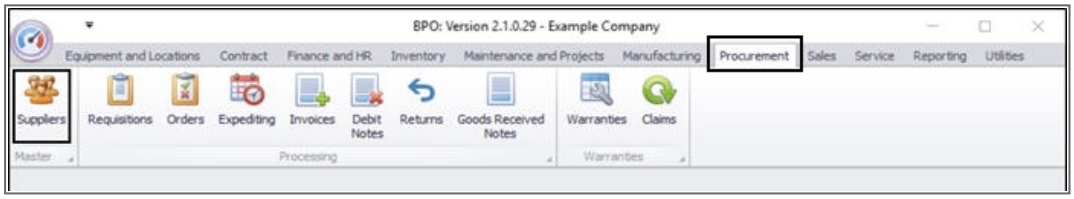
PROCUREMENT

INTRODUCTION TO SUPPLIERS

A **supplier** is anyone who supplies you with **goods** and/or **services**. Supplier **types** can be set up within the system to distinguish between your suppliers.

You need to have a supplier set up in order to create a Purchase Order.

Ribbon Access: *Procurement > Suppliers*



The ***Supplier Listing*** screen will be displayed.

SUPPLIER LISTING SCREEN

1. The screen ***site*** selection field will default to ***All Sites*** on opening and the screen ***status*** will default to ***Active***.
2. You can ***View*** any supplier in this status but if you wish to ***Edit*** a Supplier you must ***select a site first***. (The system will prompt you to do this).

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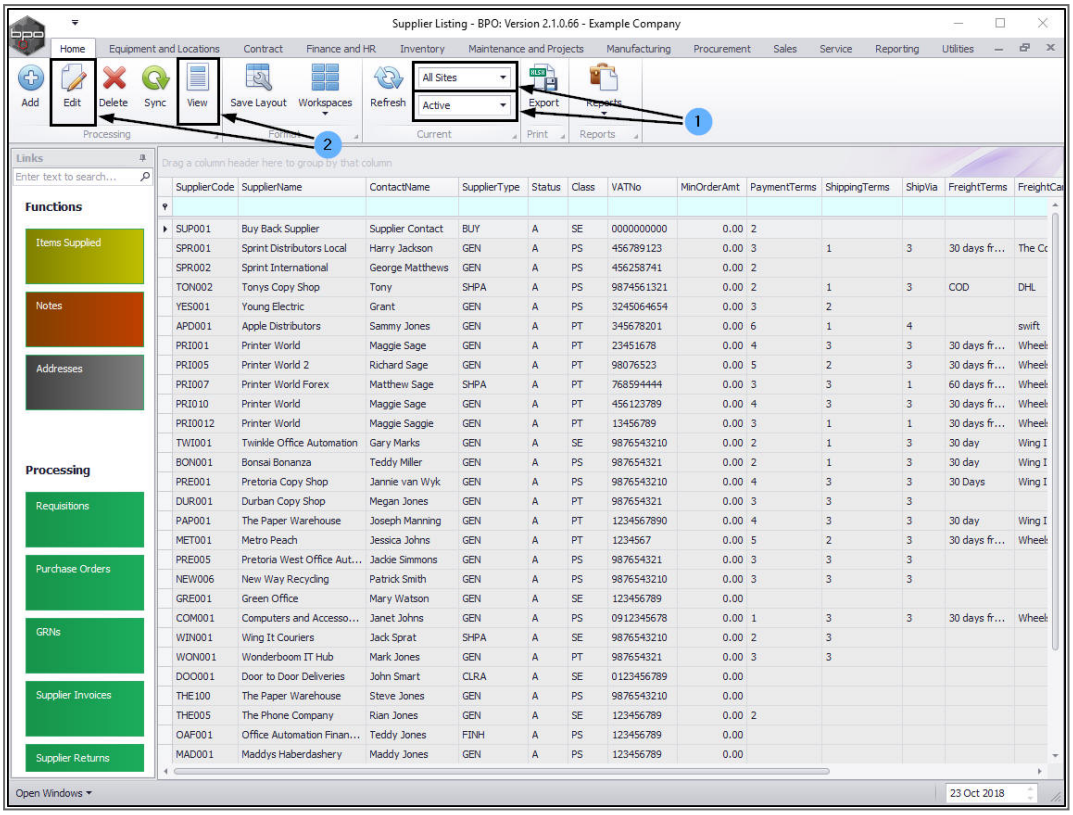

VIEW SUPPLIER DETAILS

- Click on the ***row selector*** in front of the ***supplier*** that you wish to ***view*** the details of.
- Click on ***View***.

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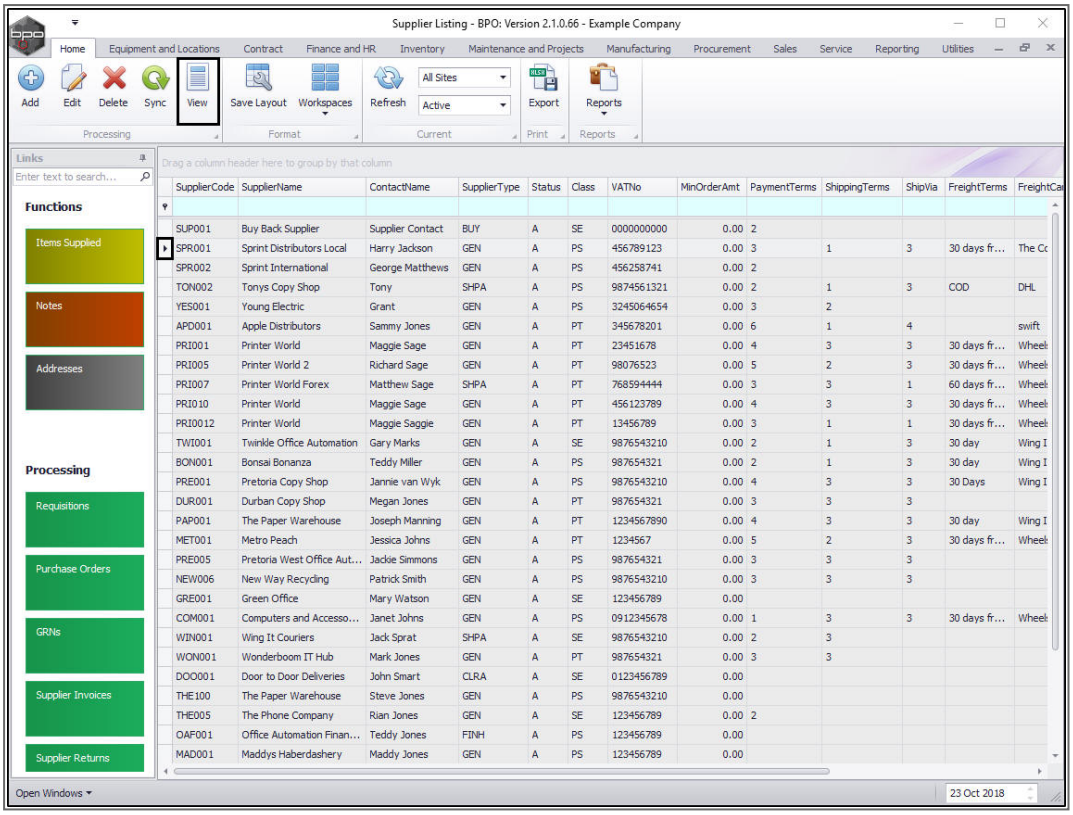

The ***View Supplier - [ ]*** screen will be displayed.

1. Here you can only ***view*** the supplier details.
2. You will note that the ***Links*** frame is in this screen, as in the ***Supplier Listing*** screen. The information linked to these Functions tiles is editable but this will be covered further in this manual.
3. Click on ***Back*** to return to the ***Supplier Listing*** screen.

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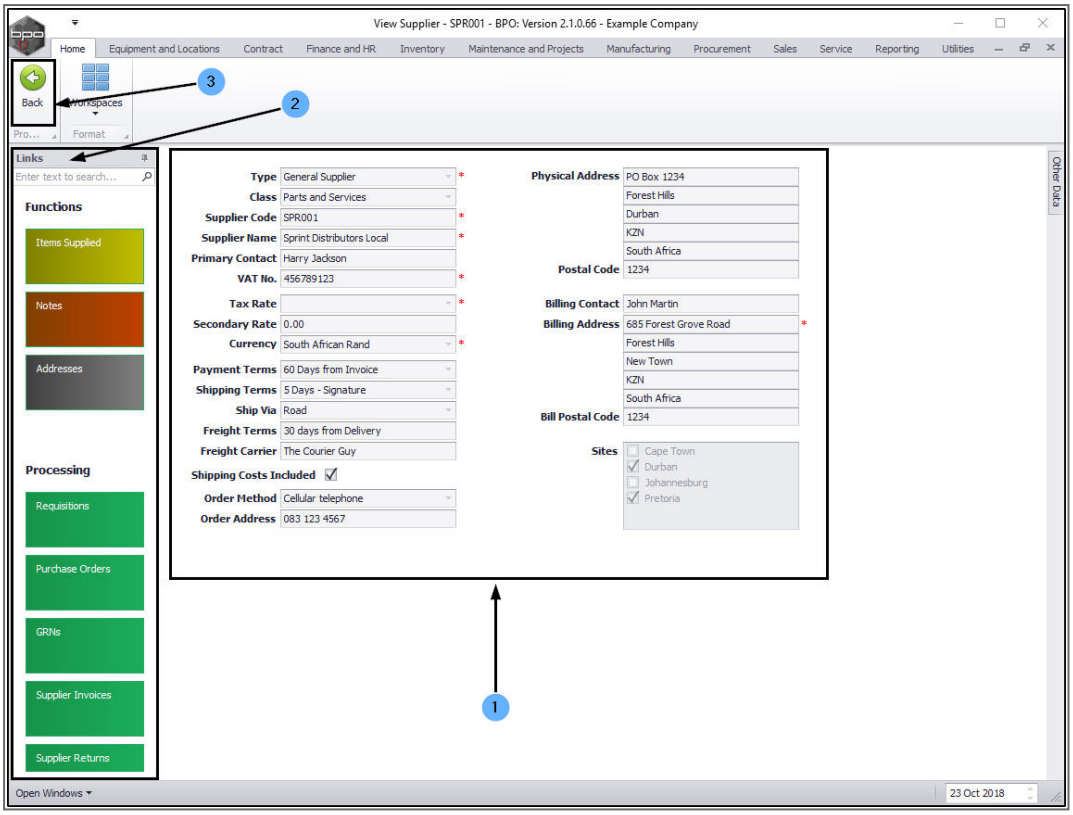

- In the ***Supplier Listing*** screen, select the ***site***.
    - In this image ***Durban*** has been selected.
- The status can be set to ***Active*** or ***Inactive***. You will most likely working in the ***Active*** status for editing purposes.

