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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.
- Supplier... 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.

Type: Purchased Ŧ

- 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: •
 - o Specific part or parts
 - o Specific part class
 - o 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:
 - 0 Part
 - Part class 0
 - 0 Operation
 - Customer 0

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 ⇒ 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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Epicor

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Menu		
EPIC01, Epic Corporation Sector 2010 EPIC02, Epicor Distribution	Material Management > Pur	chase Management > Setup
S EPIC03. Epicor USA	🖾 Buyer	🖾 Supplier Price List
S EPIC04, Epicor Financial Co.	🖾 Cents Override	🖾 Tax Authority
S EPIC05, Epicor Europe	Country	🖾 Tax Jurisdiction
EPIC06, Epicor Education	🖾 Custom Tax Algorithm	🕮 Tax Liability
< Evanston	Demand History	🗐 Tax Report Category
🖌 🧲 Los Angeles	🖾 ғов	🕮 Тах Туре
🔺 늘 Sales Management	🗐 HS Commodity	🕮 иом
E Service Management	Import Preference Schem	e 📕 UOM Class
🕨 늘 Production Management	🗐 Import Tariff	
🔺 늘 Material Management	🗐 Legal Text	
🕨 🚞 Inventory Management	🗐 Lifecycle	
🕨 🚞 Shipping / Receiving	🖲 Manufacturer	
🔺 🚞 Purchase Management	🖲 Memo Category	
and Setup	Miscellaneous Charge/Cri	edit
😁 General Operations	C Part	
📛 Reports	Part Class	
🕨 늘 Purchase Contracts Management	Person / Contact	
🖻 💳 Data Collection		
🖻 늘 Advanced Material Management		
🖻 🚔 Supplier Relationship Management		
🖻 📛 Financial Management		
▶ 늘 Executive Analysis		
▶ 🚞 System Setup		
System Management		
< Main		

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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.

Supplier Maintenance	And the second	
File Edit Tools Actions Hel	lp 🗸	
(]·≝× ଲ □ 0 Ø	🛷 😹 🙆 🛱 📭 🚬 👪 🚺 🖣 J.I.T. Machine & Fabrication	
Supplier 🕂 S	Supplier Maintenance	
Suppliers	Supplier Purchase Points Contacts Bank/Remit To Attributes SRM	Manifest Info GL Controls Tax Exemptions
J.T. Machine & Pabricatio	Detail Address Comments Address Format RoHS Search Cross-Re	sferences
	Supplier Statu	8
	Supplier JITMACH Change ID	Global Lock:
	Name: J.I.T. Machine & Fabrication	
	Currency: United States Dollar	Inter-Company:
	Language English/United States	Consolidated Purchasing:
	Tax Liability	Approved:
	Tay Authority	Inspection Required:
		Hold Payments:
	Tax ID:	Inactive:
	Supplier Information	
	Acct Ref: CSCI Grou	Ip: Outside Vendor
	Country Entry: Term	IS: C.O.D
	Calendar Ship Vi	ia: UPS Ground
	FO	B: Ex Works
	Supplier Due Date Horizon: 0	Minimum Order Value: 0.00
	Payment Metho	d: AP Check Payment
	Print Options	
	Labels: 🗹 Payment Reportin	ng: 🔽
	Accounting	
	One Invoice per Check: 🗖	
< E		
Ready		

Actions to Create the Approved Supplier

Click on the Actions menu Actions and select Approved Suppliers

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Business Proce	ess Procedu	ıre - Appro	ved Suppli	er		Cra	wford Software
C Supplier Mainter	nance						
File Edit Tools	Actions - H	elp 🗸					
🗋 - ڬ 🗙 💵	🔯 Approve	ed Suppliers	n 🖞	. m k	🖣 J.I	.T. Machir	1e & F;
Supplier	🖾 Price Li	st	ance				
Suppliers	🗂 Link Su	pplier	hase Points	Contacts	Bank/Rer	mitTo A	ttribute
J.I.T. Machine	🖉 Attachm	ients	s Comme	nts Addres	s Format	RoHS S	Search
	🖵 Memo						
	🛄 Change	Log	Supplier	JITMA	СН	Change I	D
			Nar	me: J.I.T. N	lachine & F	abrication	1
		Language /	Тах				
		(Currency: Un	ited States D	ollar		•
		La	anguage: En	glish/United	States		•

The Approved Supplier Maintenance window will display.

