

Product Training Suppliers

Where "Lean" principles are considered common sense and are implemented with a passion!



Suppliers

Suppliers are used for purchase orders, purchase invoices, purchase credits and supplier returns. The supplier master stores bill to and ship to information.



General Tab

The screenshot shows the 'WinMan Latest Release' application window with the 'Suppliers' form open. The 'General' tab is selected. The form contains the following fields:

- Supplier:** S00001 | 0000
- Name:** Arizona Wire Specialist
- Supplier Information:**
 - Address:** 1234 First ST, Cave Creek, AZ 85331
 - Phone:** (480) 123-6765
 - Fax:** (480) 214-5113
 - Email:** sales@mail.sabinocreek.com
 - Web site:** www.sabinocreek.com
 - Approved Status:** [Default]

General Tab

- ☐ **Supplier** – First field is a 6 digit supplier number that will increment by 1 for each new supplier. The second field is the branch. A supplier can have multiple branches which can be used as ship to addresses.

Note: It is good practice to use the automatically generated sequential number as the supplier number. Using intelligent number that reflect the supplier name are problematic with today's mergers and acquisitions that lead to company name changes.

SYSTEM SETTING:

The default length of a Supplier number is 6 characters. This can be amended to be as many 10 characters. Use the Supplier system setting **Supplier Identifier Length**. Enable the profile and use the number of characters for the supplier number as the value.

SYSTEM SETTING:

The default prefix of a Supplier number is S. The prefix can be amended to be any character. Use the Supplier system setting **Supplier Identifier Prefix**. Enable the profile and use the character(s) required for the prefix as the value.

SYSTEM SETTING:

The default length of a Supplier branch is 4 characters. This can be amended to be changed but the max is 4 characters. Use the Supplier system setting **Supplier Branch Length**. Enable the profile and use the number of characters for the supplier branch as the value.

General Tab

- ☐ **Name** – The name of the supplier
- ☐ **Address** – Address of the supplier
- ☐ **City** – The city of the supplier
- ☐ **State** – The state that the supplier is found in. State's are in the table and must be maintained in the States program.
- ☐ **Zip code** – Enter the zip code of the supplier. For quick entry of City and State, enter the zip code and select the icon next to the zip code field.
- ☐ **Country** – Enter the country of the supplier
- ☐ **Phone number** – The main supplier phone number (Individual phone numbers can be assigned to a contact)
- ☐ **Fax** – The main supplier fax number (Individual fax numbers can be assigned to a contact)
- ☐ **Email** – The main supplier email address. (Individual email numbers can be assigned to a contact)
- ☐ **Web Site** – The supplier's web site

Financial Tab

The screenshot shows the 'WinMan Latest Release' application window. The 'Suppliers' tab is active, and the 'Financial Information' sub-tab is selected. The form displays the following fields:

General	
Supplier	S00001 0000
Name	Arizona Wire Specialist

Financial Information	
Billing Address	☒
Currency	USD
Bank	SUNTRUST
Credit Terms	000
Settlement Terms	000
Discount	NONE
Credit Limit	\$ 0
1099 Tax #	
Tax Code	STD
Tax Code Secondary	[Default]

Financial Tab

- ❑ **Billing Address** – The branch that will be the Bill to for the supplier. Each supplier must have a billing address as all invoices generated will be assigned to the Bill to supplier record. **Note:** It is good practice to have all branches of 0000 represent the Billing address.
- ❑ **Currency** – The currency that the supplier is trading in.
- ❑ **Bank** – The bank for the supplier. A payment to the vendor can be made from any bank using the Cash program. However, using the Payment Runs program payments to the vendor can only come from the Supplier bank.
- ❑ **Credit Terms** – Used as a default for purchase invoices to calculate invoice due dates.
- ❑ **Settlement terms** – The default early pay discount for the supplier.
- ❑ **Discount** – The default discount code that will be applied to all purchase orders and purchase invoices for the supplier. The supplier discount code would be overridden by a discount code in products if one exists. All discounts will be overridden by any discount found in the supplier cross reference.
- ❑ **Credit Limit** – The credit limit for the supplier, used as reference only.
- ❑ **Tax Number** – The tax number for the supplier used for reference only.
- ❑ **Tax Code** – The default tax code used for the supplier.
- ❑ **Tax code secondary** – The default second tax, if required.

