

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



	*						BPO: Version 2.1	.0.31 - Example	Compl	ny				7)
) E	quipment and l	locations	Contract	t Financ	te and HR	Inven	tory Maintenar	nce and Projects	Mar	ufacturing	Procurement	Sales	Service	Reporting	Utilities	ŝ.
7	Ĩ	HA	6			5		2	Q							
pplers	Requisitons	1000	Expeding	house #	Debit	577	Goods Received	Warrantes								
-				Presson	Notes		Notes	Mananta								
ster "				Processing				Warrante								
en Wed	lons *													10 Oct	2017	1

ADD A SUPPLIER

The *Supplier Listing* screen will be displayed.



Select the Site

Add Edit Delete	Syn	c .		t Workspaces Refresh	Al S ID 0 1	tes Al Sites Durban Pretoria							
nks	8				ľ								
iter text to search	2	9	upplerCode	SupplerName	L				VATNo	MnOrder Amt	FreightCarrier	FreightTerms	Paym
Functions		Ŧ			x								
		, 9	UP001	Buy Back Suppler	L,	pio conact-	001	-	0000000000	0.00			2
Items Supplied		9	PR001	Sprint Distributors Local	Har	ry Jackson	GEN	A	456789123	0.00	The Courier Guy	30 days from Delivery	3
		9	PR002	Sprint International	Geo	rge Matthews	GEN	A	456258741	0.00			2
	1	T	ON001	Tonys Copy Shop	Ton	IΥ	SPA	A	9874561321	0.00	DHL	C00	2
Notes		Y	E5001	Young Electric	Gra	nt	GEN	A	3245064654	0.00			3
	[P	R1005	Printer World 2	Rid	hard Sage	GEN	A	98076523	0.00	Wheels on Wings	30 days from delivery	5
		P	R1007	Printer World Forex	Mat	thew Sage	9/PA	A	768594444	0.00	Wheels on wings	60 days from invoice	3
Addresses		P	R1010	Printer World	Ma	ygie Sage	GEN	A	456123789	0.00	Wheels with Wings	30 days from delivery	4
		P	R10012	Printer World	Ma	ggie Saggie	GEN	A	13456789	0.00	Wheels with Wings	30 days from delivery	3
	L	T	W1001	Twinkle Office Automation	Gar	y Marks	GEN	A	9876543210	0.00	Wing It Couriers	30 day	2
		Ð	ON001	Bonsai Bonanza	Ted	idy Miller	GEN	A	987654321	0.00	Wing It Couriers	30 day	2
		Р	RE001	Pretoria Copy Shop	Jan	nie van Wyk	GEN	A	9876543210	0.00	Wing It	30 Days	4
Processing		0	UR001	Durban Copy Shop	Me	pan Jones	GEN	A	987654321	0.00			3
roceaning		P	AP001	The Paper Warehouse	309	eph Manning	GEN	A	1234567890	0.00	Wing It	30 day	4
Requisitons		М	ET001	Metro Peach	les	sica Johns	GEN	A	1234567	0.00	Wheels with Wings	30 days from delivery	5
		P	RE005	Pretoria West Office Auto.	, Jac	ke Simmons	GEN	A	987654321	0.00			3
		N	EW006	New Way Recycling	Pat	rick Smith	GEN	A	9876543210	0.00			3
Purchase Orders	1	W	/ON001	Wonderboom IT Hub	Mar	k Jones	GEN	A	987654321	0.00			3
		8	88	Abs Store	Ab		GEN	A	654789	0.00	DHL	14 days after payment	2
		M	1555	A	A		GEN	A	986789	0.00	DHL	10 days	2
GRVIs													

• In this image *Durban* has been selected.



• Click on Add.

