Chapter

14

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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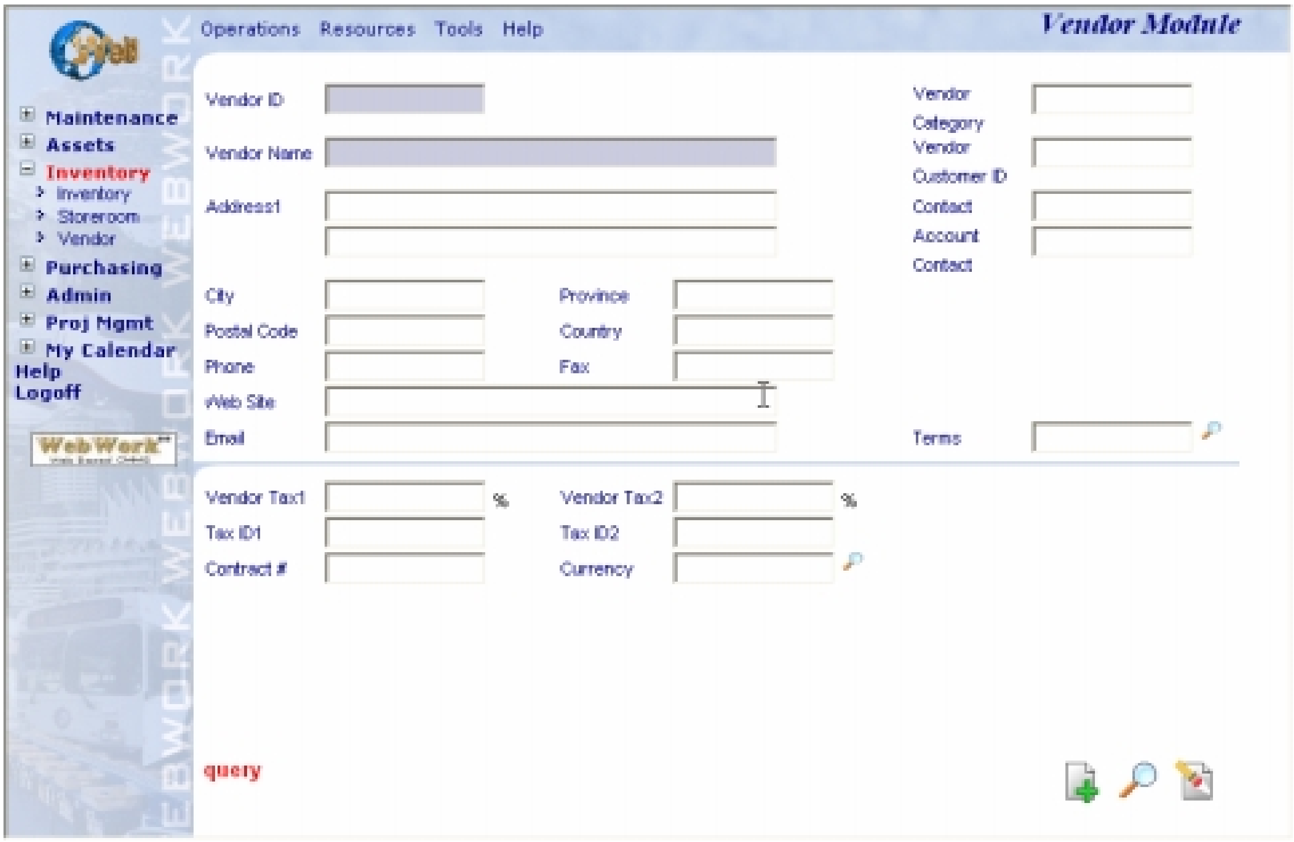
14.1 Overview of the Vendor Module

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

- Click on the  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:

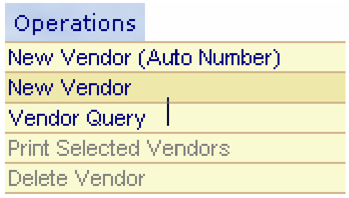


The  drop down menus contain the various features available in the Vendor module.

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.