Accounting Tab

The screenshot shows the 'WinMan Latest Release' application window with the 'Suppliers' tab selected. The 'Accounting Information' sub-tab is active, displaying the following fields:

Accounting Information	
Division	01
Control Account	2110
Free Text Account	[Default]

- ❑ **Division** – The Accounts Payable division as well as the default expense division.
- ❑ **Control Account** – The Accounts Payable account.
- ❑ **Free Text Account** – The default free text account that will be used when a free text item is added to a purchase order or purchase invoice.

Details Tab

Details Tab

- ☐ **Active** – Determines if purchase orders or purchase invoices can be created for the supplier.
- ☐ **Include in SBI** – If the supplier is used in Self-Billing Invoice. The self-billing Tab found in Purchase Invoices can automate the process of invoice creation by creating invoices based on the Goods Receipt. A lean technique that saves time by not having to match vouchers, and makes it easier to take advantage of early pay discounts. A good relationship with the supplier is usually required.
- ☐ **Industry** – The industry that the supplier belongs to. Can be used for reporting.
- ☐ **Department** – The department responsible for the supplier. This can be a group of WinMan users responsible for the account.
- ☐ **Location** – A location that all goods for the supplier will be received into. This overrides the location in products, but does not override the location from supplier cross reference.
- ☐ **Their Identifier** – The customer number that the supplier uses in their system. For reference only.
- ☐ **Site** – If multi-site is in use; a supplier is either available to a specific site or all sites. The supplier may only have purchase orders entered for the sites it is assigned to.

BACS Tab

WinMan Latest Release

File Tasks Navigation Tools Windows Help Developer

WinMan Central System Options Suppliers

General Financial Accounting Details BACS Products Contacts and Branches Notes Carriers Prompt Text Process Events Settings Other

Supplier S00001 0000

Name Arizona Wire Specialist

BACS Information

Pay by BACS ☐

Bank

Account

Name

Reference

IBAN

BIC

- ❑ **Pay by Bacs** – BACS is used for electronic payment. When paying vendors a payment run can either be a check run or a BACS run. The BACS run will not use check numbers.
- ❑ **Banking Information** – The Bank information that can be including on an output used to upload to the bank. Outputs will be bank specific, a WinMan representative should work closely with the bank and WinMan site to determine how best to fill out these fields.

Products Tab

WinMan Latest Release

File Tasks Navigation Tools Windows Help Developer

WinMan Central System Options Suppliers

General Financial Accounting Details BACS Products Contacts and Branches Notes Carriers Prompt Text Process Events Settings Other

Supplier S00001 0000

Name Arizona Wire Specialist

Products

Product Id	Supplier Id	Normal Cost	Discount Id	UOM Factor	UOM Factor I	Batch Qua	Currency Dis	Location #	Location Id	SupplierSeq
1007-163	S00001	99.75000	[Default]		[Default]		\$			999
CON1	S00001	0.00000	[Default]		[Default]		\$			999
JLSUBCON	S00001	2.50000	[Default]		[Default]		\$			999
JL2SUB	S00001	2.00000	[Default]		[Default]		\$			999
1007-383	S00001	3.00000	[Default]		[Default]		\$			999
1007-101	S00001	0.00000	[Default]		[Default]		\$	3421	R12B01	999

See supplier cross reference section in Products for more information.

