SUPPLIER SETUP
11-20-19

1) **GENERAL DETAILS**

   a.

   b. **Supplier Name**: enter how this supplier wishes his company is displayed (required field)

   c. **Supplier color:** Pick a color for this supplier to be used in a pie chart (required field)

   d. **Description:** Add a supplier description as an option.

   e.

   f. **Branch Number:** Enter the branch # of this supplier that is the primary supplier for this Stockroom.

   g. **Maximum Order Size:** Enter the # of lines in an order that cannot be exceeded in any one order.

   h. **Default Order Required Days:** If left blank, then the Required Date on all orders will be today's date. If 3 is entered here, then each order will have a Required Date that is 3 days from the date the order was created.

2) **ADDRESS DETAILS**

Address Details

Address	
City	
State	
Zip Code	
Country	▼
Contact *	
Phone *	
Fax	

a.

b. **Address, City, State, Zip Code, Country (used to format the Phone numbers expected by the country), Contact, Phone, and Fax.**

3) **OTHER DETAILS**

Other Details

Send EDI to Vendor	☐
Vendor Return ASN	☐
Supplier Needs Kit Components	☐

a.

b. **Send EDI to Vendor:** Check this box if this Supplier is using "Integration" from TrackStock to send it any transactions, like Orders, Pulls, etc. If the box is not checked, then the Supplier is not using Integration.

c. **Vendor Returns ASN:** An ASN is an EDI 856 file that has shipping information like, the pack slip #, the items shipped, the quantities shipped. Check this box if the Supplier will be using this EDI file type.

d. **Supplier Needs Kit Components:** Some end customers use TrackStock to build/break and/or order kits. If the end-customer is going to order kits from the supplier, the question is will the supplier know what components are included in the end-customer's kits? If the Supplier does, then do not check this box. TrackStock will only send to the Supplier the "higher-level part # of the kit." If the Supplier does not have the knowledge of what the end-customer's kit components are, then check this box to allow TrackStock's integration to send both the high level kit part #, but also the components.

4) **IMAGE PATH**

a.

Image Path

○ Local Image ● External Url

ImageExternalURL

SupplierImage
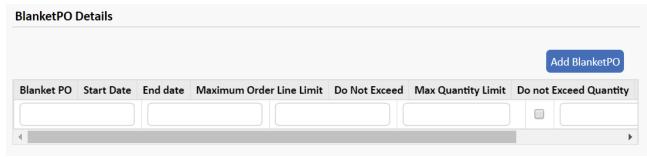
IMAGE NOT AVAILABLE

b.

Local Image: this means that the image for this Supplier is located on a user's computer. By checking this radio button, the user will be presented with a "Browse" button to click on to find the file on his/her computer. When clicked, the image will display in the "Image not Available" box. If the Image is available as a link on a server somewhere, then the address of the file on that server needs to be entered into the ImageExternalURL box.
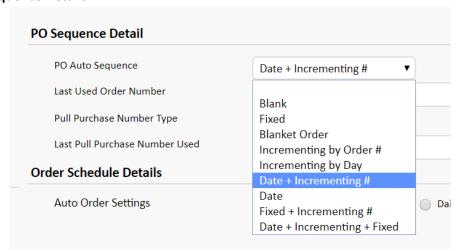
5) **Blanket PO Details**

BlanketPO Details

[Add BlanketPO]

Blanket PO	Start Date	End date	Maximum Order Line Limit	Do Not Exceed	Max Quantity Limit	Do not Exceed Quantity	
						☐	

a. **Add Blanket PO**
   i. **Blanket PO:** This is the actual Blanket PO #. Required
   ii. **Optional data:**
      1. **Start Date:** This is the first date that this Blanket PO can be used.
      2. **End Date:** This is the last date that this Blanket PO can be used.
      3. **Maximum Order Line Limit:** This is the maximum # of line items on the Blanket PO that can be ordered at one time.
      4. **Do not Exceed:** This is the $ limit that all of the items using the Blanket over time cannot exceed.
      5. **Max Quantity Limit:** This is the maximum quantity of an item that can be ordered. The user may exceed this limit if the Do Not Exceed Quantity check box is not checked.
      6. **Do Not Exceed Quantity check box:** If checked, then the Max Quantity Limit cannot be exceeded in an Order.
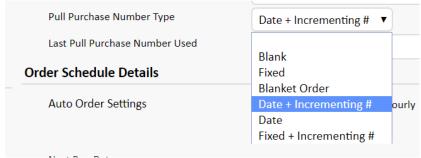
6) **Account Details**

a.