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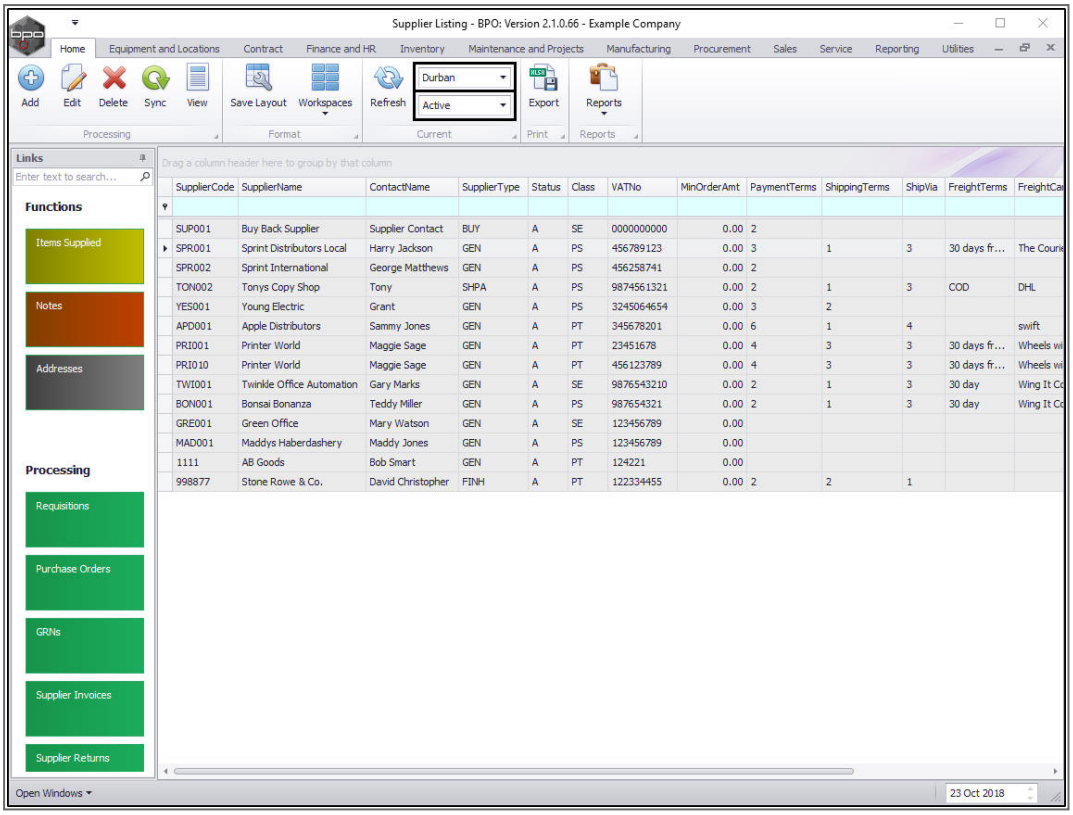

VIEW EDIT SUPPLIER SCREEN

- Click on the ***row selector*** in front of the ***supplier*** that you wish to ***edit*** the details of.
- Click on ***Edit***.

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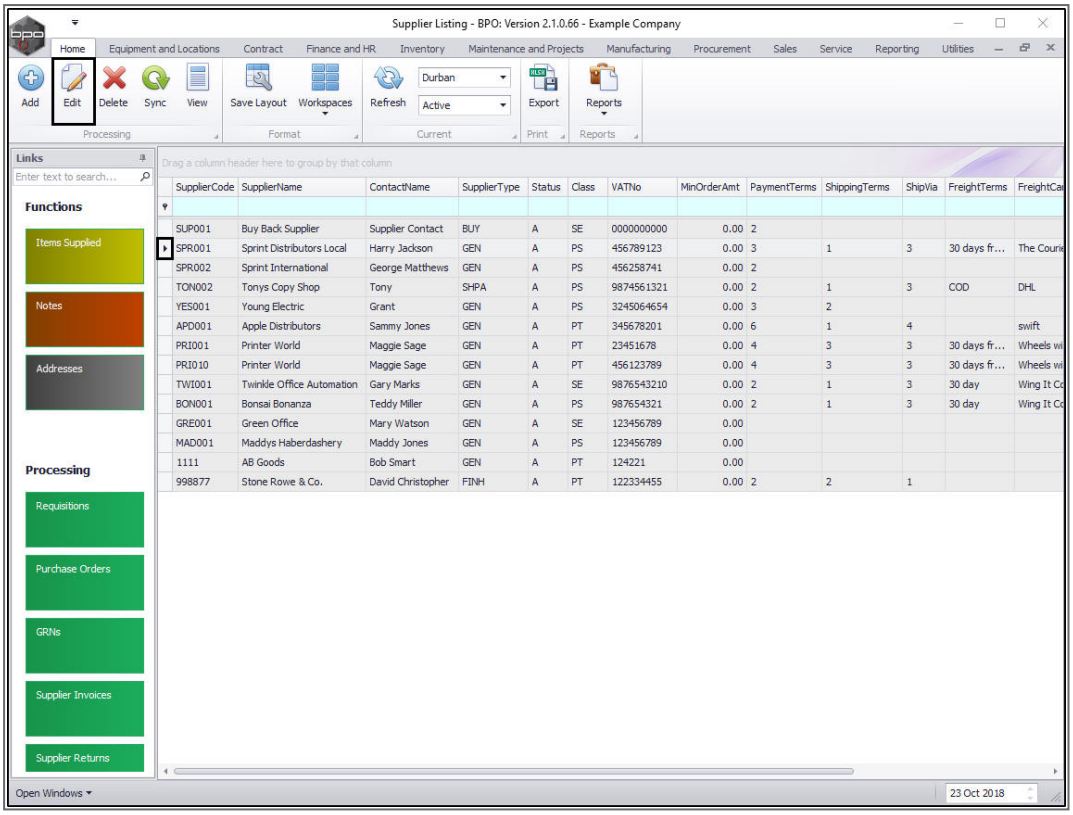

- The ***Edit Supplier - Code [ ]*** screen will be displayed.
- Here you can ***edit*** or ***update*** the supplier details as necessary.

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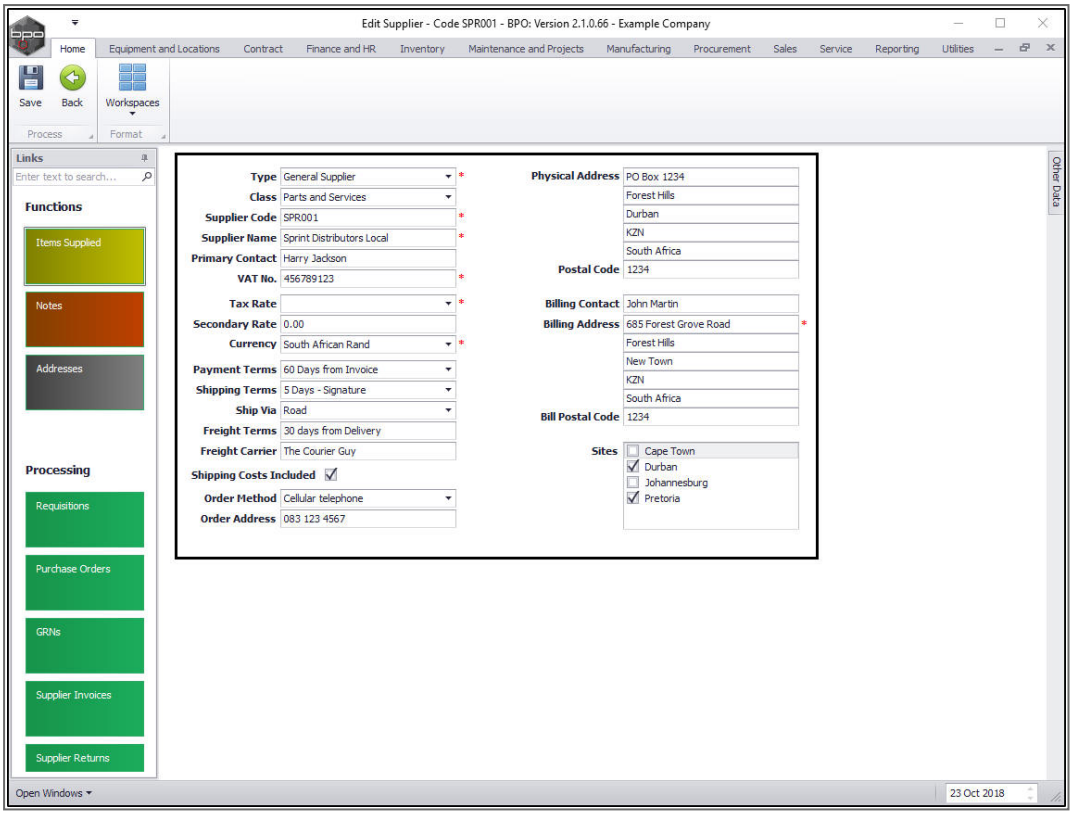

FUNCTIONS TILES

1. The ***Links*** frame contains ***Functions*** tiles and ***Processing*** tiles which will direct you to further information regarding the selected supplier.

ITEMS SUPPLIED

2. Click on the ***Items Supplied*** tile.

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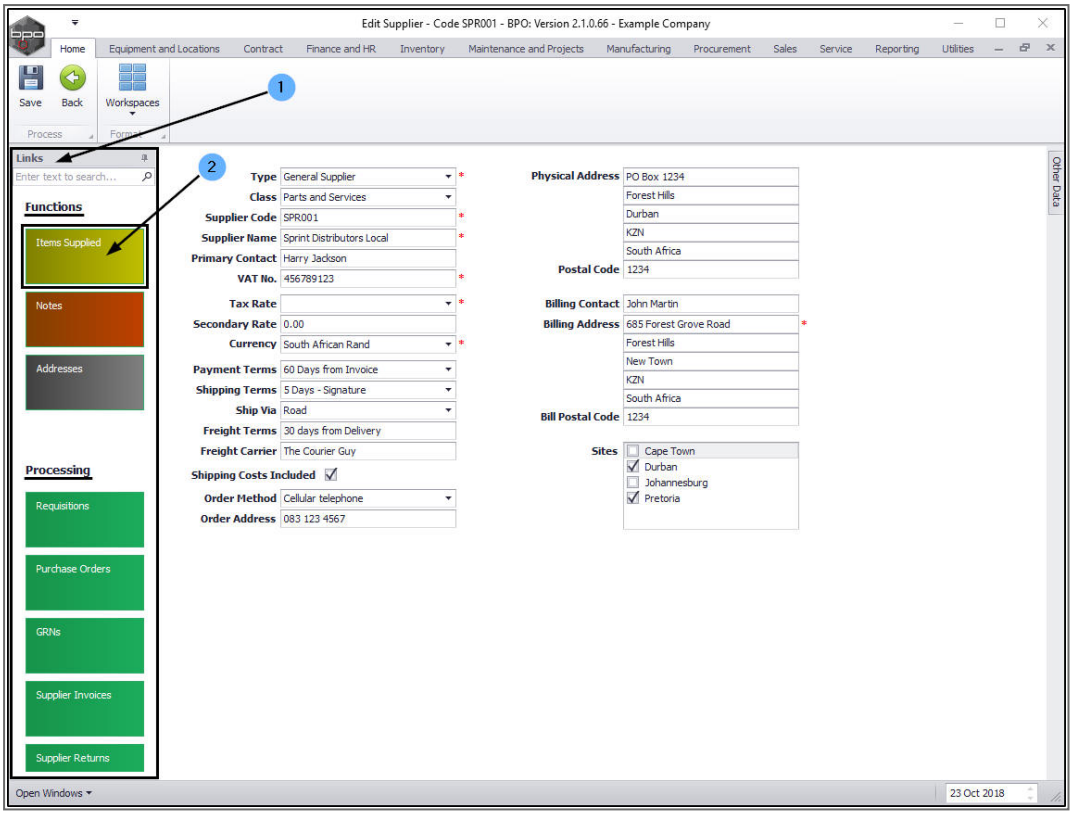

The ***Items Supplied by Supplier*** screen will be displayed.