	and	ocations Cont	tract Finance and HR Inve	ntory Maintenance	e and Projects	Manuf	acturing Pro	curement Sal	es Service Repo	rting Utilities -	8)
Add Edit Delete	Sync	Save Layou	ut Workspaces Refresh	Durban •	-0						
Processing		Fa	emat	Current	Print						
	a .										
	p		uder here to group by that cal			Photo: -		In the later	Public Inc.		
Functions			SupplierName	ContactName	SupplierType	Status	VATNO	MnOrderAnt	FreightCarrier	FreightTerms	Payn
Functions		A PROVINCE	Au dad Aurilia	Carda Carbod		2		0.00			
Items Supplied	1	5UP001	Buy Back Suppler Sprint Distributors Local	Supplier Contact Harry Jackson	BUY GEN	A	0000000000 456789123	0.00	The Courier Guy	30 days from Delivery	2
	ŀ	SPR001	Sprint Distributors Local	George Matthews		A	456258741	0.00		Ju bays from Dervery	2
		TON001	Tonys Copy Shop	Tony	SHPA	A	9874561321	0.00		C00	2
Notes	H	YE5001	Young Electric	Grant	GEN	A	3245054554				3
INTERNAL D	ŀ	PR1010	Printer World	Maggie Sage	GEN	A	456123789			30 days from delivery	4
		TWI001	Twinkle Office Automation		GEN	A	9876543210		Wing It Couriers	30 day	2
Addresses	r li	BON001	Bonsal Bonanza	Teddy Miller	GEN	A	987654321		Wing It Couriers	30 day	2
Processing											
Processing Requisitons											
ţ.											
Requisitions											
Requisitions Purchase Orders											



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.

<u>a </u>		Add	new Suppli	er - BPO: Version 2.1.0.31 -	Example Comp	any				÷.)	Ķ
Home Equipment and	d Locations Contract	Finance and HR	Inventory	Maintenance and Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	З,	ð	X
8 🚱													
Save Back													
Process													
inics a	1						-				-	-	17
nter text to search P													Prove south
Functions													1000
runcuons													12
Items Supplied													
	Туре			• P	ysical Address								
Notes	Class												
	Supplier Code												
Addresses	Supplier Name						_						
100 6325	Primary Contact				Postal Code				_				
The second second	VAT No.				rustarcoue								
	Tax Rate	14.00			Billing Contact								
	Secondary Rate				Billing Address								
Processing	Currency	South African Ra	nd	•									
and the second	Payment Terms			•					_				
Requisitions	Shipping Terms								_				
	Ship Via			•	Bill Postal Code				_				
	Freight Terms												
Purchase Orders	Freight Carrier												
	Sites	V Durban											
		Pretoria											
GRINE													
Suppler Invoices	Order Method												
STEAS FULLACE	Order Address			_									
												-	
pen Windows *										10 Oct 1	2017	1	



- **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	I new Suppl	ier - BPO: Version 2.1.0.3	1 - Example Compi	any				1	Q	>
Home Equipment	and Locations Contract	Finance and HR	Inventory	Maintenance and Project	ts Manufacturing	Procurement	Sales	Service	Reporting	Utities	2	Ð
10												
e Back												
ocess a											_	_
	8											
r text to search	P											
inctions												
LIGHT GART												
Items Supplied												
	Type	Finance House			Physical Address							
lotes	Class				in produces				-			
	Supplier Code	and the second s										
000000	Supplier Name		0.									
Vódresses	Primary Contact											
	STREAM STREET	122334455			Postal Code							
	Tax Rate	konstruktion (Billing Contact							
	Secondary Rate				Billing Address							
	12.5 20 20 20 20 20 20 20 20 20 20 20 20 20	British Pound										
ocessing	Payment Terms											
leguistions	Shipping Terms											
	Ship Via	1							_			
	Freight Terms				Bill Postal Code							
Aurchase Orders	Freight Carrier	-		_								
		🖉 Durban										
	-	Pretoria										
GRNs												
Suppler Invoices	Order Method			•								



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.



Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities
Back Workspaces Process Format hts Image: Stoppler Code Supplier Code 99877 Tax Rate 500 Tax Rate 500 Secondary Rate 17.5 Currency Billing Contact Ship Via Sea Bill Postal Code Ship Via Sea Bill Postal Code Bill Postal Code Bill Postal Code
Addresses Addresses Type Functions Type Finance House Class Parits Supplier Code 998977 Supplier Code 998977 Supplier Code 998977 Primary Condex Supplier Name Stoppler Code 998977 Supplier Code 998977 Primary Condex Supplier Code Parimary Condex Supplier Code VAT No. 12233455 Tax Rate 15.00 Secondary Rate 17.5 Secondary Rate 17.5 Supplier Code Silipping Terms 10 Days - Signature Ship Via Sea Freight Terms Sites Cape Town
Functions Class Parts
Functions Supplier Code 99877 • • Items Supplier Name Stone Rowe & Co. • • Primary Contact David Christopher • • VAT No. 122334455 • • Notes Tax Rate 15.00 • Billing Contact Secondary Rate 17.5 Billing Addresse • Addresses Payment Terms 30 Days from Invoice • Shipping Terms 10 Days - Signature • Shipping Terms 10 Days - Signature • Freight Terms Bill Postal Code •
Supplier Code 998977 •
Notes Primary Contact VAT No. 122334455 Notes Tax Rate 15.00 Billing Contact Secondary Rate 17.5 Currency British Pound Vat Times 10 Days - Signature Ship Pia Sea Ship Via Sea Freight Terms Image: Signature Freight Carrier Sites
VAT No. 122334455 Postal Code Notes Tax Rate 15.00 • Billing Contact Secondary Rate 17.5 Billing Address • Addresses Payment Terms 30 Days from Invoice • Shipping Terms 10 Days - Signature • Shipping Terms 10 Days - Signature • Freight Terms 5 • Freight Carrier Sites Cape Town
Notes Tax Rate 15.00 • Billing Contact • Notes Tax Rate 15.00 • Billing Contact • Secondary Rate 17.5 Billing Address • • Addresses Payment Terms 30 Days from Invoice • • Shipping Terms 10 Days - Signature • • • Freight Carrier Bill Postal Code • • • Freight Carrier Sites Cape Town • •
Addresses Secondary Rate 17.5 Billing Address Addresses Payment Terms 30 Days from Invoice Image: Compary C
Addresses Payment Terms 30 Days from Invoice Shipping Terms 10 Days - Signature Ship Via Sea Freight Terms Freight Carrier Freight Carrier Site Cape Town
Addresses Payment Terms 30 Days from Invoice Shipping Terms 10 Days - Signature Ship Via Sea Bill Postal Code Bill Postal Code Freight Carrier Freight Carrier Sites Cape Town
Shipping Terms 10 Days - Signature Ship Via Sea Freight Terms Bill Postal Code Freight Carrier Sites
Ship Via Sea Bill Postal Code Freight Terms Freight Carrier Sites Cape Town
Freight Terms biii Postal Code Freight Carrier Sites Cape Town
Freight Terms Freight Carrier Sites Cape Town
Processing Shipping Costs Included
Owder Method
Requisitions Order Address
Requisitions

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.



	Aliment Probability				0.31 - Example Comp	-	(ella	1423.000	121112	Timber		8	X
Home Equipment a	nd Locations Contract	Finance and the	Buventory	Maintenance and Pro	jects Manutacturing	Procurement	2965	SELVICE	Reporting	Unites	-	. 0.	
0													
Back													
088													
1	1											-	
text to search A													
	1												
nctions													
terns Suppled													
lates		Finance House		*	Physical Address				_				
	Class			•					_				
	Supplier Code	Stone Rowe & Co							-				
lddresses	Primary Contact			_									
	1.10.2013 0.000	1122334455		_	Postal Code								
	1997				Million Contraction				-				
	Tax Rate	1200		_	Billing Contact								
	Secondary Rate	British Pound			Billing Address		_		_				
ocessing	e antoquara	in the second					_		_				
Requisitons	Payment Terms			•			_						
in the second	Shipping Terms		re	-									
_	Ship Via	Sea			Bill Postal Code								
Urchase Orders	Freight Terms Freight Carrier	Chinada	_	_									
		Urban	_										
	Sites	Pretoria											
RN6													
	Order Method			*									
Suppler Invoices	A CONTRACTOR OF A CONTRACTOR OFTA CONTRACTOR O												



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



				er - BPO: Version 2.1.0.		-	1000			T.		1.00	X
Home Equipment	and Locations Contract	Finance and HR	Inventory	Maintenance and Proje	ts Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	8	
Back													
095													
												-	
	p												
nctions													
terns Supplied													
ens suppres													
lotes	Туре	Finance House			Physical Address								
M1C2	Class	Parts											
	Supplier Code	998877							_				
lddresses	Supplier Name	Stone Rowe & Co							_				
wu casa	Primary Contact	David Christopher			Postal Code				-				
	VAT No.	1122334455			Postar code								
	Tax Rate	14.00			Billing Contact								
	Secondary Rate	17.50			Billing Address								
ocessing	Currency	British Pound		•									
	Payment Terms	30 Days from Inv	oice										
Requisitions	Shipping Terms								_				
	Ship Via	Sea			Bill Postal Code								
	Freight Terms				on rosai couc								
Archase Orders	Freight Carrier	Shipmark											
	Sites	🖌 Durban											
	0.03670	Pretoria											
Re													
	in the statement												
	Order Method			•									
Suppler Invoices	Order Address												



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.



