

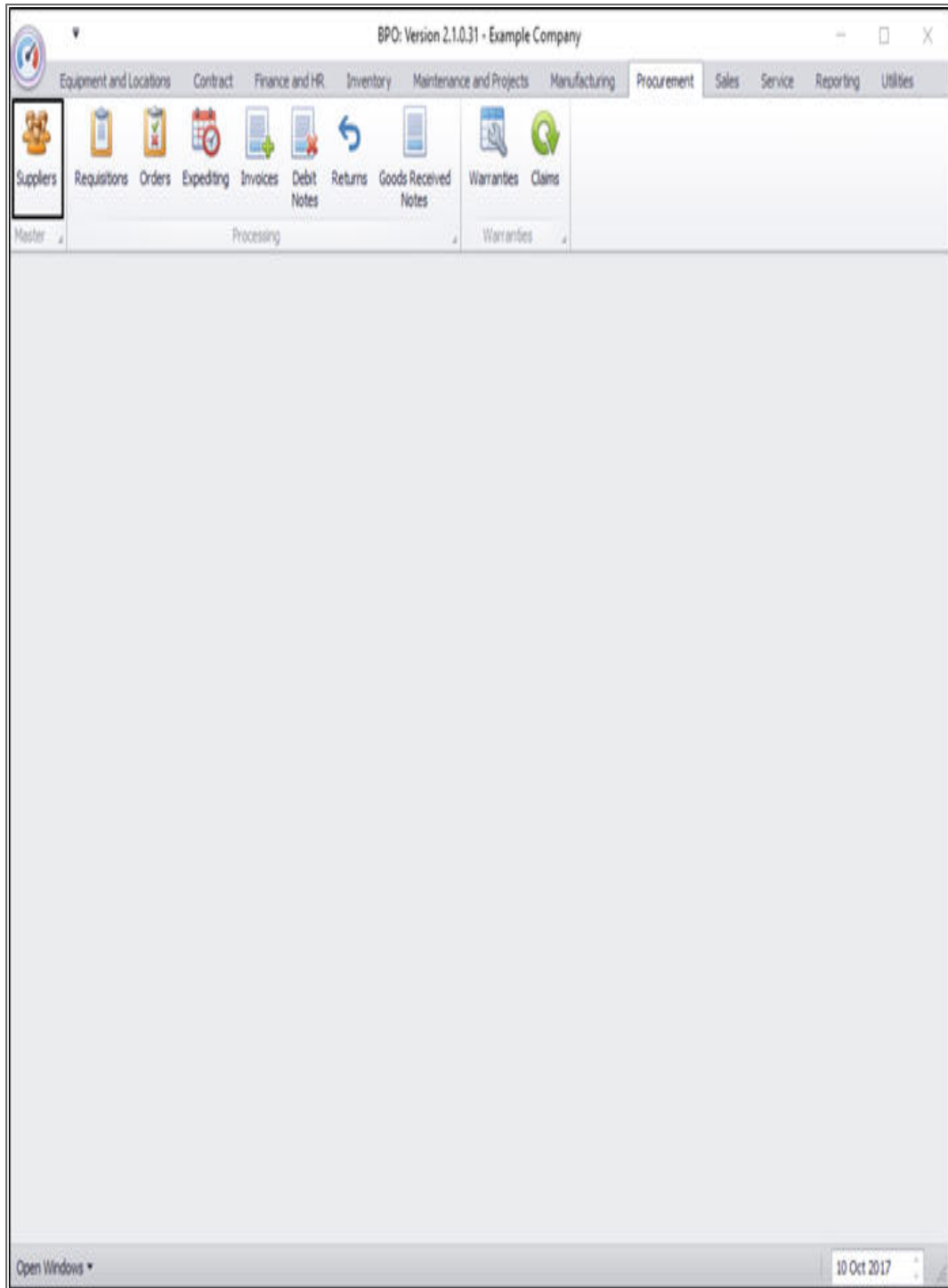
# PROCUREMENT

## ADD A SUPPLIER

---

Ribbon Access: *Procurement* > *Suppliers*

---



## **ADD A SUPPLIER**

---

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

Select the Site

- In this image **Durban** has been selected.

The screenshot shows the 'Supplier Listing' window in BPO Version 2.1.0.31. The interface includes a menu bar, a toolbar with icons for Add, Edit, Delete, Sync, Save Layout, Workspaces, and Refresh. A dropdown menu is open over the 'All Sites' filter, showing a list of sites: 0 All Sites, 1 Durban (highlighted), and 2 Pretoria. The main table displays a list of suppliers with columns for SupplierCode, SupplierName, VATNo, MinOrderAmt, FreightCarrier, FreightTerms, and Payment.

