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Purpose

Use this procedure to update a new supplier or change an existing supplier with the required information for purchase order processing.

Trigger(s)

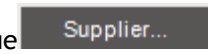
A new part is required and that part will be purchased.

A new supplier has been identified for an existing part.

Prerequisites

Engineering has approved the supplier for the part(s).

Helpful Hints

- This transaction can be used to create a new supplier, change an existing supplier or delete a supplier from the system.
- Remember that you can right click on a field to drill into more details.
- 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 supplier, such as adding a purchase point, contact or bank.
- Remember to use field help to find out more detail about a field that is not defined in this manual. Help ⇨ Field Help
- When reviewing a table of items that need to be filled in the column R/O/D represent:
  - R= Required
  - O = Optional
  - D = Display

Supplier – General Data

Definition

Suppliers are companies or people that you purchase products or services from.

Employees can be setup as suppliers for miscellaneous payments and reimbursements processing.

Procedure

- Start the transaction using the menu path.
- Search for an existing supplier, or enter the new supplier code to create a new supplier record.
- Update the required fields for the supplier master.

Menu Path

Material 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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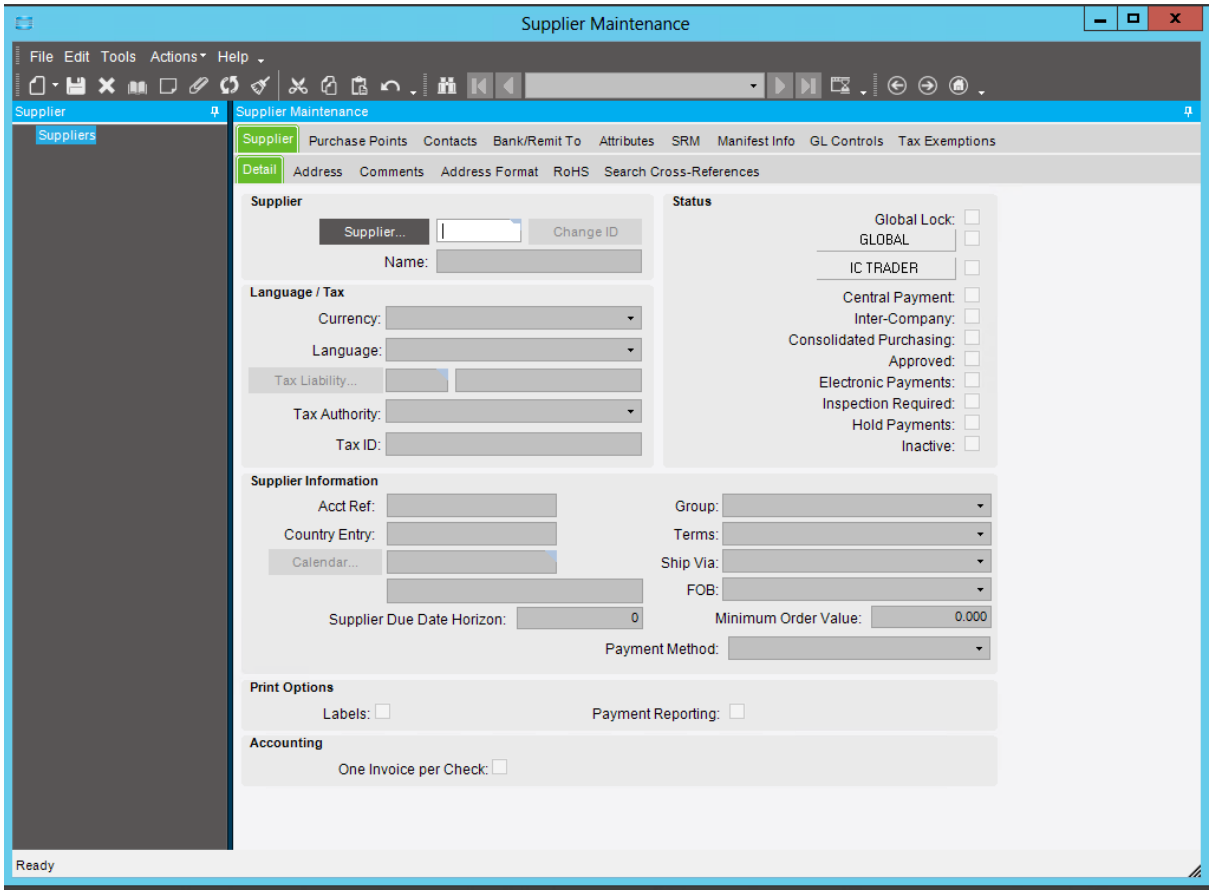
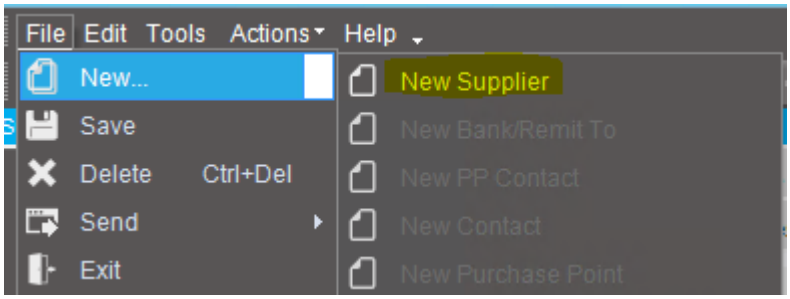


Search for the supplier by using the Supplier... button to make sure that the supplier does not already exist. Duplicate suppliers can cause multiple problems such as duplicate purchase orders, over ordering and more.

To create a new supplier click the button or do drop down arrow , use the File ⇨ New ⇨ New Supplier.



