S10 — Contractors & Suppliers — Screen Spec (MVP)

Status: Draft (MVP scope locked)

Last updated: 2026-02-20

Purpose: Central register for vendors used across Inventory/Requisitions, Projects, and WOs — with categorization, contacts, quote history, performance, and approvals.

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1) Purpose (engineer-first)

Contractors & Suppliers is the engineer's **vendor brain**:

- Quickly find the right supplier/contractor by **category** (mechanical, pumps, electrical, IT, etc.).
- Store contacts, account info, lead times, and "how we buy from them".
- Track quote comparisons (esp. Projects) and basic vendor performance.
- Support approvals / preferred supplier lists without slowing day-to-day engineering work.

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2) Inputs (what the user records here)

Vendor profile (Supplier or Contractor)

- Vendor name (required)
- Vendor type: Supplier / Contractor / Both
- Categories (multi-select) *(required)*:

 - Mechanical (general)

 - Pumps & valves

 - Engines & generators

 - HVAC / Chillers

 - Electrical

 - AV/IT / Networks

 - Plumbing / Watermakers

 - Hydraulics

- Safety / LSA / FFE

- Paint / Composite / Structural

- Deck equipment

- Refrigeration / Galley

- Cleaning / Consumables

- Other (custom tag)

- Regions / ports served (optional)
- Preferred status: Preferred / Approved / Temporary / Do Not Use
- Credit terms (optional): COD / 30 days / 60 days / account number
- Typical lead time (days) + reliability note
- Notes + attachments (catalogs, price lists, certificates, contracts)

Contacts

- Contact person(s): name, role, email, phone/WhatsApp
- After-hours contact (optional)
- Emergency support toggle (yes/no)

Commercial / compliance fields (MVP-simple)

- Insurance (yes/no) + expiry date (optional)
- NDA on file (yes/no)
- Certifications (free text) (e.g., ABYC, OEM approved)
- Payment method preference (bank transfer/card) (optional)

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3) Outputs (what it creates/updates elsewhere)

- Enables vendor selection in:

- **S04 Inventory & Requisitions** (preferred suppliers, ordering)

- **S09 Projects** (up to 3 estimates and vendor comparison)

- **S02 WOs/Tasks** (assigned contractor, supervised-by later)

- Stores and exposes:

- Quote history per vendor

- Spend rollups per vendor (feeds **S08 Accounting**)

- Performance notes (late deliveries, quality issues)

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4) Layout (tabs / sections)

A) Vendor Directory (default)

- Search + filters:

- Category, region/port, preferred status, vendor type

- List columns (engineer-first):

- Vendor, categories, preferred status, typical lead time, last used date, rating (optional)

B) Vendor Profile (detail view)

Tabs within a vendor:

1) **Overview**

- Summary, categories, preferred status, key contacts, terms

2) **Contacts**

- Contact list + quick copy buttons (email/phone)

3) **Quotes & Estimates**

- Saved quotes linked from Projects and Requisitions

- "Last 10 quotes" list with dates and amounts

4) **Purchases & Spend**

- Purchase history (linked to S04) + totals by month (MVP: simple)

5) **Jobs & Work**

- Linked WOs (S02) and Project line items (S09)

6) **Documents**

- Contracts, certs, insurance docs, price lists

7) **Performance**

- Rating (1–5 optional)

- Delivery reliability notes

- Quality notes / returns

- "Do not use" reasons (if applicable)

C) Admin Tools (optional role-gated)

- Merge duplicates

- Mark vendor "Do Not Use" (requires reason → Activities Log)

- Manage category tags (admin only)

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5) Rules & behaviors (automations + triggers)

A) Preferred supplier logic

- Category-based preferred flags:

 - A vendor can be "Preferred" for one category but only "Approved" for another.

- When user creates a requisition (S04), show:

 - Preferred vendors for that item category first.

B) Quote capture + re-use

- Any time a quote is attached in:

 - S04 Requisitions or S09 Projects

 …store a reference copy in **Vendor → Quotes & Estimates**.

C) Vendor performance signals (lightweight)

- Auto-suggest a performance note when:

 - Delivery is marked late (received after expected date)

 - Requisition is cancelled due to supplier issue

 - WO is delayed due to vendor non-performance (manual flag)

D) Approval and "Do Not Use"

- Changing vendor status to **Do Not Use**:

 - Requires a reason

 - Logs to **S08 Activities Log**

 - Vendor remains searchable but is visually flagged

E) Data integrity

- Vendor is a shared reference table; deletion is not allowed in MVP.
- Vendors can be archived/inactive instead.

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6) Links to other screens (drill-down)

- From vendor profile:

 - Open linked requisitions/purchases (S04)

 - Open linked project line items (S09)

 - Open linked WOs/Tasks (S02)

 - View vendor spend rollups (S08 Accounting)

- From Projects (S09):

 - When selecting the 3 estimates, picker opens vendor directory filtered by category.

MVP notes (scope control)

- Keep it simple: directory + vendor profiles + quote history + basic spend + basic performance notes.
- Deep contractor management (work permits, risk assessments) can be part of Compliance later.