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Business	Process	Procedure	e - App	roved S	Suppli	er

File Edit Tools Actions Help Image: Control of the state of the s	📑 Approved Supplier Maintenance - Supplier: JITMACH 💷 💻	
Approved Supplier Maintenance Approved Supplier Maintenance Detail List Supplier Name: Approved Attributes Customer Name: Type: Part Number Description: Operation Operation Description:	File Edit Tools Actions Help 🗸	
Approved Supplier Maintenance 4 Detail List Supplier Image: I	│ │ └│ × ∅ ∢ × ᄵ ╚	» ▼
Detail List Supplier Parts Supplier Name: Name: Supproved Attributes Customer Name: Name: Supplier Parts Part Number Part Class Description: Supplier Part Class Operation Description: Description: Supplier Part Class Description: Supplier Part Class Description: Supplier Part Part Part Part Part Part Part Par	Approved Supplier Maintenance	
SupplierName:Approved AttributesCustomerName:Type:Type:Part NumberDescription:Part ClassDescription:OperationDescription:	Detail List Supplier Parts	
Name:Approved AttributesCustomerName:Type:Type:Part NumberDescription:Part ClassDescription:OperationDescription:	Supplier	
Approved Attributes Customer Name: Type: Part Number Description: Part Class Description: Operation Description:	Name:	
CustomerName:Type:Part NumberDescription:Part ClassDescription:OperationDescription:	Approved Attributes	
Name:Type:Part NumberDescription:Part ClassDescription:OperationDescription:	Customer	
Type:Part NumberDescription:Part ClassDescription:OperationDescription:	Name:	
Part NumberDescription:Part ClassDescription:OperationDescription:	Туре:	
Description: Image: Class Part Class Image: Class Description: Image: Class Operation Image: Class Description: Image: Class	Part Number	
Part Class Description: Operation Description:	Description:	
Description: Operation Description:	Part Class	
Operation Description:	Description:	
Description:	Operation	
	Description:	
Produ	Banda	

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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Business Process Procedure - Approved Supplier 🗂 Approved Supplier Maintenance - Supplier: JITMACH 😐 😐 х File Edit Tools Help 🗸 ኤ ሪ ቤ » • ď1 55 × 5 Ð € ŕ٦ 21 ත් . д New Approved Supplier Supplier. Name: Approved Attributes Customer.. Name: Type: Part Number. Description: Part Class. Description: Operation.. Description: Ready

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Approved Supplier initial ADD screen after selecting New Approved Supplier:

📁 Approved Supplier Maintenance - Supplier: JITMACH 💷 💻	
📱 File Edit Tools Actions Help 🗸	Π
Ĺ·≝×∽∢×ĉĉ °, ₩, €⊝	» ▼
Approved Supplier Maintenance	դ
Detail List Supplier Parts	
Supplier	
Name: J.I.T. Machine & Fabrication	
Approved Attributes	
Customer	
Name:	
Type: Part	
Part Number	
Description:	
Part Class	
Description:	
Operation	
Description:	
Ready	1

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Business Process Procedure - Approved Supplier

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	
Туре	R	 Specifies the Approval type that you are setting up on this specific supplier. Approval types are: Part Operation Class 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 wi 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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Crawford Soft	W	ar	e
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Business Process Pro	ocedure - Approved Supplier	
Part		
C Approved Supplier Main	tenance - Supplier: JITMACH 😐 😐	x
File Edit Tools Actions	Help 🗸	
്വ- ല×ഗ ്രി		»
Approved Supplier Maintenan		
Detail List Supplier Parts	5	
Supplier	JITMACH	
Name:	J.I.T. Machine & Fabrication	
Approved Attributes		
Customer		
Name:		
Туре:	Part 🗸	
Part Number	28E8	
Description:	SEAT BELT BRACKET,STEEL	
Part Class		
Description:		
Operation		
Description:		
Ready		