SupplierCode	SupplierName	VATNo	MinOrderAmt	FreightCarrier	FreightTerms	Payment
SUP001	Buy Back Supplier	0000000000	0.00			2
SPR001	Sprint Distributors Local Harry Jackson	456789123	0.00	The Courier Guy	30 days from Delivery	3
SPR002	Sprint International George Matthews	456258741	0.00			2
TON001	Tonys Copy Shop Tony	9874561321	0.00	DHL	COD	2
YES001	Young Electric Grant	3245064654	0.00			3
PR1005	Printer World 2 Richard Sage	98076523	0.00	Wheels on Wings	30 days from delivery	5
PR1007	Printer World Forex Matthew Sage	768594444	0.00	Wheels on wings	60 days from invoice	3
PR1010	Printer World Maggie Sage	456123789	0.00	Wheels with Wings	30 days from delivery	4
PR1012	Printer World Maggie Saggie	13456789	0.00	Wheels with Wings	30 days from delivery	3
TW1001	Twinkle Office Automation Gary Marks	9876543210	0.00	Wing It Couriers	30 day	2
BON001	Bonsai Bonanza Teddy Miller	987654321	0.00	Wing It Couriers	30 day	2
PRE001	Pretoria Copy Shop Jamie van Wyk	9876543210	0.00	Wing It	30 Days	4
DUR001	Durban Copy Shop Megan Jones	987654321	0.00			3
PAP001	The Paper Warehouse Joseph Manning	1234567890	0.00	Wing It	30 day	4
MET001	Metro Peach Jessica Johns	1234567	0.00	Wheels with Wings	30 days from delivery	5
PRE005	Pretoria West Office Auto... Jackie Simmons	987654321	0.00			3
NEW006	New Way Recycling Patrick Smith	9876543210	0.00			3
WON001	Wonderboom IT Hub Mark Jones	987654321	0.00			3
888	Abs Store Abi	654789	0.00	DHL	14 days after payment	2
M555	A A	986789	0.00	DHL	10 days	2

- Click on **Add**.

Supplier Listing - BPO: Version 2.1.0.31 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Processing Format Current Print

Links

Enter text to search...

Functions

- Items Supplied
- Notes
- Addresses

Processing

- Requisitions
- Purchase Orders
- GRNs

SupplierCode	SupplierName	ContactName	SupplierType	Status	VATNo	MinOrderAmt	FreightCarrier	FreightTerms	Payment
SUP001	Buy Back Supplier	Supplier Contact	BUY	A	0000000000	0.00			2
SPR001	Sprint Distributors Local	Harry Jackson	GEN	A	456789123	0.00	The Courier Guy	30 days from Delivery	3
SPR002	Sprint International	George Matthews	GEN	A	456258741	0.00			2
TON001	Tonys Copy Shop	Tony	SHPA	A	9874561321	0.00	DHL	COO	2
YES001	Young Electric	Grant	GEN	A	3245064654	0.00			3
PR1010	Printer World	Maggie Sage	GEN	A	456123789	0.00	Wheels with Wings	30 days from delivery	4
TV1001	Twinkle Office Automation ...	Gary Marks	GEN	A	9876543210	0.00	Wing It Couriers	30 day	2
BON001	Bonsai Bonanza	Teddy Miller	GEN	A	987654321	0.00	Wing It Couriers	30 day	2

Open Windows 10 Oct 2017

## ADD SUPPLIER DETAILS

---

The *Add new Supplier* screen will be displayed.

- **Type:** Click on the drop-down arrow and select from the list the Supplier Type, e.g. General Supplier or Finance House.
- **Class:** Click on the drop-down arrow and select from the list the Class of Item Supplied or Service Rendered.
- **Supplier Code:** Type in the code you wish to use to identify the Supplier.



**Note 1:** The Supplier Code is very important because it is linked to *Pastel Evolution* and all the supplier information and history will be linked to this code and not the Supplier Name.



**Note 2:** If you are manually entering the Supplier Code, the recommended standard is using a supplier code which is 6 characters long starting with 3 letters and then 3 numbers.



**Note 3:** From BPO2 v2.5.1.4 restrictions have been put into place to prevent special characters from being saved. You will only be allowed to save upper case characters and digits from 0 to 9.

- **Supplier Name:** Type in the name of the Supplier.
- **Primary Contact:** Type in the person who is your contact at this Supplier.
- **VAT No:** Type in the VAT No. of the Supplier.
- **Tax Rate:** Type in the tax rate. If the tax rate is not set, your procurement documentation will not calculate a tax value onto your items.
- **Secondary Rate:** Type in a secondary rate, if applicable.

- **Currency:** Click on the drop-down arrow and select from the list the currency applicable to this supplier.

- **Payment Terms:** Click on the drop-down arrow and select from the list the payment terms of the Supplier.
- **Shipping Terms:** Click on the drop-down arrow and select from the list the shipping terms of the Supplier, if applicable.
- **Ship Via:** Click on the drop-down arrow and select from the list the type of transport used for shipping the item, if applicable.
- **Freight Terms:** Type in the Freight Terms, if applicable.
- **Freight Carrier:** Type the Freight Carrier, if applicable.

Add new Supplier - BPO: Version 2.1.0.31 - Example Company
\_ □ ×

Home
Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities - □ ×

Save Back
Process

Links
Other Data

Enter text to search...
P

**Functions**

Items Supplied

Notes

Addresses

**Processing**

Requisitions

Purchase Orders

GRNs

Supplier Invoices

Type

Class

Supplier Code

Supplier Name

Primary Contact

VAT No.