1. Here you can view all the ***parts*** supplied by this Supplier.
2. In this screen you can ***Add***, ***Edit*** or ***Delete*** a part.

    - Click on ***Back*** to return to the ***Edit Supplier - Code [ ]*** screen.

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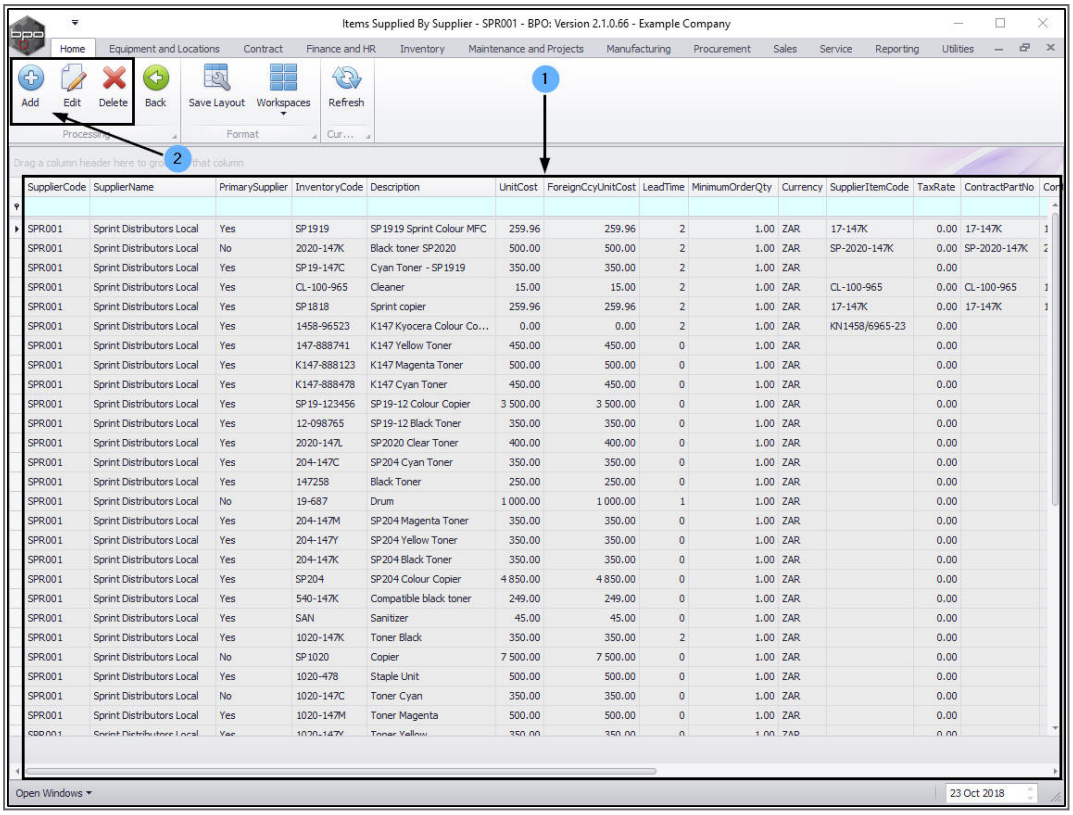

SupplierCode	SupplierName	PrimarySupplier	InventoryCode	Description	UnitCost	ForeignCcyUnitCost	LeadTime	MinimumOrderQty	Currency	SupplierItemCode	TaxRate	ContractPartNo	Con
SPR001	Sprint Distributors Local	Yes	SP1919	SP1919 Sprint Colour MFC	259.96	259.96	2	1.00	ZAR	17-147K	0.00	17-147K	1
SPR001	Sprint Distributors Local	No	2020-147K	Black toner SP2020	500.00	500.00	2	1.00	ZAR	SP-2020-147K	0.00	SP-2020-147K	2
SPR001	Sprint Distributors Local	Yes	SP19-147C	Cyan Toner - SP1919	350.00	350.00	2	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	CL-100-965	Cleaner	15.00	15.00	2	1.00	ZAR	CL-100-965	0.00	CL-100-965	1
SPR001	Sprint Distributors Local	Yes	SP1818	Sprint copier	259.96	259.96	2	1.00	ZAR	17-147K	0.00	17-147K	1
SPR001	Sprint Distributors Local	Yes	1458-96523	K147 Kyocera Colour Co...	0.00	0.00	2	1.00	ZAR	KN1458/6965-23	0.00		
SPR001	Sprint Distributors Local	Yes	147-888741	K147 Yellow Toner	450.00	450.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	K147-888123	K147 Magenta Toner	500.00	500.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	K147-888478	K147 Cyan Toner	450.00	450.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	SP19-123456	SP19-12 Colour Copier	3 500.00	3 500.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	12-098765	SP19-12 Black Toner	350.00	350.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	2020-147L	SP2020 Clear Toner	400.00	400.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	204-147C	SP204 Cyan Toner	350.00	350.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	147258	Black Toner	250.00	250.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	No	19-687	Drum	1 000.00	1 000.00	1	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	204-147M	SP204 Magenta Toner	350.00	350.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	204-147Y	SP204 Yellow Toner	350.00	350.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	204-147K	SP204 Black Toner	350.00	350.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	SP204	SP204 Colour Copier	4 850.00	4 850.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	540-147K	Compatible black toner	249.00	249.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	SAN	Sanitizer	45.00	45.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	1020-147K	Toner Black	350.00	350.00	2	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	No	SP1020	Copier	7 500.00	7 500.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	1020-478	Staple Unit	500.00	500.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	No	1020-147C	Toner Cyan	350.00	350.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	1020-147M	Toner Magenta	500.00	500.00	0	1.00	ZAR		0.00		
SPR001	Sprint Distributors Local	Yes	1020-147Y	Toner Yellow	350.00	350.00	0	1.00	ZAR		0.00		

NOTES

- In the ***Edit Supplier*** screen, click on the ***Notes*** tile.

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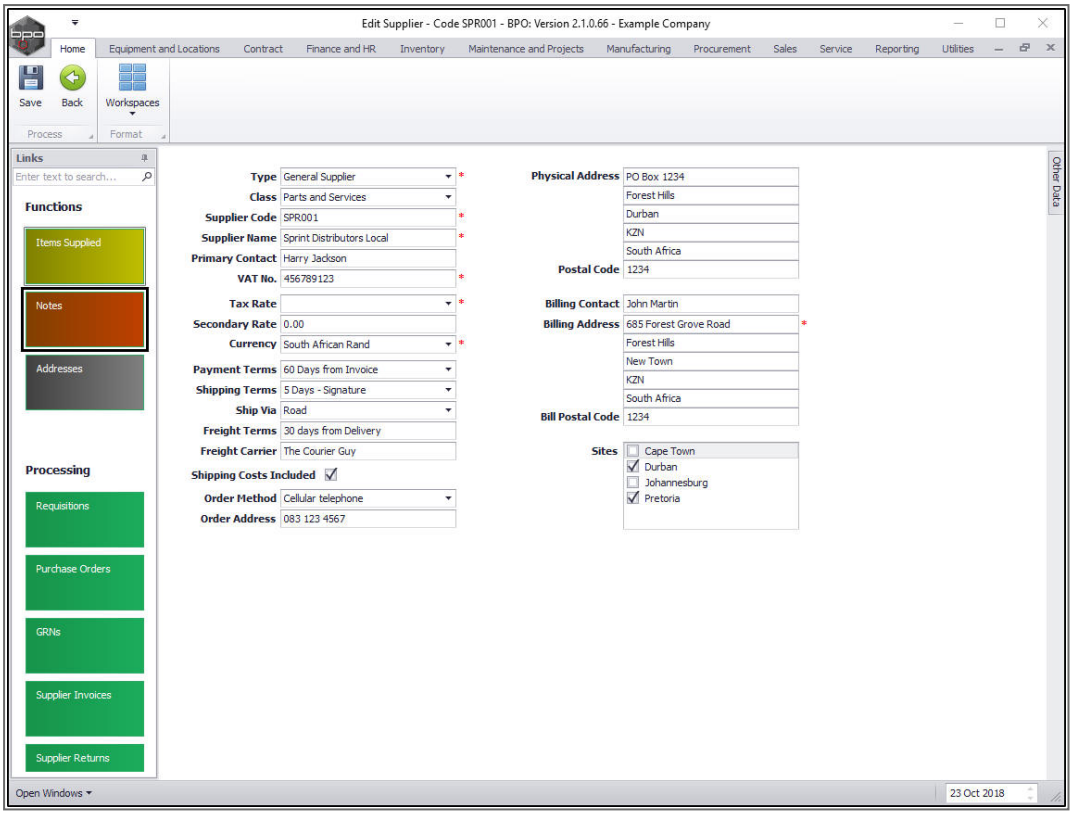

The ***Notes for Supplier []*** screen will be displayed. In this screen you can view the

1. **Comments**: Internal notes regarding the Supplier and
2. **Notes**: Notes concerning orders to this supplier, which will pull through to the Purchase Order.
3. Type in the relevant text boxes to ***add*** a note or comment as required.

    - Click on ***Back*** to return to the ***Edit Supplier - Code [ ]*** screen.

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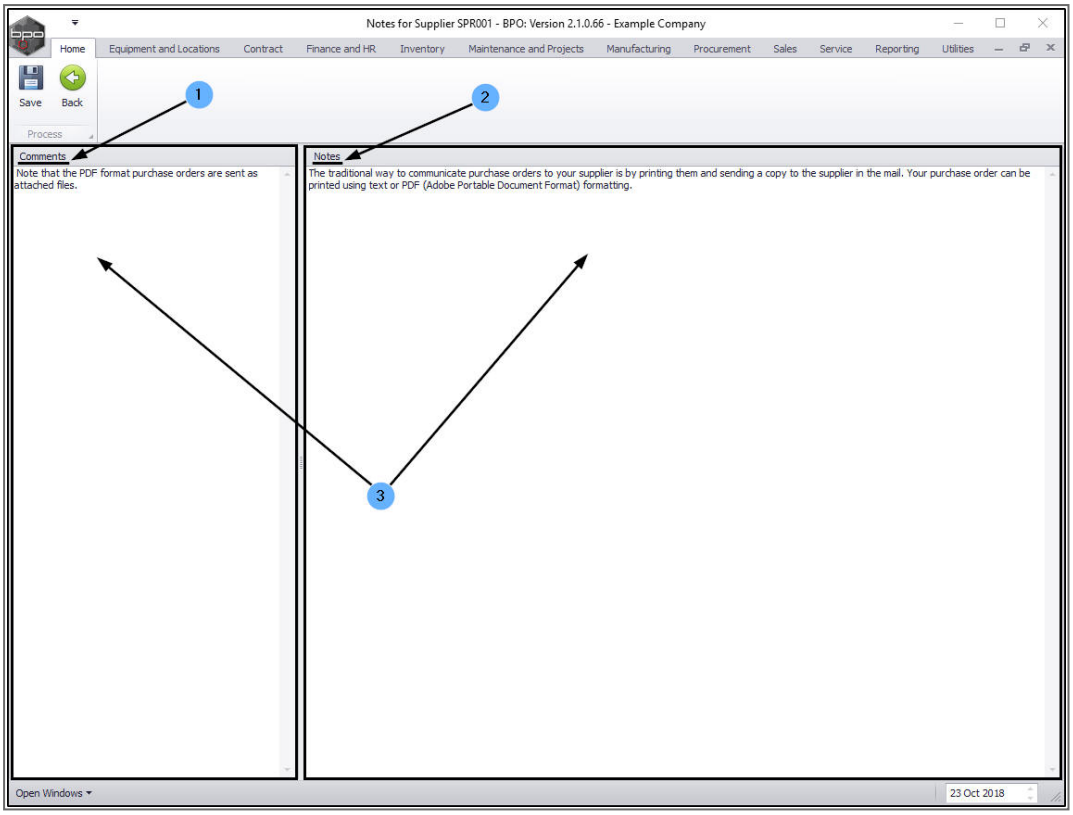

ADDRESSES

- In the ***Edit Supplier Code - [ ]*** screen, click on the ***Addresses*** tile.

