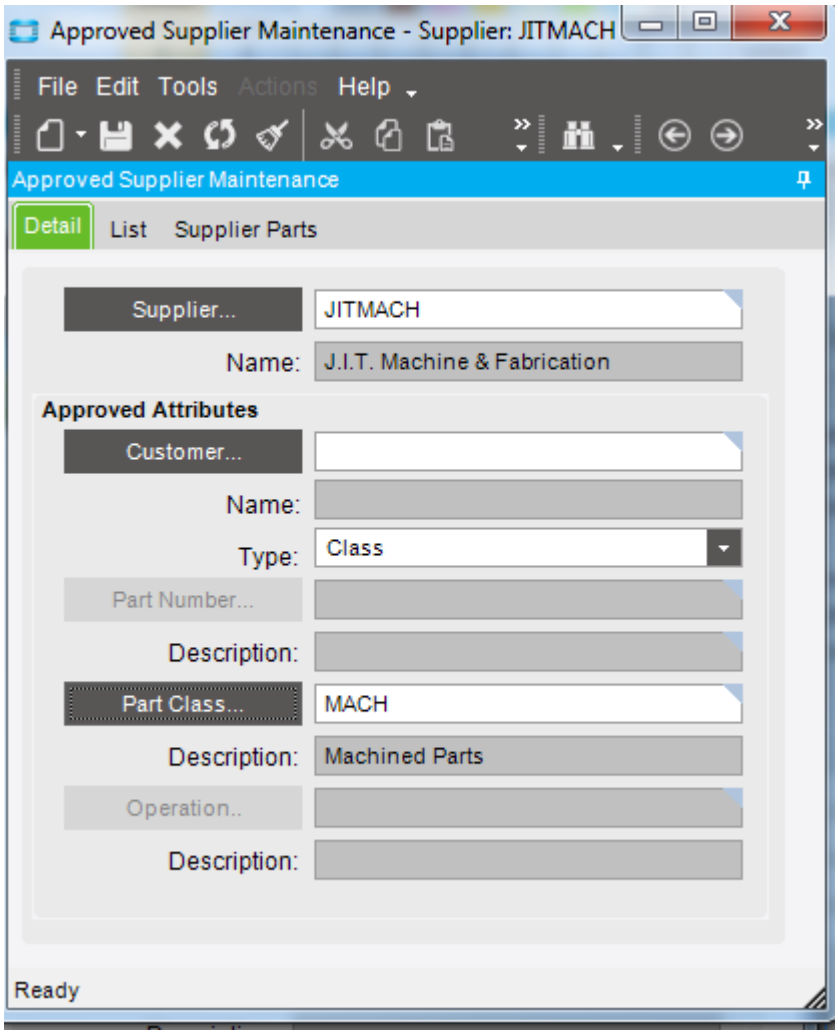
*Class*





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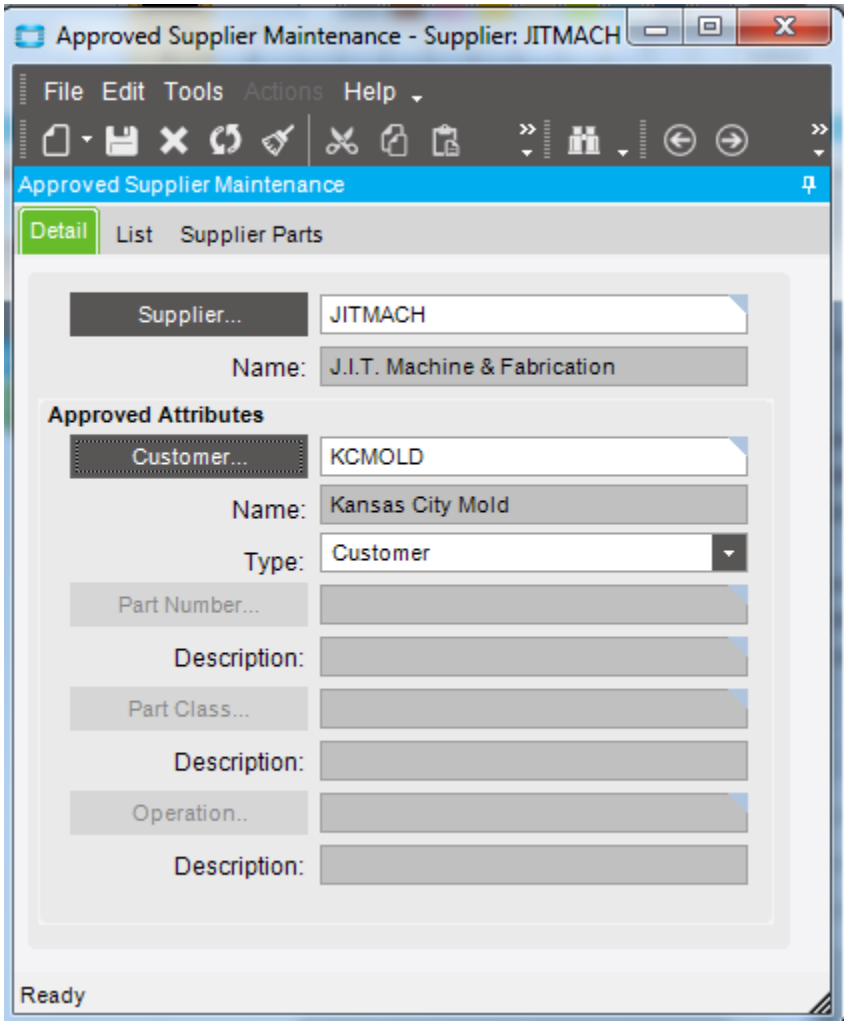
*Customer*