Tax Rate

Secondary Rate

Currency

Payment Terms

Shipping Terms

Ship Via

Freight Terms

Freight Carrier

Sites  Durban  
 Pretoria

Order Method

Order Address

Physical Address

Postal Code

Billing Contact

Billing Address

Bill Postal Code

Open Windows
10 Oct 2017



## SHIPPING COSTS INCLUDED FLAG

---

- If you wish Shipping Costs to be included in the cost of parts/items received from this supplier then ensure that this flag is selected.
- If you wish Shipping Costs not to be included in the cost of parts/items received from this supplier and would like the ability to add shipping costs to items/parts received then ensure that this flag is not selected.

### Important Notes:

- i. If the flag is un-ticked, then any goods received from this supplier will then be received into quarantine, where they must have shipping costs added before the goods can be released, and then received into store.
- ii. The Company Configuration Enforce Quarantine must be selected.
- iii. In the Configurator, the Include Shipping flag on the Purchasing Centre must be ticked.

Add new Supplier - BPO: Version 2.1.0.71 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Workspaces

Process | Format

Links  
Enter text to search...

**Functions**

- Items Supplied
- Notes
- Addresses

**Processing**

- Requisitions
- Purchase Orders
- GRNs

**Supplier Information:**

- Type: Finance House \*
- Class: Parts
- Supplier Code: 998877 \*
- Supplier Name: Stone Rowe & Co. \*
- Primary Contact: David Christopher \*
- VAT No.: 122334455 \*
- Tax Rate: 15.00 \*
- Secondary Rate: 17.5
- Currency: British Pound \*
- Payment Terms: 30 Days from Invoice
- Shipping Terms: 10 Days - Signature
- Ship Via: Sea
- Freight Terms:
- Freight Carrier:
- Shipping Costs Included:
- Order Method:
- Order Address:

**Physical Address:**

Postal Code:

**Billing Contact:**

**Billing Address:** \*

Bill Postal Code:

**Sites:**

- Cape Town
- Durban
- Johannesburg
- Pretoria

Open Windows | 02 Jul 2019

## SITES

- **Sites:** The particular **Site** check box will be auto populated according to your **site selection** in the beginning of this process.
- Make sure that the **correct site(s)** have been selected for the Supplier that you are setting up.

Add new Supplier - BPO: Version 2.1.0.31 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Process

Links: Enter text to search...

**Functions**

- Items Supplied
- Notes
- Addresses

**Processing**

- Requisitions
- Purchase Orders
- GRNs
- Supplier Invoices

**Supplier Details:**

Type: Finance House  
Class: Parts  
Supplier Code: 998877  
Supplier Name: Stone Rowe & Co.  
Primary Contact: David Christopher  
VAT No.: 1122334455  
Tax Rate: 14.00  
Secondary Rate: 17.50  
Currency: British Pound  
Payment Terms: 30 Days from Invoice  
Shipping Terms: 10 Days - Signature  
Ship Via: Sea  
Freight Terms:  
Freight Carrier: Shipmark

**Sites:**

- Durban
- Pretoria

Order Method:  
Order Address:

**Physical Address:**

Postal Code:

**Billing Contact:**

**Billing Address:**

Bill Postal Code:

Open Windows | 10 Oct 2017

## ORDER METHOD

---

- **Order Method:** Click on the drop-down arrow and select the Order Method e.g. Email or Telephone.
- **Order Address:** Type in the Order Address e.g. the Email Address if the order method is Email.

Add new Supplier - BPO: Version 2.1.0.31 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Process

Links

**Functions**

Items Supplied

Notes

Addresses

**Processing**

Requisitions

Purchase Orders

GRNs

Supplier Invoices

Type

Class

Supplier Code

Supplier Name

Primary Contact

VAT No.

Tax Rate

Secondary Rate

Currency

Payment Terms

Shipping Terms

Ship Via

Freight Terms

Freight Carrier

Sites
 Durban  
 Pretoria

Order Method

Order Address

Physical Address

Postal Code

Billing Contact

Billing Address

Bill Postal Code

Open Windows 10 Oct 2017

## ADDRESSES

---

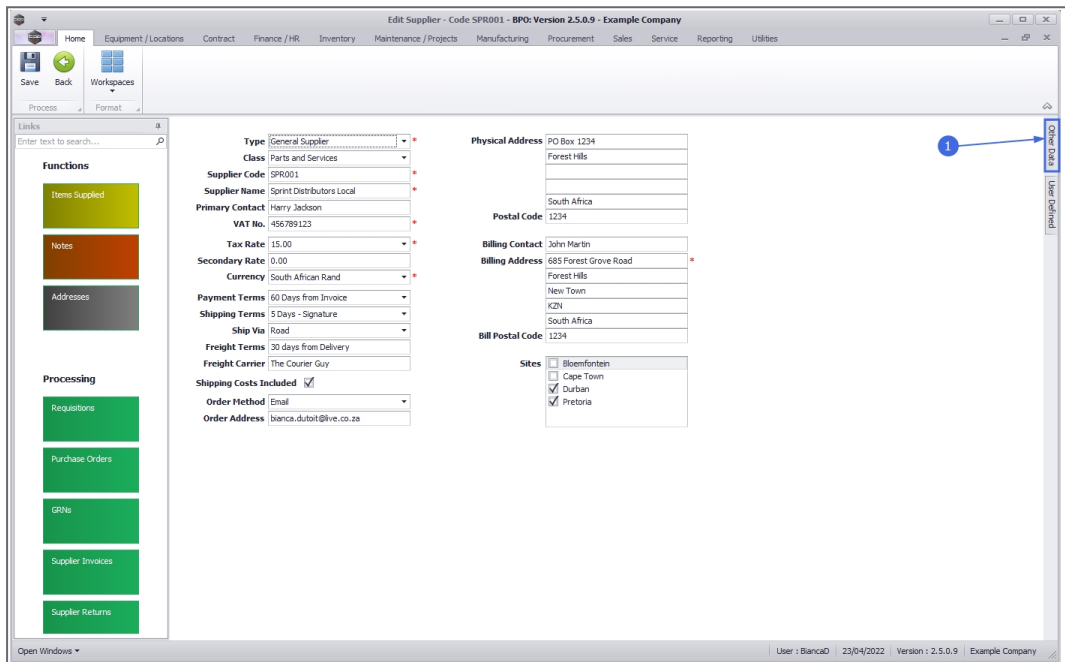
- **Physical Address:** Type in the Physical Address.
- **Postal Code:** Type in the Postal Code.
- **Billing Contact:** Type in the Billing Contact.
- **Billing Address:** Type in the Billing Address.
- **Bill Postal Code:** Type in the Bill Postal Code.