				er - BPO: Version 2.1.0.							0		2
Home Equipment a	and Locations Contract	Finance and HR I	inventory	Maintenance and Proje	cts Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	Ð	ł
e Back													
ocess 4												_	
s 8													
r text to search J													
inctions													
Items Supplied													
				,					_				
	Type	Finance House			Physical Address								
lotes	Class												
	Supplier Code	998877											
No.	Contraction of the	Stone Rowe & Co.											
Nódresses	Primary Contact	David Christopher			100020000				_				
-	101000010000000000000000000000000000000	122334455			Postal Code								
	Tax Rate	14.00			Billing Contact								
	Secondary Rate			_	Billing Address								
a carefue	Contraction of the second	British Pound			10000								
ocessing	1	30 Days from Invoi											
Requisitons	2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	10 Days - Sgnature											
and setting	Ship Via	a da glor da com	2						_				
	Freight Terms				Bill Postal Code				_				
Purchase Orders	Freight Carrier			_									
	100 100 100 100 100 100 100 100 100 100	🖌 Durban											
	1	Pretoria		_									
GRINIS													
Suppler Invoices	Order Method	Email		•									
supplet trivoices		davidc@stonerowe	ALC: NOTE:										



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.

	ф. т.	Edit Supplier - Co	de SPR001 - BPO: Ve	rsion 2.5.0.9 - Example Co	mpany		_ — X
See tot Vortage Processing Registron Registron Support Code Support Processing Registron Support Code Support Support Code Support Code Support Support Code Support Support Code Support Code Support Support Code Support Code Support Support Code Support Code Support Code Support Support Code Supp	Home Equipment / Locations Contract Fina	ance / HR Inventory Maintenance / Projects	Manufacturing	Procurement Sales !	Service Reporting Ut	lities	_ @ ×
See tot Vortage Processing Registron Registron Support Code Support Processing Registron Support Code Support Support Code Support Code Support Support Code Support Support Code Support Code Support Support Code Support Code Support Support Code Support Code Support Code Support Support Code Supp							
Verse Verse <							
Under auf base Under base of hum Functions Bond Steppler Suppler tode Steppler Suppler tode Steppler Primary Control Hum Johnson Addresse Processing Readestorse Processing Readestorse Order Address Dorder Address Do	Save Back Workspaces						
Under auf base Under base of hum Functions Bond Steppler Suppler tode Steppler Suppler tode Steppler Primary Control Hum Johnson Addresse Processing Readestorse Processing Readestorse Order Address Dorder Address Do	Courses Formation						
Image: description: Functions Rem Suppled Note: Supple: refailed Service: Vote: Address: Description: Supple: refailed Service:							
Functions Case interview interview<		-					윩
Suppler Code \$8001 * -			Physical Address				
Intel Supplet Intels Notes Notes <t< th=""><th></th><th></th><th></th><th>Porest Hills</th><th></th><th></th><th>ata</th></t<>				Porest Hills			ata
Note: Tax Rate: 15.00 • Addresse: 0.00 • Addresse: 0.00 Payment Term: 0.00 ps fron Invoice Shipping Term: 0.00 ps fron Delvery Shipping Term: 0.00 ps fron Delvery Preight							c
Note: Tax Rate: 15.00 • Addresse: 0.00 • Addresse: 0.00 Payment Term: 0.00 ps fron Invoice Shipping Term: 0.00 ps fron Delvery Shipping Term: 0.00 ps fron Delvery Preight	reens supplied			South Africa			er -
Note: Tax Rate: 15.00 • Addresse: 0.00 • Addresse: 0.00 Payment Term: 0.00 ps fron Invoice Shipping Term: 0.00 ps fron Delvery Shipping Term: 0.00 ps fron Delvery Preight			Postal Code				efin
Addresses Supplied Set Mail Supplied Set Mail Supplied Set Mail Billing Addresse Supplied Set Mail Supplied Set Mail Billing Addresse Supplied Set Mail Supplied Set Mail Billing Addresse Supplied Set Mail Supplied Set Mail <td>VAT No.</td> <td>456789123 *</td> <td></td> <td></td> <td></td> <td></td> <td>ed.</td>	VAT No.	456789123 *					ed.
Addeesees Addeesees Addeesees Addeesees Payment Terms Bib prost Shipping Terms Shipping Terms Shipping Casts Included 10 Processing Shipping Casts Included 10 Corder Address Vorder Address Vorder Address Suppler Envolues	Notes Tax Rate	15.00 *	Billing Contact	John Martin			
Addresses Payment Terms Obysymmin Invice Implement Terms Shipping Terms Solgar Soguature South Africa Shipping Terms Solgar Soguature Bill Postal Code Processing Shipping Terms Solgar Soguature Requestors Order Hethod Email Order Address bianca.dulot Bilve.co.za	Secondary Rate	0.00	Billing Address	685 Forest Grove Road	*		
Addesided Paryment Terms (d) Darys from Invoice • Shipping Terms Solary Stoput • Shipping Terms 30 darys from Delivery • Processing Shipping Costs Included ✓ Requestors Order Hethod Imail • Order Address Wards duite(Wee.co.ze) ✓	Currency	South African Rand 👻 *		Forest Hills			
Shipping Terms Dega - Sgashre Sequences Sadap Kon Dellwey Processing Shipping Costs Included Sougher Envoices Sadap Kon Dellwey Supplier Envoices Supplier Envoices	Addresses Payment Terms	60 Days from Invoice					
Ship Via Nod Predpht Terms 30 days fram Delivery Bill Postal Code 1244 Processing Shipping Casts Included Image: Casts Included Regulators Order Hethod Pridpht Terms Varian Order Address Varian Processing Suppler Envolues Suppler Envolues							
Processing 30 days from Delivery Processing 30 days from Delivery Regulators Order Hethod Biol Cope Toon Order Address Datam							
Processing Freight Carrier The Courter Gay Sites Caper Toon Regulations Order Hethod Enal Caper Toon Order Address Diancs.dubit@live.co.za Pretura			Bill Postal Code	1234			
Processing Slapping Cotts Included I Regulations Order Hethod Order Address banca.duiot@het.co.za			Siter	Bloemfontein			
Suppler Envoices Suppler Envoices Suppler Envoices			Sites				
Neglation Order Address Burdhase Orders blanca.dubit@live.co.za GR1s Sugoler Envoices	5 Shipping Costs In			V Durban			
Purchase Orders GRNe Suppler Envoices	Requisitions			V Pretoria			
Gible Supplier Threaders	Order Address	bianca.dutoit@ive.co.za					
Gible Supplier Threaters							
Gible Supplier Threaders	Purchase Orders						
Supplier Thronkes							
Supplier Thronkes							
Supplier Thronkes	CT111						
	GROVE						
Suppler Returns	Supplier Invoices						
Suppler Returns							
Suppler Returns							
	Supplier Returns						
Open Windows * User : Bianca0 23/04/2022 Version : 2.5.0.9 Example Company 🖉	Open Windows 👻					User : BiancaD 23/04/2022	Version : 2.5.0.9 Example Company