After you have selected the type and the corresponding required element of: Part, Class, Operation or Customer, save the record with the save button.

You may now add additional records to the approved supplier list by following the steps for New Approved Supplier.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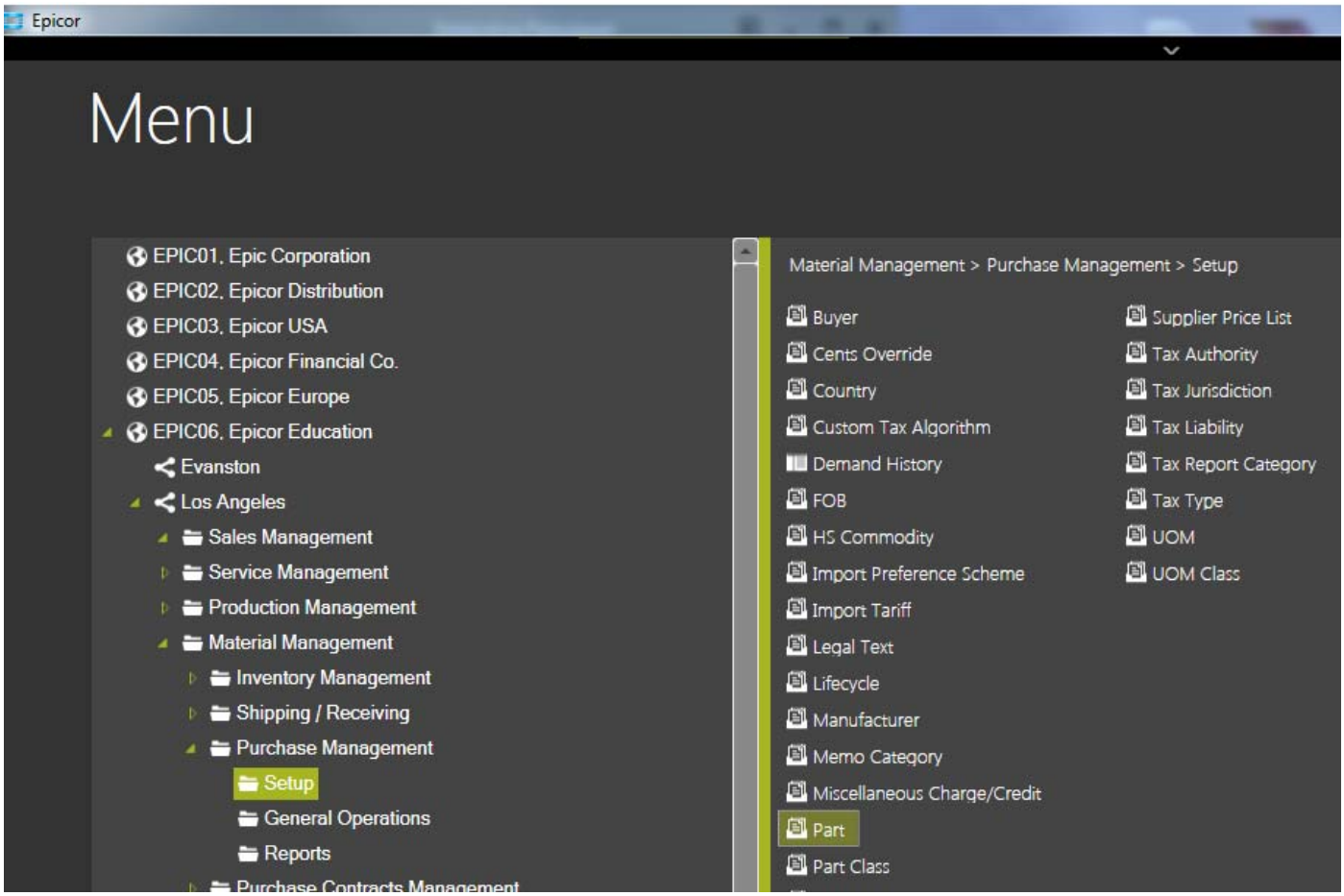
## Access the Part

