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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.

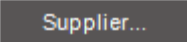
Part has been created and active within the system.

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.

Type: 

- 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.

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

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

Epicor

Menu

- EPIC01, Epic Corporation
- EPIC02, Epicor Distribution
- EPIC03, Epicor USA
- EPIC04, Epicor Financial Co.
- EPIC05, Epicor Europe
- EPIC06, Epicor Education
 - Evanston
 - Los Angeles
 - Sales Management
 - Service Management
 - Production Management
 - Material Management
 - Inventory Management
 - Shipping / Receiving
 - Purchase Management
 - Setup**
 - General Operations
 - Reports
 - Purchase Contracts Management
 - Data Collection
 - Advanced Material Management
 - Supplier Relationship Management
 - Financial Management
 - Executive Analysis
 - System Setup
 - System Management
 - Main

Material Management > Purchase Management > Setup

- Buyer
- Cents Override
- Country
- Custom Tax Algorithm
- Demand History
- FOB
- HS Commodity
- Import Preference Scheme
- Import Tariff
- Legal Text
- Lifecycle
- Manufacturer
- Memo Category
- Miscellaneous Charge/Credit
- Part
- Part Class
- Person / Contact
- Product Tax Category
- Purchasing Terms
- Qualified Manufacturer
- Requisition Actions
- Ship Via
- Supplier**
- Supplier Group
- Supplier Price List
- Tax Authority
- Tax Jurisdiction
- Tax Liability
- Tax Report Category
- Tax Type
- UOM
- UOM Class

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.

The screenshot displays the 'Supplier Maintenance' application window. The main window title is 'Supplier Maintenance' and the current tab is 'Supplier'. The supplier name is 'J.I.T. Machine & Fabrication'. The interface includes several sections:

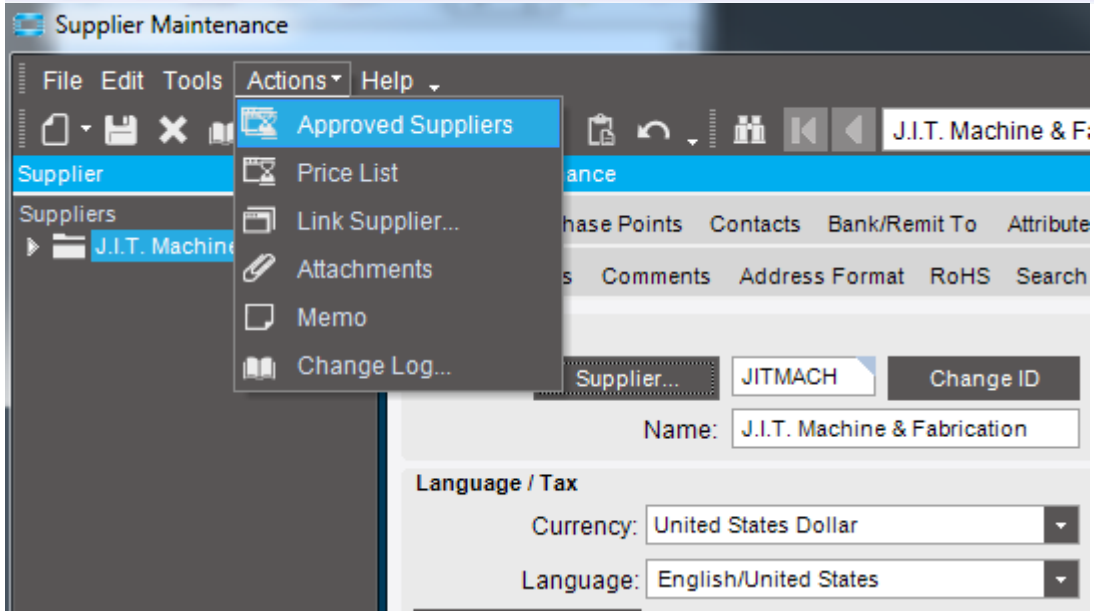
- Supplier:** Contains a 'Supplier...' button, a text field with 'JITMACH', and a 'Change ID' button. Below this is a 'Name' field containing 'J.I.T. Machine & Fabrication'.
- Language / Tax:** Includes dropdown menus for 'Currency' (United States Dollar) and 'Language' (English/United States). There are also fields for 'Tax Liability...', 'Tax Authority:', and 'Tax ID:'.
- Supplier Information:** Contains fields for 'Acct Ref:' (CSCI), 'Country Entry:', 'Calendar...', 'Supplier Due Date Horizon:' (0), 'Group:' (Outside Vendor), 'Terms:' (C.O.D), 'Ship Via:' (UPS Ground), 'FOB:' (Ex Works), and 'Minimum Order Value:' (0.00). A 'Payment Method:' dropdown is set to 'AP Check Payment'.
- Status:** A list of checkboxes for various status options: Global Lock: GLOBAL, IC TRADER, Central Payment, Inter-Company, Consolidated Purchasing, Approved (checked), Electronic Payments, Inspection Required, Hold Payments, and Inactive.
- Print Options:** Includes 'Labels:' (checked) and 'Payment Reporting:' (checked).
- Accounting:** Includes 'One Invoice per Check:' (unchecked).