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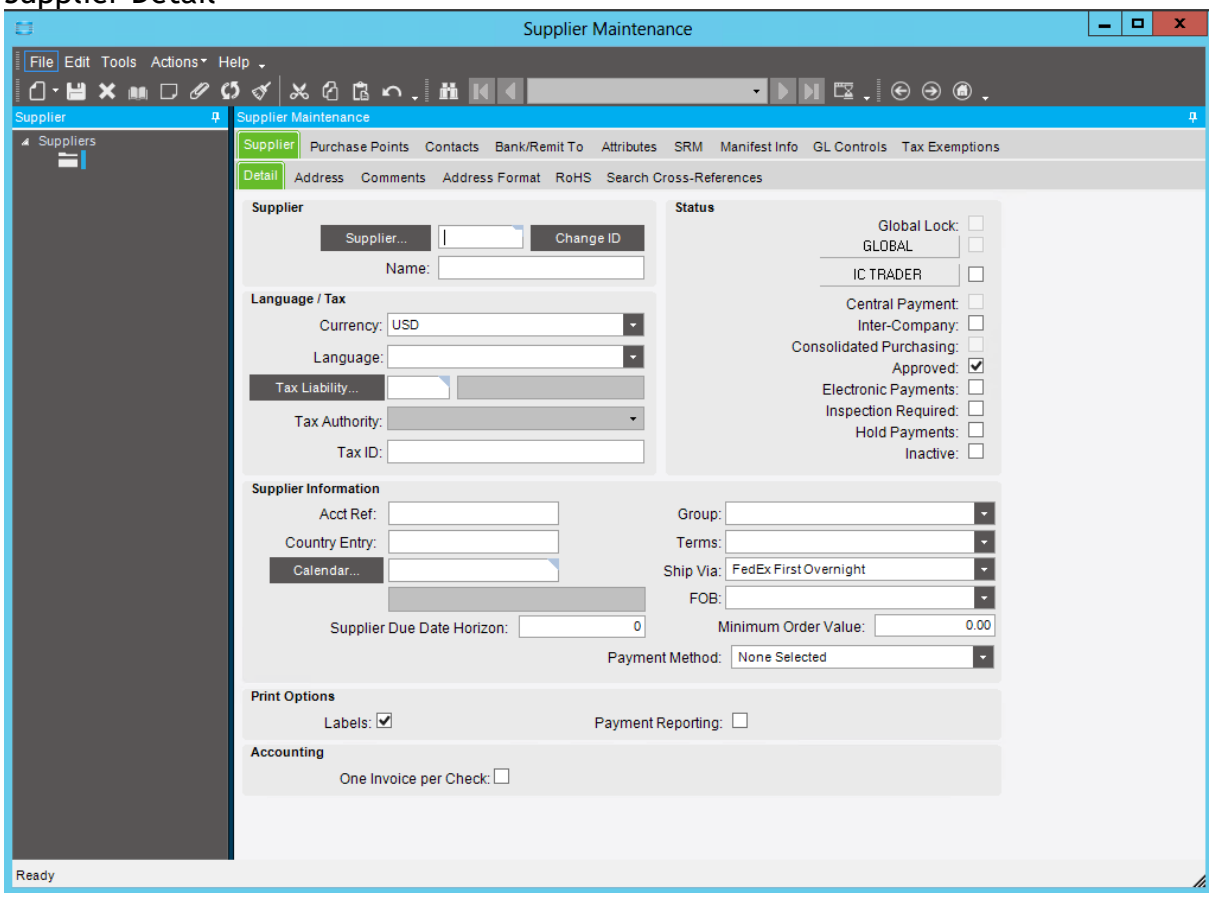
Supplier Maintenance

Supplier Detail



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Field Name	R/O/D	Description
Supplier	R	The supplier code. This is the alpha numeric key that is used to search for and identify the supplier. Recommendation is to choose something like the first eight characters of the supplier name or something that will be consistent when creating suppliers. When searching you will be able to search by this id and other information including the name.
Name	R	Enter the supplier registered name.
Currency	R	What is the currency that this supplier uses? The default is your companies default currency
Language	O	This is the language used by this supplier.
Tax Liability	O	Select the tax liability for the supplier. For this supplier, are state, local or other taxes required?
Tax ID	O	Enter the supplier's federal tax id.
Tax Authority	D	Only used if there is a link to an external finance system.
Acct Ref	O	The reference number for the account you have with the supplier. Your customer ID in the supplier's ERP/Accounting system.
Country Entry	O	Used for intrastate reporting to identify the entry point for goods shipped by this supplier.
Calendar	O	Enter a calendar that identifies the supplier production calendar. Useful if the items you purchase from this supplier are only manufactured at certain times during the year, or if the supplier has a shutdown period. Requirement: Define a production calendar in Manufacturing Setup for the supplier before you can assign.
Supplier Due Date Horizon	O	This defines the number of days from the purchase order release due date that the Scheduling engine considers incoming purchase order releases for this supplier to be late.
Group	R	Use supplier groups to separate, or group, suppliers according to types of products purchased from them. Typical groupings would be plastics, bearings, glass etc.

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Field Name	R/O/D	Description
		Requirement: The supplier group must first be defined in the supplier group maintenance before you can assign.
Terms	R	Select the payment terms for this supplier.
FOB	R	This identifies where the title and ownership for the product changes from the supplier to your company. Ex Works – when the part(s) leave the supplier location.
Minimum Order Value	O	Set this value if the supplier has a minimum order value when placing a purchase order.
Payment Method	O	Select the payment method for this supplier. While not Required it is highly recommended to set each supplier up with a payment method to help with your payment processing. Requirement: The payment method must be maintained in Setup Payment Methods prior to being assigned.
Approved	R	Set this indicator if the supplier is approved. Uncheck if the supplier should no longer be used. If this indicator is not set, then a purchase order cannot be created for this supplier.
Inspection Required	O	Set this indicator to have all goods receipt for this supplier automatically be flagged and set for incoming inspection.
Hold Payment	O	Set this indicator to have all payments for this supplier held. The supplier will not be included in the check processing.
Inactive	O	Set this indicator to make the supplier inactive. The supplier can no longer be used for purchases. The supplier cannot be referenced on a purchase order.
Labels	O	This option activates label printing in a third party reporting tool. This checkbox indicates that mailing labels will be automatically printed out for this supplier through the third party reporting tool.

