

# PROCUREMENT

# **ADD A SUPPLIER**

**Ribbon Access:** *Procurement > Suppliers* 

Help v2.5.0.14 - Pg 1 - Printed: 25/06/2024

CO3 Technologies (Pty) Ltd © Company Confidential



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### **ADD A SUPPLIER**

The *Supplier Listing* screen will be displayed.



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• In this image *Durban* has been selected.



#### • Click on Add.

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### **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.

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- **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.



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### SHIPPING COSTS INCLUDED FLAG

- If you wish Shipping Costs to be <u>included</u> in the cost of parts/items received from this supplier then ensure that this flag <u>is</u> selected.
- If you wish Shipping Costs <u>not</u> 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 <u>not</u> selected.

#### Important Notes:

- If the flag is un-ticked, then any goods received from this supplier will then be <u>received into quarantine</u>, 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 <u>Include Shipping flag</u> on the Purchasing Centre must be ticked.



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#### 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.



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#### **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.

Help v2.5.0.14 - Pg 12 - Printed: 25/06/2024



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#### **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.



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### **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.

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

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



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	Secondary Rate 0.00	Billing Address	685 Forest Grove Road	Other8	Field 8	
	Currency South African Rand 🔻	•	Forest Hills		Field 9	
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### **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



ф. т.		Edit Supplier - Code SPR001 - BPO: Ve	rsion 2.5.0.9 - Example Company		X
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a contra proprieta	Supplier Name Sprint Distributors Local		South Africa	-	User Defined
Р	Primary Contact Harry Jackson	Postal Code		-	efin.
	VAT No. 456789123				8
Notes	Tax Rate 15.00	<ul> <li>Billing Contact</li> </ul>			
s	Secondary Rate 0.00		685 Forest Grove Road	*	
	Currency South African Rand	<b>*</b> *	Forest Hills New Town	_	
	Payment Terms 60 Days from Invoice	•	KZN	-	
	Shipping Terms 5 Days - Signature	•	South Africa	-	
	Ship Via Road	<ul> <li>Bill Postal Code</li> </ul>	1234		
	Freight Terms 30 days from Delivery			-	
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Processing 5	Shipping Costs Included 🛛 🗹		V Durban		
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Purchase Orders					
GRNs					
Supplier Invoices					
Supplier Returns					
Open Windows *				Liser : BiancaD	23/04/2022 Version : 2.5.0.9 Example Company

#### **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



¢ =		Edit Supplier - Code SPR001 - BPO: Ve	rsion 2.5.0.9 - Example Company	<i>,</i>		>
Home Equipment / Location	ns Contract Finance / HR Inventory M	Naintenance / Projects Manufacturing	Procurement Sales Service	Reporting Utilities		_ 8 )
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Turnellan a	Class Parts and Services	•	Forest Hills			
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	VAT No. 456789123	<ul> <li>Postal Code</li> </ul>	1234	PRCH_CODE02	Supplier UDF Lookup List Example	
Notes	Tax Rate 15.00	• * Billing Contact	John Martin	PRCH_CODE03	Supplier UDF Yes No Field Example	
THO LES	Secondary Rate 0.00		685 Forest Grove Road	- I		
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Open Windows 🔻				Use	er : BiancaD 23/04/2022 Version : 2.5	.0.9 Example Company

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

					Add new cust	om element - BPO:	Version 2.5.0.9 -	Example Comp	any			
Home	Equipment / Lo	cations Contract	Finance / HR	Inventory	Maintenance / Proje	cts Manufacturing	Procurement	Sales Ser	vice Reporting	Utilities		- 6
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ess 4												
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TUbur LAbe	Type	A Description										
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	LOOKUP	Lookup list										
	YESNO	Yes or No value										
	×											
	~		11.									



#### **ADD LOOKUP ITEMS**

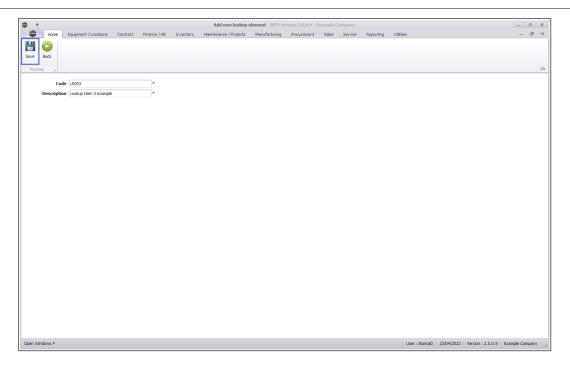
For Lookup Input Variables - the right click context menu includes the option to add items to the Lookup List.

