Manual: New Vendor Registration app

Introduction

This is the manual for using one of the MDM PowerApps, you can find this app in the PowerApps application on your phone or desktop via these links: [Master Data Management Portal] or [Certis Belchim shared space]

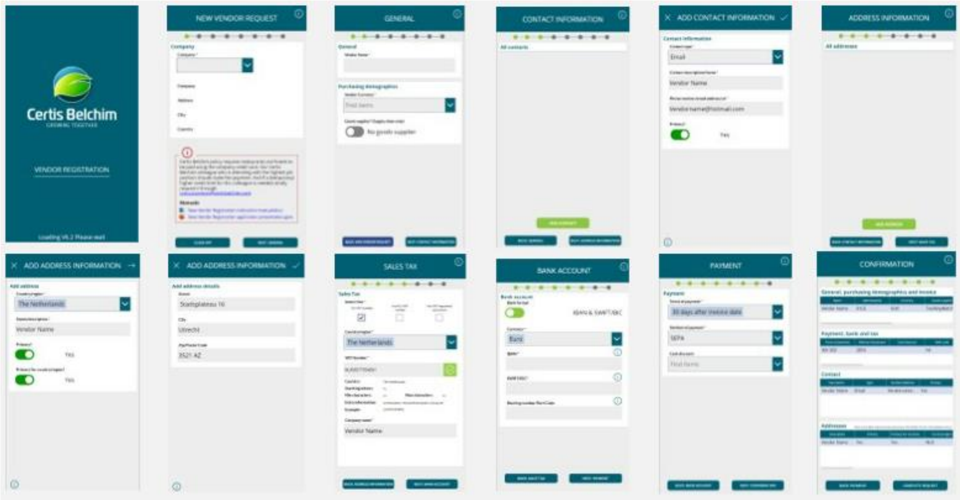
Information needed

Below is a list of the information required fields in order to submit a new vendor request:

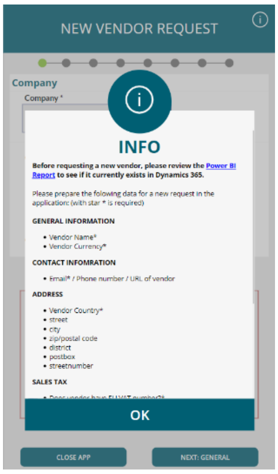
- Which D365 company ID (e.g., 01CE, 10NL or 20BE)
- Company/Vendor name
- Company currency (e.g., Euro or specific foreign currency)
- Contact information (person)
    - Name or Company/Vendor name
    - Type (e.g., Email or phone)
    - Email address/phone number/URL
- Address information (address)
    - Company/Vendor name
    - Country of address
    - Any further address information (based on selected country)
- Tax number (VAT (Value Added Tax) Number) if it is not applicable add text "non-VAT registered"
- Country of VAT number
- Bank account number / IBAN
- Swift code (BIC)
- Country of bank account
- Currency of bank account

How to use the New Vendor Registration app

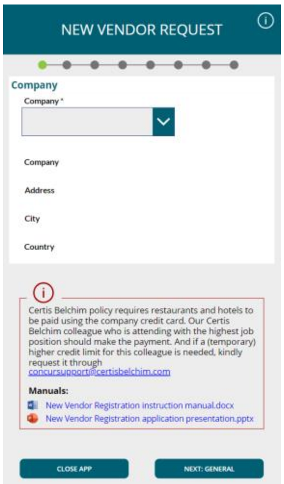
This app consists of several screens (as shown below), which guide you through a few steps where the required information needs to be filled in. Most of the pages have 2 buttons 'next' or 'back'. There is no save button and preview of fields yet. If a mandatory field is skipped, the app will notify you to complete the required step.



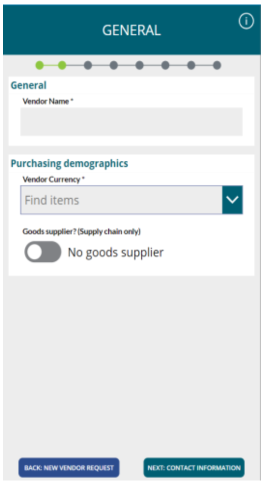
- Upon startup of the app, a loading page will show the app version and the list of required information needed, as well as a direct link to Power BI Report of all existing vendors in D365.