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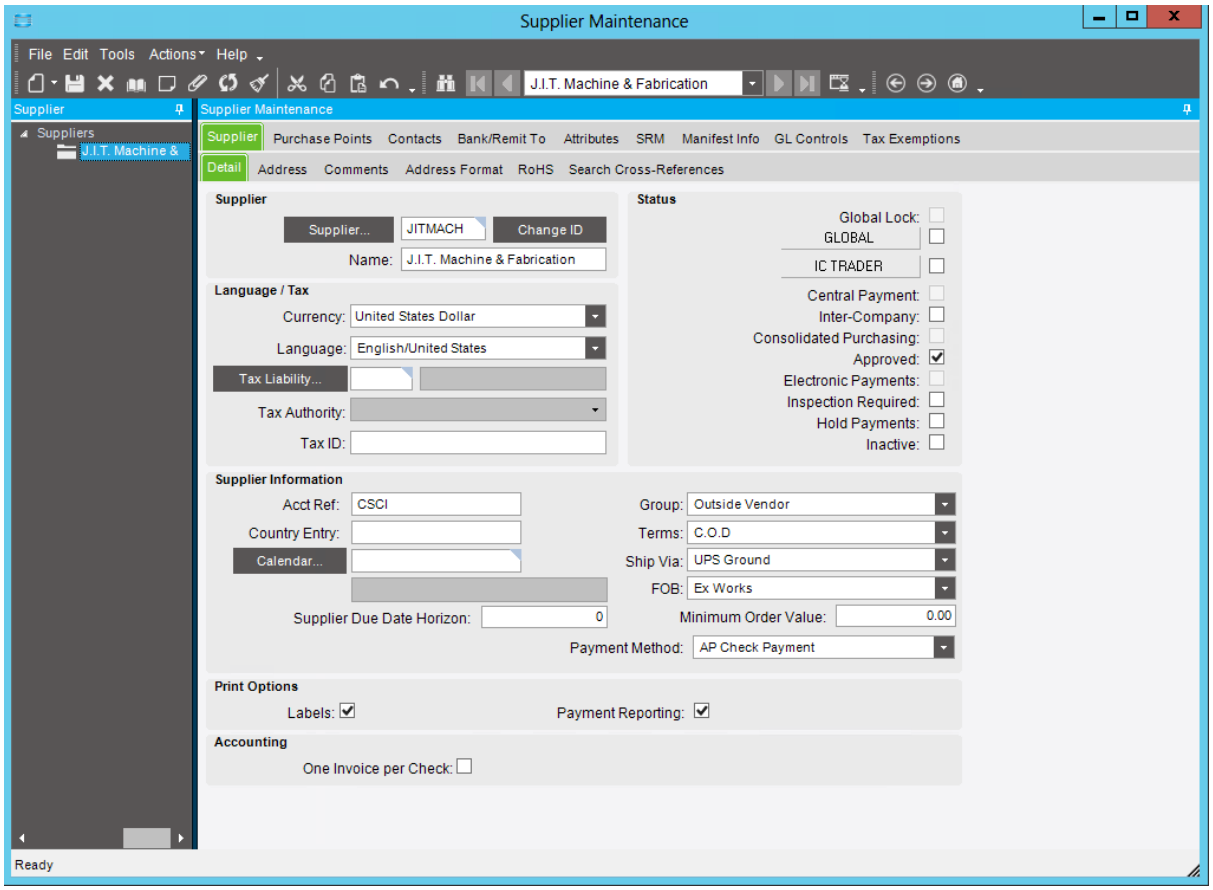
Field Name	R/O/D	Description
		NOTE: This does not control label printing in the shipping and receiving module.
Payment Reporting	O	This indicates that this supplier is required to report payments to a tax collection agency if checked.
One Invoice Per Check	O	Set this indicator if one invoice is to be paid on each check and one invoice only for this supplier.



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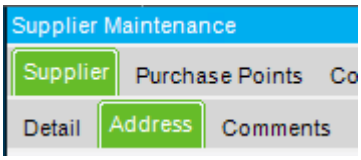
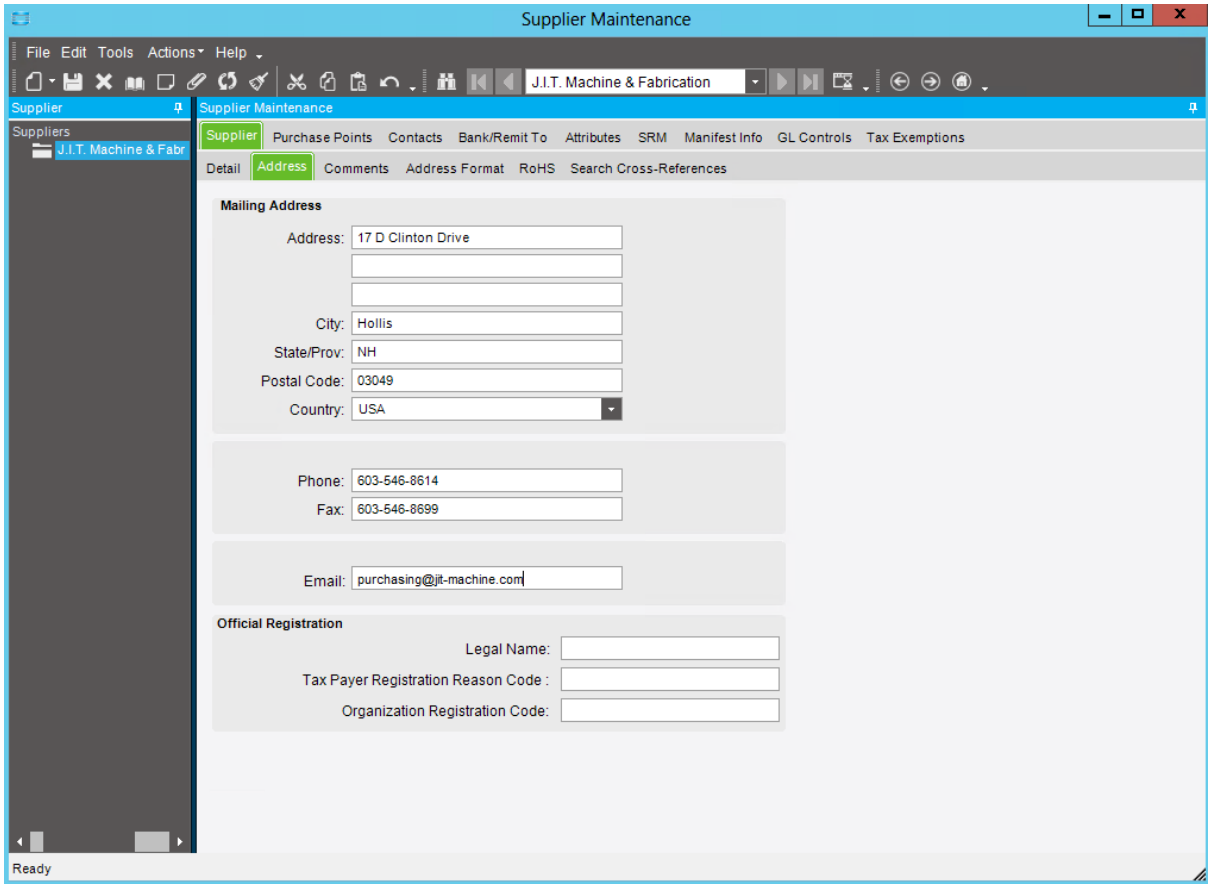
Supplier Address

Navigate to the address tab 



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Field Name	R/O/D	Description
Address	O	Use the three lines available to enter the supplier address as it will print for purchase orders etc. This is the supplier's payment address. While not Required highly recommended to have an address on the supplier
City	O	Enter the city of the address for the suppliers payment address.
State	O	Specify the name or two letter abbreviation of the province or state where the supplier is located. You can eliminate this field from printing on the Address Format tab for international addresses.
Postal Code	O	Enter the postal code for the suppliers payment address.
Country	O	Select the country code for the suppliers payment address.
Phone	O	Enter the suppliers main phone number for following up on invoices etc.
Fax	O	Enter the supplier fax number for sending purchase orders.
Email	O	Enter the supplier's main email for sending electronic purchase order copies to.