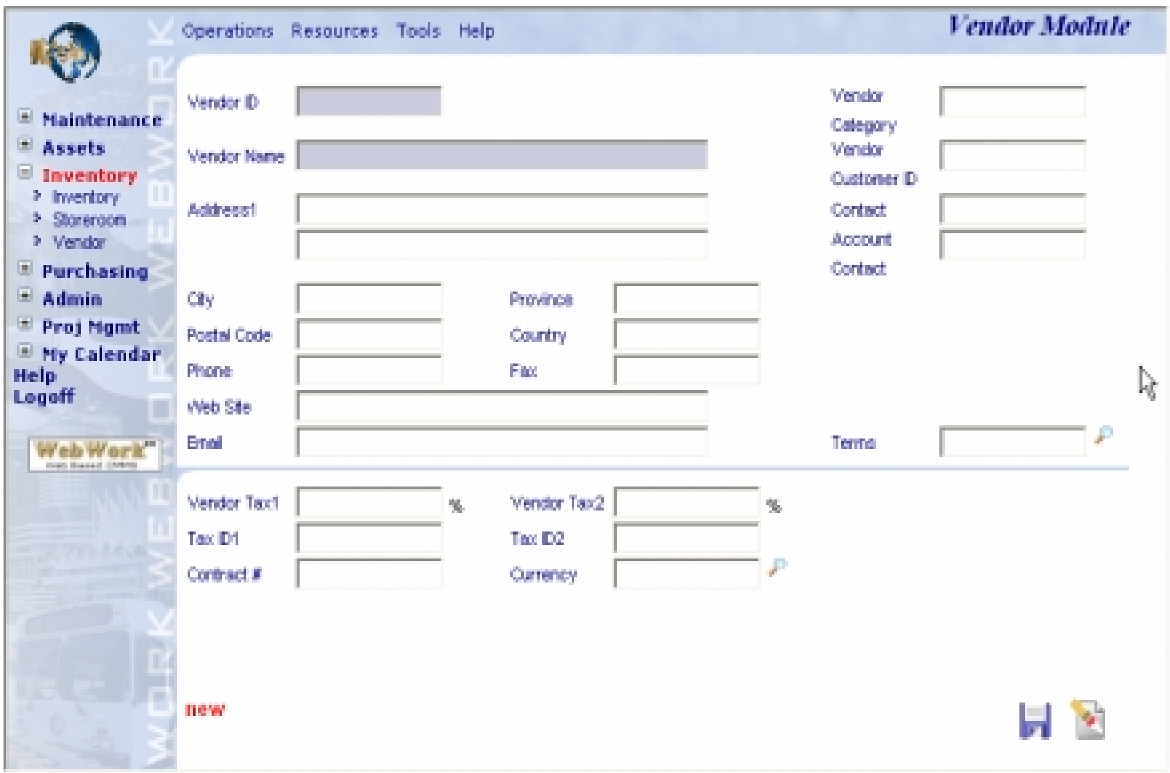
14.2 Creating Vendor Codes

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.
- 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:



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.

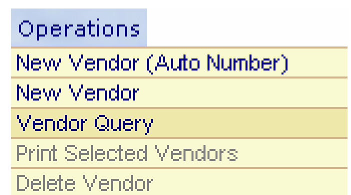
- Enter information into the applicable fields.
- The Vendor ID and Description fields are required fields. All other fields are optional.
- Click on the button to save the new vendor.