The status bar at the bottom left shows 'Ready'.

Actions to Create the Approved Supplier

Click on the Actions menu **Actions** and select Approved Suppliers

Business Process Procedure - Approved Supplier



The Approved Supplier Maintenance window will display.

The screenshot shows a software window titled "Approved Supplier Maintenance - Supplier: JTMACH". The window has a menu bar with "File", "Edit", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with various icons. The main area of the window is divided into tabs: "Detail" (selected), "List", and "Supplier Parts". The "Detail" tab contains several input fields:

- Supplier... (text field)
- Name: (text field)
- Approved Attributes** section:
 - Customer... (text field)
 - Name: (text field)
 - Type: (dropdown menu)
 - Part Number... (text field)
 - Description: (text field)
 - Part Class... (text field)
 - Description: (text field)
 - Operation.. (text field)
 - Description: (text field)

The status bar at the bottom left of the window displays "Ready".

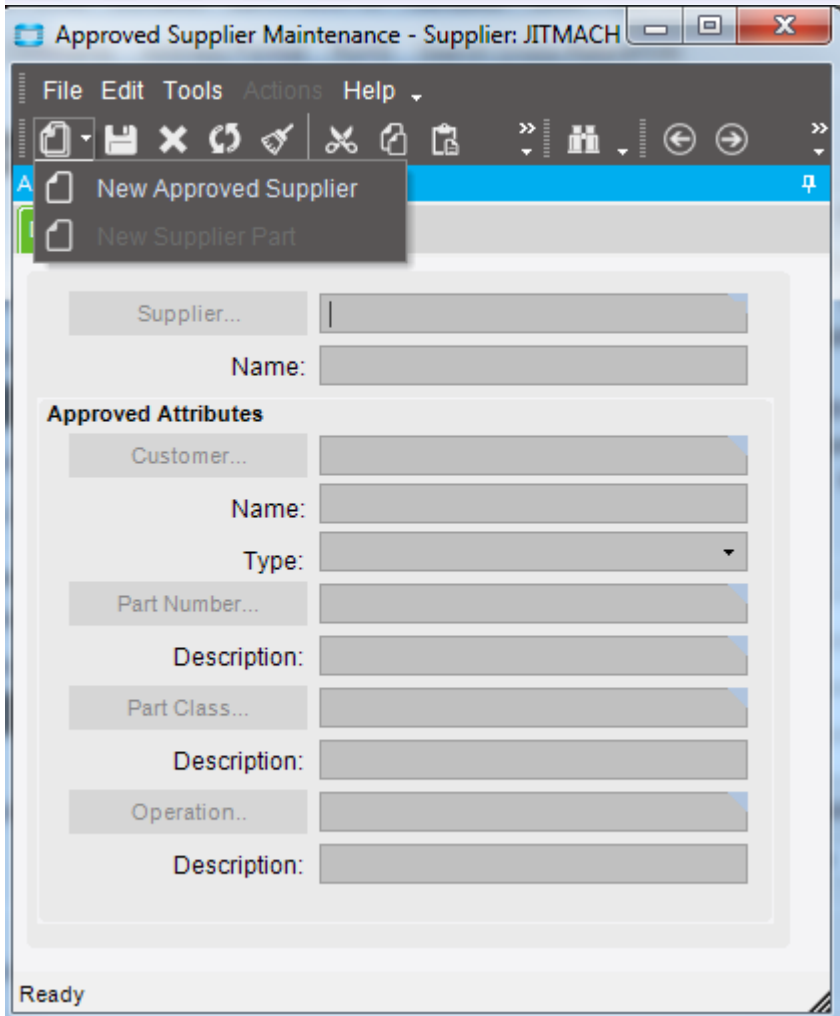
Add the Approvals for the Supplier

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

Follow the Menu Path:

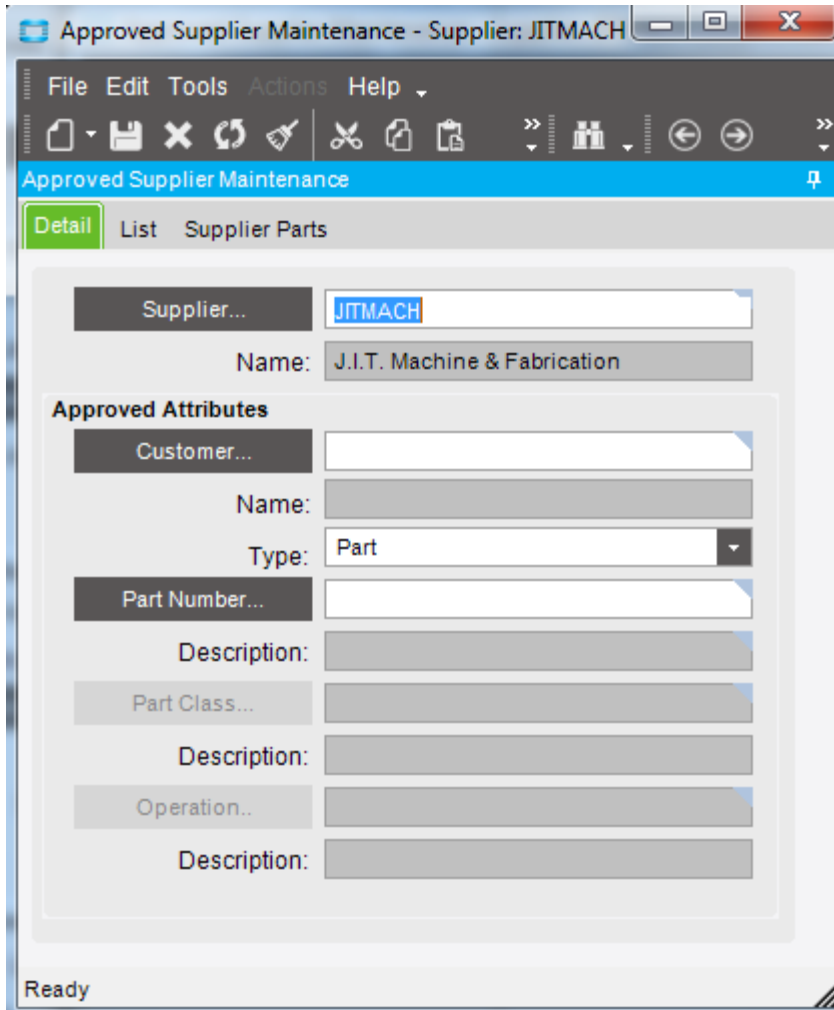
New ⇒ New Approved Supplier:

Business Process Procedure - Approved Supplier



Business Process Procedure - Approved Supplier

Approved Supplier initial ADD screen after selecting New Approved Supplier:

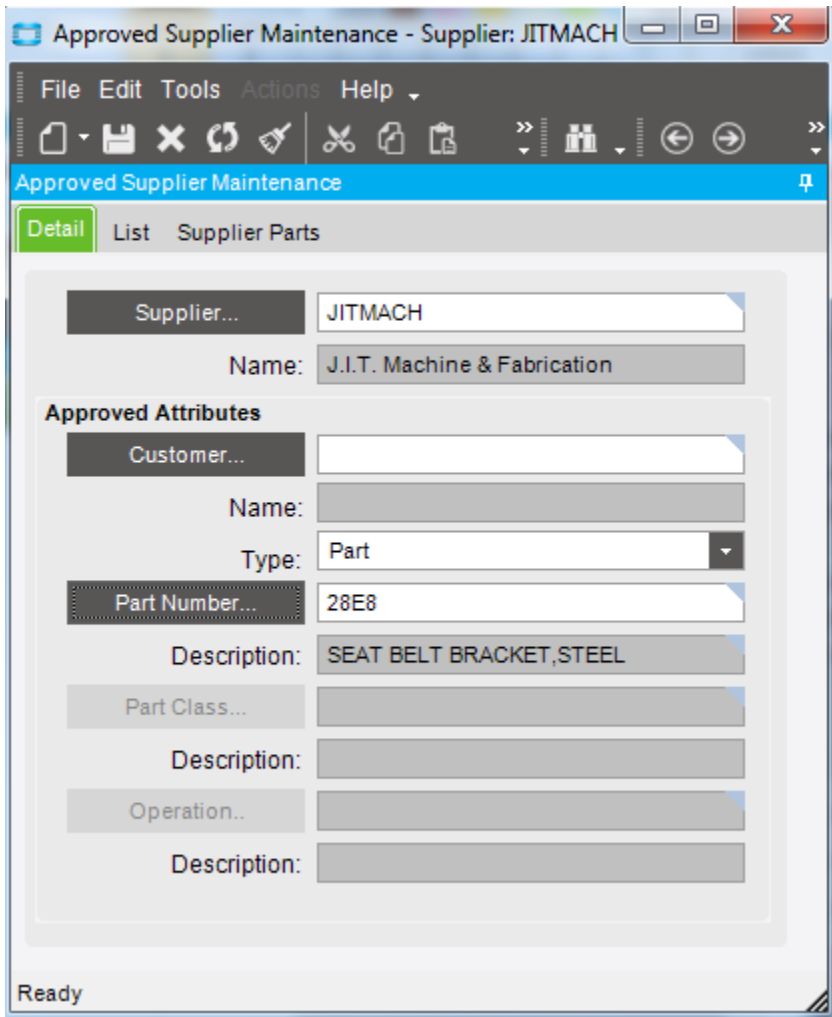


Business Process Procedure - Approved Supplier

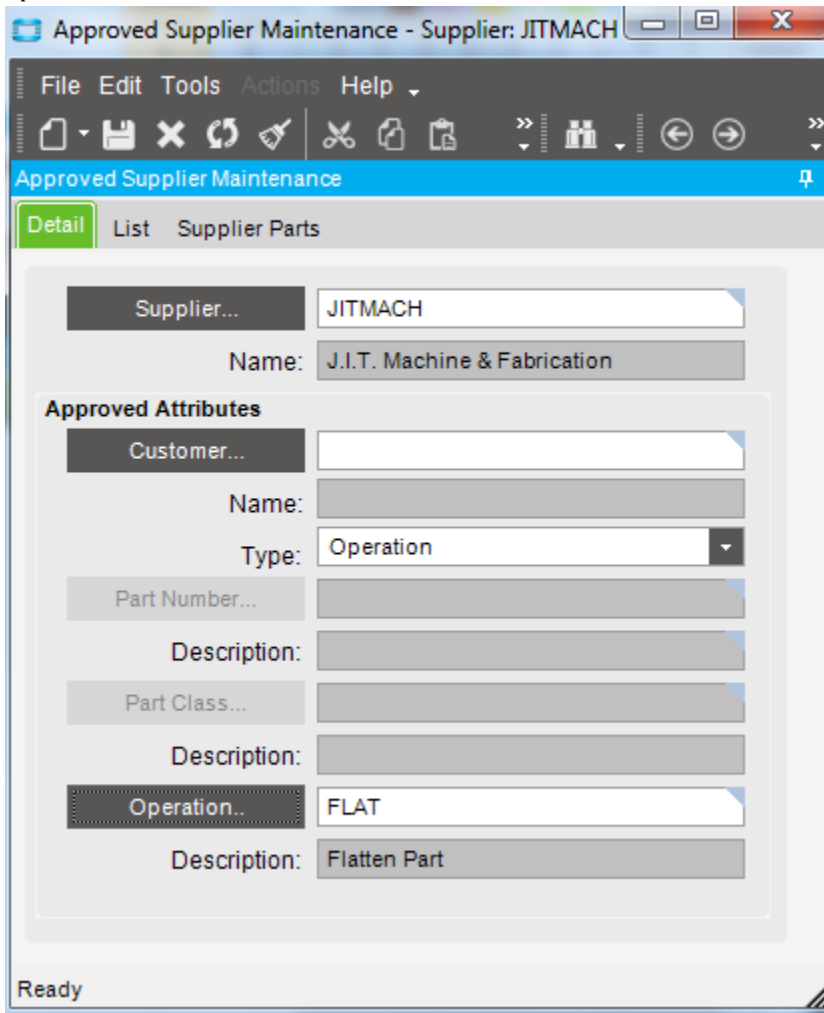
Field Name	R/O/D	Description
Supplier	R	The Supplier ID for whom you are creating the Approvals.
Name	D	The Name of the Supplier.
Customer	O/R	If the Type selected is Customer then this field is required and identifies the Customer ID that this supplier is approved to have parts purchased for that are specific to the customer.
Name	D	The display of the full name of the customer
Type	R	Specifies the Approval type that you are setting up on this specific supplier. Approval types are: <ul style="list-style-type: none"> • 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 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:

Part

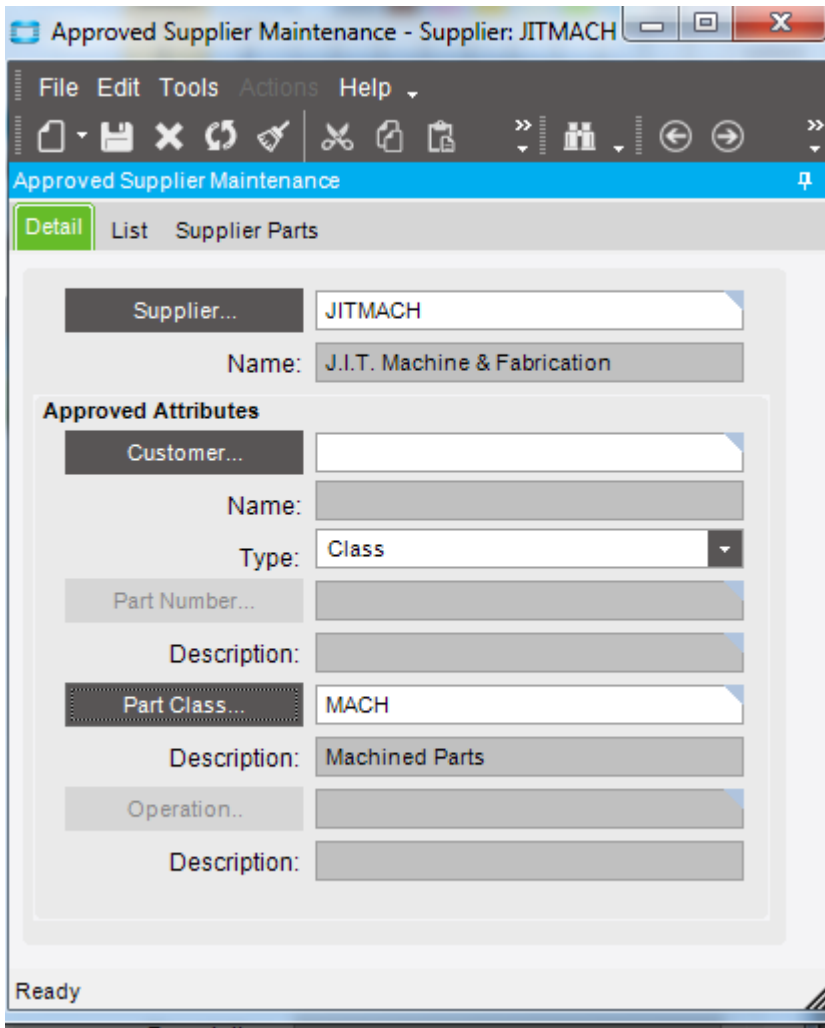


Operation



Business Process Procedure - Approved Supplier

Class




Customer

The screenshot shows a software window titled "Approved Supplier Maintenance - Supplier: JITMACH". The window has a menu bar with "File", "Edit", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with various icons. The main area is titled "Approved Supplier Maintenance" and has tabs for "Detail", "List", and "Supplier Parts". The "Detail" tab is active, showing a form with the following fields:

- Supplier...: JITMACH
- Name: J.I.T. Machine & Fabrication
- Approved Attributes section:
 - Customer...: KGMOLD
 - Name: Kansas City Mold
 - Type: Customer (dropdown menu)
 - Part Number...: (empty)
 - Description: (empty)
 - Part Class...: (empty)
 - Description: (empty)
 - Operation..: (empty)
 - Description: (empty)

The status bar at the bottom left of the window displays "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.

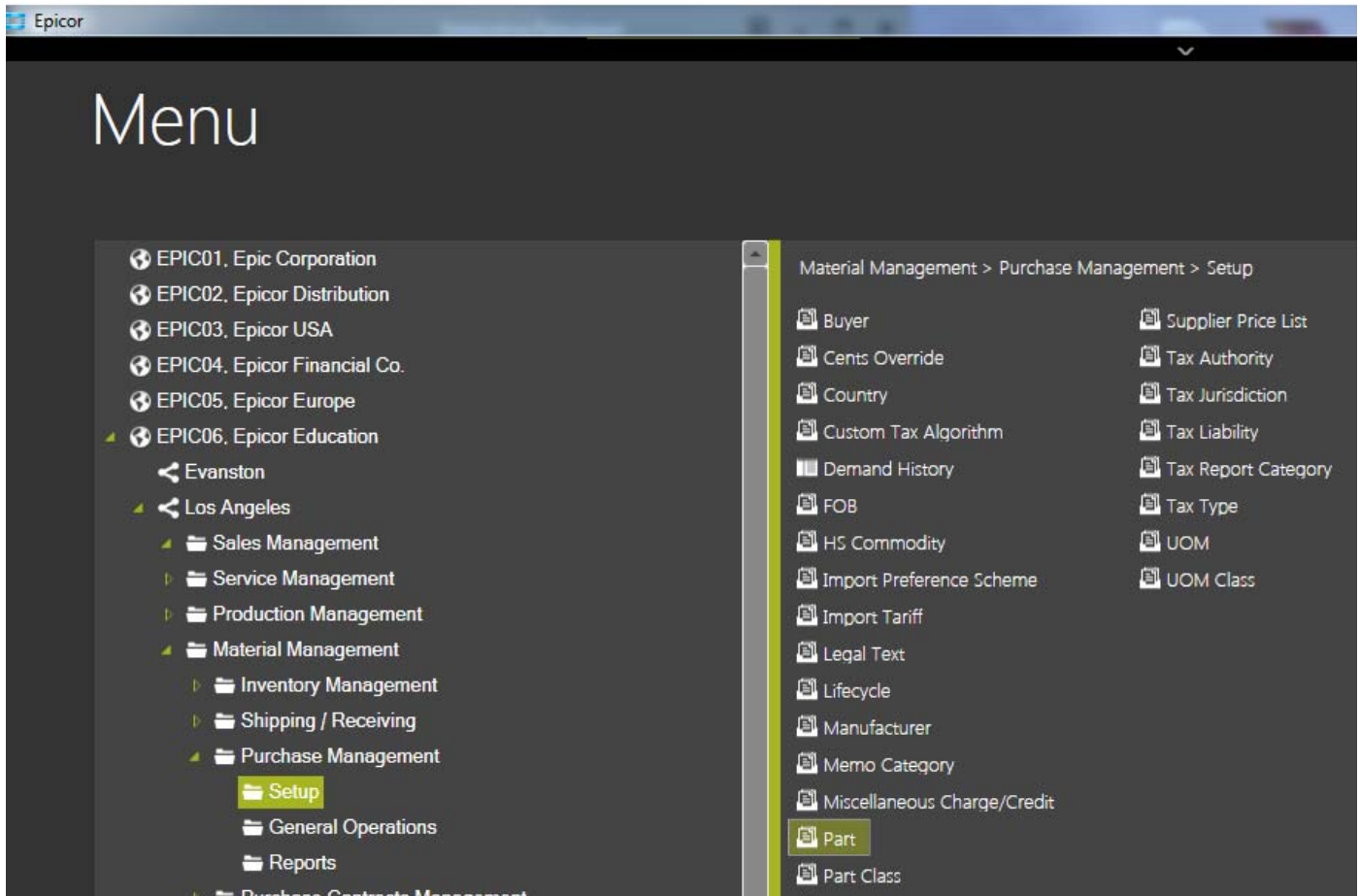
You may now add additional records to the approved supplier list by following the steps for New Approved Supplier.