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

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



Ŧ	Edit S	upplier - Code SPR001 - BPO: Ve	rsion 2.5.0.9 - Example Compa	ny		
Home Equipment / Locati	ons Contract Finance / HR Inventory Maintenan	ce / Projects Manufacturing	Procurement Sales Service	e Reporting Util	ities	_ 8
Back Workspaces						
ocess 🖌 Format 🖌						
s a text to search P	Type General Supplier	 Physical Address 		Other Data		
text to search P	Type concreter ouppiler	 Physical Address 	PO BOX 1234 Forest Hills	Other1	Additional info 1	
Functions	Class Parts and Services		rorest hills	Other2	Additional info 2	
	Supplier Code SPR001			Other3	Additional info 3	
Items Supplied	Supplier Name Sprint Distributors Local	•	South Africa	Other4	Field 4	
	Primary Contact Harry Jackson	Postal Code	1234	Other5	Field 5	
	VAT No. 456789123	•		Other6	Field 6	
Notes	Tax Rate 15.00 -	 Billing Contact 	John Martin	Other7	Field 7	
	Secondary Rate 0.00	Billing Address	685 Forest Grove Road	Other8	Field 8	
	Currency South African Rand 🔻	•	Forest Hills		Field 9	
Addresses	Payment Terms 60 Days from Invoice -		New Town	Other10	Field 10	
	Shipping Terms 5 Days - Signature 🔻		KZN	-		
	Ship Via Road		South Africa	-		
	Freight Terms 30 days from Delivery	Bill Postal Code	1239	-		
	Freight Carrier The Courier Guy	Sites	Bloemfontein			
Processing	Shipping Costs Included		Cape Town			
Requisitions	Order Method Email		V Pretoria			
requisitoris	Order Address bianca.dutoit@live.co.za			_		
Purchase Orders						
GRNs						
Supplier Invoices						
Supplier Returns						
ndows 🕶				L	User : BiancaD 23/04/2022 Vers	ion : 2.5.0.9 Example Compa

