



**ERP Consulting
Web Development
Custom Programming Solutions
Desktop & Web Applications for Manfact**

NorthClark Computing, Inc.

Supplier Maintenance User Guide

**Web and Desktop Applications
for Manfact by Epicor**

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Supplier Entry and Maintenance

NorthClark's *Buyer's Workbench* and web based *Supplier Portal* are designed to improve communication between Buyers and Suppliers, and streamline the process of obtaining quotes for parts and custom engineered components. The Buyer's Workbench is a *Windows* based desktop application that may be used to view, create, and modify Purchase Requisitions, Requests for Quote (RFQ), and Purchase Orders (PO) in your Manfact system.

The Supplier Maintenance procedure is used to maintain supplier data, as well as view performance and bid history. It includes many of the same data fields as the Manfact VEN.N or VEN.AC procedures, plus extra features such as multiple contacts, dated notes, and document management.

The screenshot shows a Windows-style application window titled "Supplier Maintenance". The window has a menu bar (File, Edit, View, Tools, Help) and a toolbar with various icons. The main area is divided into several tabs: "Supplier", "Profile", "Notes / Doc's", "Accts Payable", "QCD", and "Bid History". The "Supplier" tab is active, displaying a form with the following fields:

- Supplier Id: 1100
- Company Name: MARTIN P. WILSON
- Address (1): 213 E. 9TH STREET
- Address (2): APARTMENT 10
- Address (3): MARINA DEL REY, CA 90275
- Address (4):
- Sort City: MARINA DEL REY
- Sort State: CA = California
- Sort Zip: 90275
- Buyer: JS = Jo Savage
- F.O.B.: Shipping Point
- Ship Via: UPS
- Primary Contact: George Johnson
- Primary Contact Title: Sales Manager
- PO/RFQ E-Mail To: savageja@worldnet.att.net
- Phone Numbers: 999-999-9999
- Fax Number: 999-999-9999

Below the form is a "Contacts" table:

	Name	Title	Phone Number	Ext.	Fax Number	E-Mail Address	Note
1	John Smith	Sales Director	999-999-9998	123	999-999-9998	savageja@att.net	Contact if George
2							

At the bottom of the window, there is a status bar showing "100 MARTIN P. WILSON Account: NCC5.10".

The procedure is divided into six "tabs": Supplier, Profile, Notes and Documents, Accounts Payable, Supplier Performance (QCD), and Bid History.

Main Menu Options

Following is a brief description of the options available from the Main Menu of the *Supplier Maintenance* application.

Menu	Option	Description
File	Clear	Clear all data on current displays.
	Save	Save changes/new entries to the database.
	Print	Print the current active spreadsheet.
	Import	Import data from Excel to populate the active spreadsheet.
	Export	Export data from the active spreadsheet.
	Exit	Close the application.
Edit	Copy	Copy data to <i>Windows</i> clipboard.
	Cut	Cut data from the field and copy it to <i>Windows</i> clipboard.
	Paste	Paste data from <i>Windows</i> clipboard.
	Fill	Update all of the selected cells from <i>Windows</i> clipboard.
	Zoom	View, print and/or edit the expanded contents of a field.
	Insert Row	Insert a Row above the current position of the cursor.
	Delete Row	Delete the selected Row from the active spreadsheet.
View	Unhide All Columns	Expose all columns previously hidden.
	Auto Fit Columns	Automatically adjust the width of each column to accommodate your data.
	Display Options	Set user preferences affecting the appearance of the screen.
Tools	Supplier Search	Search for suppliers that meet specified criteria.
Help	User Guide	View this document.
	About	Displays copyright and version information.

Supplier Entry

The Supplier display is the first view shown when Supplier Maintenance application is accessed. This screen is used to add, view or edit general supplier information such as name/address, shipping and contact data. Enter the identifier of the Supplier you wish to update, or click the button next to the Supplier Id prompt to locate a Supplier using a variety of search criteria.

Supplier Display - Field Definitions

Supplier Id	Number or Code assigned to the Supplier (Vendor ID).
Company Name	Business name of Supplier
Address	Full address (including city, state, zip)
Sort City	City (used in various Manfact inquiries and reports)
Sort State	Select State from Pull-down Window (used in various inquiries and reports)
Sort Zip	Zip Code (used in various inquiries and reports)
Buyer	Unique identifier for each Buyer. Select the Buyer Id from the Pull-down Window.
F.O.B.	Freight On Board: The point at which ownership changes hands, for example, Destination or Shipping Point.
Primary Contact	Default Purchasing Contact Name
Primary Contact Title	Default Purchasing Contact Title
PO/RFQ E-Mail To	Default Purchasing Contact E-Mail Address
Phone Numbers	Default Purchasing Contact Phone Numbers
Fax Number	Default Purchasing Contact Fax Numbers
Contacts	Enter additional Contact information if desired.