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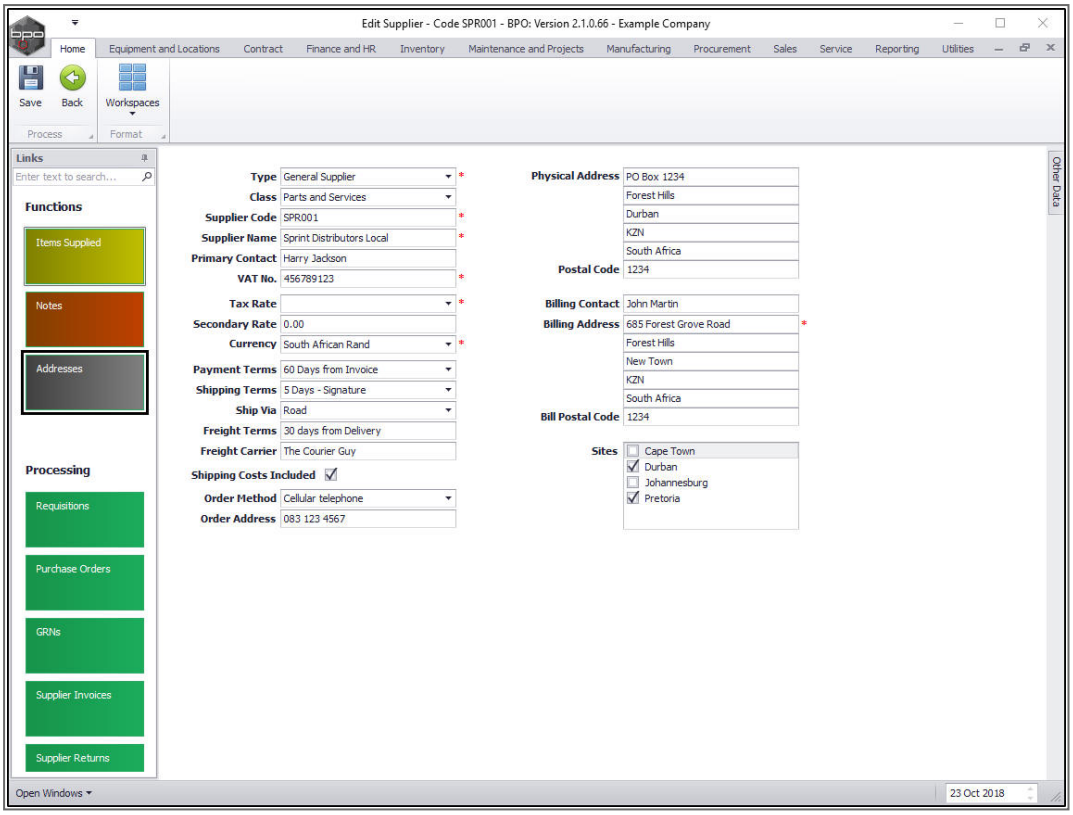

The ***Addresses for Supplier - []*** screen will be displayed.

1. Here you can view the different address types; ***Postal***, ***Physical***, ***Billing*** and ***Shipping***.

    - **Note**: Make sure you have a ***Physical*** address set up, as this pulls through to the ***Purchase Order***.

2. In this screen you can ***Add***, ***Edit*** or ***Delete*** an address type.

    - Click on ***Back*** to return to the ***Edit Supplier - Code [ ]*** screen.

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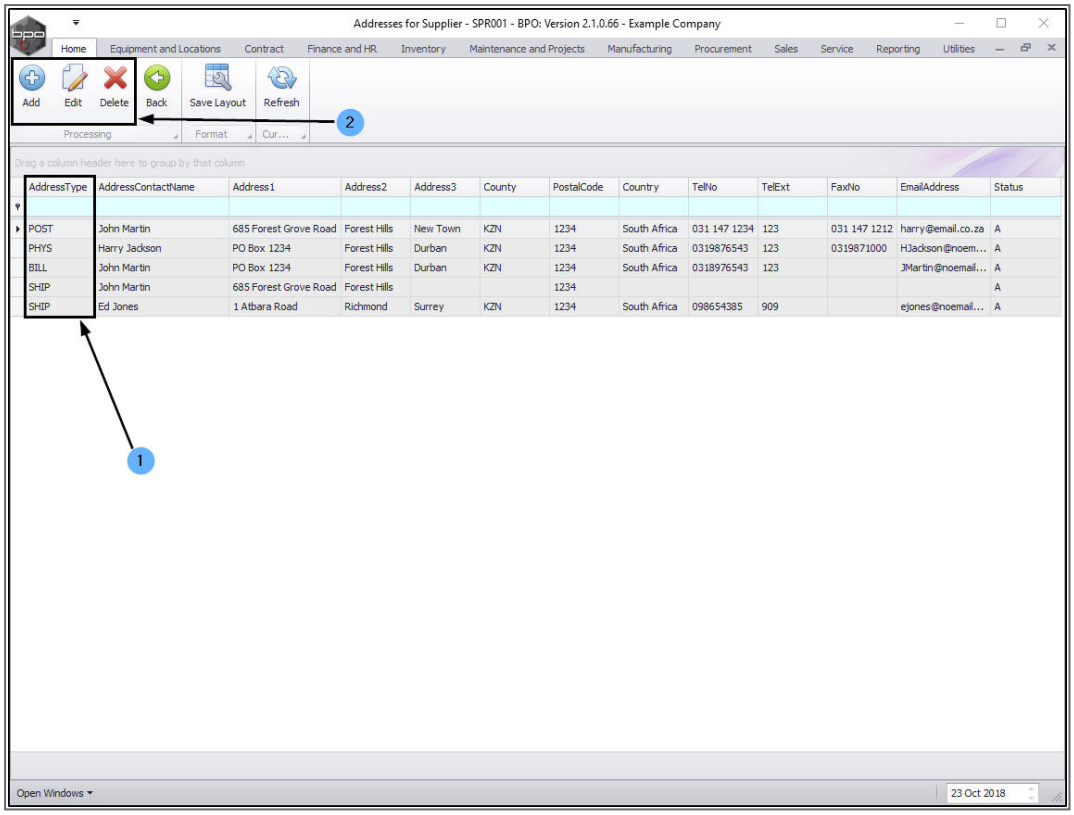

PROCESSING TILES

The Links frame also contains the Processing tiles:

REQUISITIONS

- In the ***Edit Supplier - Code [ ]*** screen, click on the ***Requisitions*** tile.

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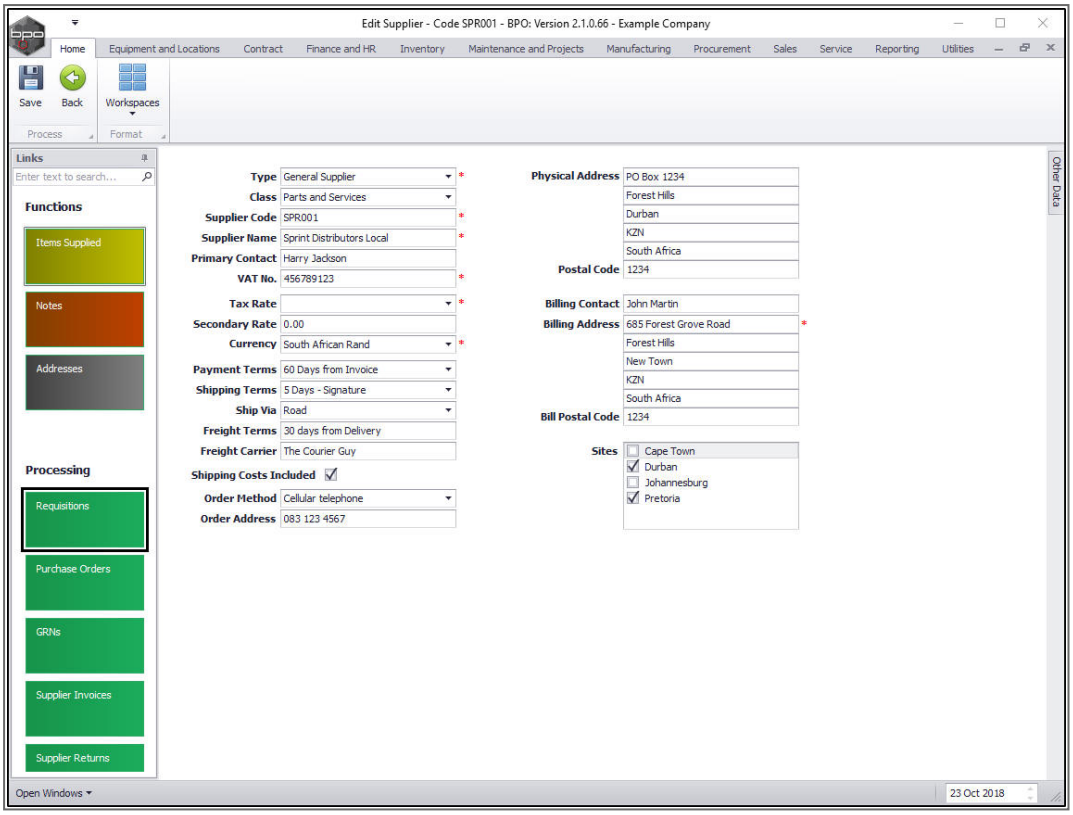

The ***Purchase Requisitions for Supplier [ ]*** screen will be displayed. This screen will default to the ***site*** selected in the ***Supplier Listing*** screen and the ***status*** will default to ***New***.

1. In this screen, you can Add, Edit, Delete and View a selected requisition.
2. and depending on the ***status*** that is selected,
3. you can either Hold, Release, Approve or Decline a selected requisition.

    - Click on ***Back*** to return to the ***Edit Supplier - Code [ ]*** screen.