b. **Account No:** This is the Customer account # that the Supplier uses to identify the Company that is running this stockroom. Required.

c. **Account Name:** If the Account No is entered, the Account Name is required.

d. **Address, City, State, Zip Code, Country, ShipToID are all optional.**

e. **Is Default:** This is checked for the primary Account Number.

7) **PO Sequence Details**

a.

b. Blank: User must fill in the PO # each time an order is created.

c. Fixed: ABG or another value that does not change

d. Incrementing by Order #: Simple increasing #

e. Incrementing by Day: Monday, Tuesday, Wednesday, etc.

f. Date + Incrementing #: 10-22-2019 114. Each new PO will have today's date plus the next higher # thank the "Last Used Order Number"

g. Date: 10-22-2019, used for all Orders that day.

h. Fixed + Incrementing #: ABG 42

i. Date + Incrementing # + Fixed: 11-20-19 123 ABG

8) **Last Order Number Used:** This allows the user to see what the last Order # was for the last order to see where the Orders are in a sequence.

9) **Pull Purchase Order Type:**

a.

b. Blank: User must fill in the PO # each time an order is created.

c. Fixed: ABG or another value that does not change

d. Blanket Order: This is the Blanket Order # referenced above

e. Date + Incrementing #: 10-22-2019 114. Each new PO will have today's date plus the next higher # thank the "Last Used Order Number"

f. Date: 10-22-2019, used for all Orders that day.

g. Fixed + Incrementing #: ABG 42

10) **Last Pull Purchase Number Used:** This allows the user to see what the last Pull Purchase Order # was for the last Pull to see where the Pulls are in a sequence.

11) **Order Schedule Details**

a. Next Run Date

b. **Auto Order Settings:** These settings determine when TrackStock will review all items in the Suggested Order Cart to look for items to be sent to this Supplier. The user can choose None (no schedule), Immediate (whenever an item is placed in the Cart), Hourly, Daily, Weekly, or Monthly. Then choose how many times a week, for example, and on what day(s). Then, the user selects Auto Generate which removes this Supplier's items from the Cart and places them in an Unsubmitted Order, or Auto Generate & Submit which takes the Unsubmitted Order and submits it for approval. Clicking in the ScheduleRunTime box determines what time of day this will occur. Lastly, checking the box in front of "Is Active" will make it run on the next schedule which will be displayed next to the "Next Run Date."

12) **Consigned Batch Pull Schedule Details**

Consigned Batch Pull Schedule Details

Auto Consigned Batch Pull Settings ○ Manual ○ Immediate ○ Hourly ○ Daily ● Weekly ○ Monthly

Recurring every [0] Weeks On

☐ Monday ☐ Tuesday ☐ Wednesday
☐ Thursday ☐ Friday ☐ Saturday
☐ Sunday

Pull_ScheduleRunTime [_____]

☐ Is Active

Next Run Date

a.

b. **Auto Consigned Batch Pull Settings**: These settings determine when TrackStock will review all items in the Pull History to look for Pulls to be sent to this Supplier. If this feature is active, then the end-user performs Pulls daily, but they only get sent to the Supplier based on this feature. The user can choose Manual (no schedule: the user selects Pulls in the Pull history grid to batch and send), Immediate (whenever an item is Pulled), Hourly, Daily, Weekly, or Monthly. Then the day of the week if Weekly is chosen. Clicking in the Pull_ScheduleRunTime box determines what time of day this will occur. Lastly, checking the box in front of "Is Active" will make it run on the next schedule which will be displayed next to the "Next Run Date."