Profile

The Profile Display allows you to enter more descriptive information about the Supplier's business environment, including preferred communication methods, available resources, and product categories.

Any Custom Fields created by your System Administrator will be available for entry using the appropriate format.

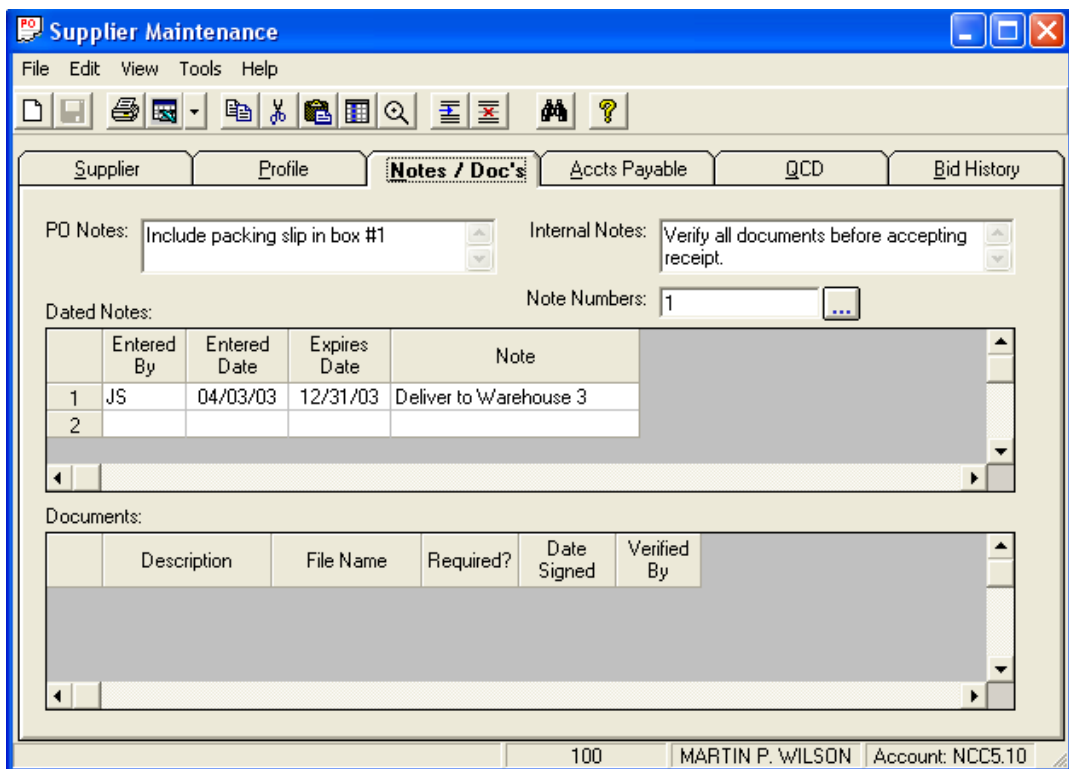
Profile Display - Field Definitions

PO Transmit Via	Select the normal method of transmitting the PO to the supplier from the pull-down window.
RFQ Via	Select the normal method of transmitting an RFQ to the supplier from the pull-down window.
Win/Loss Via	Select the normal method of notifying the supplier of the Win/Loss status on their bid.
Security Level	1, 2, 3, 4, 5 or 6. See: Security Level for the definitions of each security code.
Resource Code	Select a Resource Code for this item using the pull-down menu. Valid resource codes are defined using the Manfact TABLE.WO entry procedure.

Business Desc	Free form description of the supplier's business.
Equipment	Description of available equipment and/or products
Public Company	If the supplier is a Public Company, click the appropriate checkbox.
Union Shop	If the supplier is a Union Shop, click the appropriate checkbox.
Annual Sales	Supplier's estimated annual sales (optional)
Square Ft	Square footage of Supplier's facility (optional).
Part Categories	A list of Part Category Codes describing the type of products this Supplier normally provides. Part Category Codes may be defined using the Ncc_CodesAdmin procedure.
Business Hours	Suppliers normal business hours (free form text)
Insurance Expire Date	Expiration Date of Suppliers Insurance

Notes / Docs

This view supports the entry of internal and external note fields. This procedure also maintains the list of signed documents for the Supplier.