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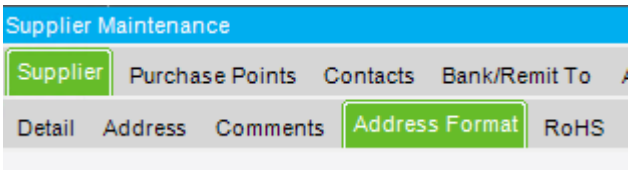
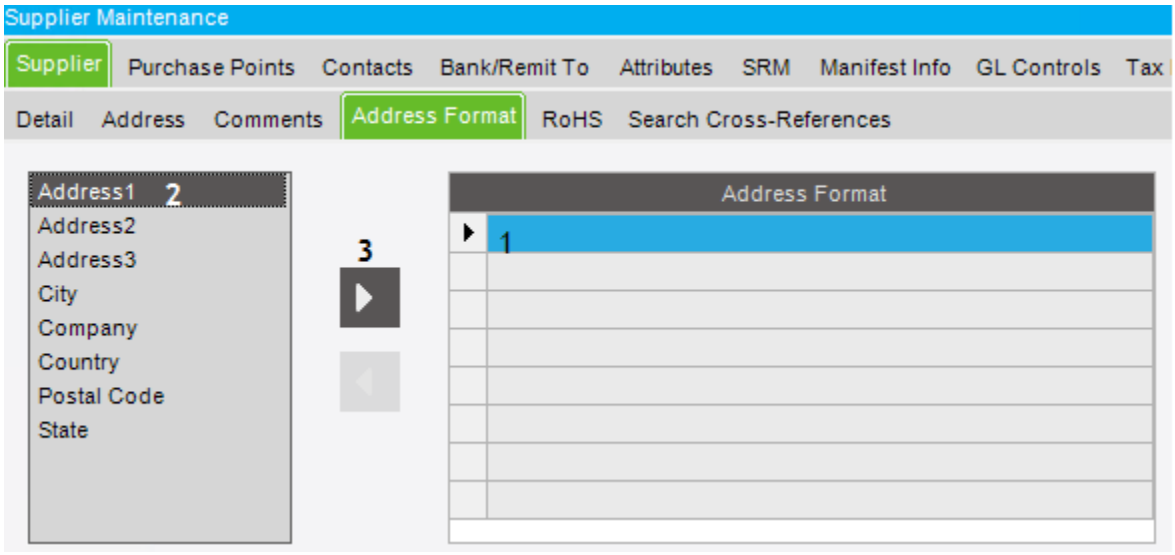
Supplier Address – Format

Use this screen to change the order, or remove fields from forms such as the Purchase order for a specific supplier. By default the address format will align to US standards, this function can be used to setup address printing on forms to support international suppliers.

Navigate to the address format tab

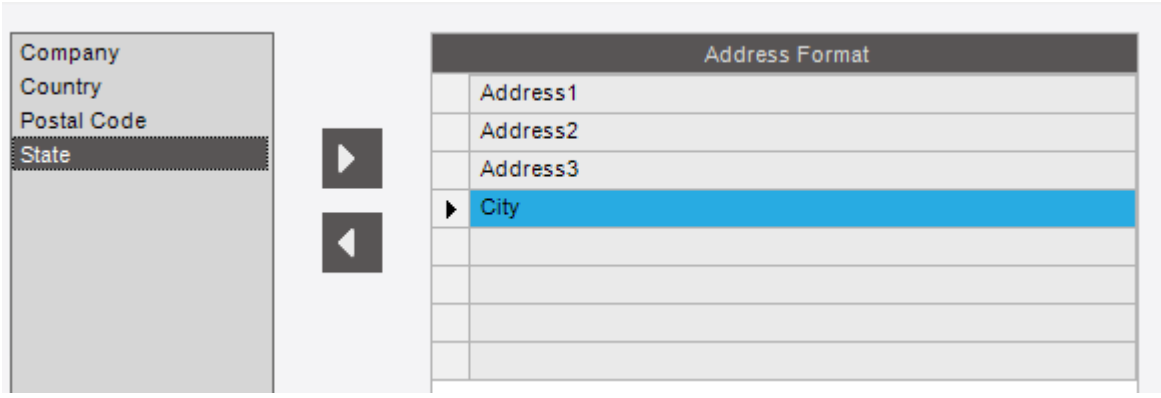


Select the location on the right, select the field on the left, and then click on the



To place two fields on the same line, select the first field and move over as above.

With the same address format row highlighted,



Select another field and press the to move that field over.