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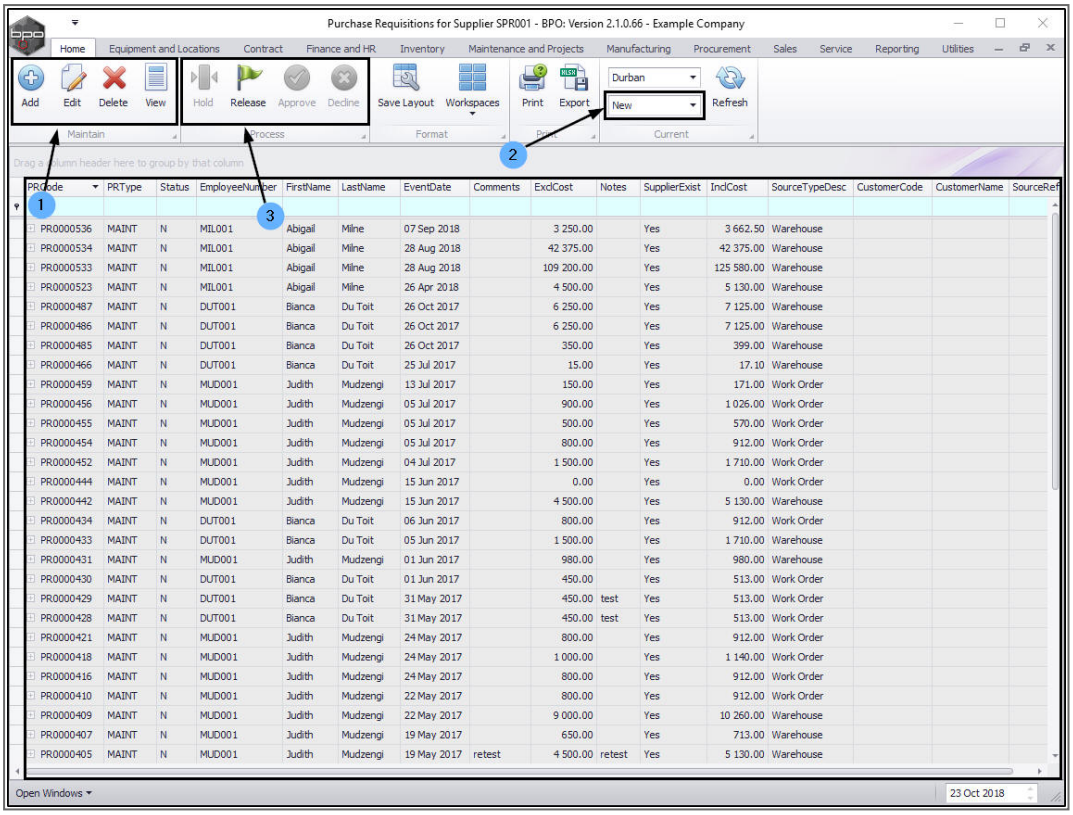

PURCHASE ORDERS

- In the ***Edit Supplier - Code [ ]*** screen, click on the ***Purchase Orders*** tile.

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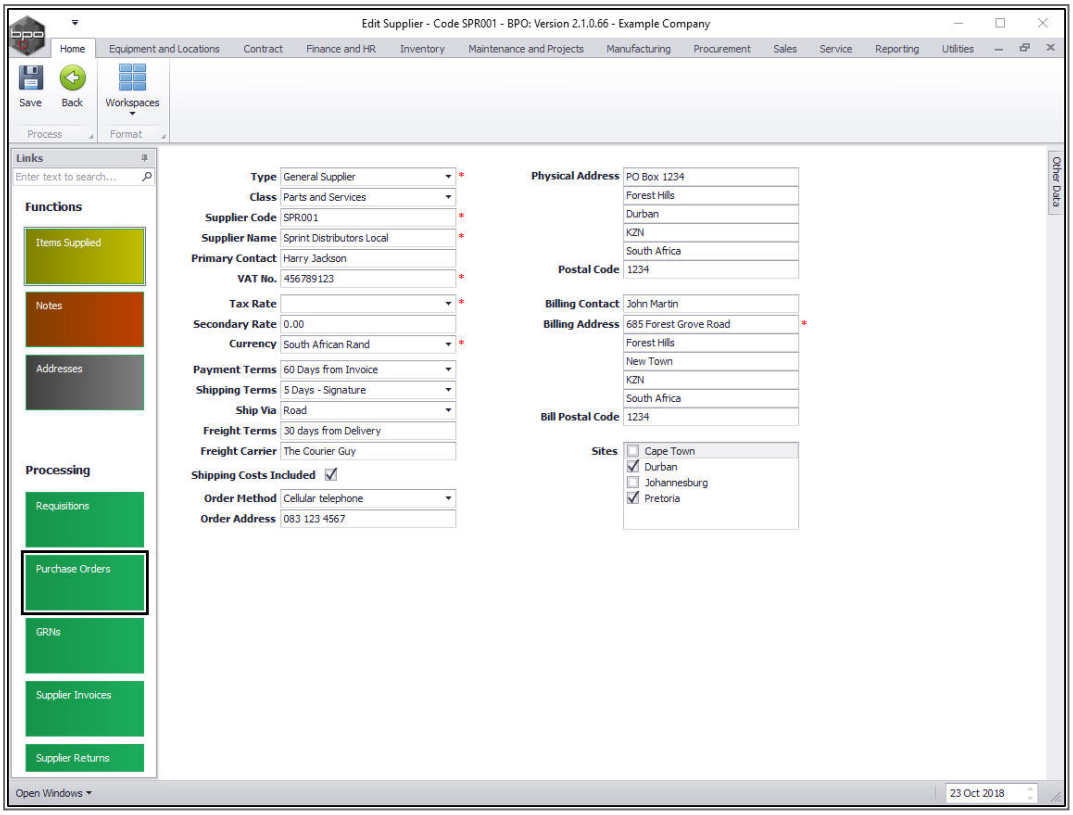

The ***Purchase Orders for Supplier [ ]*** screen will be displayed. This screen will default to the ***site*** selected in the ***Supplier Listing*** screen and the ***status*** will default to ***New***.

1. In this screen, you can view a list of purchase orders linked to this supplier. Click on ***View*** to see further detail for a selected order.
2. and depending on the ***status*** that is selected and the company procurement approval process set up
3. You can create a Non Stock GRN or arrange a ***Collection Agent*** for a purchase order.
4. You can also Print a Collection Voucher and Print the purchase order which activate the goods receiving against a selected order.
5. There are also supplier Functions tiles in this screen that will direct you to more information regarding the ***supplier***.

    - ***Close*** the screen to return to the ***Edit Supplier - Code [ ]*** screen.

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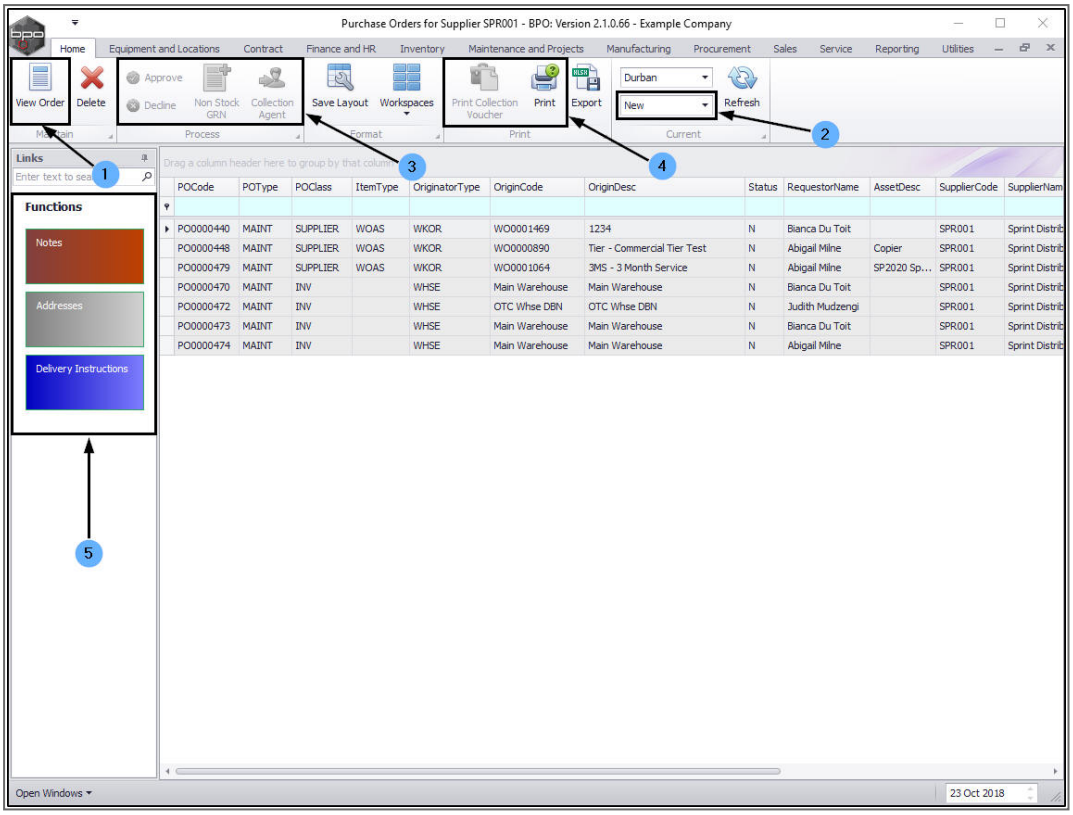

GRNS

- In the ***Edit Supplier - Code [ ]*** screen, click on the ***GRNs*** tile.

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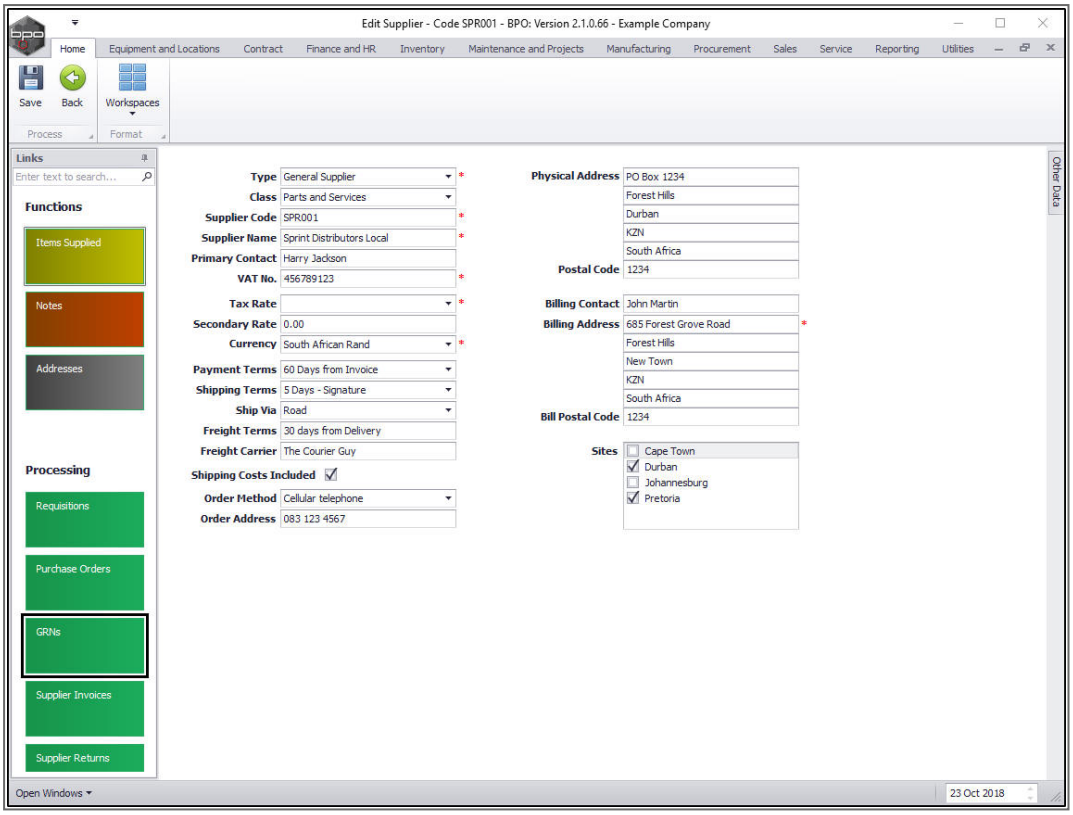

The ***Goods Received Notes for Supplier [ ]*** screen will be displayed. This screen will default to the ***site*** selected in the ***Supplier Listing*** screen and the ***status*** will default to ***New***

1. In this screen you can view the Stock and Non Stock GRNs linked to this supplier.
2. Depending which ***status*** you are in,
3. you can either Complete or View a selected GRN.