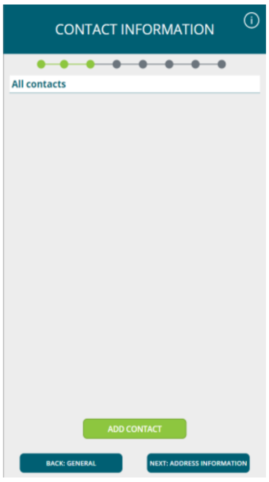
- The New Vendor Request screen, you will get the option to select the D365 company ID that the new vendor needs to be created in.



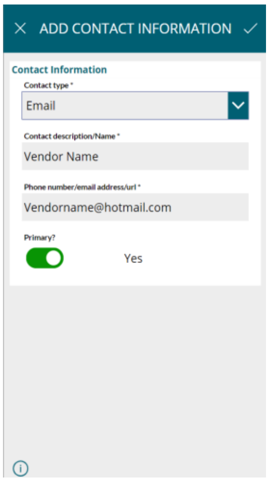
- On the General screen, you need to fill in the company/vendor's name and currency and it gives you the option to create a goods supplier, this will enable some other fields (Supply chain only - Toller)



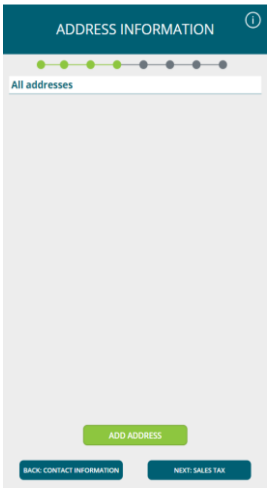
- On the Contact info screen, is the ability to create contact(s) by clicking the add button. You can repeat this until all contact(s) are added. You can also delete a contact by clicking on the trash icon.



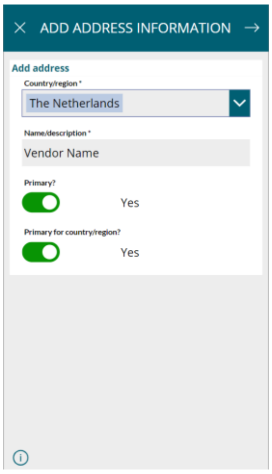
- On the Add contact info screen, you can fill in all the information regarding the contact person.



- After you have filled in all the contact(s), you can add an address to the vendor request. You can add an address by clicking the add button. You can also delete an address by clicking on the trash icon.

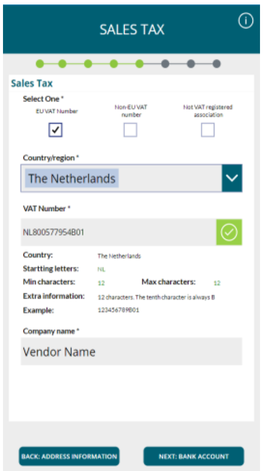


- On this screen, you can give the address a name (e.g., company name same as vendor name). Also, you can select the country and if the address is a primary address. Note: the selected country affects the field on the next screen. Note: a vendor needs at least one 'primary' address.

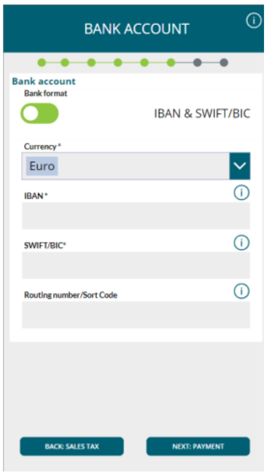


- On this screen, you can fill in the address information according to the selected country.

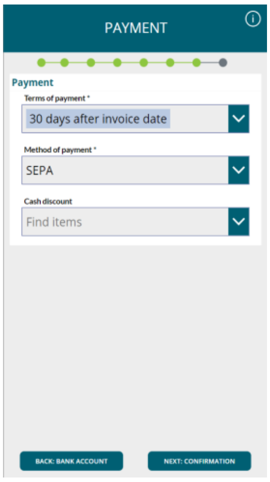
- On the screen below, you can fill in the information regarding the VAT number (Tax exempt number), country and company name (vendor name). VAT numbers will be electronically validated.