## ADDITIONAL DATA

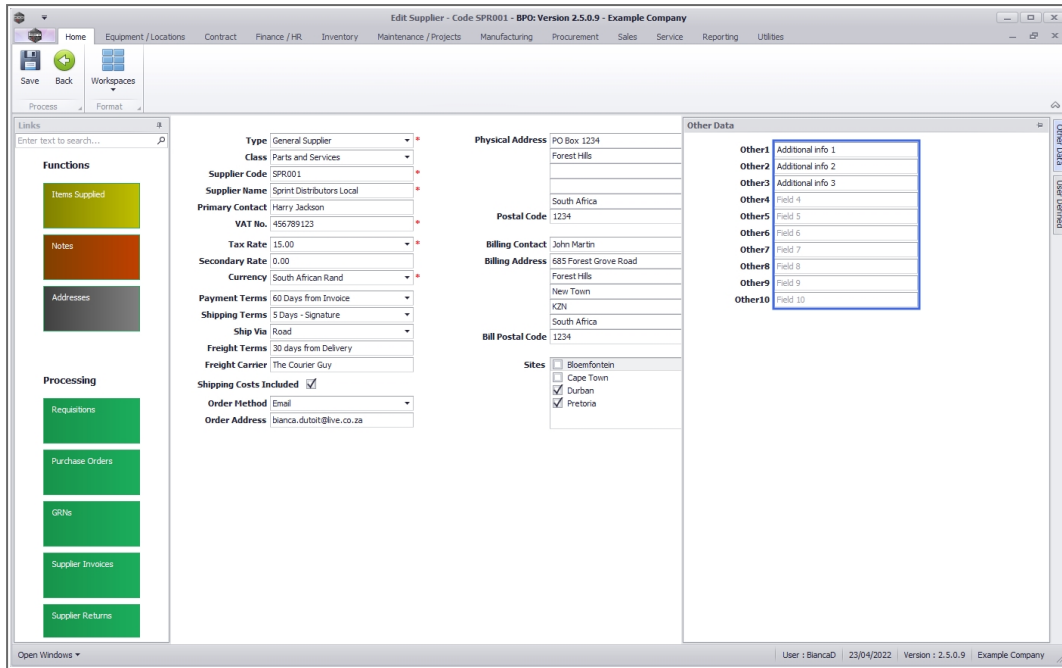
Additional data allows for 10 extra fields of information that can be used depending on your company's requirements. The definition for these fields should be pre-determined and used as allocated. The labels for these fields can be configured via user rights.

- Click on the **User Defined** dock panel tab to open the panel



- Type in the values as required if used by your company.