    - ***Close*** the screen to return to the ***Edit Supplier - Code [ ]*** screen.

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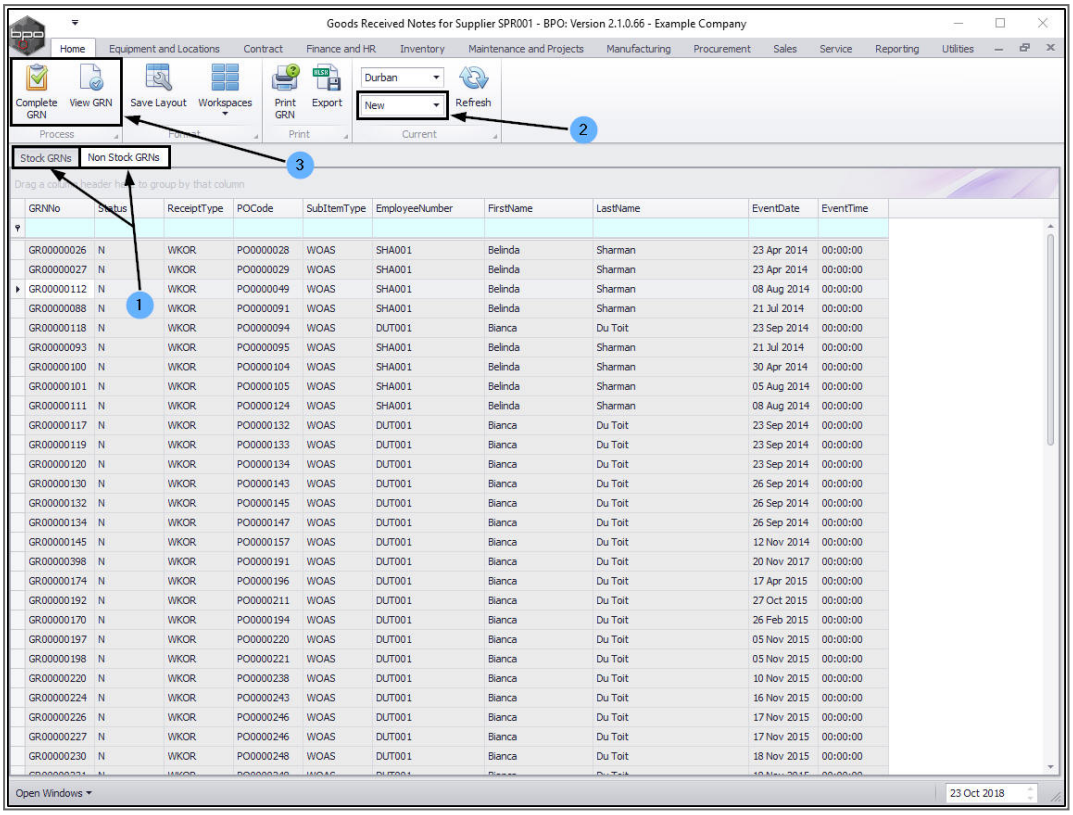

SUPPLIER INVOICES

- In the ***Edit Supplier - Code [ ]*** screen, click on the ***Supplier Invoices*** tile.

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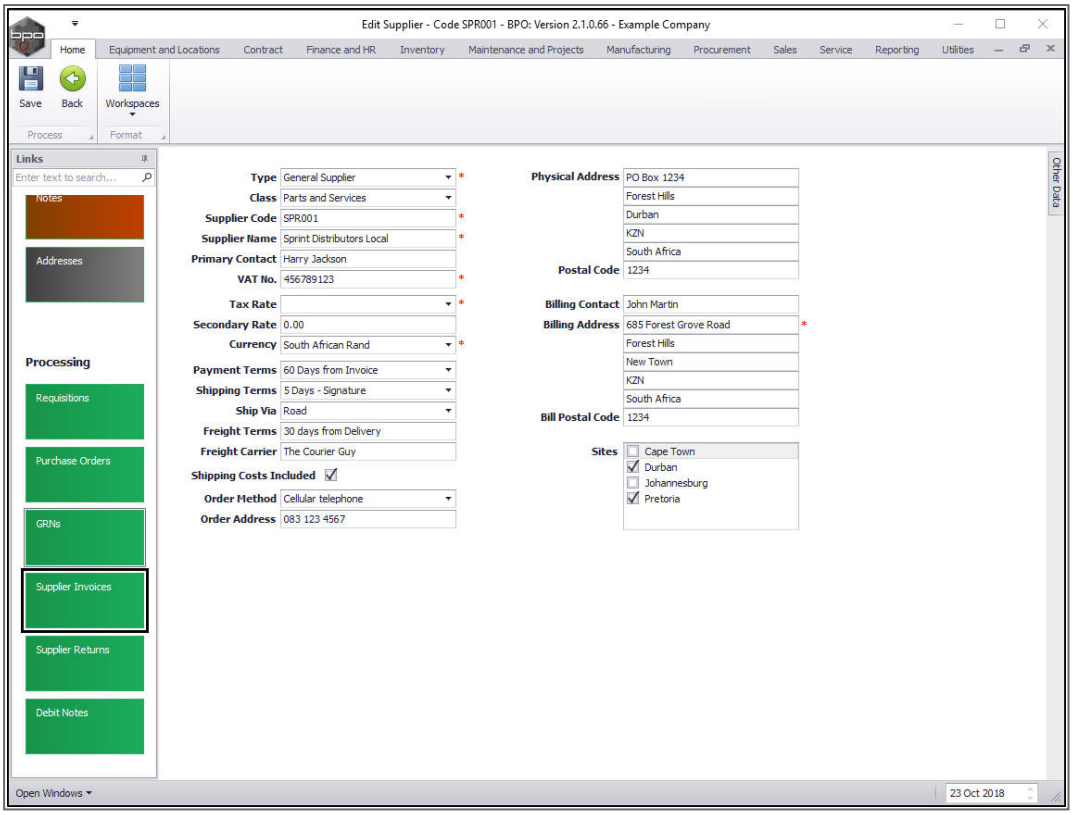

The ***Purchase Invoices for Supplier [ ]*** screen will be displayed. This screen will default to the ***site*** selected in the ***Supplier Listing*** screen and the ***status*** will default to ***New***.

1. In this screen you can view a list of the Supplier Invoices linked to this supplier.
2. Depending which ***status*** you are in,
3. you can Add, Edit, Delete, View, Approve or Decline a supplier invoice.

    - ***Close*** this screen to return to the ***Edit Supplier - Code [ ]*** screen.

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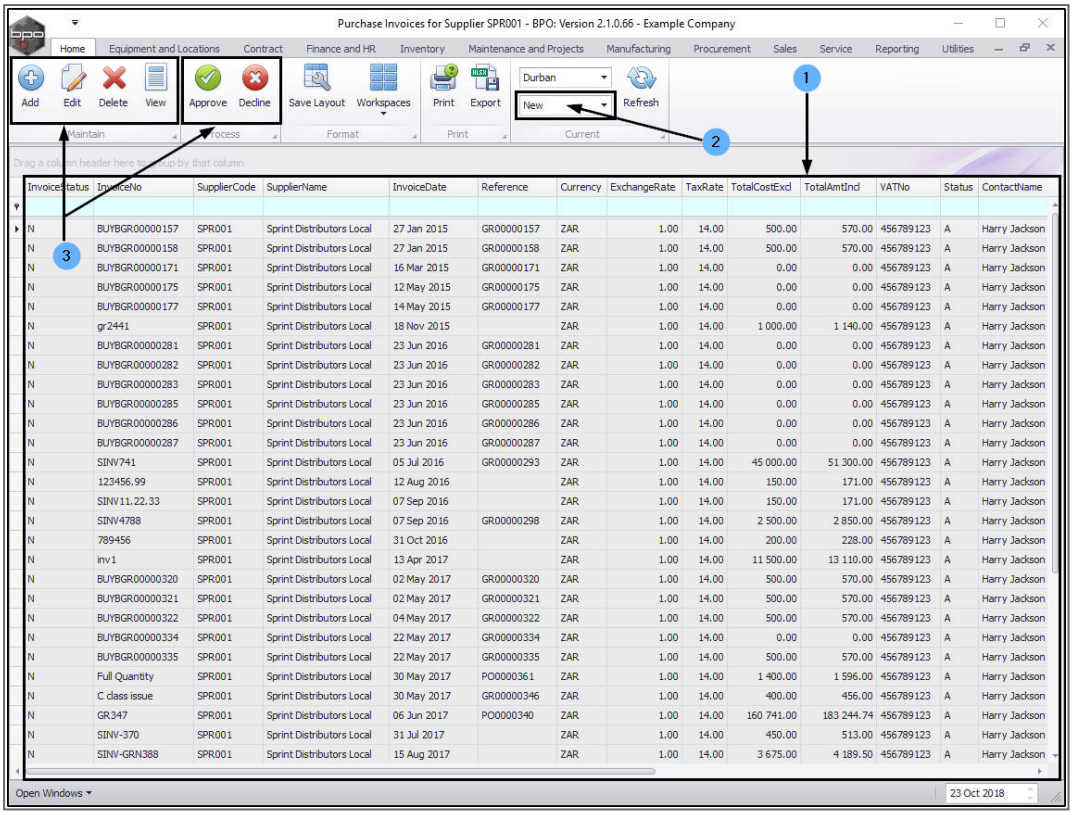