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 Compatibility¹

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

¹ 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
Home Equipment / Locations	Contract Finance / HR Inventory M	aintenance / Projects Manufacturing	Procurement Sales Service	Reporting Utilities	- 8 ×
Save Back Workspaces					
Save back workspaces					
Process _ Format _					\$
Links A				_	9
Enter text to search P	Type General Supplier	Physical Address			
Functions	Class Parts and Services	-	Forest Hills	-	1
	Supplier Code SPR001	*		-	
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	 Billing Contact 			
s	Secondary Rate 0.00		685 Forest Grove Road	*	
	Currency South African Rand	* *	Forest Hills New Town	_	
	Payment Terms 60 Days from Invoice	•	KZN	-	
	Shipping Terms 5 Days - Signature	•	South Africa	-	
	Ship Via Road	 Bill Postal Code 	1234		
	Freight Terms 30 days from Delivery			-	
	Freight Carrier The Courier Guy	Sites	Bloemfontein Cape Town		
Processing 5	Shipping Costs Included 🛛 🗹		V Durban		
Regulations	Order Method Email	-	V Pretoria		
	Order Address bianca.dutoit@live.co.za				
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)
Save Back Workspaces						6
Links 4				User Defined		4
Enter text to search P	Type General Supplier	 Physical Address 	PO Box 1234			P VariableValue I
Turnellan a	Class Parts and Services	•	Forest Hills			
Functions	Supplier Code SPR001	•		Code	CodeDescription	VariableValue
Items Supplied	Supplier Name Sprint Distributors Local	•			-	100
	Primary Contact Harry Jackson		South Africa	PRCH_CODE01	SupplierUDF Free Input Text Example	
	VAT No. 456789123	 Postal Code 	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		
	Currency South African Rand	• *	Forest Hills	- 1		
Addresses		•	New Town		Process	
Addresses	Payment Terms 60 Days from Invoice		KZN		Add New Custom Field	
	Shipping Terms 5 Days - Signature	•	South Africa			
	Ship Via Road	 Bill Postal Code 	1234		Edit Custom Field	
	Freight Terms 30 days from Delivery					
	Freight Carrier The Courier Guy	Sites	Bloemfontein Cape Town			· I
Processing	Shipping Costs Included 🗹		Durban			
Requisitions	Order Method Email	-	V Pretoria			
	Order Address bianca.dutoit@live.co.za					
				-		
Purchase Orders						
Furchase orders						
GRNs						
GRIS						
Constant Transform						
Supplier Invoices						
Supplier Returns						
				4		→
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
Back												
ess 4												
Code	PRCH_CODE	33	*									
Description	Supplier UDF	Yes No Field Example										
Input Type			•									
TUbur LAbe	Type	A Description										
	FREETEXT	Free input text										
	LOOKUP	Lookup list										
	YESNO	Yes or No value										
	×											
	~		11.									



ADD LOOKUP ITEMS

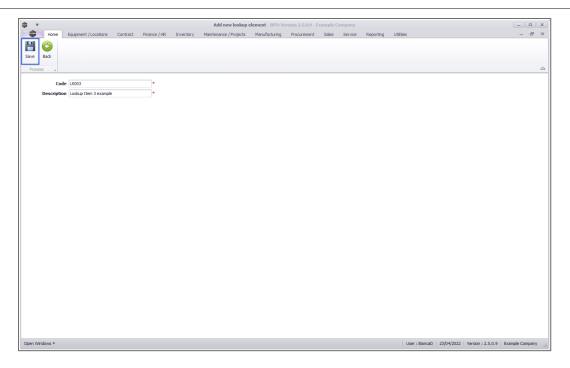
For Lookup Input Variables - the right click context menu includes the option to add items to the Lookup List.

