



Vendor Module

The Vendor module allows you to setup Vendor codes. This Chapter describes how to use the Web Work, Vendor module.

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14.1 Overview of the Vendor Module

The Vendor module is used to enter and query vendor records. These vendor codes will be used in Purchase order.

- Click on the **Vendor** button on the left hand side of the screen to access the Vendor module.
- When you enter the Vendor module you will be in Query mode as pictured below:

The screenshot shows the 'Vendor Module' interface. At the top, there are navigation tabs: 'Operations', 'Resources', 'Tools', and 'Help'. The title 'Vendor Module' is displayed in the top right corner. On the left side, there is a vertical navigation menu with the following items: Maintenance, Assets, Inventory (with sub-items: Inventory, Storeroom, Vendor), Purchasing, Admin, Proj Ngmt, My Calendar, Help, and Logoff. The main content area contains several input fields for vendor information, organized into two columns. The left column includes: Vendor ID, Vendor Name, Address1, City, Province, Postal Code, Country, Phone, Fax, Web Site, and Email. The right column includes: Vendor, Category, Vendor, Customer ID, Contact, Account, Contact, and Terms. Below these fields, there are additional fields for Vendor Tax1, Vendor Tax2, Tax ID1, Tax ID2, Contract #, and Currency. A 'query' button is located at the bottom left of the form area. At the bottom right, there are three icons: a green plus sign, a magnifying glass, and a document with a pencil.

The **Operations Resources Tools Help** drop down menus contain the various features available in the Vendor module.




Web Work includes “help files” for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field selected.

14.2 Creating Vendor Codes

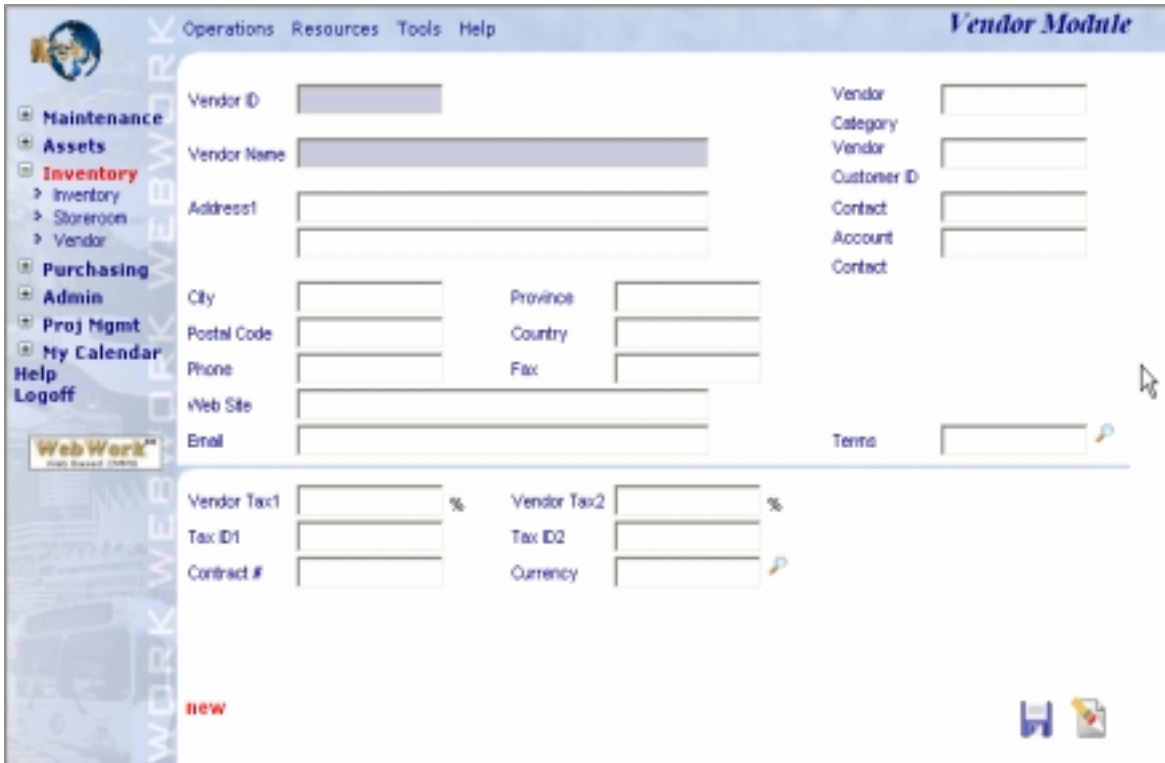
To create a new vendor:

- Click on the **Vendor** button on the left hand side of the screen to access the Vendor module.
- Move the mouse over the **Operations** menu at the top of the Vendor Screen to display the drop down menu.