InvoiceStatus	InvoiceNo	SupplierCode	SupplierName	InvoiceDate	Reference	Currency	ExchangeRate	TaxRate	TotalCostExcl	TotalAmtIncl	VATNo	Status	ContactName
N	BUYBGR00000157	SPR001	Sprint Distributors Local	27 Jan 2015	GR00000157	ZAR	1.00	14.00	500.00	570.00	456789123	A	Harry Jackson
N	BUYBGR00000158	SPR001	Sprint Distributors Local	27 Jan 2015	GR00000158	ZAR	1.00	14.00	500.00	570.00	456789123	A	Harry Jackson
N	BUYBGR00000171	SPR001	Sprint Distributors Local	16 Mar 2015	GR00000171	ZAR	1.00	14.00	0.00	0.00	456789123	A	Harry Jackson
N	BUYBGR00000175	SPR001	Sprint Distributors Local	12 May 2015	GR00000175	ZAR	1.00	14.00	0.00	0.00	456789123	A	Harry Jackson
N	BUYBGR00000177	SPR001	Sprint Distributors Local	14 May 2015	GR00000177	ZAR	1.00	14.00	0.00	0.00	456789123	A	Harry Jackson
N	gr2441	SPR001	Sprint Distributors Local	18 Nov 2015		ZAR	1.00	14.00	1 000.00	1 140.00	456789123	A	Harry Jackson
N	BUYBGR00000281	SPR001	Sprint Distributors Local	23 Jun 2016	GR00000281	ZAR	1.00	14.00	0.00	0.00	456789123	A	Harry Jackson
N	BUYBGR00000282	SPR001	Sprint Distributors Local	23 Jun 2016	GR00000282	ZAR	1.00	14.00	0.00	0.00	456789123	A	Harry Jackson
N	BUYBGR00000283	SPR001	Sprint Distributors Local	23 Jun 2016	GR00000283	ZAR	1.00	14.00	0.00	0.00	456789123	A	Harry Jackson
N	BUYBGR00000285	SPR001	Sprint Distributors Local	23 Jun 2016	GR00000285	ZAR	1.00	14.00	0.00	0.00	456789123	A	Harry Jackson
N	BUYBGR00000286	SPR001	Sprint Distributors Local	23 Jun 2016	GR00000286	ZAR	1.00	14.00	0.00	0.00	456789123	A	Harry Jackson
N	BUYBGR00000287	SPR001	Sprint Distributors Local	23 Jun 2016	GR00000287	ZAR	1.00	14.00	0.00	0.00	456789123	A	Harry Jackson
N	SINV741	SPR001	Sprint Distributors Local	05 Jul 2016	GR00000293	ZAR	1.00	14.00	45 000.00	51 300.00	456789123	A	Harry Jackson
N	123456.99	SPR001	Sprint Distributors Local	12 Aug 2016		ZAR	1.00	14.00	150.00	171.00	456789123	A	Harry Jackson
N	SINV11.22.33	SPR001	Sprint Distributors Local	07 Sep 2016		ZAR	1.00	14.00	150.00	171.00	456789123	A	Harry Jackson
N	SINV4788	SPR001	Sprint Distributors Local	07 Sep 2016	GR00000298	ZAR	1.00	14.00	2 500.00	2 850.00	456789123	A	Harry Jackson
N	789456	SPR001	Sprint Distributors Local	31 Oct 2016		ZAR	1.00	14.00	200.00	228.00	456789123	A	Harry Jackson
N	inv1	SPR001	Sprint Distributors Local	13 Apr 2017		ZAR	1.00	14.00	11 500.00	13 110.00	456789123	A	Harry Jackson
N	BUYBGR00000320	SPR001	Sprint Distributors Local	02 May 2017	GR00000320	ZAR	1.00	14.00	500.00	570.00	456789123	A	Harry Jackson
N	BUYBGR00000321	SPR001	Sprint Distributors Local	02 May 2017	GR00000321	ZAR	1.00	14.00	500.00	570.00	456789123	A	Harry Jackson
N	BUYBGR00000322	SPR001	Sprint Distributors Local	04 May 2017	GR00000322	ZAR	1.00	14.00	500.00	570.00	456789123	A	Harry Jackson
N	BUYBGR00000334	SPR001	Sprint Distributors Local	22 May 2017	GR00000334	ZAR	1.00	14.00	0.00	0.00	456789123	A	Harry Jackson
N	BUYBGR00000335	SPR001	Sprint Distributors Local	22 May 2017	GR00000335	ZAR	1.00	14.00	500.00	570.00	456789123	A	Harry Jackson
N	Full Quantity	SPR001	Sprint Distributors Local	30 May 2017	PO0000361	ZAR	1.00	14.00	1 400.00	1 596.00	456789123	A	Harry Jackson
N	C class issue	SPR001	Sprint Distributors Local	30 May 2017	GR00000346	ZAR	1.00	14.00	400.00	456.00	456789123	A	Harry Jackson
N	GR347	SPR001	Sprint Distributors Local	06 Jun 2017	PO0000340	ZAR	1.00	14.00	160 741.00	183 244.74	456789123	A	Harry Jackson
N	SINV-370	SPR001	Sprint Distributors Local	31 Jul 2017		ZAR	1.00	14.00	450.00	513.00	456789123	A	Harry Jackson
N	SINV-GRN388	SPR001	Sprint Distributors Local	15 Aug 2017		ZAR	1.00	14.00	3 675.00	4 189.50	456789123	A	Harry Jackson

SUPPLIER RETURNS

- In the ***Edit Supplier - Code [ ]*** screen, click on the ***Supplier Returns*** tile.

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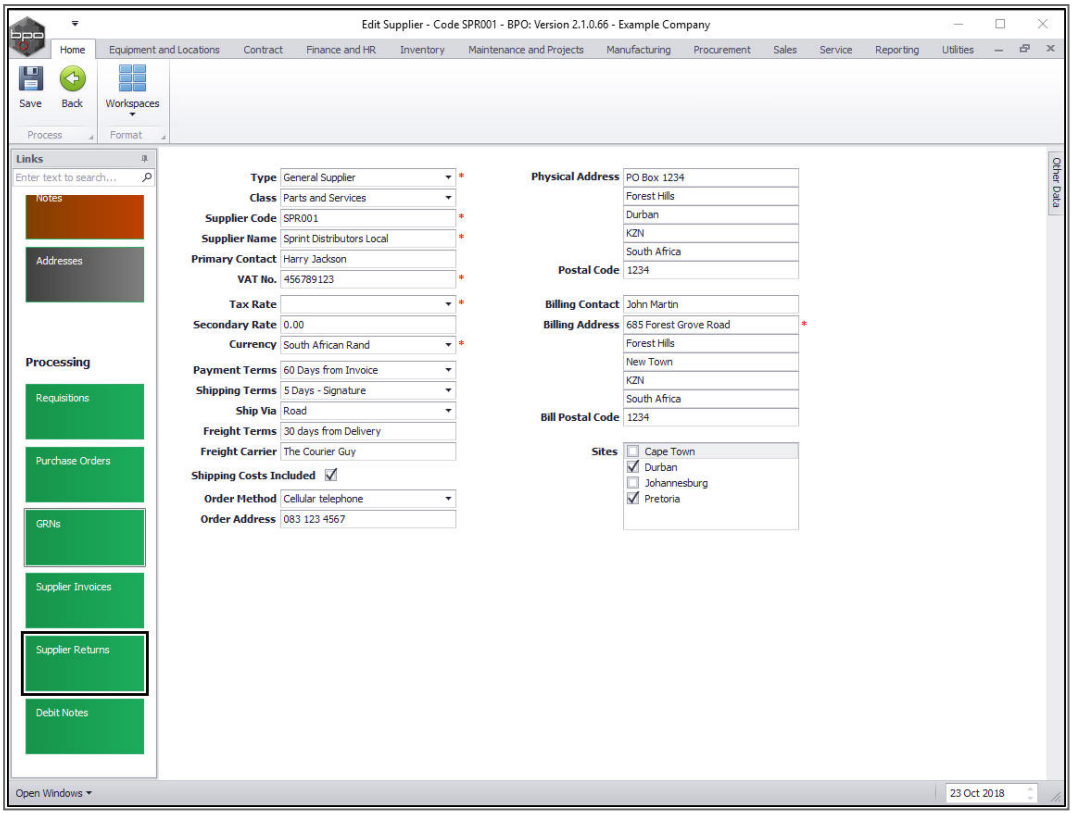

The ***Supplier Returns for Supplier [ ]*** screen will be displayed. This screen will default to the ***site*** selected in the ***Supplier Listing*** screen.

1. In this screen you can view a list of the Stock and Non Stock Returns linked to this supplier.
2. You can also ***Add***, ***Edit***, or ***View*** a supplier return.

    - ***Close*** this screen to return to the ***Edit Supplier - Code [ ]*** screen.

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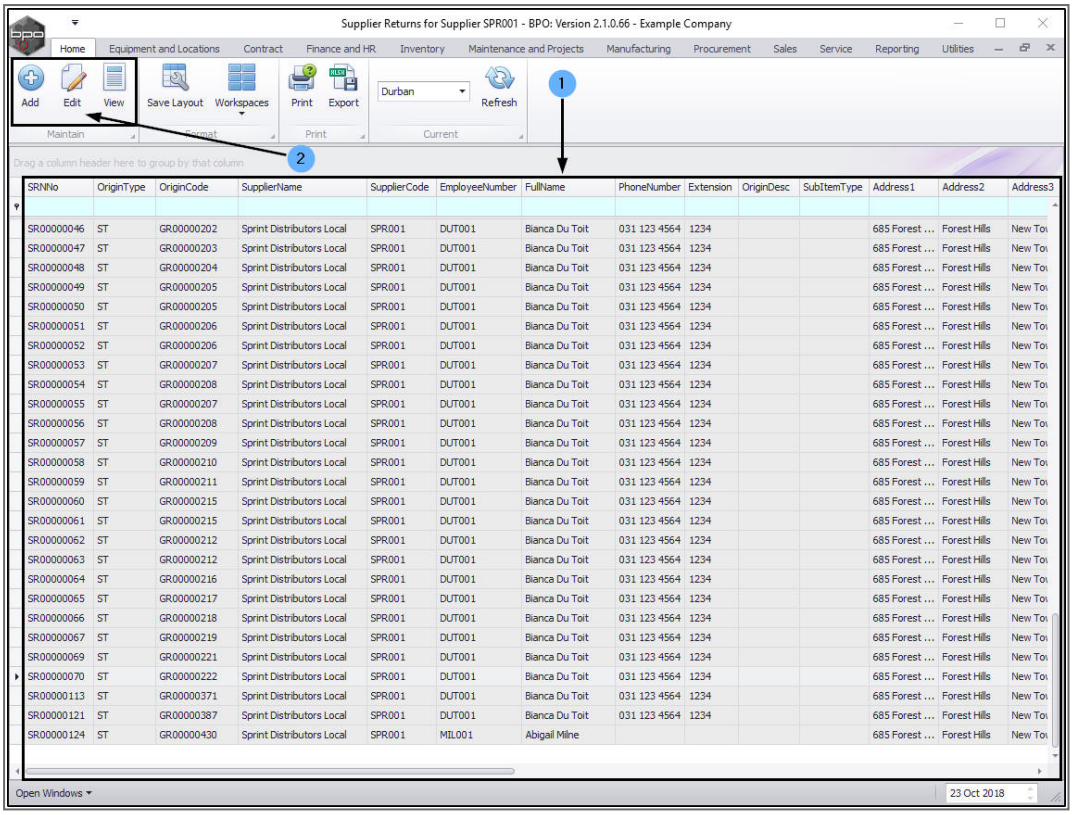

DEBIT NOTES

- In the ***Edit Supplier - Code [ ]*** screen, click on the ***Debit Notes*** tile.