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Operation

Approved Supplier Main	tenance - Supplier: JITMACH 😐 💷 💌
File Edit Tools Actions	Help 🗸
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Approved Supplier Maintenar	nce P
Detail List Supplier Parts	s
Supplier	JITMACH
Name:	J.I.T. Machine & Fabrication
Approved Attributes	
Customer	
Name:	
Туре:	Operation
Part Number	
Description:	
Part Class	
Description:	
Operation	FLAT
Description:	Flatten Part
Ready	

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Crawford Software	Cra	wford	Soft	ware
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Class				
📰 Approved Supplier Maintenance - Supplier: JITMACH 💷 📼 🔀				
File Edit Tools Actions Help 🗸				
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Approved Supplier Maintenance	Ą			
Detail List Supplier Parts				
Supplier JITMACH				
Name: J.I.T. Machine & Fabrication				
Approved Attributes				
Customer				
Name:				
Type: Class				
Part Number				
Description:				
Part Class MACH				
Description: Machined Parts				
Operation				
Description:				
Ready				

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Customer

Approved Supplier Main	tenance - Supplier: JITMACH 💷 🔲 🗮 🗙
File Edit Tools Action	s Help 🗸
🗋 • 💾 🗙 🖪 🚿	×ɑɑ " ₩. ⊙ → "
Approved Supplier Maintenar	nce 🗜
Detail List Supplier Parts	5
	THOM
Supplier	JIIMACH
Name:	J.I.T. Machine & Fabrication
Approved Attributes	
Customer	KCMOLD
Name:	Kansas City Mold
Type:	Customer
Part Number	
Description:	
Part Class	
Description:	
Operation	
Description:	
Ready	

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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Business Process Procedure - Approved Supplier

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.

Epicor	B - B B	_
		~
Manu		
IVIENU		
EPIC01, Epic Corporation	Material Management > D	Irchase Management & Setun
S EPIC02, Epicor Distribution	Material Management > Pt	archase Management > Setup
S EPIC03, Epicor USA	🖾 Buyer	🖾 Supplier Price List
S EPIC04, Epicor Financial Co.	🗐 Cents Override	🗐 Tax Authority
S EPIC05, Epicor Europe	Country	🗐 Tax Jurisdiction
Selection	🗐 Custom Tax Algorithm	🗐 Tax Liability
< Evanston	Demand History	🗐 Tax Report Category
🔺 < Los Angeles	🗐 ғов	🕮 Тах Туре
🔺 🚞 Sales Management	🕮 HS Commodity	🕮 иом
👂 🚟 Service Management	Import Preference Schei	me 🕮 UOM Class
👂 늘 Production Management	🖾 Import Tariff	
🥖 늘 Material Management	🗐 Legal Text	
🕩 📛 Inventory Management	🗐 Lifecycle	
🕨 📛 Shipping / Receiving	🗐 Manufacturer	
🕢 🚔 Purchase Management	🗐 Merno Category	
a Setup	🗐 Miscellaneous Charge/C	Credit
General Operations	🖹 Part	
E Reports	🗐 Part Class	
E Purchase Contracts Management		