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

Vertical condition        Vertical condition </th <th>ф. т</th> <th></th> <th></th> <th>E</th> <th>dit Supplier - Cod</th> <th>e SPR001 - BPO: Ve</th> <th>rsion 2.5.0.9 - E</th> <th>Example Co</th> <th>ompany</th> <th></th> <th></th> <th>_</th> <th></th>	ф. т			E	dit Supplier - Cod	e SPR001 - BPO: Ve	rsion 2.5.0.9 - E	Example Co	ompany			_	
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Nosi Tas Rate 15.00   Scondary Rate 15.00   Stippin Trends 15.00 <td></td> <td>VAT No.</td> <td>456789123</td> <td></td> <td>•</td> <td>i ostar couc</td> <td>16.01</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td><u> </u></td>		VAT No.	456789123		•	i ostar couc	16.01						<u> </u>
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Open Windows * User : BiancaD 23/04/2022 Version : 2.5.0.9 Example Company	GRNs Suppler Invoices												
	Open Windows 🕶										User : BiancaD 23/04/2022	Version : 2.5.0.9 Example (	Company

- 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.

Help v2.5.0.14 - Pg 21 - Printed: 25/06/2024



	Type General Supplier Class Parts and Services Code SPR001 ame Sprint Distributors Local	enance / Projects Manufacturing		Service Reporting	Utilities	-	. @
eve Book Workspeces Process Functions Function	Code SPR001 Sprint Distributors Local		PO Box 1234	User Defined			
Addresses Processing Regulations Parchase Orders	Code SPR001 Sprint Distributors Local		PO Box 1234	User Defined			
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Functions     Supplier 0       Items Supplied     Supplier 10       Notes     Supplier 10       Addresses     Primary Cont       Addresses     Payment Te       Shipping Cos     Shipping Cos       Processing     Order Net       Purchase Orders     Order Addresses	Code SPR001 Iame Sprint Distributors Local	•					
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Supplier Invoices							
Supplier Returns							
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## **SAVE SUPPLIER**

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



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Items Supplied										
Notes		Finance House		Physical Address	Name and Address of the Owner o	use				
	Class				The Quadrant		_			
	Supplier Code	998877			Richmond Road		_			
Addresses	Supplier Name	Stone Rowe & Co.			Surrey		_			
Addresses	Primary Contact	David Christopher			United Kingdom					
	VAT No.	1122334455		Postal Code	SW141HQ					
	Tax Rate	14.00		Billing Contact	Moneypenny B	nd				
	Secondary Rate			Billing Address						
	NULL OF CALLERY	British Pound		county reserves	The Quadrant					
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	23021	Pretoria								
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Supplier Invoices	Order Method	Enal								
CARGE STYLES	1 0000000000	davidr@stonerowe.co.uk								
AND AND AN	Order Address	Gavior ipstonerowe.co.uk								



### **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.

Home E	quipment a	and Locations	Contract Finance and HR 3	inventory Maintenar	nce and Projects	Manufac	turing Proc	urement Sales	Service	Reporting	Utilities	- 8	3
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Process	sing	4	Format	Current	Print a Re	eports "							
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unctions		٣											
		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	
		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	
Notes		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	
		PRI001	Printer World	Maggie Sage	GEN	A	PT	23451678	0.00	4	3	3	
Addresses		PRI010	Printer World	Maggie Sage	GEN	A	PT	456123789	0.00	4	3	3	
		TWI001	Twinkle Office Automation Supplies	Gary Marks	GEN	A	SE	9876543210	0.00	2	1	3	
		BON001	Bonsai Bonanza	Teddy Miller	GEN	A	PS	987654321	0.00	2	1	3	
		GRE001	Green Office	Mary Watson	GEN	A	SE	123456789	0.00				
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rocessing		1111	AB Goods	Bob Smart	GEN	A	PT	124221	0.00				i
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