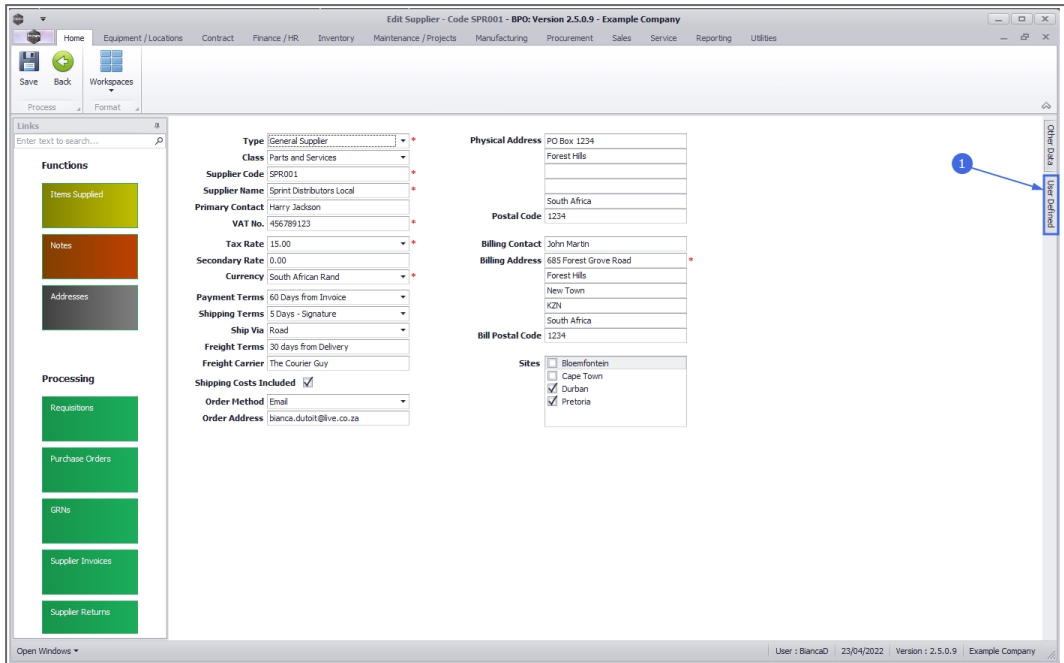
## USER DEFINED FIELDS

The inclusion of User Defined Fields is to provide more information within the Asset, Contract, Customer and Location modules so that associated work/processes can be carried out more efficiently. It will serve as connective tissue between contracts and call center functions to improve call center performance by having readily accessible information.

### Version Compatibility<sup>1</sup>

- Click on the **User Defined** dock panel tab to open the panel

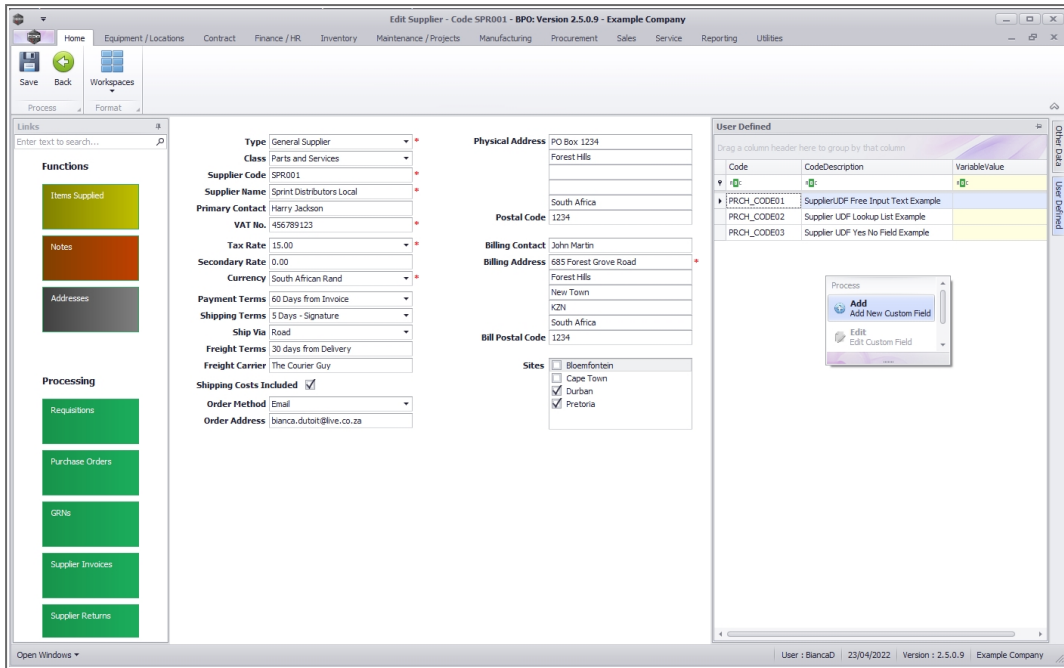
<sup>1</sup> BPO2 v2.5.0.8 or higher. " Add Interest Rate " on page 2