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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 Maintenance				
File Edit Tools Actions Help 🗸				
ပြ-≝×ଲାଠେଡ୍ଡ୍୪୪୯၆၆၈.	iii 🛛 🖉 28	E8	-	
Part 4 Part Maintenance				ų
Parts Part Accounting Reporting Inte	grations Attribut	es		
Detail Descriptions Revisions	Alternates UOM:	s Lots Sites		
Part	28E8			Global Lock: Global
Description:	SEAT BELT BRAN	CKET,STEEL		Search: 28E8 Inactive
Туре:	Purchased		•	PLM:
UOM Class:	Counted Units		•	Hold
	Inventory:	Sales:	Purchasing:	
Primary UOMs:	EA 🝷	EA -	EA 🔹	
Sales Unit Price:	0	.00000 /1	▼ EA	Run Out:
Internal Price:	2	.75000 /1	- EA	Use Part Rev: V
Group:			•	Constrained Material:
Class:			•	Track Lots:
Warranty:			•	Package Control Specific UOMs:
Head/Asm Analysis:			•	S/N Format Track Serial Numbers:
Material Analysis:				Consolidated Purchasing:
Reference Category:				Receipt Docs Required:
Tax Category:	1			Shipping Docs Required:
HS Commodity Code				Sub Level Code: 0
Supp Units Factor.		1.0000	0000	Default Site Parameters
Country of Origin:	None Selected			
				Link to Contract: Non-Stock Item:
Unit Net Weight:	0.00000 g	-		Dron Shin: Dhantor BOM
Unit Gross Weight:	0.00000 LB	-	10/25	
Unit Net Volume:	0.00000 L	 Per Cor 	ntainer: 0	MDPV: 0
Mtl Burden Rate %:	0.00000	Shelf Life	/Days: 0	Returnable Container:
Ready				

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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Business Process Procedure - Approved Supplier Part Maintenance File Edit Tools Actions Help -Approved Suppliers.. Ш 28E8 XIII m 11 ĽΖ Qualified Manufacturers.. Part A Parts Integrations Attributes Revision Þ 28E8 ⊳ E 🖾 Forecast... ns Alternates UOMs Lots Sites 28E8 ĽΖ SEAT BELT BRACKET, STEEL tion: Master Production Schedule... pe: Purchased Duplicate... Counted Units ass: Supplier Price List... Inventory: Sales: Purch RoHS Compliance Ms: EA EA EA Attachments EA 0.00000 /1 rice: Memo EA rice: 2.75000 /1 Change Log... up: Class:

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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	Approved Supplier Main	tenance - Part:	28E8		x
Fi	le Edit Tools Actions	Help 🗸	N =	:	
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Appr	roved Supplier Maintenar	ice			1
Det	ail List Supplier Parts	;			
	Supplier	1		-	
	Name:	1			
	Name.				
A	Customer				
	oustonier				
	Name:				
	Type:			•	
	Part Number				
	Description:				
	Part Class				
	Description:				
	Operation				
	Description:				

Add the Approvals for the Supplier

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

Follow the Menu Path:

New \Rightarrow New Approved Supplier:

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Business Process Procedure - Approved Supplier
📑 Approved Supplier Maintenance - Part: 28E8 📃 💷 💌
File Edit Tools Actions Help 🗸
<u>@·₩×∽∢≈а</u> с "н.€⊝ "
A 🗍 New Approved Supplier 📮
New Supplier Part
Supplier
Name:
Approved Attributes
Customer
Name:
Type:
Part Number
Description:
Part Class
Description:
Operation
Description:
Ready

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Approved Supplier ADD initial screen:

Approved Supplier Main	tenance - Part: 28E8
File Edit Tools Actions	Help 🗸
🗋 - 🔛 🗙 🗭 🛷 🗌	ж4ћ °, н . е э °,
Approved Supplier Maintenan	ice 🗸
Detail List Supplier Parts	;
Supplier	
Name:	
Approved Attributes	
Customer	
Name:	
Туре:	Part -
Part Number	28E8
Description:	SEAT BELT BRACKET, STEEL
Part Class	
Description:	
Operation	
Description:	
Ready	

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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Business Process Procedure - Approved Supplier

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.
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.

Approved Supplier Maint	tenance - Part: 28E8
File Edit Tools Actions	Help 🗸
🗋 - 💾 🗙 🗭 🚿	×4ā °, m. • • ?
Approved Supplier Maintenan	ce 🕂
Detail List Supplier Parts	
200000000000000000000000000000000000000	
Supplier	JITMACH
Name:	J.I.T. Machine & Fabrication
Approved Attributes	
Customer	
Name:	
Type:	Part •
Part Number	28E8
Description:	SEAT BELT BRACKET,STEEL
Part Class	
Description:	
Operation	
Description:	
Ready	1

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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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