Operations
New Vendor (Auto Number)
New Vendor
Vendor Query
Print Selected Vendors
Delete Vendor

- Select New Vendor from the drop down menu or click on the  button to open the Vendor module in New mode.

A screen similar to the one pictured below will open:



The screenshot shows the 'Vendor Module' form in the Web Work application. The form is divided into several sections. On the left, there is a navigation menu with options like Maintenance, Assets, Inventory, Purchasing, Admin, Proj Mgmt, My Calendar, Help, and Logoff. The main form area contains various input fields for vendor information, including Vendor ID, Vendor Name, Address1, City, Province, Postal Code, Country, Phone, Fax, Web Site, Email, Vendor Category, Vendor, Customer ID, Contact, Account, Contact, Terms, Vendor Tax1, Vendor Tax2, Tax ID1, Tax ID2, and Contract #. A 'new' button is located at the bottom left of the form area. The top of the screen shows the 'Operations' menu, which is highlighted in the previous image.



Auto-Numbering is set up in the Admin module of Web Work. For more information on auto-numbering see the Admin section of this manual.


- Enter information into the applicable fields.
- The Vendor ID and Description fields are required fields. All other fields are optional.

- Click on the  button to save the new vendor.

14.3 Vendor Queries

Web Work provides two ways to retrieve the vendor codes. The easy way is that enters the vendor code in the screen and presses the Enter key. The related information will be displayed. The other one is by using the Query function.

To find certain vendor by using Query function:

- Open the vendor module in query mode.
- Move the mouse over the **Operations** menu and select Vendor Query from the drop down menu or click on the  button to show the vendor list.
- A screen similar to the one pictured below will open:

Operations
New Vendor (Auto Number)
New Vendor
Vendor Query
Print Selected Vendors
Delete Vendor

Select all Unselect all Retrieve Records Order by: CompanyCode

	Vendor ID	Vendor Name	City	Contact
<input type="checkbox"/>	AAAA	AAAA COMPANY LTD	PORT MOODY	order
<input type="checkbox"/>	ABC DE	abcde.com		
<input type="checkbox"/>	ACE	ACE	Seattle	WETQTR
<input type="checkbox"/>	ACKLANDS	Acklands/Grainger		
<input type="checkbox"/>	BBBB	BBBB COMPANY LTD	N. VANCOUVER	
<input type="checkbox"/>	BBE	Big Business Enterprise	Vancouver	Thomas
<input type="checkbox"/>	BE	Best Electric		Sam Jones
<input type="checkbox"/>	CARRIER-LGY	Carrier	Langley	Dave Odowichuk
<input type="checkbox"/>	EBH	E.B. Horsman		
<input type="checkbox"/>	FRAN	FRAN	port	me
<input type="checkbox"/>	GE	General Electric		
<input type="checkbox"/>	HITACHI	HITACHI ELECTRICAL	VANCOUVER	ALBERT BLACK
<input type="checkbox"/>	HOMEDEPOT	Home Depot		
<input type="checkbox"/>	MUMMY	Mummy		
<input type="checkbox"/>	PHIL	Phillips Electrical		Paul Ramsey
<input type="checkbox"/>	SCRAP	SCRAP	TOKYO	MOMOKO
<input type="checkbox"/>	SEARS	Sears	North Vancouver	
<input type="checkbox"/>	V1	V'3 "5		

SELECT * FROM Vendor

query result (18 / 18)




- Click the beside the vendor code or use the **SELECT ALL** function and then click the **Retrieve Records** to bring the selected vendor.

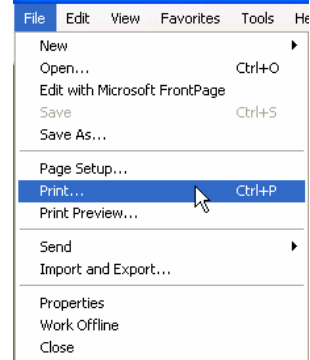
14.4 Printing Vendor Records

There are two ways to print Vendor records. You can print an individual vendor record or multiple Vendor records that you have selected and retrieved.

14.4.1 Printing Individual Vendor Records

To print only the vendor record that is open on the screen:

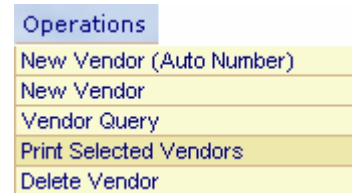
- Click on the  button at the bottom right hand side of the screen.
- The selected record will open in a new browser window.
- Click on File and select Print from the drop down menu to proceed with printing.