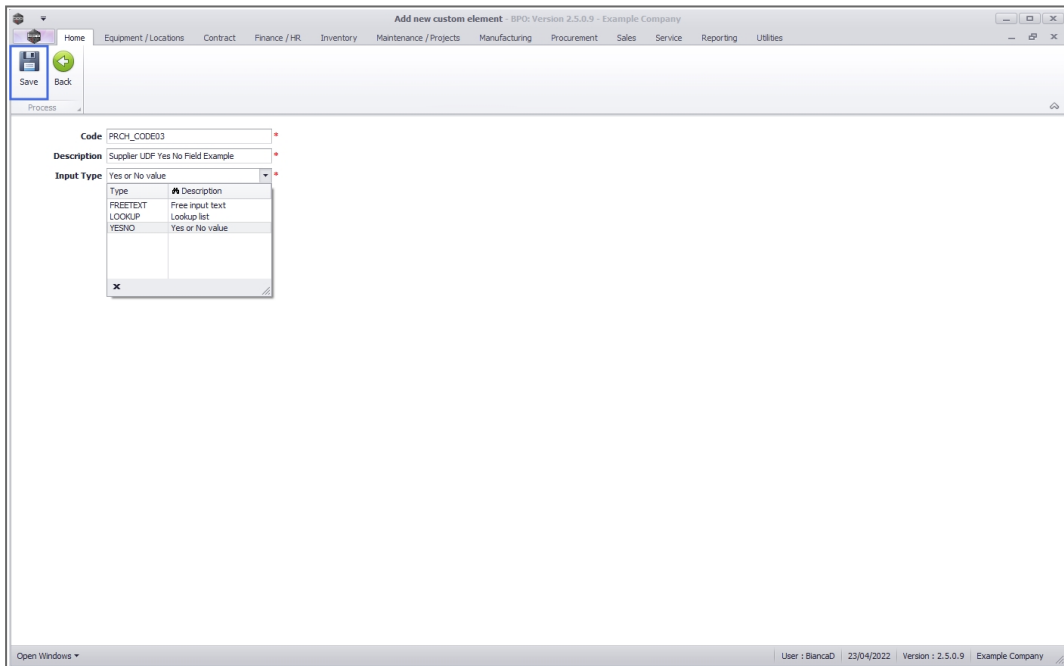
## ADD NEW CUSTOM FIELD

New User Defined Customer Fields can be created from here. Any User Defined field created will be available for update on all suppliers.

- Right click in User Defined panel and select **Add New Custom Field**



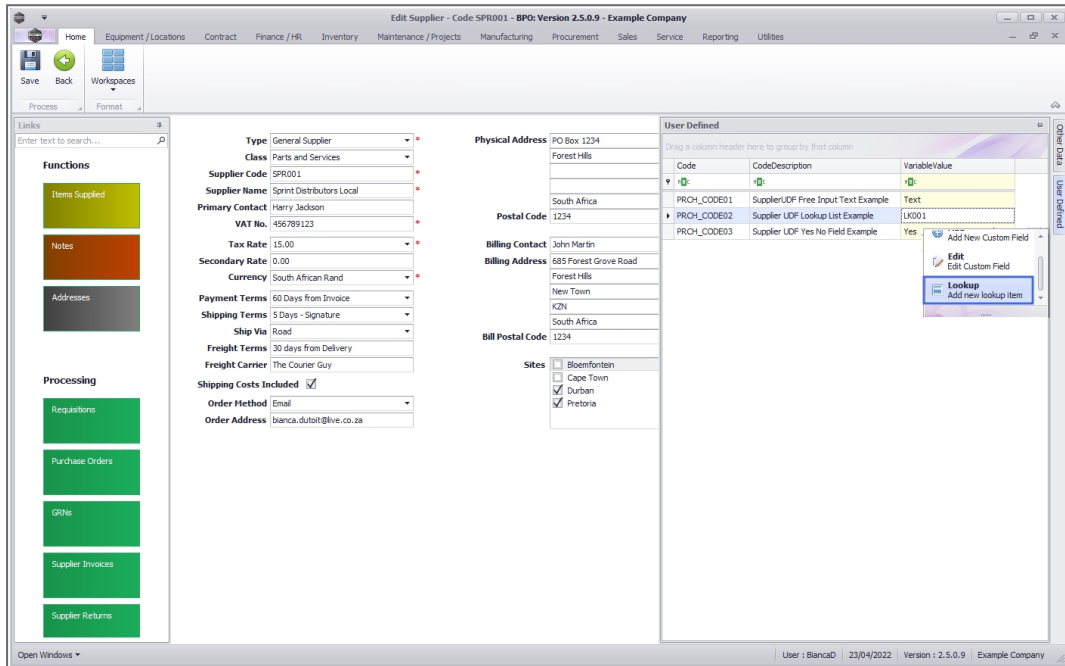
- Type in a **Code** and **Description** for the new User Defined Field.
- Select the Input Type.
- Click on the **Save** button.



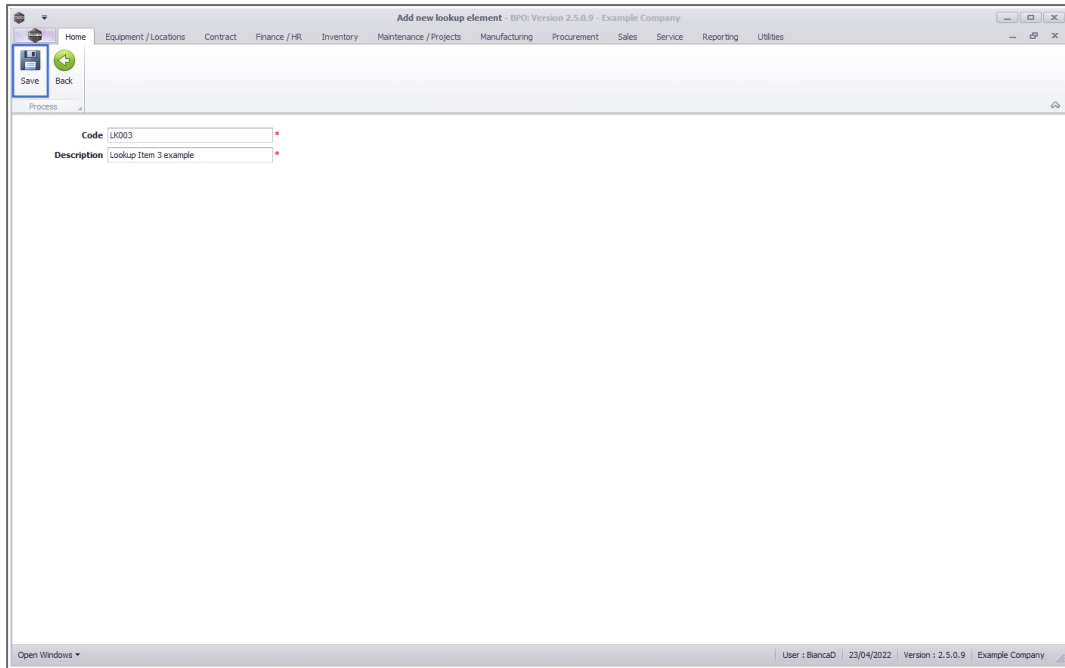
## ADD LOOKUP ITEMS

For Lookup Input Variables - the right click context menu includes the option to add items to the Lookup List.