Access the Part

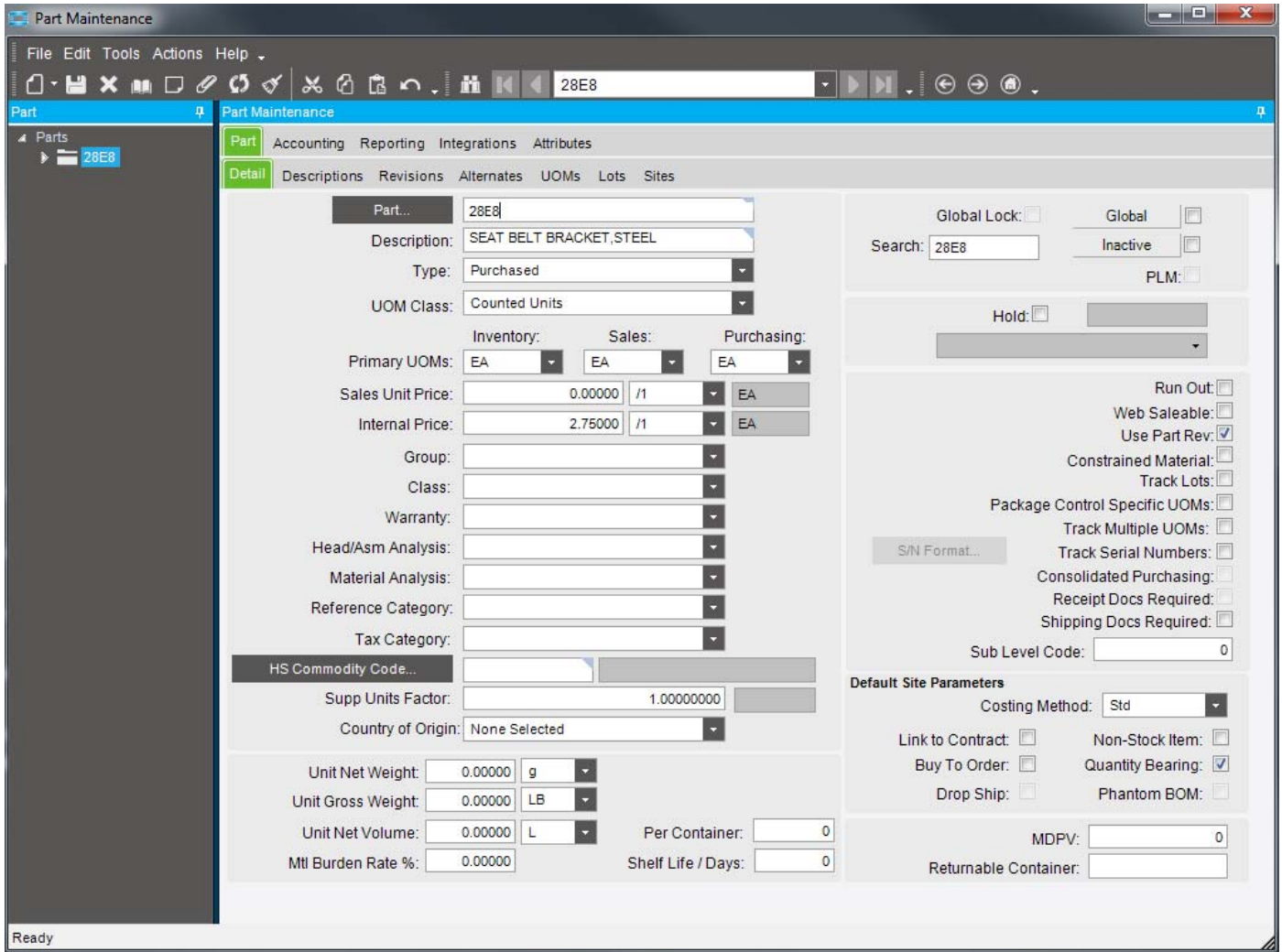
2. Access the transaction using the menu path.