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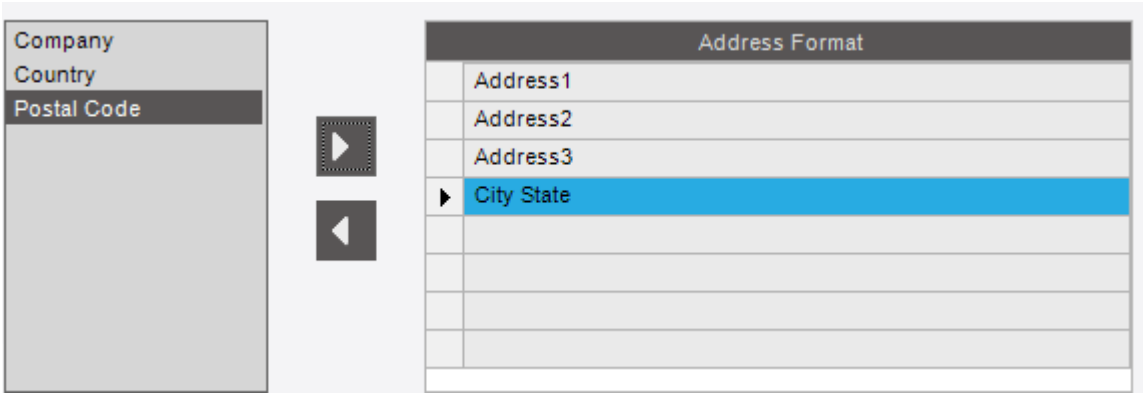
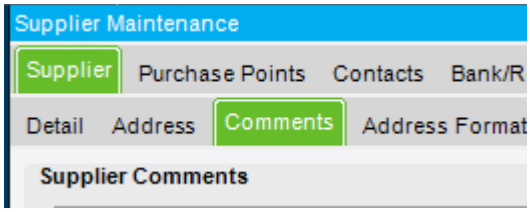
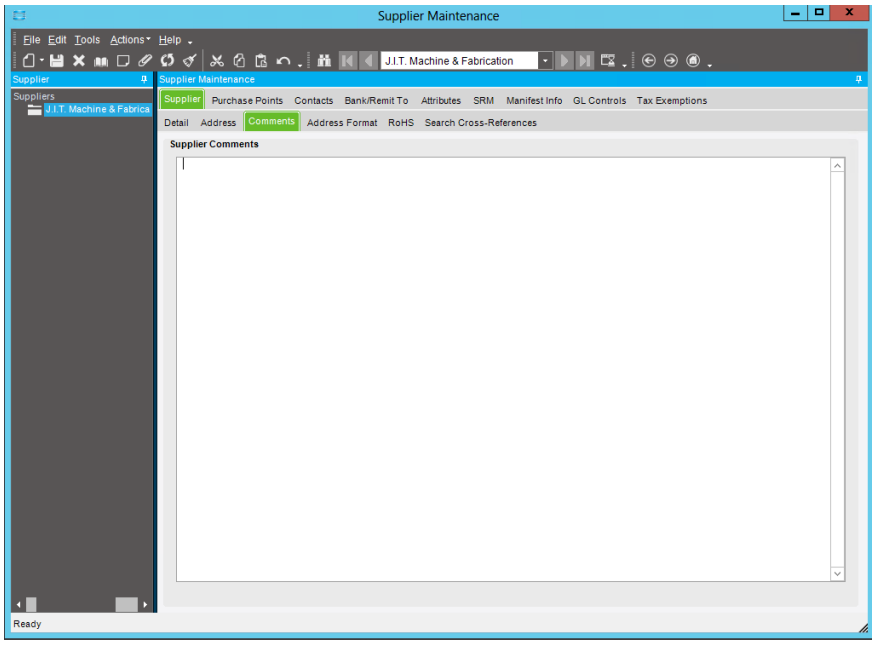


Select a field and press the to remove it from the address line and return it to the selection list.

Supplier Comments

Navigate to the comments tab 



Use this area to enter internal comments regarding the supplier. Comments entered here do not appear on any external documents in the standard system.

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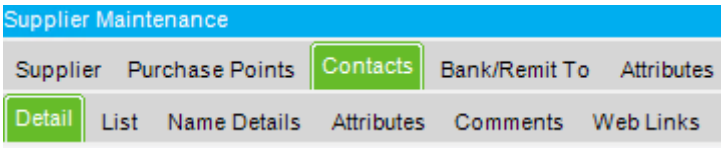
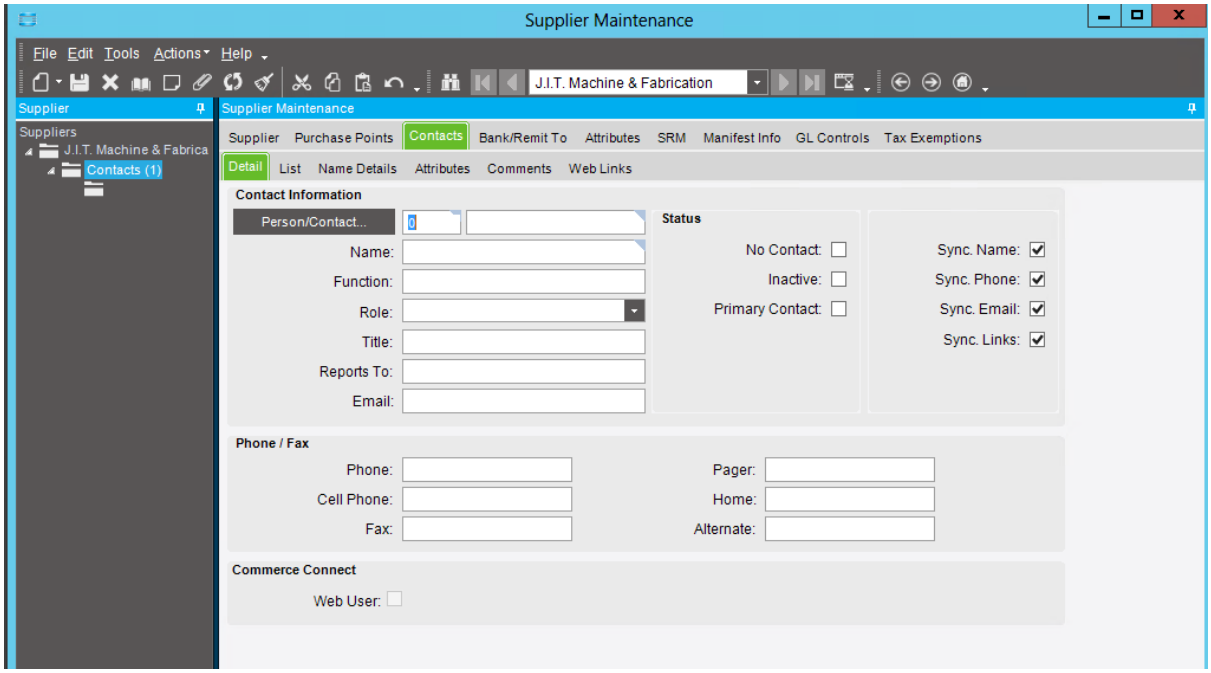
Supplier Contacts

Navigate to the contacts tab 

Create a new Contact for the supplier by doing File ⇨ New Contact or clicking on the new button .



Field Name	R/O/D	Description
Name	R	Enter the first and last name of the contact at the supplier.
Function	O	Enter the function this person has at the supplier. This is a free form text field but you should be consistent in the way you complete the field. This is the contacts main function. IE: Shipping, Invoicing, Sales.
Role	O	Choose the valid role for this contact. Roles define the position of the contact for the supplier. IE: Sales Manager, Salesperson, Vice President.
Title	O	Enter the contacts title if known.
Reports To	O	Enter the name of the person this contact reports to if known.
Email	R	Enter the email address for this contact.