- Right click on Lookup input type Custom Field and select **Add new lookup item** (you may need to scroll down).



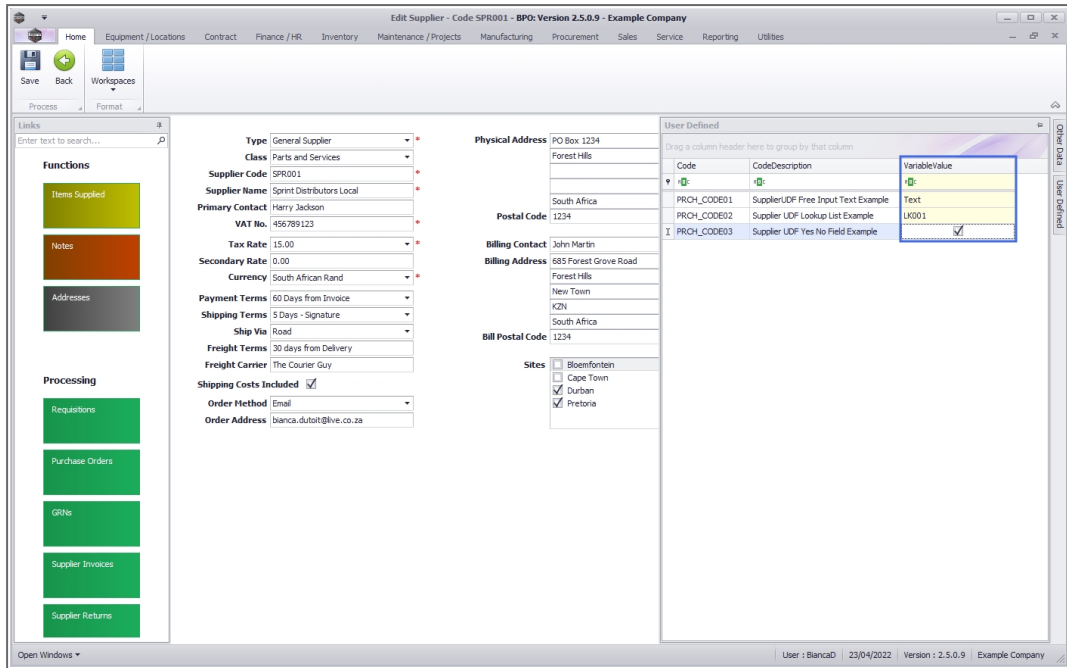
- Type in the lookup item **Code** and **Description**.
- Click on the **Save** button.



## UPDATE CUSTOM FIELD

This will update the detail for the User Defined Field for this contract.

- **Variable Value:** Type in, pick from the Lookup List or Toggle Yes/No depending on the Input type.



## SAVE SUPPLIER

- When you have finished entering all the new Supplier details, click on **Save**.