 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			_	
	Home Equipment / Locations	Contract Fina	ance / HR In	iventory Main	tenance / Projects	Manufacturing	Procurement	Sales	Service Re	porting	Utilities	-	. 8 ×
Functions Case Persons • Suppler Code \$P0001 \$p0001 \$p0001000000000000000000000000000000000	Save Back Workspaces												\$
Functions Case Persons • Suppler Code \$P0001 \$p0001 \$p0001000000000000000000000000000000000	Links 4								User Define	ed			÷ 0
Functions Case Part and Services Supplier Case Supplier Case Supplier Case Supplier Case Primary Casted Harry Addoin Primary Casted Harry Addoin Votes Tak Rate Socid Africa Socid Africa Supplier Case Socid Africa Case Socid Africa Stapplier Tame Socid Africa Stapplier Tame Socid Africa Stapplier Tame Socid Africa Addresses Socid Africa Processing Stapplier Case Stapplier Case Socid Africa St	Enter text to search ,P	Туре	General Supplier	r	. *	Physical Address	PO Box 1234		Drag a colum				ther
Suppler Code SPR011 Items Suppler Code SPR011 Primary Codata Items Suppler Code Suppler Code Suppler Code Primary Codata Items Suppler Code Suppler Code	Euections	Class	Parts and Servic	ces	-		Forest Hills					VariableValue	Data
Notes Tax Rate Scondary Rate Currence 0 Sold Advisors Payment Terms Sold Advisors Stopping Terms Stopping Terms <t< td=""><td>Functions</td><td>Supplier Code</td><td>SPR001</td><td></td><td>•</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>	Functions	Supplier Code	SPR001		•								
Notes Tax Rate Scondary Rate Currence 0 Sold Advisors Payment Terms Sold Advisors Stopping Terms Stopping Terms <t< td=""><td>Items Supplied</td><td>Supplier Name</td><td>Sprint Distributo</td><td>ors Local</td><td>*</td><td></td><td>Carath A film</td><td></td><td></td><td>00601</td><td></td><td>-</td><td>Jser</td></t<>	Items Supplied	Supplier Name	Sprint Distributo	ors Local	*		Carath A film			00601		-	Jser
Notes Tax Rate Scondary Rate Currence 0 Sold Advisors Payment Terms Sold Advisors Stopping Terms Stopping Terms <t< td=""><td></td><td>Primary Contact</td><td>Harry Jackson</td><td></td><td></td><td>Portal Code</td><td></td><td></td><td>_</td><td></td><td></td><td></td><td>Defir</td></t<>		Primary Contact	Harry Jackson			Portal Code			_				Defir
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>
Addresses Suppling Terms Suppling Terms Suppling T	Notes	Tax Rate	15.00		• *	Billing Contact	John Martin					 Add New Custom 	
Addresses Suppling Terms Suppling Terms Suppling T		Secondary Rate	0.00			Billing Address	685 Forest Grow	e Road				Edit Edit Custom Field	n
Addresses Payment Terms Shipping Tom Produce Shipping Tom Produce Shipping Tom Produce Dodar Variance Dodar Variance Shipping Costs Include Image Costs Order Address Dorder Address Dorder Address Dorder Address Supping Tom Produce Image Costs Dorder Address		Currency	South African R	and	* *								
Shipping Terms 5 Double - Supature Shipping Carres 5 Double - Supature Processing Supping Carres Shipping Carres 120 days from Delivery Processing Supping Carres Supping Carres 120 days Order Address 120 days Parchase Doders 120 days Supping Carres 120 days	Addresses	Payment Terms	60 Days from In	woice	-				-			Add new lookup it	em 🗸
Ship Via Rod Processing Solays fon Delvery Freight Carrie Delays fon Delvery Freight Carrie Delays fon Delvery Stegistions Order Address Order Address Dena Furthase Orders Suppler Invokes Suppler Invokes		Shipping Terms	5 Days - Signati	ure	•				-				
Processing 30 days fon Delvery Freight Carrie The Courie Gay Shipping Casts The Courie Gay Order Method Email Order Address Banca.dutat@lve.co.za		Ship Via	Road		-	Bill Portal Code			-				
Processing Shipping Costs Include ✓ Requisitorie Order Address Dates Order Address Dates. Address Dates. Address Barchaller Driver Dates. Address Dates. Address Suppler Invokes Suppler Returne Image Returne		Freight Terms	30 days from De	elivery		biii Postai Code	1234		-				
Registion Order Address banca.dubit@he.co.za Registion Order Address banca.dubit@he.co.za GRVs Suppler Invokes Suppler Invokes		Freight Carrier	The Courier Guy	y		Sites	Bloemfonteir	n					
Regustion Order Address banca.dubtit@live.co.za Purchase Orders banca.dubtit@live.co.za GRite	Processing						🗹 Durban						
Purchase Orders GR4e Suppler Invoces Suppler Returns	Requisitions	Order Method	Email		•		V Pretoria						
GRIe Sugeler Protoces Sugeler Returns		Order Address	bianca.dutoit@l	live.co.za					-				
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			
Princtions Functions	Code SPR001 Sprint Distributors Local		PO Box 1234				-
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	•					
Items Suppler C Suppler C Items Suppler C Suppler C Notes Val Notes Secondar N Addresses Payment Te Shipping Cos Shipping Cos Processing Shipping Cos Regulations Order Het Purchase Orders Order Addresses	ame Sprint Distributors Local		Forest Hills				1
Notes Primary Con Notes Payment Te Addresses Payment Te Shipping Cos Processing Shipping Cos Processing Order Het Order Addresses Order Addresses		•		Code	CodeDescription	VariableValue	
Notes Primary Cont VAT Notes Secondary F Addresses Payment Te Shipping Te Shipping Cont Processing Order Net Order Net Order Vet Order Vet	teret Den Sederer	*		P 10:	 •••• 	1 0 :	
Notes Tax R Secondary R Addresses Payment Te Shipping Te Order Net Order Net	Itact marry Jackson		South Africa	PRCH_CODE01	SupplierUDF Free Input Text Example	Text	
Addresses Secondary R Curre Addresses Payment Te Shipping C Processing Shipping Cos Processing Order Het Order Addr	T No. 456789123	 Postal Code 	1234	PRCH_CODE02	Supplier UDF Lookup List Example	LK001	
Addresses Secondary R Currer Payment Te Shipping Te Shipping Te Shipping Te Processing Shipping Cos Requestors Order Het Order Het Order Addr	Rate 15.00	• * Billing Contact	John Martin	I PRCH_CODE03	Supplier UDF Yes No Field Example		
Addresses Payment Te Shipping Te Ship Processing Shipping Cos Regulations Order Het Order Het			685 Forest Grove Road	-			
Addresses Payment Te Shipping Te Ship Freight Te Freight Te Freight Ca Shipping Cos Regulations Order Het Order Het Order Het	ency South African Rand	• *	Forest Hills	-			
Shipping Te Ship Processing Processing Requestors Order Het Order Addr Purchase Orders			New Town	-			
Ship Preight Ca Processing Shipping Cos Regulations Order Het Order Addr Purchase Orders	erms 60 Days from Invoice	•	KZN	-			
Processing Freight Ca Processing Shipping Cos Regulations Order Net Purchase Orders	erms 5 Days - Signature	•	South Africa	-			
Processing Freight Car Processing Order Het Order Het Order Addr Purchase Orders	p Via Road	* Bill Postal Code	1234	-			
Processing Shipping Cos Regustors Order Het Order Addr Purchase Orders	erms 30 days from Delivery						
Regulations Order Adds Purchase Orders	rrier The Courier Guy	Sites					
Regussions Order Addr	sts Included 🗹		Cape Town Durban				
Purchase Orders	thod Email	•	V Pretoria				
	ress bianca.dutoit@live.co.za						
				-			
GRNs							
GRNs							
GRNs							
Supplier Invoices							
Supplier Returns							
n Windows 🔻				L		Version : 2.5.0.9 Example C	_