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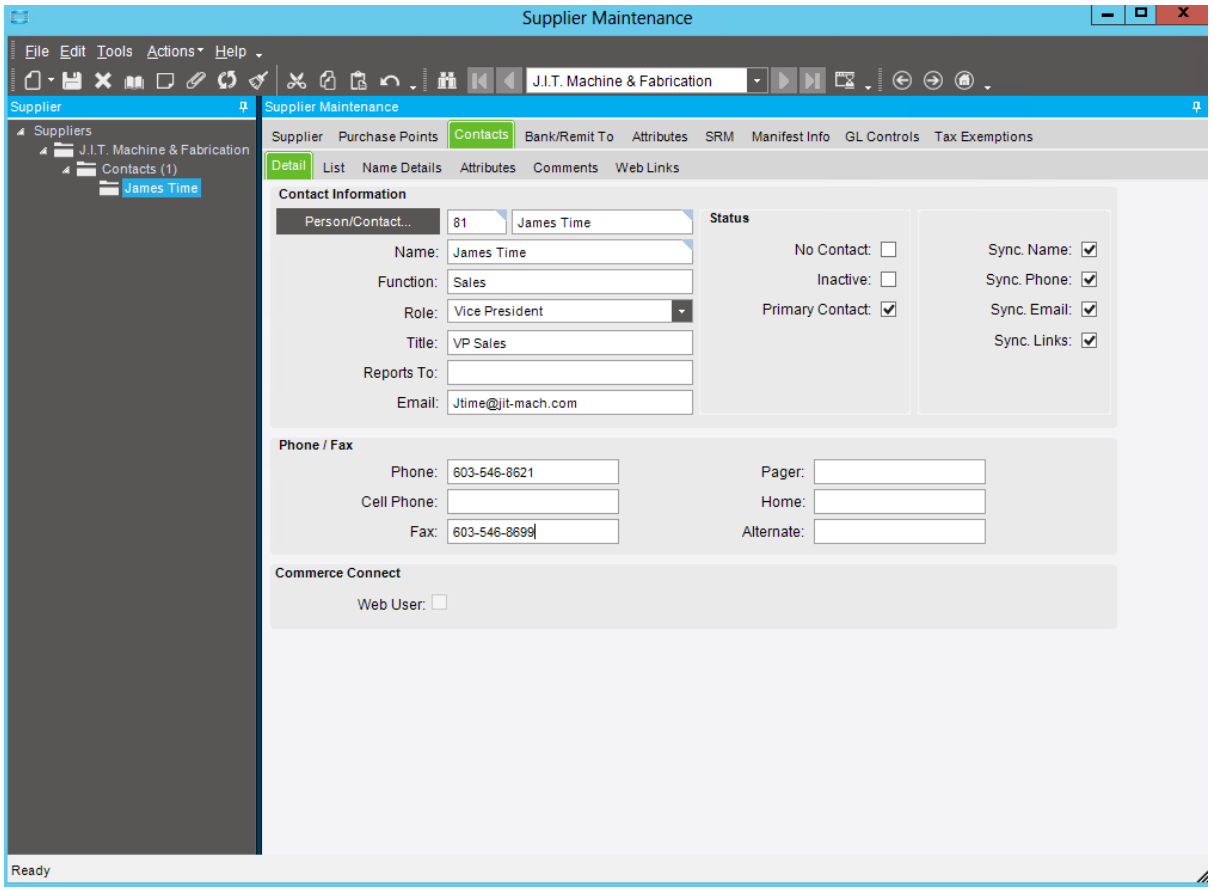
Field Name	R/O/D	Description
Phone	O	Enter the phone number for this contact.
Cell Phone	O	Enter the cell phone number for this contact.
Fax	O	Enter the supplier fax number for sending purchase orders.
Pager	O	Enter the pager number for this contact.
Home	O	Enter the home phone number for this contact.
Alternate	O	Enter an alternate phone number for this contact.
No Contact	O	Set this indicator if there should be no further contact with this person.
Inactive	O	Set this indicator if the person is no longer in this role or no longer at this supplier.
Primary Contact	O	Set this indicator if this is the primary contact at this supplier. If marked this will be the default contact that shows.



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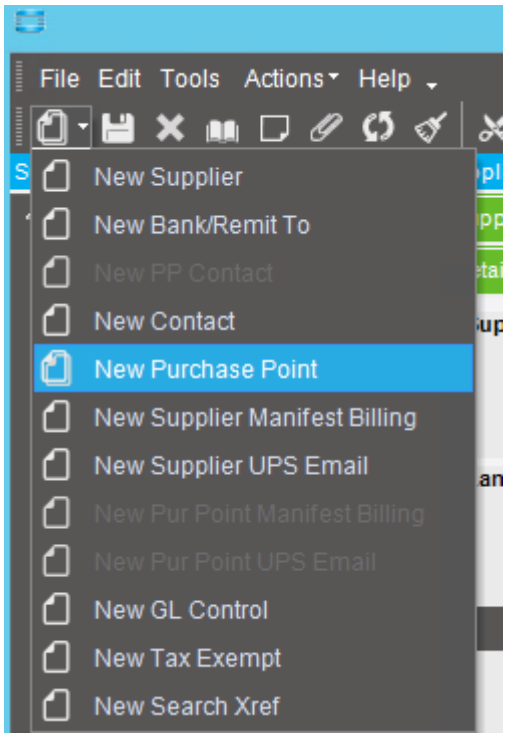
Purchase Points

Purchase Points are locations from which the supplier will ship material or provide services for your company.