Contacts and Branches Tab

CRM Contact ID	Contact Name	First Name	Last Name	Title	Job Title	Phone (Home)	Phone (Work)
CT000003	Michael Horner	Michael	Horner	MR	Manager		480 555 4433

Supplier ID	Branch	Supplier Ref	Supplier Name	Address	City	State	Postal Code
S00001	0000	S00001-0000	Arizona Wire Specialist	1234 First St	Cave Creek	AZ	85331

❑ **Contacts** – Contacts can be added and stored against a supplier record. Each branch will have its own list of contacts. Contacts can be added by using the action New Contact.

❑ **Details Tab of adding a contact allows you to track;**

- A. Work Phone
- B. Mobile Phone
- C. Home Phone
- D. Fax Number
- E. Work Email
- F. Home Email

❑ **Additionally on the General Tab the following fields are provided;**

- A. **Job Title** – The contact's job title
- B. **Owner** – The WinMan user who is responsible for the contact
- C. **Lead type** – The type of contact
- D. **Active** – If the contact is active
- E. **CRM Source** – The CRM source of the contact
- F. **CRM Group** – The CRM group of the contact
- G. **CRM Region** – The CRM region of the contact

Notes Tab

Any notes that apply to the supplier. This is one notes field and can be appended to any time. It is used for reference only.

Carriers Tab

The screenshot shows the 'WinMan Latest Release' application window with the 'Suppliers' tab selected. The 'Carriers' sub-tab is active, displaying a table of carrier information for the selected supplier, 'Arizona Wire Specialist'.

Customer Id	Customer Name	Supplier Id	Supplier Name	Carrier Id	Customer Account	Default	Shipping Term Id
		S00001	Arizona Wire Specialist	DEFAULTS		☒	DEFAULT

The preferred carriers for the supplier. Multiple entries can be added for a supplier and a single record can be designated as a default for purchase order entry. Supplier's UPS collect numbers can be stored if needed for reference only.

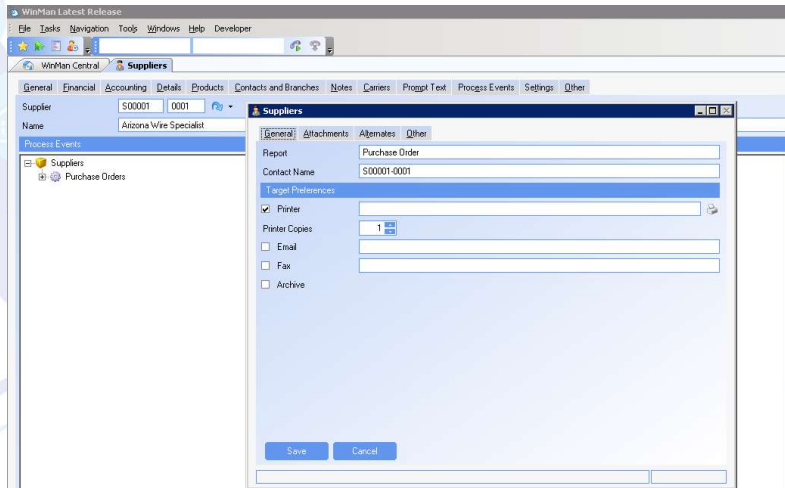
Prompt Text Tab

The screenshot shows the 'WinMan Latest Release' application window with the 'Suppliers' tab selected. The 'Prompt Text' sub-tab is active, displaying a text field for the supplier 'Arizona Wire Specialist'.

Prompt Text:
Remind Arizona wire to ship orders collect

Text that will be displayed at the purchase order header in WinMan to alert Order Entry users. This is used as a message only and does not appear on any prints.

Process Events Tab



Process Events Tab

- ❑ **Report Preferences** – Any sales related print that can be sent to a customer can be set up as a report preference. The report preference stores the preferred method(s) the customer would like to receive the print which include;
 - Fax
 - Email
 - Printed copy which also included the number of copies.
 - Archive which saves a copy of the document as an attachment to the record being printed. For example, when the archive option is selected in the sales order program for the sales pro-forma invoice, a pdf of the pro-forma invoice will be attached in the documents panel for the sales order
- ❑ Fax and email options also allow for a specific email address and specific fax number for the print.