The PO Notes and Internal Notes fields are used as defaults during Purchase Order Entry. PO Notes are printed on the Header of all Purchase Orders for this Supplier. Internal Notes are displayed on Supplier Selection screens.

The Dated Notes spread supports entry of an expiration date, after which time the note will no longer be displayed.

A master list of legal documents is maintained using the Buyer's Workbench Administration utility. The Buyer is responsible for deciding which documents are required for each supplier, and entering the *Date Signed* and *Verified By* fields in the Documents section.

Notes and Documents - Field Definitions

PO Notes	Free form notes to be included on each purchase order
Internal Notes	Free form internal notes. These notes will not appear on the purchase order.
Note Numbers	Identifiers for user defined Notes from Manufact PURTEXT.N screen. The associated notes will be printed on the purchase order document. Select the note number from the pop-up window.
Dated Notes	Allows entry of internal notes with expiration dating. Enter the buyer id, date entered, expiration date of the note and the free form note information.
Documents	Use the Buyer's Workbench Administration procedure to create a list of Documents you wish to track. Examples might include: confidentiality agreements, material safety data sheets, etc. The Buyer may enter the date each Document was using the Supplier Maintenance screen.

Accounts Payable

This view includes; A/P Contact, Terms and Credit data, A/P Notes, Hold Codes, Tax Codes, Currency and 1099 data.

Note: Access to this screen requires appropriate security clearance. If you do not have access and believe you should, contact your System Administrator for assistance.

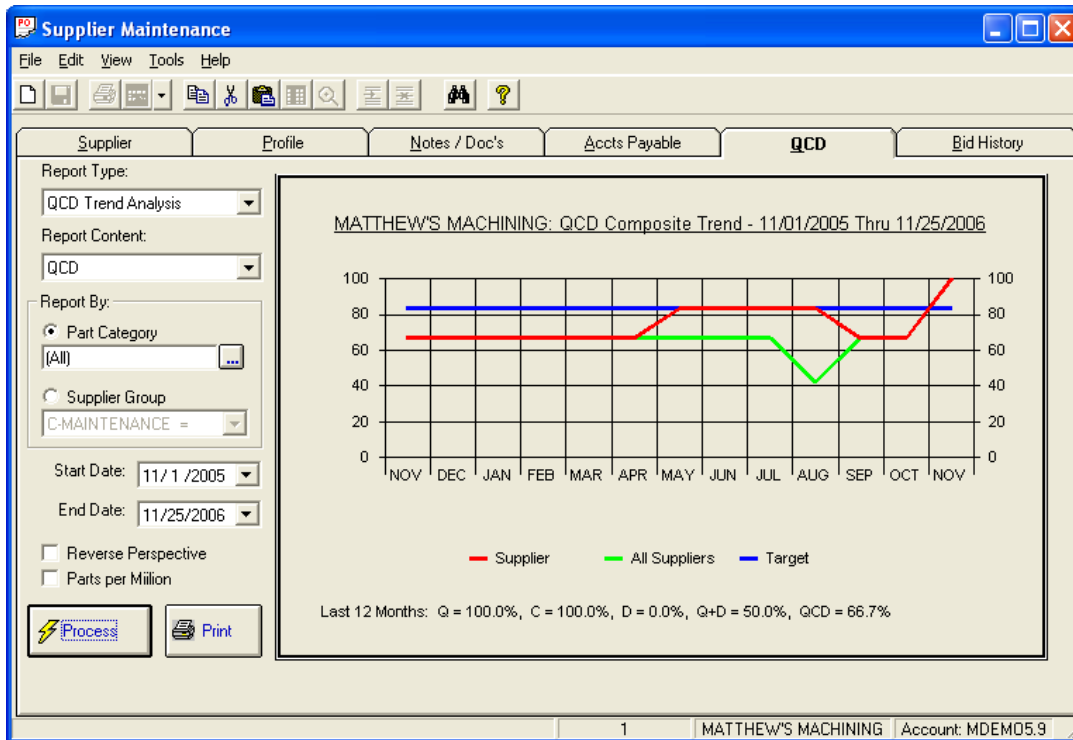
Field Definitions

Remit to	Enter the Supplier Id number for the Remit To Vendor.
A/P Contact	The name of the person that Accounts Payable would contact.
A/P Phone	The telephone number of the Accounts Payable Contact.
Terms Code	Select the standard terms for payment from the pull-down window.
Days to Pay	This prompt contains the number of days you have to pay the invoice and still claim the early payment discount.
Credit Limit	The maximum allowable credit extended by the supplier.
A/P Notes	Free form Notes for Accounts Payable