2. Access the transaction using the menu path.

Materials Management ⇨ Purchase Management ⇨ Setup ⇨ Part

**NOTE:** Part Maintenance may be accessed from many different areas.





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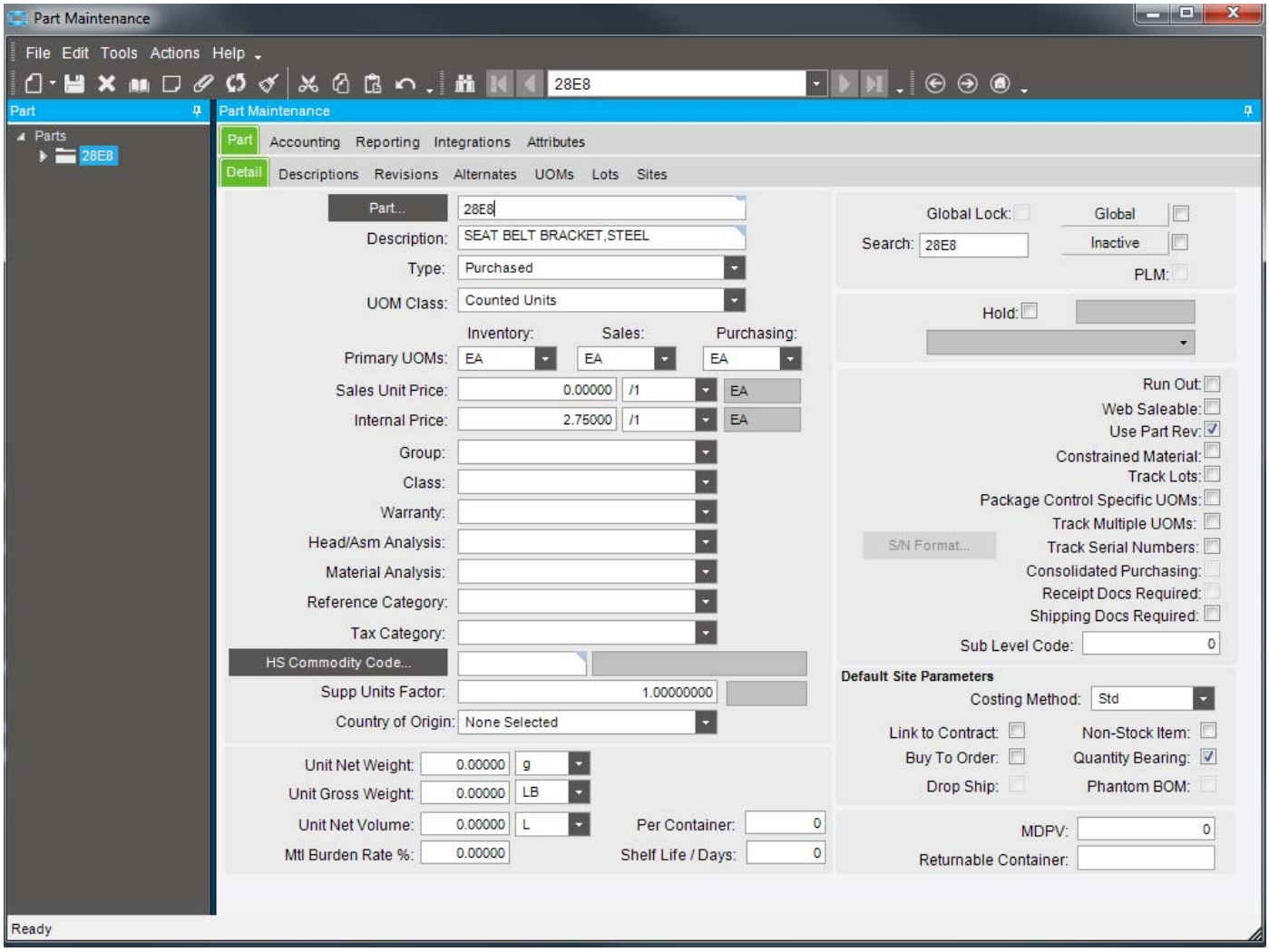
On the main screen enter the Part Number and press TAB. If you do not know the Part Number you can click on the Part... button to search for the part.