14.3 Vendor Queries

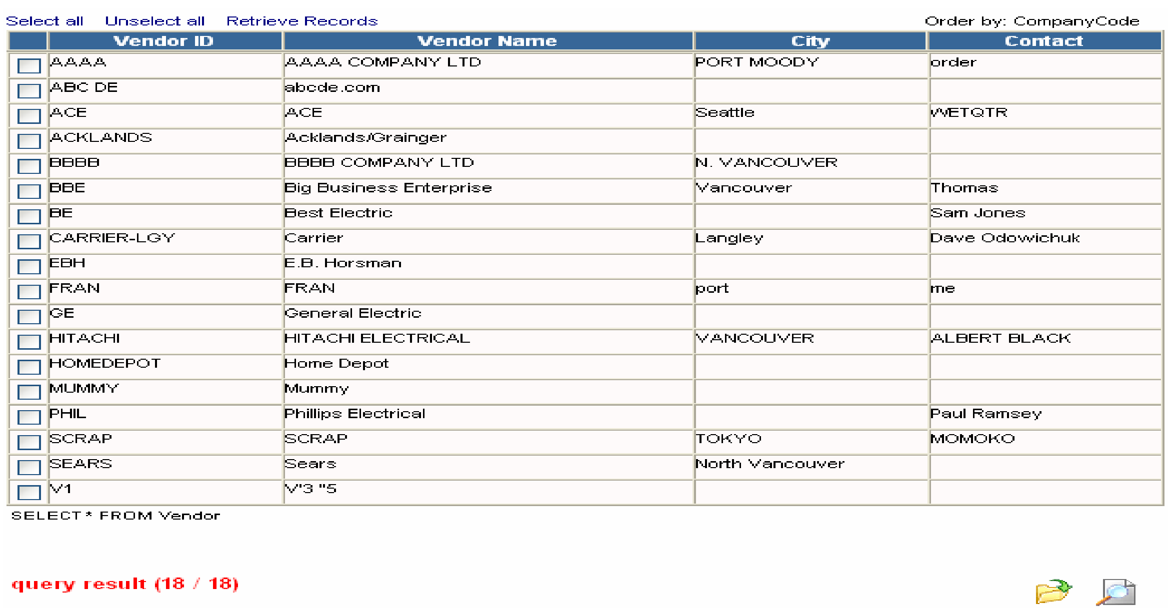
Web Work provides two ways to retrieve the vendor codes. The easy way is that enters the vendor code in the screen and presses the Enter key. The related information will be displayed. The other one is by using the Query function.

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:



Select all   Unselect all   Retrieve Records   Order by: CompanyCode

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

SELECT * FROM Vendor

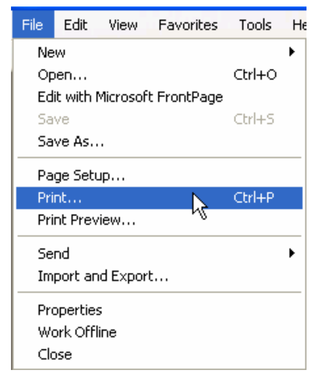
query result (18 / 18)

- 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



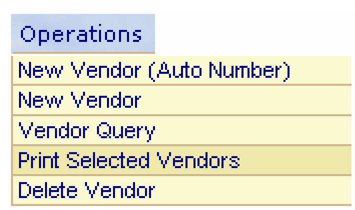
To print only the vendor record that is open on the screen:

- 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  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.

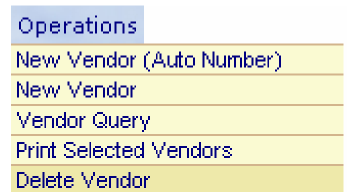


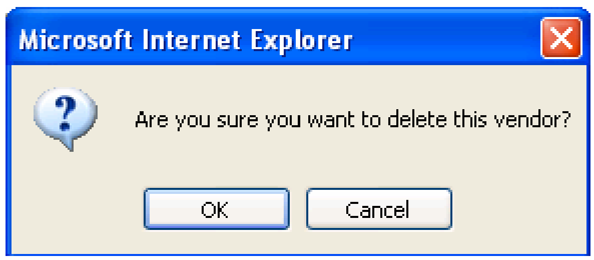
14.5 Deleting Vendor Codes

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.