Hold	<p>Enter one or more Hold Codes to restrict the following types of transactions:</p> <p>Q=RFQ and Quote type transactions (POQ.N) B=Blanket Purchase Orders (POQ.N) P=Purchase Orders (PO.N) R= Purchase Order Receipts (REC.N, REC.A) I=Accounts Payable Invoices (AP.N) C=Accounts Payable Checks (CHECKS.SET, CHECKS.N) A=Enable All the above hold codes</p>
Tax Codes	If A/P sales tax is calculated, enter the appropriate Tax Code.
Currency	If the payment is made in other than the domestic currency, select the appropriate currency code.
Check Code	<p>Check codes allow you to control how checks for this vendor are issued:</p> <p>Blank = CHECKS.SET is used, domestic currency A = CHECKS.SET is used, domestic amounts are adjusted for foreign currency rate fluctuation. H = Hand Checks only.</p>
1099 Required	Do the services performed by this supplier require that a 1099 be filed at the end of the fiscal year? If "Y", then the remaining 1099 fields must be entered.
1099 Sales	Total value of 1099 activity for the current year.
Backup Withholding	Is Backup Withholding withheld from payments to Supplier?
1099 Code	Select the type of Services to be reported on 1099.
Taxpayer Id	Supplier's Taxpayer ID - Required when filing 1099 information.
Remit-To Only	Check this box if this Supplier is used for Remit-To only.

Quality Cost and Delivery (QCD)

This option provides a graphical view of the Supplier's Quality, Cost and Delivery performance. See *QCD Ratings* in the General Information section to see how the QCD ratings are determined.



There are 5 different *Report Types* to choose from:

QCD Trend Analysis	Produces a line graph with one point for each of the prior 12 months. Each point represents the Suppliers rating as of that period, based on 12 months of prior activity.
Monthly Performance	Produces a line graph with one point for each of the prior 12 months. Each point represents a single month of activity.
QCD Bar Graph	Same as Monthly Performance, in Bar Graph format.
QCD Statistics	QCD Statistics are displayed in monthly buckets in spreadsheet form.
Transactions	Detailed receiving transactions affecting QCD results for a selected date range, displayed in spreadsheet form.
Scorecard Graph	Measures the Supplier's performance against others in the same group.
Scorecard Statistics	Scorecard statistics displayed in spreadsheet form.

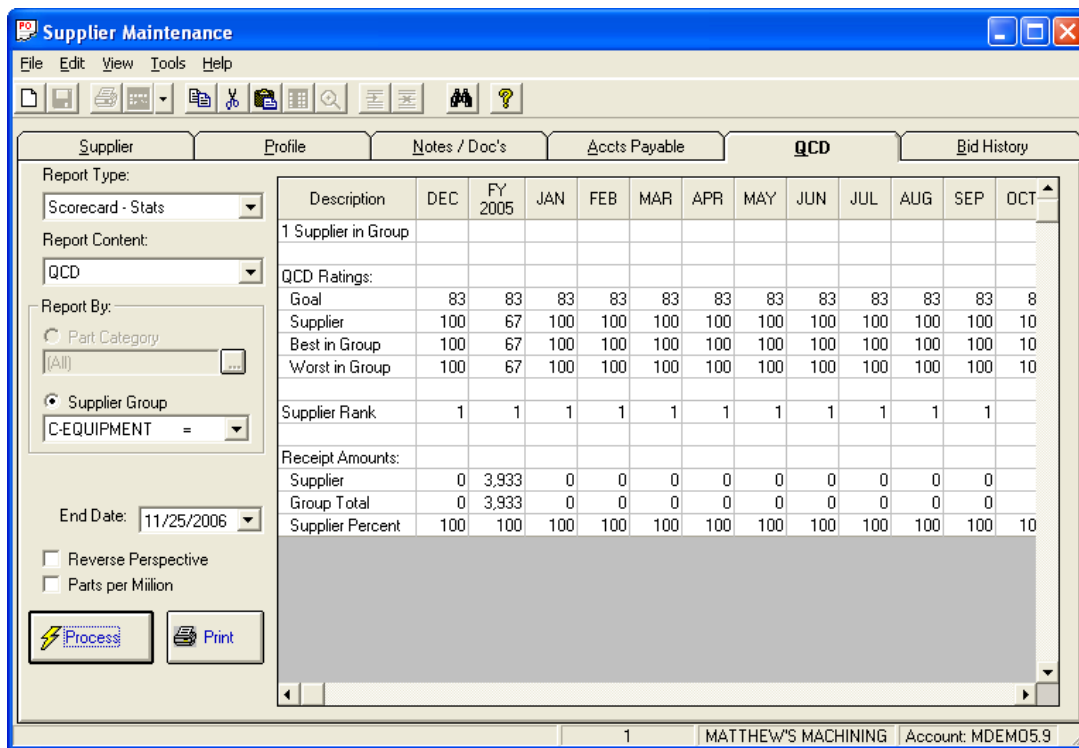
Select the **Report Content** from the drop-down list. The choices are:

Quality	Quality Performance based on number of rejections.
Cost	Cost Performance measured against Standard Cost
Delivery	Measurement of on-time deliveries, may be impacted by both early and late receipts.
Q+D	A composite of Quality and Delivery Ratings.
Q+C+D	A composite of Quality, Cost and Delivery Ratings.

Supplier Category Codes will default to those listed in the Profile Display. These codes correspond to the Category Codes in Manfact's Parts file, allowing you to view Supplier Performance information for specific types of products. You may select single or multiple codes on which to base the graph. If this field is left blank, all category codes will be selected.

You may print a hard copy of the graph by using the Print Graph command.

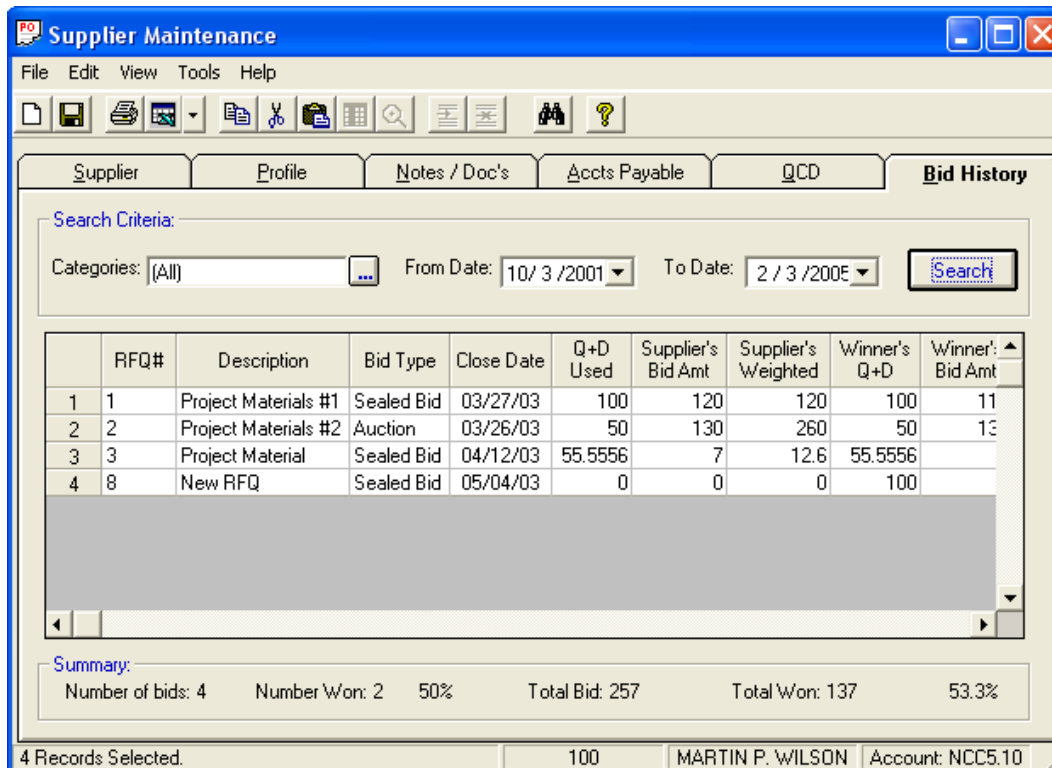
Example #2 – QCD Scorecard Statistics



Note: QCD information is updated by a procedure that is run from Manfact called **NCCQCD.UPD**. See *Updating the QCD Files* in the General Information section for more information.