## Actions to Create the Approved Supplier

Click on the Actions menu Actions and select Approved Suppliers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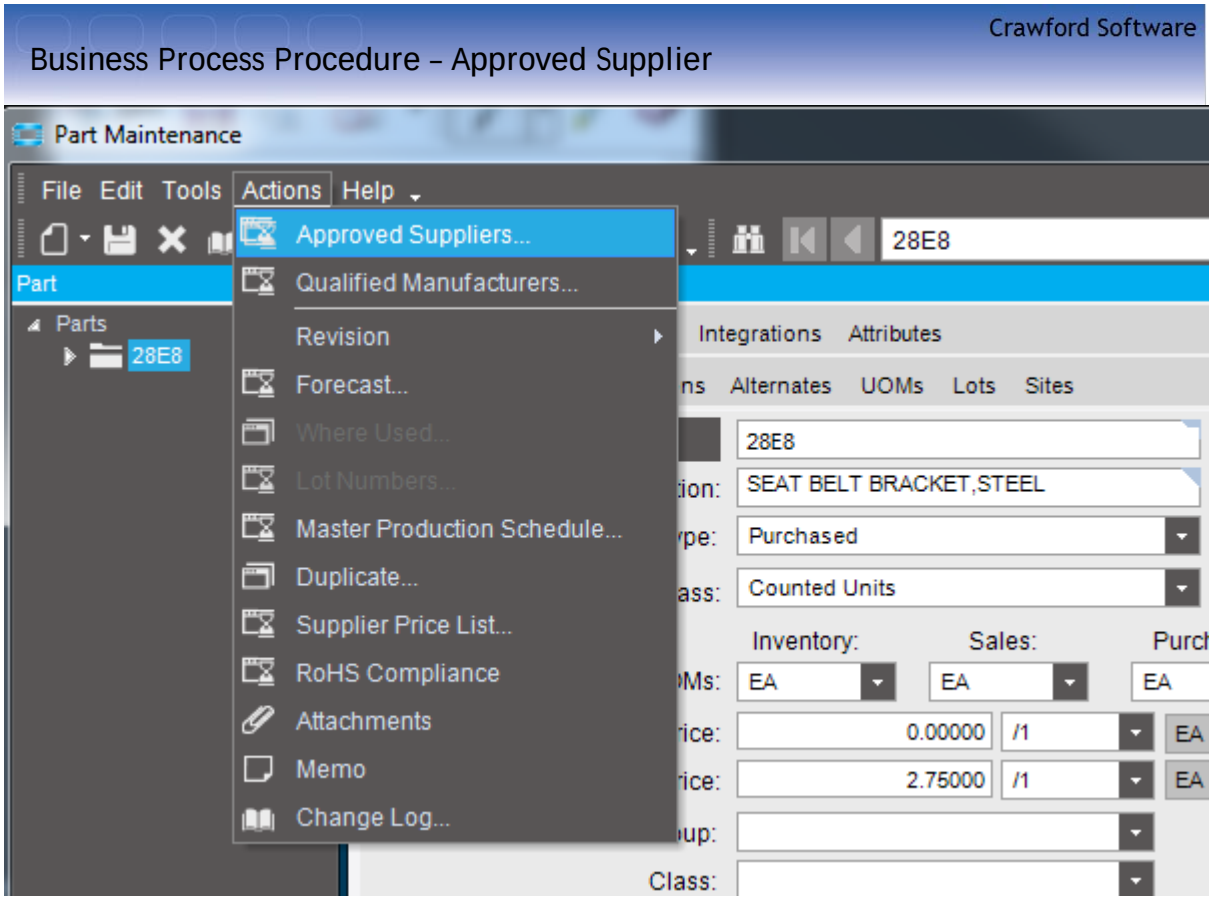


The Approved Supplier Maintenance window will display.