Purchase Point – Detail

To add a new Purchase Point

Follow the menu path New Purchase Point



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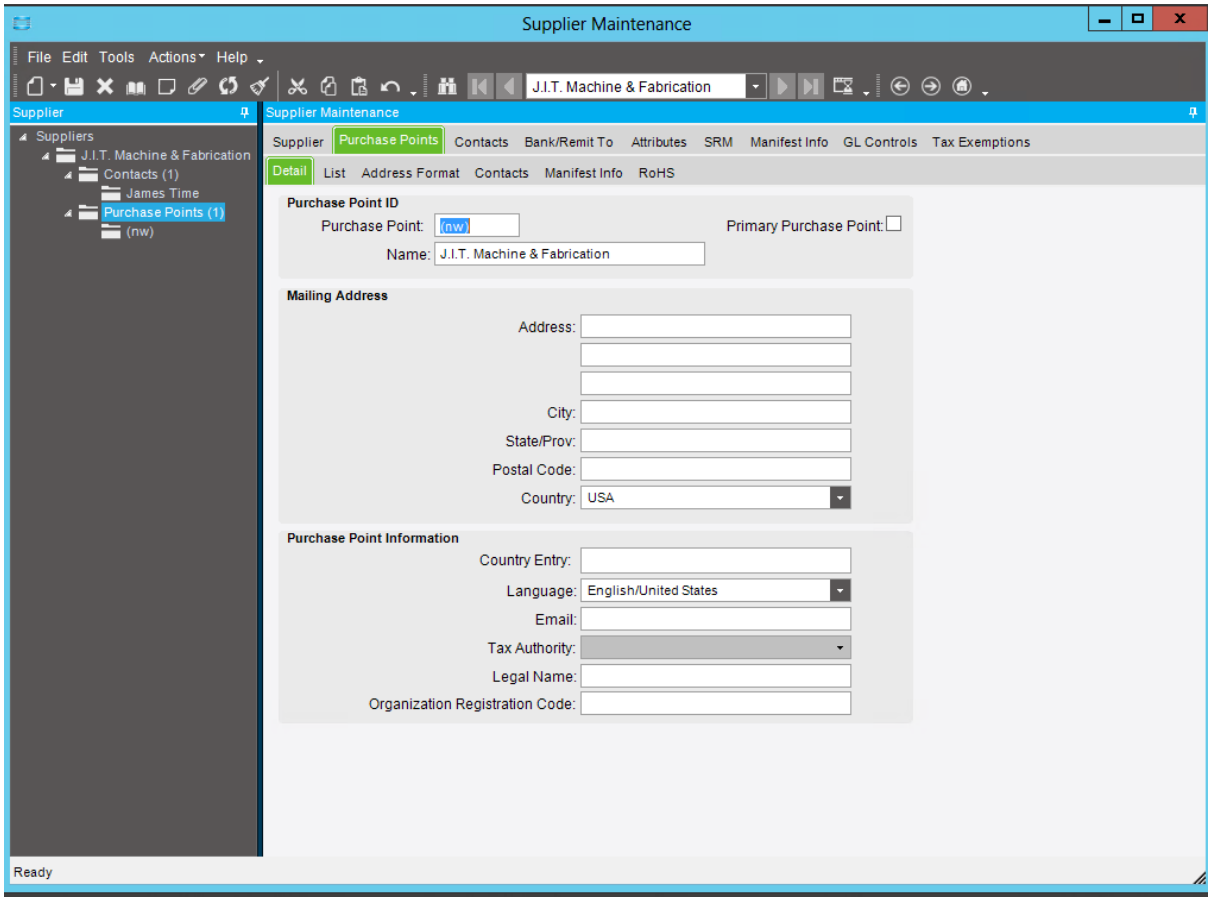

Field Name	R/O/D	Description
Purchase Point	R	Select a four character code to identify this purchase point. If the supplier has multiple purchase points in the country you can use a code to identify the region, NE for Northeast, MW, for MidWest etc. **NOTE:** When you start a new purchase point the purchase point comes in as (nw). Don't skip changing that or else you will have that as the purchase point code.
Primary Purchase Point	O	Set this indicator if this is the primary purchase point for this supplier, where we do most of our purchases.
Address	O	Use the three lines available to enter the supplier address as it will print for purchase orders etc. This is the supplier's payment address.

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Field Name	R/O/D	Description
City	O	Enter the city of the address for the suppliers purchase point.
State/Prov.	O	Specify the name or two letter abbreviation of the province or state where the suppliers purchase point is located. You can eliminate this field from printing on the Address Format tab for international addresses.
Postal Code	O	Enter the postal code for the suppliers purchase point.
Country	O	Select the country code for this purchase point. The default will be your companies Country Code.
Email	O	Enter the suppler email for sending electronic purchase order copies to at this purchase point.
Country Entry	O	Specifies the Intrastat code for the area or city that is the entry point for goods shipped from this supplier's purchase point. Only available if you have setup border crossing in the internationalization configuration.
Language	O	This is the language used by this purchase point. This language is printed on items sent to this supplier using this purchase point. Items will print with the language if you have items defined with the language. The default will be your company's language.
Email	O	This is the email address at this specific purchase point for this supplier.
Organization Registration Code	O	This is the purchase points registration code for the organization.