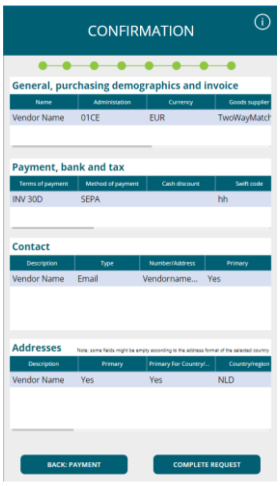
- On the following screen, you can fill in: bank account number, swift code, currency, and country of bank. There is an option for bank account details or IBAN details, depending on the information at hand. Bank account details and IBAN details will be electronically validated.



- On the Payment screen you can fill any information regarding the payment. Note: most of the time this will be the default selected values.



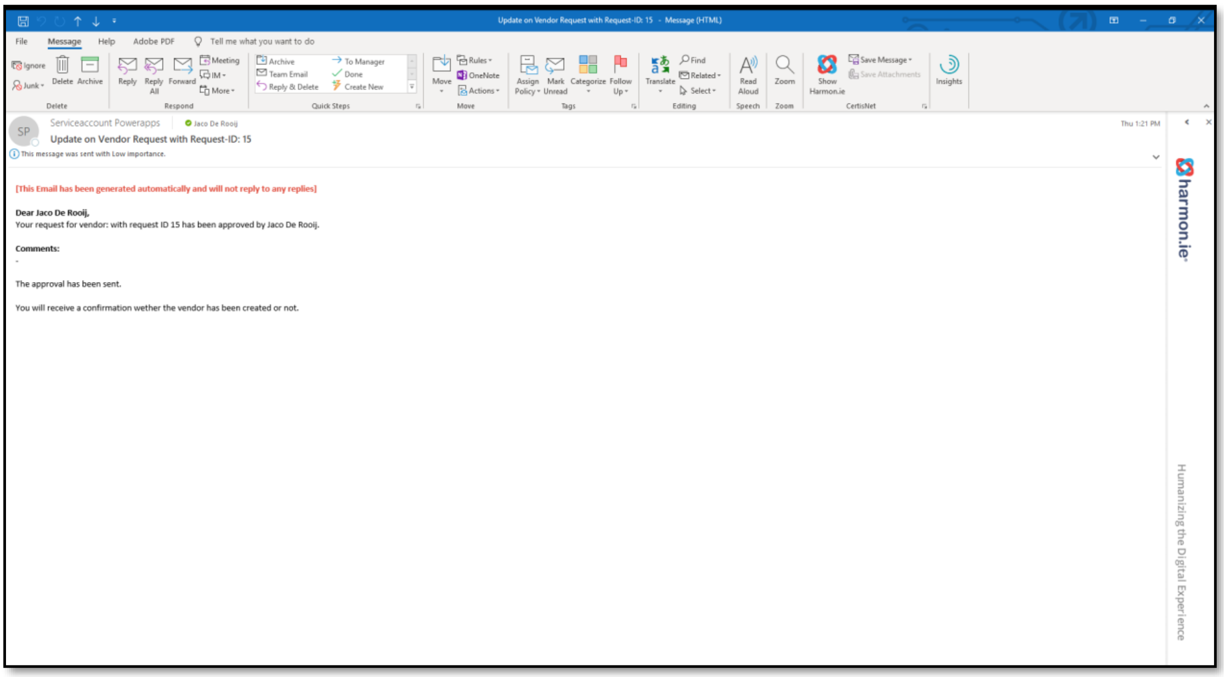
- On the last screen you can check your information one more time and send your request. Note: not all fields will be filled according to the selections you make.



What kind of response can you expect

Confirmation

If MDM team finds that the request is correct and has checked the provided info (such as: Bank account details and IBAN details, VAT number, vendor name, address information), you will receive this email (if the request does not go into error).



Denial

If MDM team finds that the vendor should not be created in D365, because the vendor already exists in D365. You will receive an email of denial with a reason, for example: Existing vendor number.