SAVE SUPPLIER

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



·			er - BPO: Version 2.1.0.3)
Home Equipment an	nd Locations Contract	Finance and HR Inventory	Maintenance and Project	ts Manufacturing	Procurement	Sales Servi	e Reporting	Utilities	-	Ø
10										
e Back										
10055 4	_									
8 I										
r text to search P										
unctions										
AIRCOVIES										
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					
ocessing	1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1				Richmond					
		30 Days from Invoice			Surrey		_			
Regusitors	Shipping Terms	10 Days - Signature			United Kingdom		_			
	Ship Via	Sea		Bill Postal Code	pulsessing surgery and	_				
	Freight Terms									
Purchase Orders	Freight Carrier	Shipmark								
	Sites	🖌 Durban								
	23021	Pretoria								
GRNs										
MUST										
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
) 🍃 🔰	(6			Durban 🔹	RUSE	1							
id Edit Dek	ete Syn	c View Sav	ve Layout Workspaces Refres	Active •		Reports							
Process	sing	4	Format	Current	Print a Re	eports "							
ks	ą.												
er text to search	<u>م</u>	SupplierCode	SupplierName	ContactName	SupplierType	Status	Class	VATNo	MinOrderAmt	PaymentTe	ShippingTe	ShipVia	
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				
		MAD001	Maddys Haberdashery	Maddy Jones	GEN	A	PS	123456789	0.00				
rocessing		1111	AB Goods	Bob Smart	GEN	A	PT	124221	0.00				i
rocessing	-	998877	Stone Rowe & Co.	David Christopher	FINH	A	PT	122334455	0.00	2	2	1	-
Requisitions Purchase Orders GRNs													
Supplier Invoices Supplier Returns		1											

MNU.056.001