Materials Management ⇨ Purchase Management ⇨ Setup ⇨ Part

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



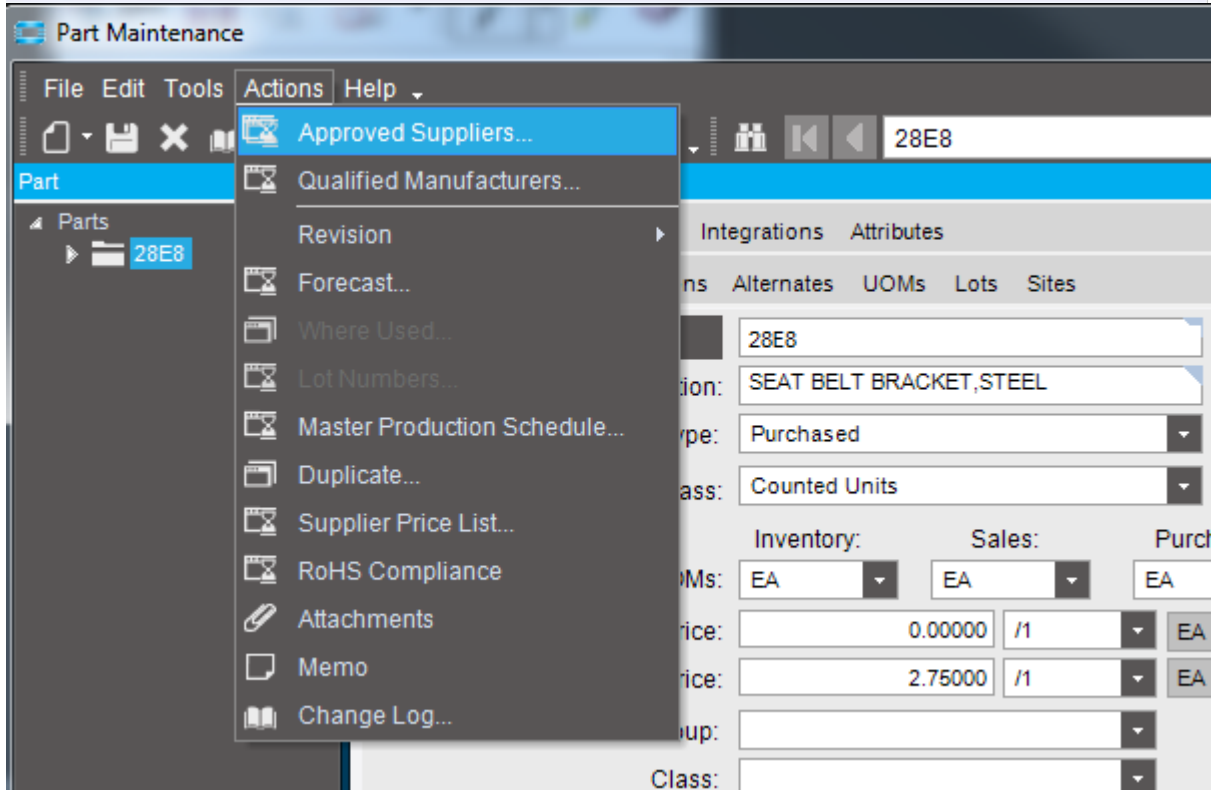
On the main screen enter the Part Number and press TAB. If you do not know the Part Number you can click on the **Part...** button to search for the part.



Actions to Create the Approved Supplier

Click on the Actions menu **Actions** and select Approved Suppliers

Business Process Procedure - Approved Supplier



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.

The screenshot displays the 'Approved Supplier Maintenance' application window for Part: 28E8. The interface includes a menu bar (File, Edit, Tools, Actions, Help) and a toolbar with various icons. The main area is titled 'Approved Supplier Maintenance' and has tabs for 'Detail', 'List', and 'Supplier Parts'. The 'Detail' tab is active, showing a form with the following fields:

- Supplier... (text input)
- Name: (text input)
- Approved Attributes**
 - Customer... (text input)
 - Name: (text input)
 - Type: (dropdown menu)
 - Part Number... (text input)
 - Description: (text input)
 - Part Class... (text input)
 - Description: (text input)
 - Operation.. (text input)
 - Description: (text input)

The status bar at the bottom of the window shows 'Ready'.