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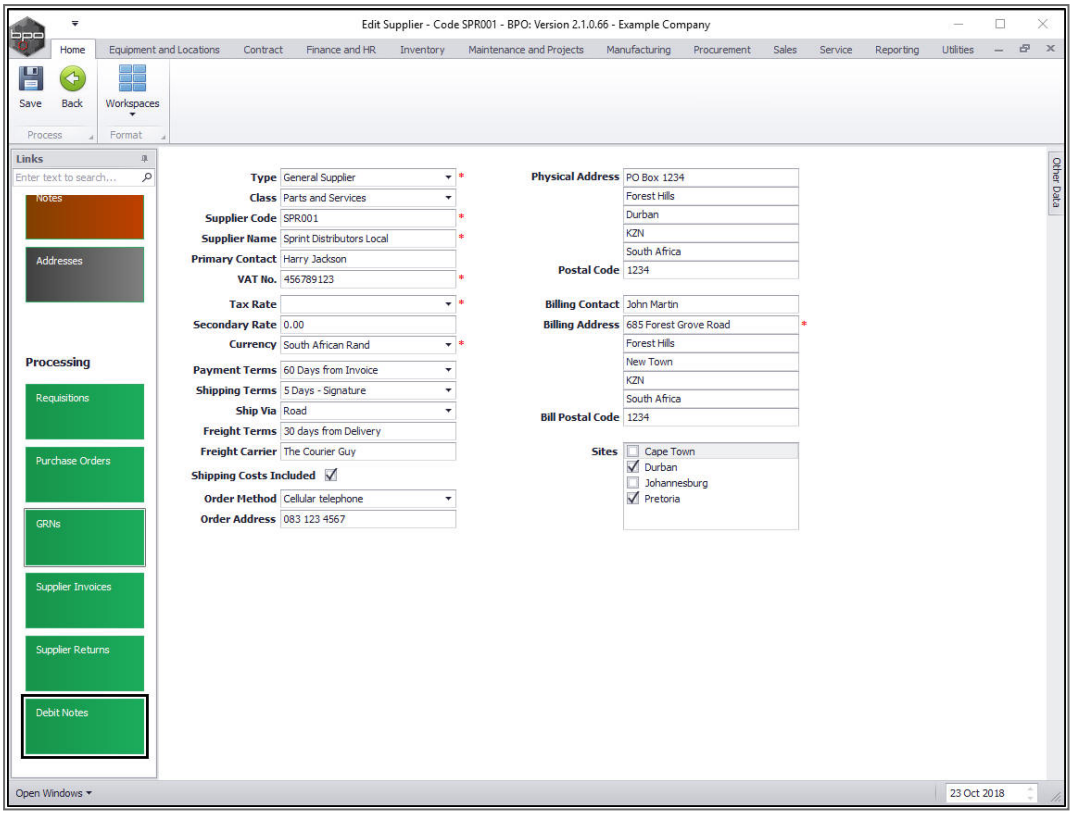

The ***Debit Note for Supplier [ ]*** screen will be displayed. This screen will default to the ***site*** selected in the ***Supplier Listing*** screen and the ***status*** will default to ***New***.

1. In this screen you can view a list of the Debit Notes linked to this supplier.
2. Depending which ***status*** you are in,
3. you can Add, Edit, Delete, View, Approve or Decline a supplier debit note.

    - ***Close*** this screen to return to the ***Edit Supplier - Code [ ]*** screen.

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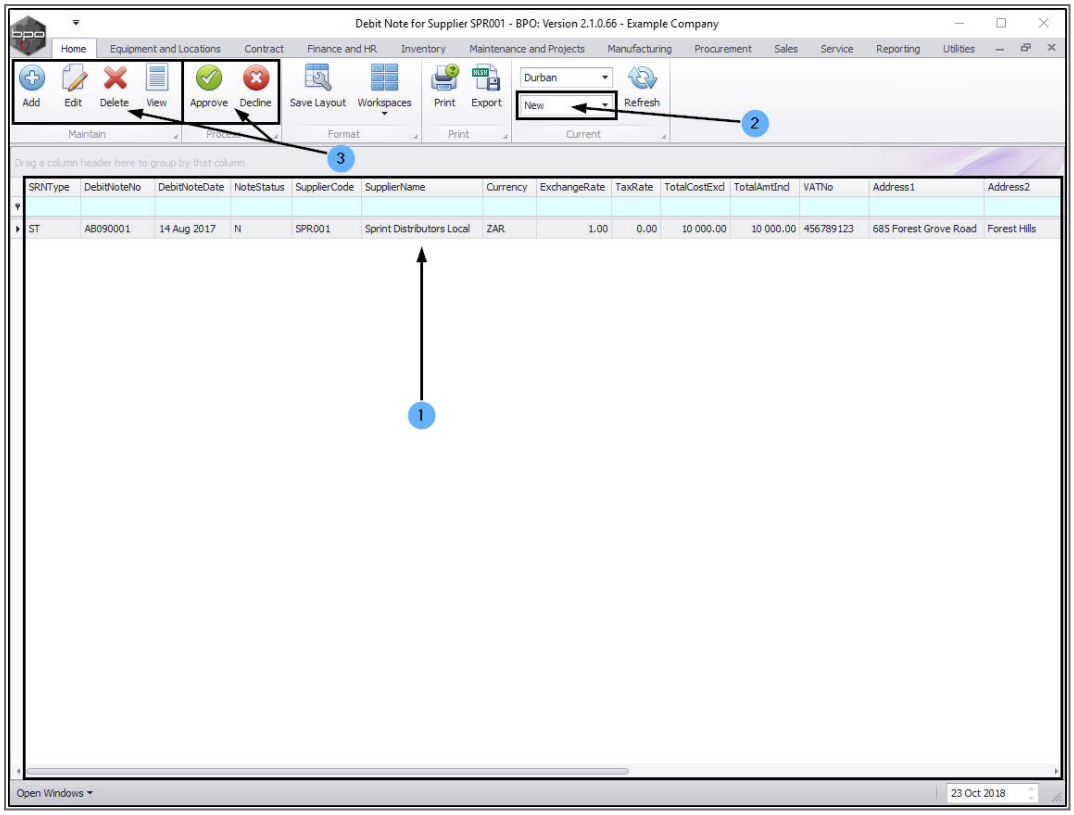

OTHER DATA

- In the ***Edit Supplier - Code [ ]*** screen, click on the ***Other Data*** tab.

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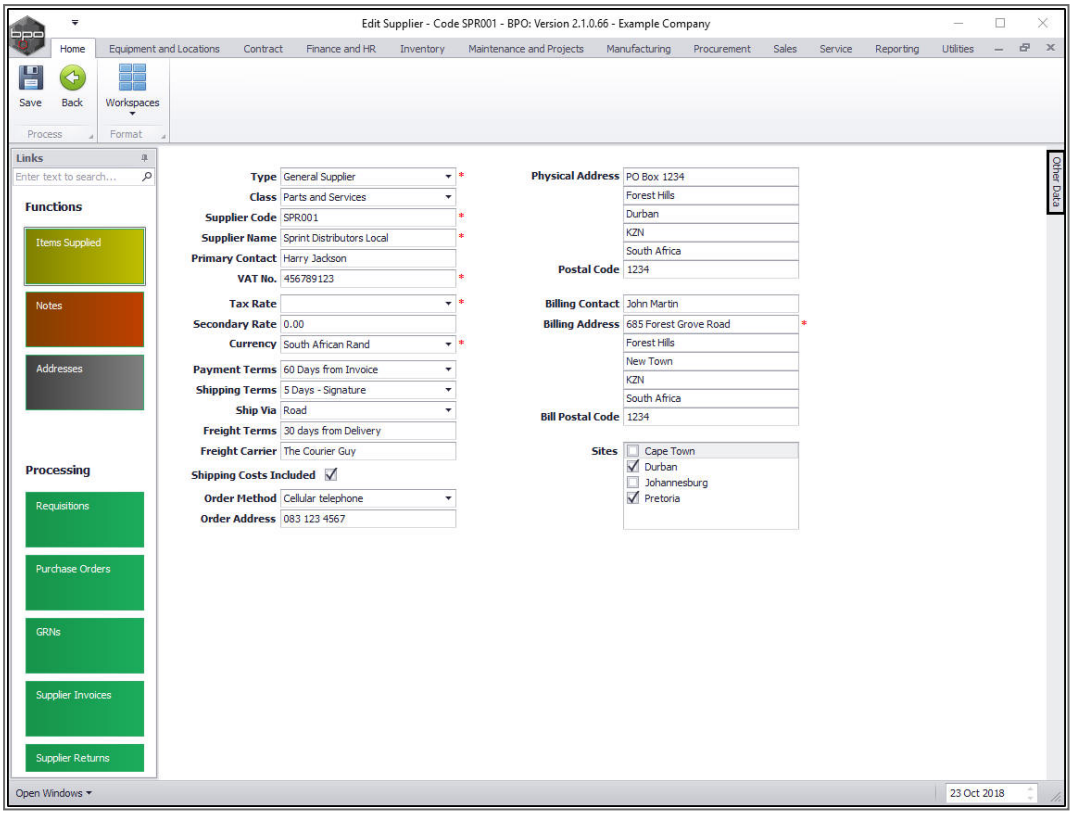

- Here, there are **10** fields where you can type in ***additional information*** pertinent to this supplier. These additional data labels (Other 1, Other 2 etc.) can be ***re-named*** as per your company's requirements.

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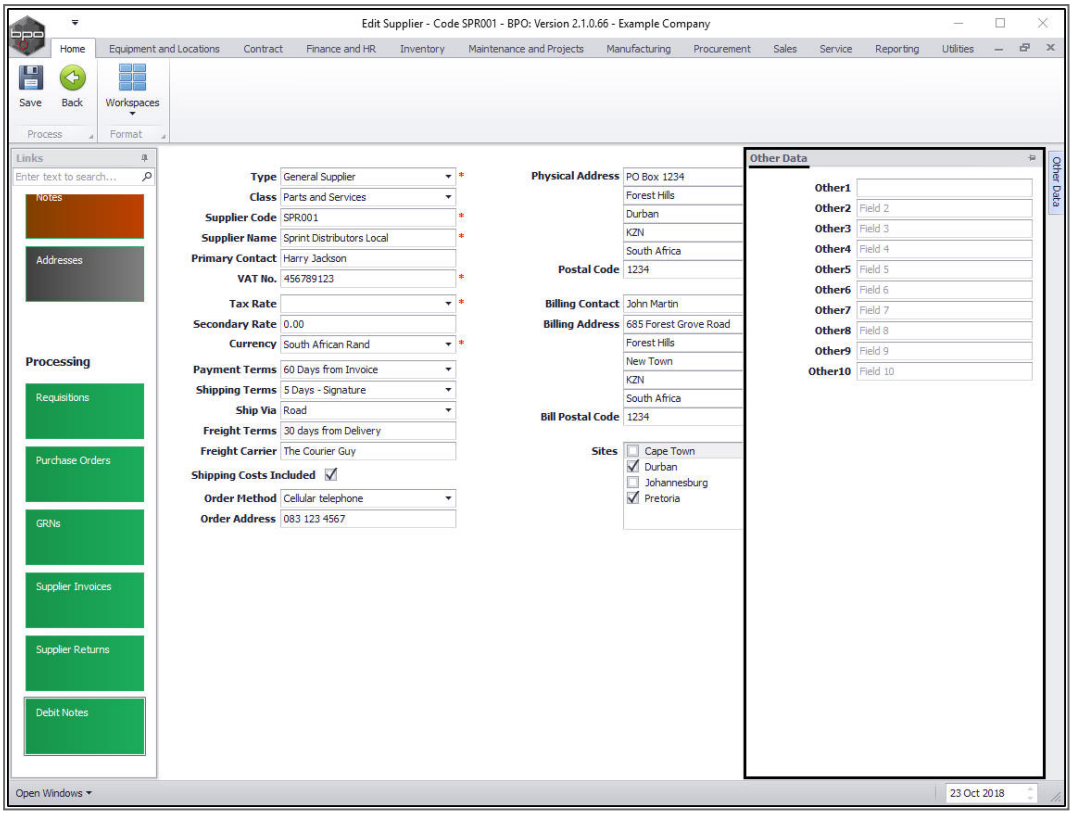

Related Topics

- Supplier Type Static Data
- Supplier Class Static Data
- Supplier - Add / Edit / Delete
- Supplier Order Details - Add / Edit
- Link Items Supplied - incl. Unit Cost & Lead Time
- Comments & Order Notes - Add / Edit / Delete
- Addresses - Add / Edit

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