Bid History

This screen provides historical details of previous bids made by the selected Supplier.



You may limit this search to bids made in certain Categories. Select the desired Category Codes from the list. All categories will be searched if the field is left blank.

Column Field Definitions

RFQ#	System assigned Request For Quote identifier that the supplier placed a bid for.
Description	Description of the Request for Quote
Bid Type	Type of bidding that was authorized for this RFQ. A = Auction, S = Sealed Bid
Close Date	Date this RFQ is scheduled to be closed for bidding.
Q+D Used	The combined Quality and Delivery rating, for the supplier, at time of bid selection

Suppliers Bid Amt	The total bid submitted by the supplier for the referenced RFQ.
Supplier's Weighted	The total bid value weighted by the Q + D rating at the time of bid selection.
Winner's Q + D	The combined Quality and Delivery rating, for the supplier who won the bid, at time of bid selection
Winner's Bid Amt	The total bid submitted by the winning supplier for the referenced RFQ.
Winner's Weighted	The total bid value weighted by the Q + D rating for the winning supplier at the time of bid selection.
Bid Variance	Supplier Bid Value - Winning Bid Value
Weighted Variance	Supplier Weighted Bid Value - Winning Weighted Bid Value
Supplier Wins	If checked, the supplier displayed won the bid.
Summary Information at the Bottom of Screen	<ul style="list-style-type: none"> <input type="checkbox"/> Total Number of Bids From Search <input type="checkbox"/> Of the Total, Number of Bids Won <input type="checkbox"/> % of Bids Won <input type="checkbox"/> Sum of the Total Bid Value <input type="checkbox"/> Sum of the Total Value of Bids Won <input type="checkbox"/> % of Bid Value Won

Locate a Supplier

This option is found on the **Tools** menu, and may be used to locate a Supplier record using various search criteria:

	Code	Name	Q	D	Q+D	Level	Phone	Contact
1	1	PROPERTY MANAGEMENT	-100.00	-100.00	-100.00		213/615-0311	BOB DRAKE
2	10	MICRO SWITCH	-100.00	-100.00	-100.00		201/445-2325	BOB GOULD
3	100	MARTIN P. WILSON	-100.00	-100.00	-100.00	4	941-534-5621	George Douglas
4	11	MILLER COMPANY	-100.00	-100.00	-100.00		505-383-6776	SHARON WEST
5	110	BEVERLY ARMSTRONG	-100.00	-100.00	-100.00			
6	12	MILLER ELECTRONIC DIV	-100.00	-100.00	-100.00		303-383-9223	BOBBY CHAMP

The fields you may use to aid in your search include: Supplier Name, Buyer, Hold Code, Categories, Phone, Fax, and Email. Use as many or as few to further narrow your search. If you don't know the exact spelling of the supplier name, you can use *wildcarding* to enter only a portion of the name.

Press the **Search** button to begin searching the Manfact database for the suppliers that meet your criteria. The system will display a message indicating how many records are being selected. The system is now generating the list of suppliers and descriptive information for you to select from. Press the **Cancel** button if you need to cancel the search before it is finished.

There are two ways you can select an item from the list:

- ❑ Position the highlight bar over the desired supplier using the arrow keys, or by clicking anywhere on the row with mouse, then click the **Select** button at upper right hand side of the screen.
- ❑ Double-click on the desired row using the left mouse button.

Column Descriptions:

Code	Supplier ID Number that has been assigned to this record.
Name	Supplier Name
Q	Quality Performance Percentage
D	Delivery Performance Percentage
Q + D	The combined Quality & Delivery Performance Percentage.
Level	Supplier Portal Security Level
Phone	The contact Phone Number
Contact	The contact name
Address	A right click will present the full address for this supplier.
Notes	A right click will present all notes recorded for this supplier.
Fax	The contact Fax Number
Email	The contact Email address
Hold Code	<p>The hold code for a Vendor.</p> <ul style="list-style-type: none"> Q RFQ and Quote type transactions (POQ.N) B Blanket Purchase Orders (POQ.N) P Purchase Orders (PO.N) R Purchase Order Receipts (REC.N, REC.A) I Accounts Payable Invoices (AP.N) C Accounts Payable Checks (CHECKS.SET, CHECKS.N) A Enable All the above hold codes