14.4.2 Printing Multiple Vendor Records

To print a batch of vendor records:

- Perform a vendor query to open the desired vendor order. See Vendor Queries for more information on performing vendor queries.
- Move the mouse over the **Operations** menu and choose Print Selected Vendors from the drop down menu.
- The selected records will open in a new browser window.
- Click on File and select Print from the drop down menu to proceed with printing.

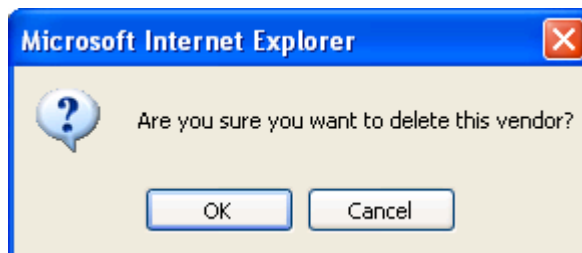
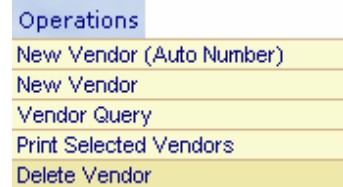


14.5 Deleting Vendor Codes

It is not advisable to delete any records which have already been assigned to a work order. Doing so may compromise the integrity of your database.

To delete a Vendor:

- Perform a vendor query to locate and open the applicable vendor record.
- Move the mouse over the **Operations** menu and select Delete Vendor.
- A message box confirming you wish to delete this vendor will open.



- Click on the **OK** button to delete the vendor or on the **CANCEL** button to cancel this operation.

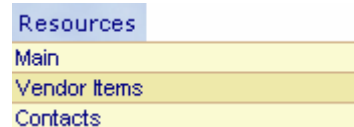
14.6 Vendor Items

After a vendor is created, you can add items to the vendor record using the Vendor Items feature.

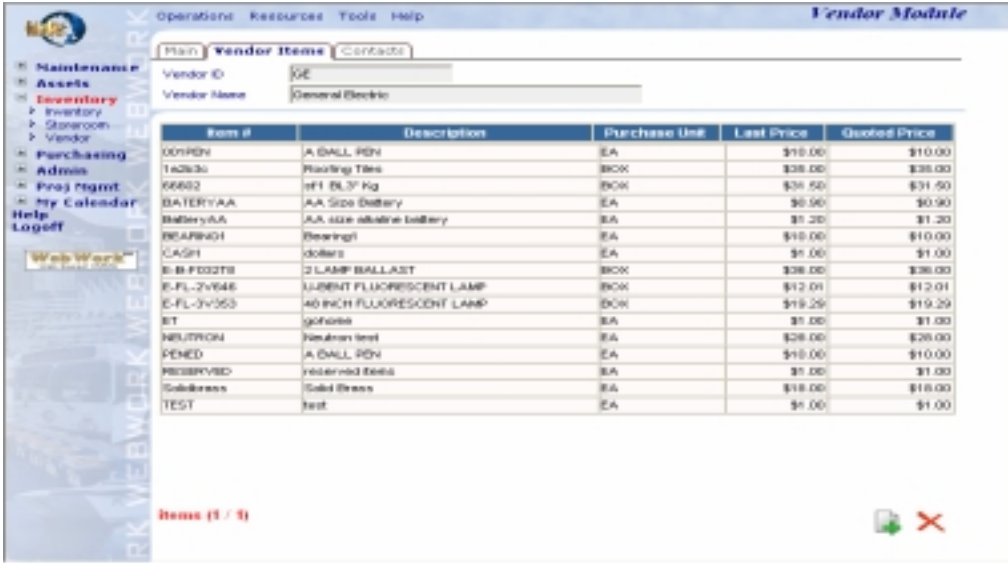
14.6.1 Adding Vendor Items


To add vendor items:

- Perform a vendor query in Vendor screen to locate and open the applicable vendor record.
- Move the mouse over the **Resources** menu and select Vendor Items from the drop down menu.





- A screen similar to the one pictured below will open:



- Click on the  button to open the New Vendor Item screen as shown below.