Add new Supplier - BPO: Version 2.1.0.31 - Example Company
\_ □ X

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities ⋮ ⌂ X

Save Back

Process

Links ⌵  
 Enter text to search... ⌵

**Functions**  

Items Supplied

Notes

Addresses

**Processing**  

Requisitions

Purchase Orders

GRNs

Supplier Invoices

Open Windows ⌵

10 Oct 2017

<table style="width: 100%; border-collapse: collapse;"> <tr><td>Type</td><td>Finance House</td></tr> <tr><td>Class</td><td>Parts</td></tr> <tr><td>Supplier Code</td><td>998077</td></tr> <tr><td>Supplier Name</td><td>Stone Rowe &amp; Co.</td></tr> <tr><td>Primary Contact</td><td>David Christopher</td></tr> <tr><td>VAT No.</td><td>1122334455</td></tr> <tr><td>Tax Rate</td><td>14.00</td></tr> <tr><td>Secondary Rate</td><td>17.50</td></tr> <tr><td>Currency</td><td>British Pound</td></tr> <tr><td>Payment Terms</td><td>30 Days from Invoice</td></tr> <tr><td>Shipping Terms</td><td>10 Days - Signature</td></tr> <tr><td>Ship Via</td><td>Sea</td></tr> <tr><td>Freight Terms</td><td></td></tr> <tr><td>Freight Carrier</td><td>Shipmark</td></tr> <tr><td>Sites</td><td><input checked="" type="checkbox"/> Durban <input type="checkbox"/> Pretoria</td></tr> <tr><td>Order Method</td><td>Email</td></tr> <tr><td>Order Address</td><td>davidr@stonerowe.co.uk</td></tr> </table>	Type	Finance House	Class	Parts	Supplier Code	998077	Supplier Name	Stone Rowe & Co.	Primary Contact	David Christopher	VAT No.	1122334455	Tax Rate	14.00	Secondary Rate	17.50	Currency	British Pound	Payment Terms	30 Days from Invoice	Shipping Terms	10 Days - Signature	Ship Via	Sea	Freight Terms		Freight Carrier	Shipmark	Sites	<input checked="" type="checkbox"/> Durban <input type="checkbox"/> Pretoria	Order Method	Email	Order Address	davidr@stonerowe.co.uk	<table style="width: 100%; border-collapse: collapse;"> <tr><td><b>Physical Address</b></td><td>Stone Rowe House</td></tr> <tr><td></td><td>The Quadrant</td></tr> <tr><td></td><td>Richmond Road</td></tr> <tr><td></td><td>Surrey</td></tr> <tr><td></td><td>United Kingdom</td></tr> <tr><td><b>Postal Code</b></td><td>SW141HQ</td></tr> <tr><td><b>Billing Contact</b></td><td>Moneypenny Bond</td></tr> <tr><td><b>Billing Address</b></td><td>Stone Rowe House</td></tr> <tr><td></td><td>The Quadrant</td></tr> <tr><td></td><td>Richmond</td></tr> <tr><td></td><td>Surrey</td></tr> <tr><td></td><td>United Kingdom</td></tr> <tr><td><b>Bill Postal Code</b></td><td>SW141HQ</td></tr> </table>	<b>Physical Address</b>	Stone Rowe House		The Quadrant		Richmond Road		Surrey		United Kingdom	<b>Postal Code</b>	SW141HQ	<b>Billing Contact</b>	Moneypenny Bond	<b>Billing Address</b>	Stone Rowe House		The Quadrant		Richmond		Surrey		United Kingdom	<b>Bill Postal Code</b>	SW141HQ
Type	Finance House																																																												
Class	Parts																																																												
Supplier Code	998077																																																												
Supplier Name	Stone Rowe & Co.																																																												
Primary Contact	David Christopher																																																												
VAT No.	1122334455																																																												
Tax Rate	14.00																																																												
Secondary Rate	17.50																																																												
Currency	British Pound																																																												
Payment Terms	30 Days from Invoice																																																												
Shipping Terms	10 Days - Signature																																																												
Ship Via	Sea																																																												
Freight Terms																																																													
Freight Carrier	Shipmark																																																												
Sites	<input checked="" type="checkbox"/> Durban <input type="checkbox"/> Pretoria																																																												
Order Method	Email																																																												
Order Address	davidr@stonerowe.co.uk																																																												
<b>Physical Address</b>	Stone Rowe House																																																												
	The Quadrant																																																												
	Richmond Road																																																												
	Surrey																																																												
	United Kingdom																																																												
<b>Postal Code</b>	SW141HQ																																																												
<b>Billing Contact</b>	Moneypenny Bond																																																												
<b>Billing Address</b>	Stone Rowe House																																																												
	The Quadrant																																																												
	Richmond																																																												
	Surrey																																																												
	United Kingdom																																																												
<b>Bill Postal Code</b>	SW141HQ																																																												

## VIEW NEW SUPPLIER

- You will return to the **Supplier Listing** screen where you can see the new supplier has now been added to the list.

The screenshot shows the 'Supplier Listing - BPO: Version 2.1.0.65 - Example Company' window. The interface includes a top menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, Sync, View, Save Layout, Workspaces, Refresh, Active, Export, and Reports. A search bar is located on the left side of the main area.

SupplierCode	SupplierName	ContactName	SupplierType	Status	Class	VATNo	MinOrderAmt	PaymentTe...	ShippingTe...	ShipVia	Pr
SUP001	Buy Back Supplier	Supplier Contact	BUY	A	SE	0000000000	0.00	2			
SPR001	Sprint Distributors Local	Harry Jackson	GEN	A	PS	456789123	0.00	3	1	3	3
SPR002	Sprint International	George Matthews	GEN	A	PS	456258741	0.00	2			
TON002	Tonys Copy Shop	Tony	SHPA	A	PS	9874561321	0.00	2	1	3	3
YES001	Young Electric	Grant	GEN	A	PS	3245064654	0.00	3	2		
APD001	Apple Distributors	Sammy Jones	GEN	A	PT	345678201	0.00	6	1	4	
PR1001	Printer World	Maggie Sage	GEN	A	PT	23451678	0.00	4	3	3	3
PR1010	Printer World	Maggie Sage	GEN	A	PT	456123789	0.00	4	3	3	3
TW1001	Twinkle Office Automation Supplies	Gary Marks	GEN	A	SE	9876543210	0.00	2	1	3	3
BON001	Bonsai Bonanza	Teddy Miller	GEN	A	PS	987654321	0.00	2	1	3	3
GRE001	Green Office	Mary Watson	GEN	A	SE	123456789	0.00				
MAD001	Maddys Haberdashery	Maddy Jones	GEN	A	PS	123456789	0.00				
1111	AB Goods	Bob Smart	GEN	A	PT	124221	0.00				
998877	Stone Rowe & Co.	David Christopher	FINH	A	PT	122334455	0.00	2	2	1	

MNU.056.001