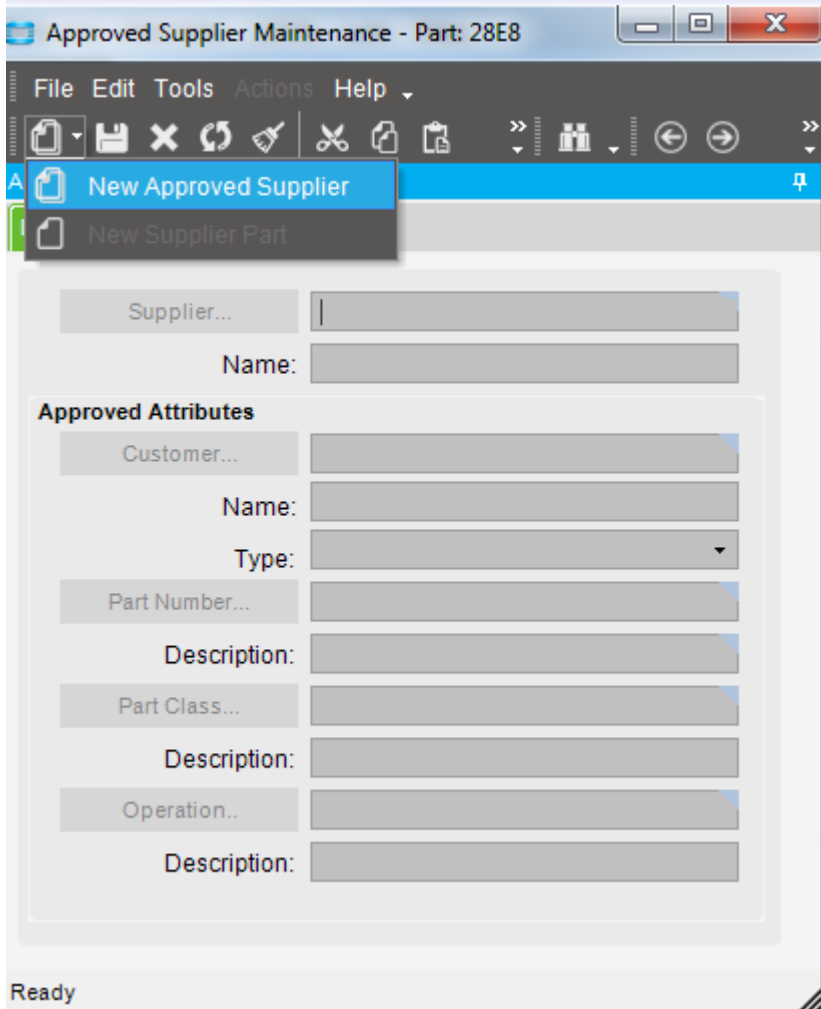
Add the Approvals for the Supplier

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

Follow the Menu Path:

New ⇒ New Approved Supplier:

Business Process Procedure - Approved Supplier



Business Process Procedure - Approved Supplier

Approved Supplier ADD initial screen:

Approved Supplier Maintenance - Part: 28E8

File Edit Tools Actions Help

Approved Supplier Maintenance

Detail List Supplier Parts

Supplier... |

Name: [Greyed out]

Approved Attributes

Customer... [Greyed out]

Name: [Greyed out]

Type: Part

Part Number... 28E8

Description: SEAT BELT BRACKET,STEEL

Part Class... [Greyed out]

Description: [Greyed out]

Operation.. [Greyed out]

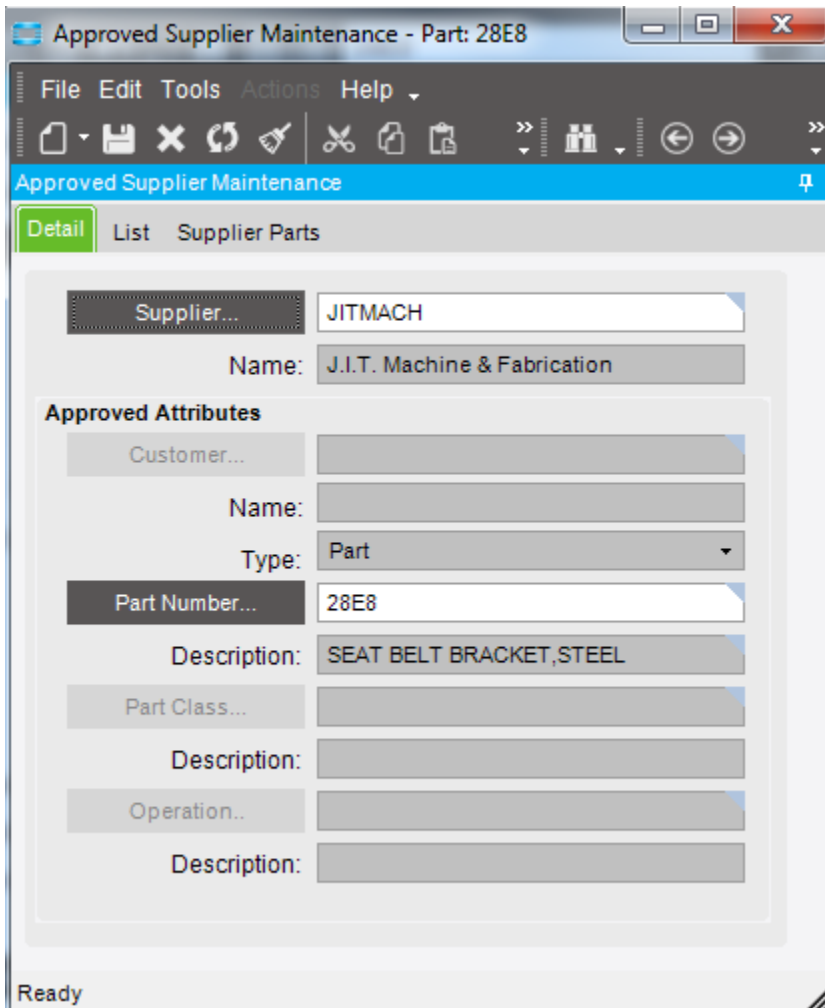
Description: [Greyed out]


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.

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. 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.



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.