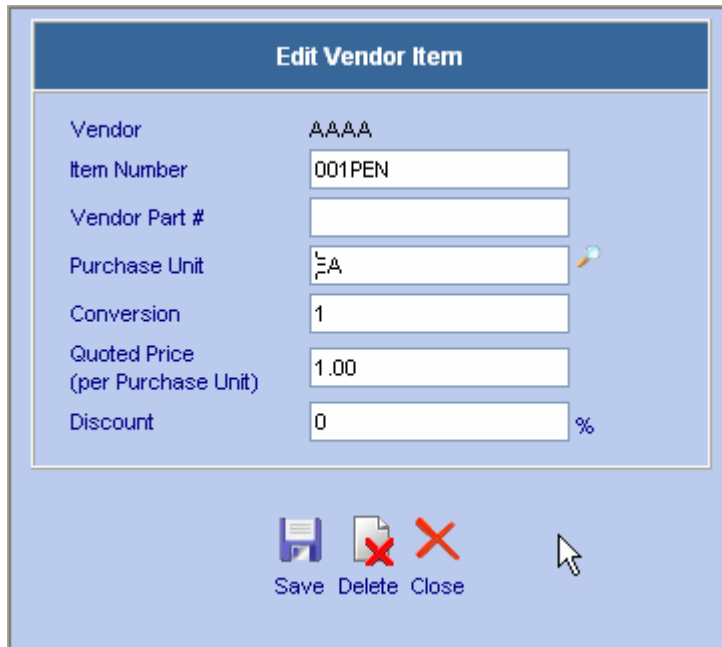
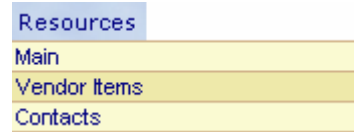
- Enter an Item # or click on the  button to select an item # from the Web Work database.
- Enter the Vendor Part #.
- Enter the Purchase Unit. i.e.: Litre, Box, Tonne, etc.
- Enter the Conversion Factor. The conversion factor is the number of issue items in a purchase unit.
- Enter the Quoted Price per purchase unit.

- Enter any applicable discount.
- Click on the  button to save the new vendor item.
- The item will now be displayed in the table on the lower half of the Vendor screen when you are in Items mode.

14.6.2 Editing Vendor Items

To edit vendor items:



- Perform a vendor query in Vendor screen to locate and open the applicable vendor record.
- Move the mouse over the **Resources** menu and select Vendor Items from the drop down menu.
- Click on the applicable item # or description to open the Edit Vendor Item screen.



A screenshot of the "Edit Vendor Item" screen. The title bar is dark blue with the text "Edit Vendor Item" in white. The main area has a light blue background and contains several input fields:

Vendor	AAAAA
Item Number	001PEN
Vendor Part #	
Purchase Unit	EA
Conversion	1
Quoted Price (per Purchase Unit)	1.00
Discount	0 %

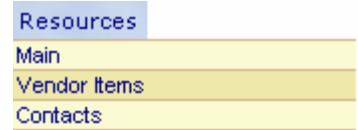
At the bottom of the screen, there are four icons: a floppy disk (Save), a document with a red X (Delete), a red X (Close), and a mouse cursor. Below these icons are the labels "Save", "Delete", and "Close".



- Update information as required.
- Click on the  button to save the updated information or on the  button to cancel this operation without updating.

14.6.3 Deleting Vendor Items

To delete vendor items:

- Perform a vendor query to locate and open the applicable vendor record.
- Move the mouse over the **Resources** menu and select Vendor Items from the drop down menu.
- Click on the applicable item # or description to open the Edit Vendor Item screen.



- Click on the  button to delete the item or on the  button to cancel this operation.