**NOTE:** If you are in Supplier Maintenance and have setup a part under Approved Suppliers, this will also show in Part Maintenance under the Actions: Approved Suppliers, Likewise for Customer, Part Class and Operations.

Look at the List View to see "all" the Approved Suppliers before adding again as you could duplicate an Approved Supplier.


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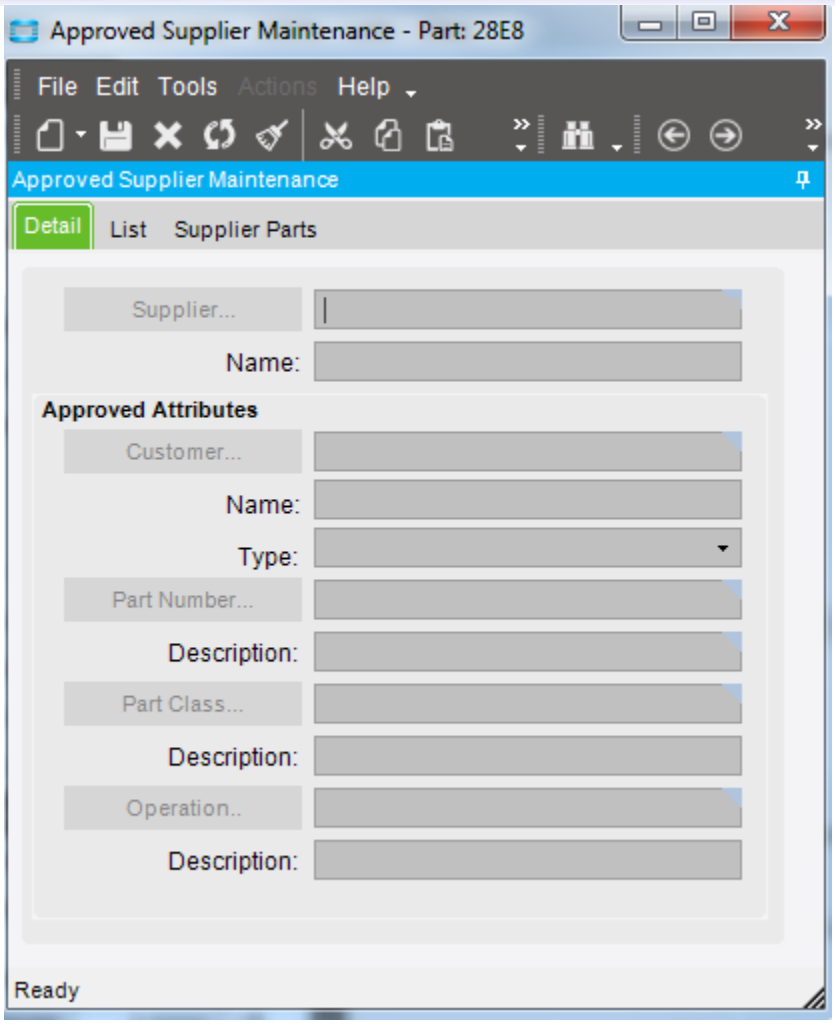


## Add the Approvals for the Supplier

If there are no approvals for this supplier already, create a new one.

Follow the Menu Path:

New ⇨ New Approved Supplier:


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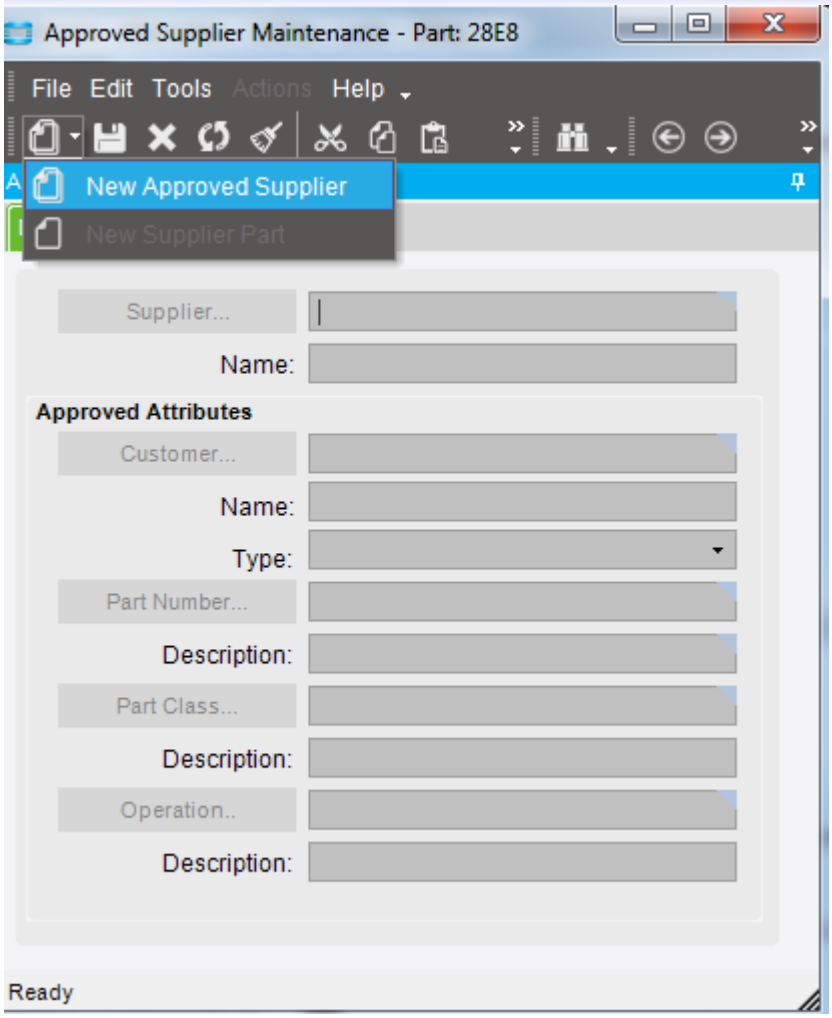



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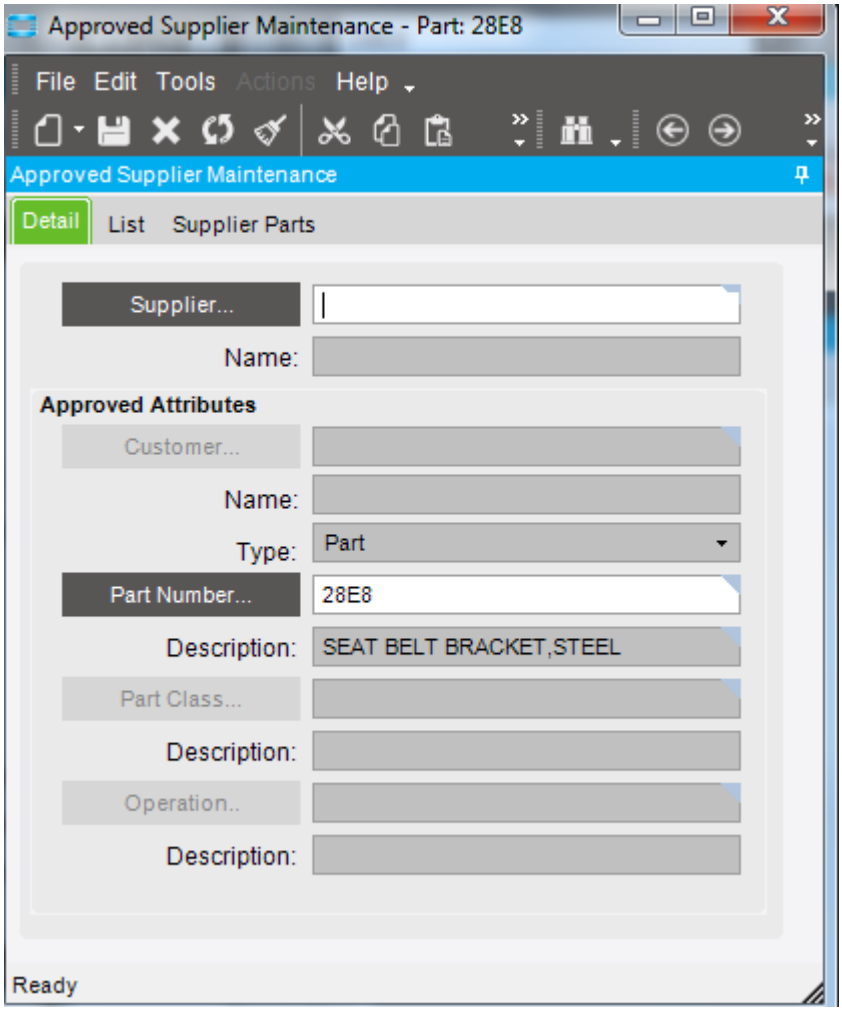
Approved Supplier ADD initial screen:




Notice that the part is already filled in and the type is greyed out so that you may only select a supplier that this part is going to be approved for.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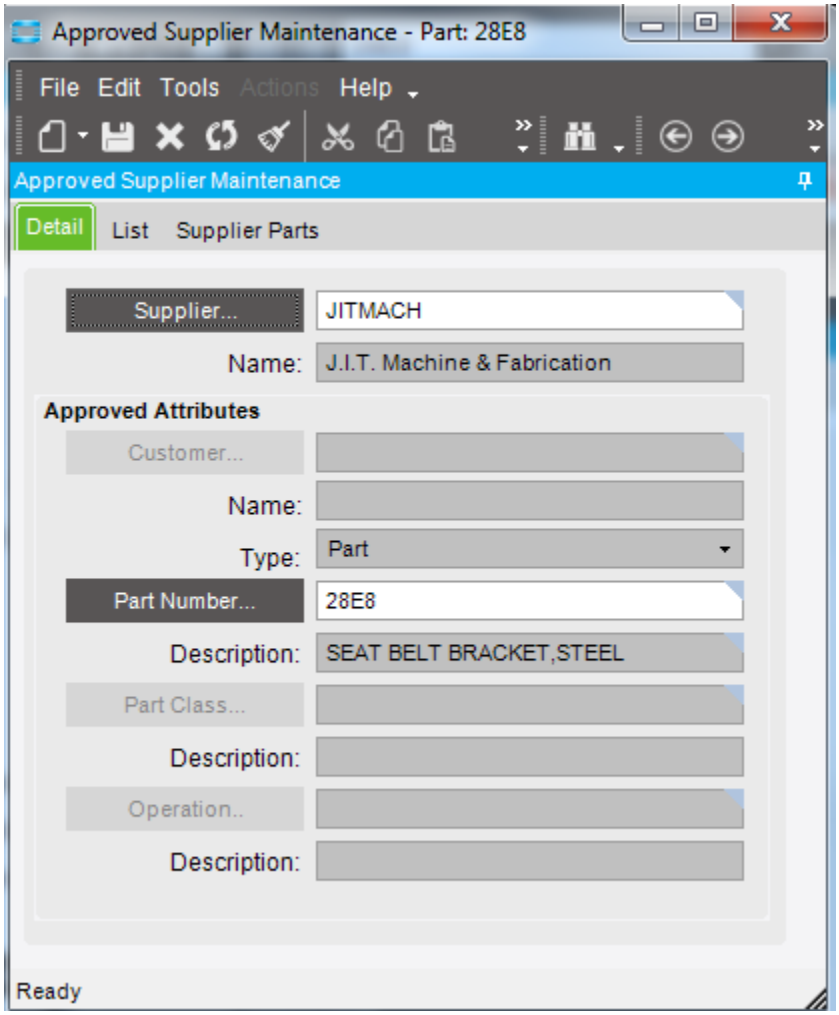
| Field Name | R/O/D | Description |
|---|---|---|
| Supplier | R | The Supplier ID for whom you are want to be approved for this specific part. Either type in the supplier ID if known or search with the search button. Supplier... |
| Name | D | The Name of the Supplier that you have entered. |
| Part Number | R | Since you are adding the approved supplier from the part maintenance this is the part number that you are maintaining. However, you may change the part number if you so desire.. |
| Description | D | If the Type was Part and the part number is entered this will be a display of the part numbers description from the part master. |





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After you have selected the supplier save the record with the save button.

You may now add additional suppliers that are approved for this part by following the steps for New Approved Supplier.


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