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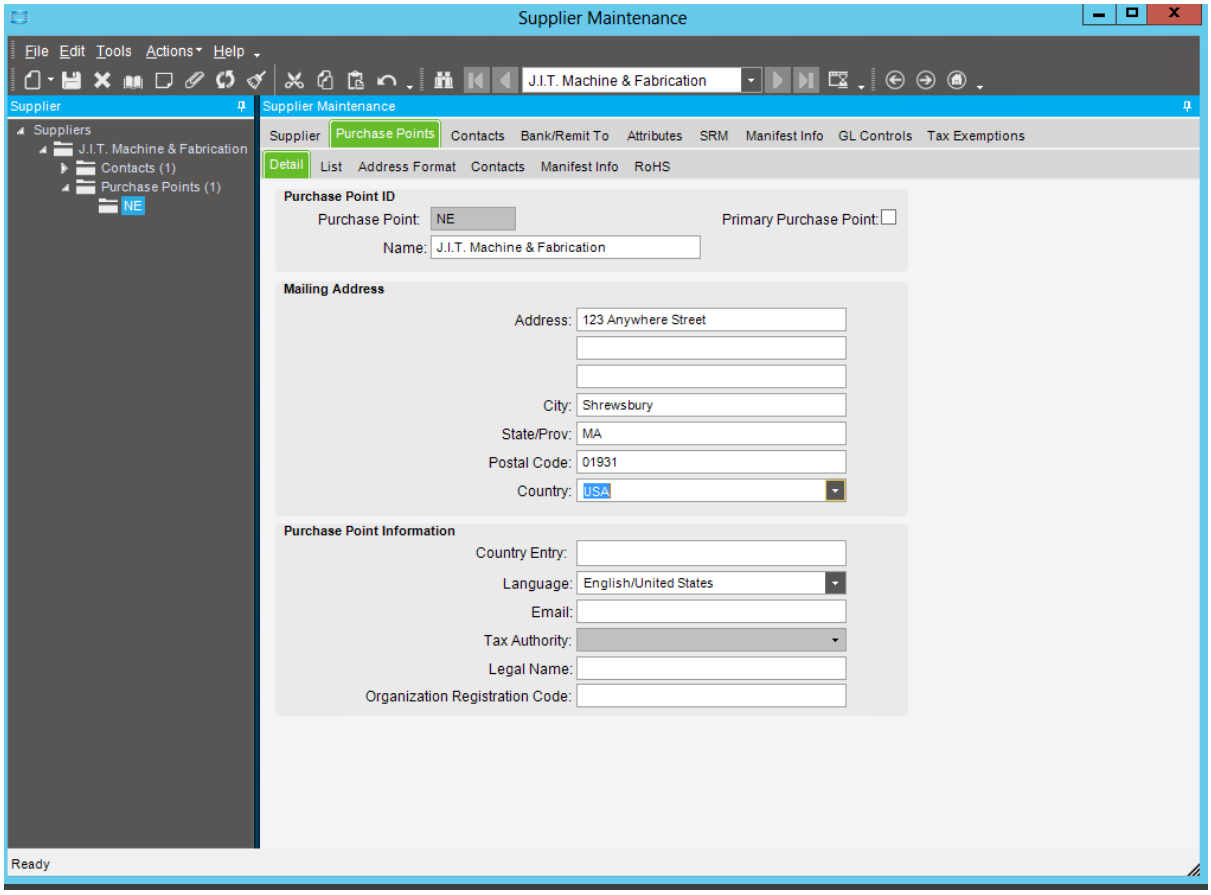
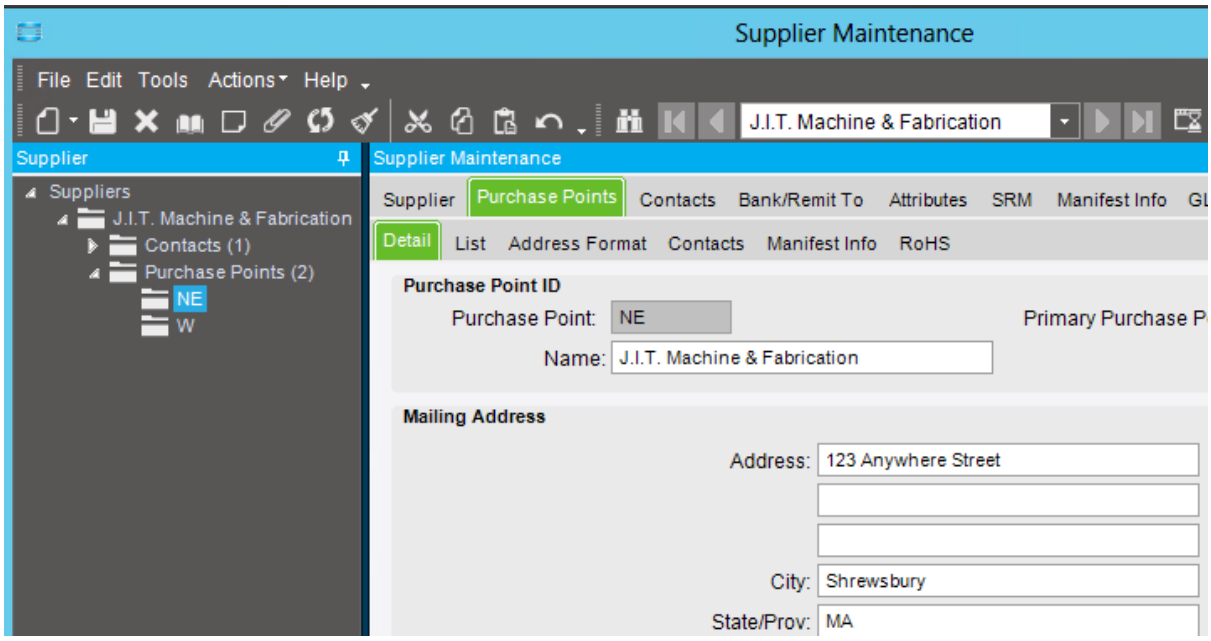


If a supplier has multiple purchase points already defined you can navigate between the details for each purchase point by selecting the appropriate purchase point in the tree diagram.



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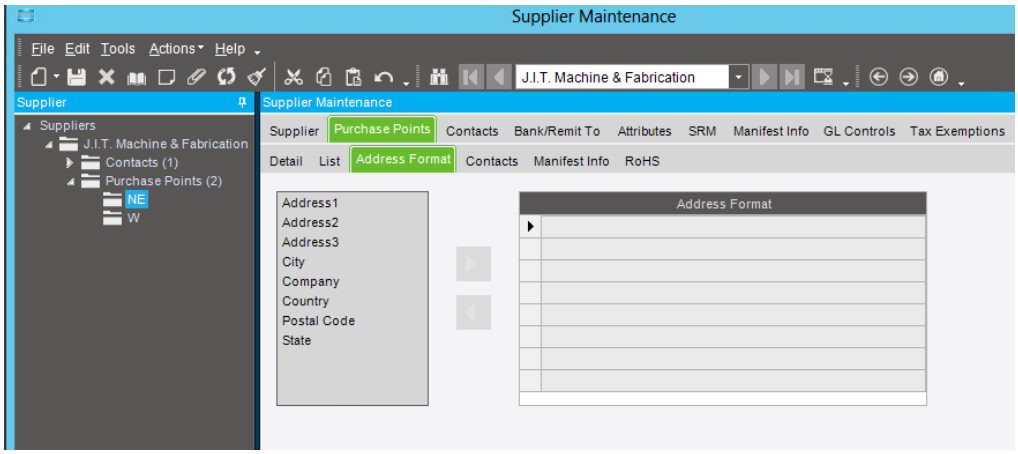
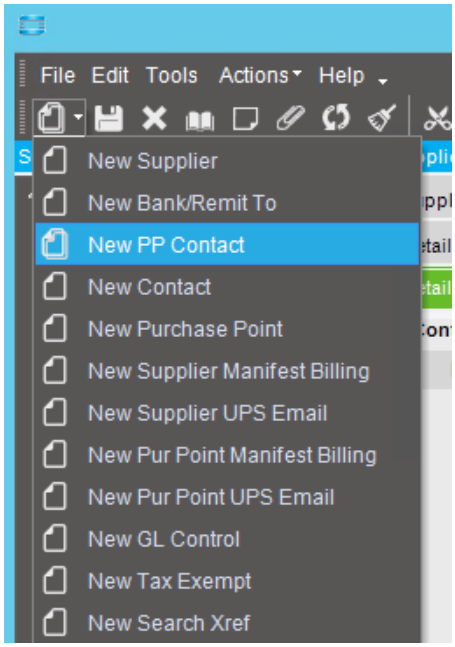
Purchase Point – Address Format



Just as you can with the primary purchasing address you can maintain the address format for the purchase point and how it is printed on documents. Refer to the address format section for instructions on updating.

Purchase Point – Contacts



Just as you can with the supplier at a general level, you can maintain contacts for the purchase point(s) created for the supplier. Refer to the supplier contact section for instructions on updating.

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