14.7 Vendor Contacts

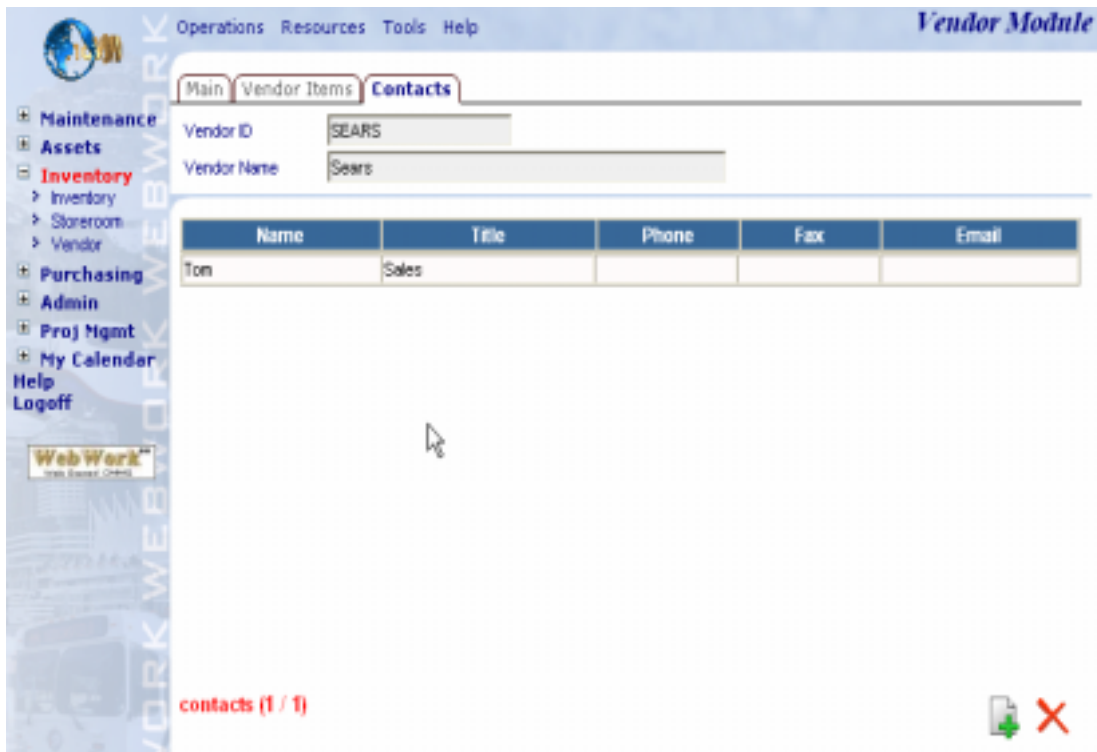
The Vendor Contacts feature offers the ability to add vendor contact information to a vendor record. There is no limit to the number of contacts for each vendor.



14.7.1 Adding Vendor Contacts

To add vendor contacts:

- Perform a vendor query to locate and open the applicable vendor record.
- Move the mouse over the **Resources** menu and select Contacts from the drop down menu.
- The vendor record will open in Contacts mode.







- Click on the  button to open the Add Vendor Contacts screen.
- Enter a Name, Title, Phone Number, Fax Number and Email Address into the applicable fields.
- Click on the  button to save the contact and return to the vendor record in Contacts mode. The contact you entered will appear in the table on the lower half of the contacts screen.





14.7.2 Editing Vendor Contacts

To edit a Vendor Contact:

- Perform a vendor query to locate and open the applicable vendor record.
- Move the mouse over the **Resources** menu and select Contacts from the drop down menu.
- The vendor record will open in Contacts mode.
- Click on the record that you want to modify to open the Edit Vendor Contacts screen.
- Update information as required.
- Click on the  button to save the updated information or on the  button to close the Edit Vendor Contacts window without updating.

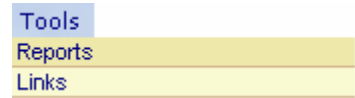
14.7.3 Deleting Vendor Contacts

To delete a Vendor Contact:

- Perform a vendor query to locate and open the applicable vendor record.
- Move the mouse over the **Resources** menu and select Contacts from the drop down menu.
- The vendor record will open in Contacts mode.
- Click on the record that you want to delete to open the Edit Vendor Contacts screen.
- Click on the  button to delete the contact or on the  button to close the Edit Vendor Contacts window without updating.

14.8 Vendor – Reports

To access Vendor reports move the mouse over on the **Tools** menu and select Reports from the drop down menu.



A screen similar to the one shown below will open:



- Click on any of the Reports listed under Standard or Custom, to open them.



Only reports applicable to the Vendor module will be displayed. To view all reports, click on the **▸ Reports** button on the left hand side of the Web Work screen. For more information about reports, see the Reports section of this manual.

14.8.1 Creating Vendor Reports

Reports cannot be created in the Vendor module. To create a vendor report click on the **▸ Reports** button to access the report writer and create the report.

14.8.2 Printing Vendor Reports








Vendor reports can be printed from the Vendor module or from the Reports module.



To print a report in the Vendor module:

- Open the Vendor module.
- Move the mouse over the **Tools** menu and select reports from the drop down menu.
- Select the report you wish to print by clicking on its title.
- The report will open in Preview mode.
- Click on File and select Print from the drop down menu to print the report.

14.9 Links

When you are in the Vendor module and you select Links from the **Tools** menu, the Web Work Create/Edit/View Links window will open as shown below. You can view existing links or create new links using this feature.

Create/Edit/View Links			
Title	Description	Belongs To	
Fees Canada			
Grainger.com	Grainger.com		
Linkdata.txt	Microsoft		
Maintenance America	Maintenance America		
Nadine Martin	Nadine Martin		
osha.gov	Occupational Safety & Health Administration		
Winter.JPG	winter		



 New Close



You can only view links, which have been setup to be accessible from this module or from all modules. Links set up in other modules with the accessibility set as only within that module will not be shown.