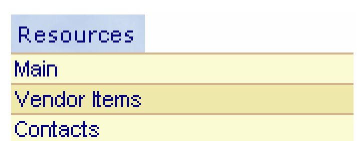
14.6 Vendor Items

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

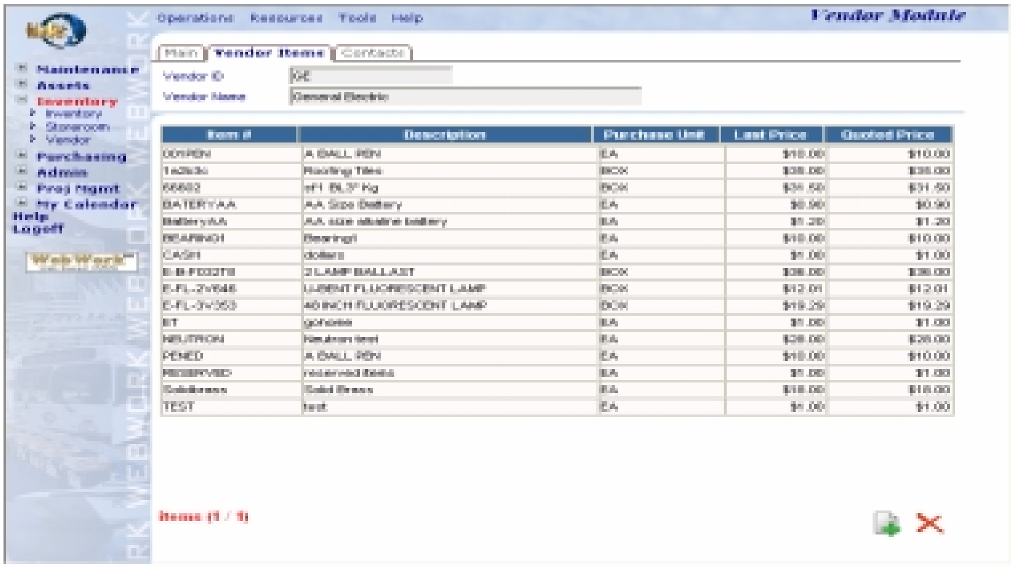
14.6.1 <u>Adding Vendor Items</u>

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.

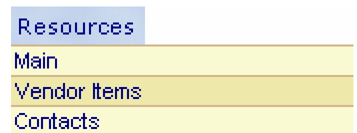
- Enter any applicable discount.

- 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 <u>Editing Vendor Items</u>

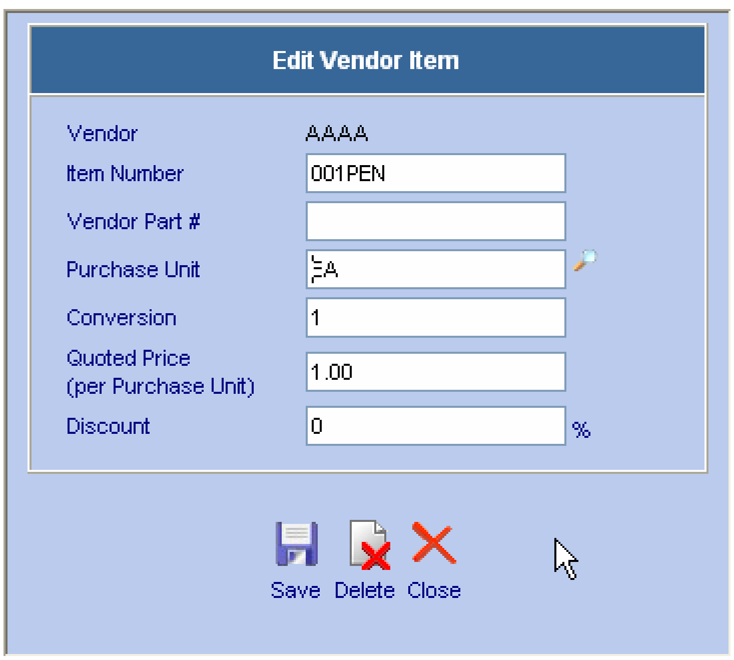
To edit vendor items:



- Perform a vendor query in Vendor screen to locate and open the applicable vendor record.

- Move the mouse over the  menu and select Vendor Items from the drop down menu.

- Click on the applicable item # or description to open the Edit Vendor Item screen.



- Update information as required.

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

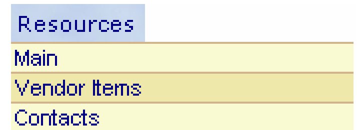
14.6.3 Deleting Vendor Items

To delete vendor items:

- Perform a vendor query to locate and open the applicable vendor record.

- Move the mouse over the 

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.

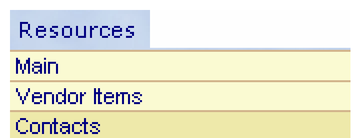
14.7 Vendor Contacts

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:

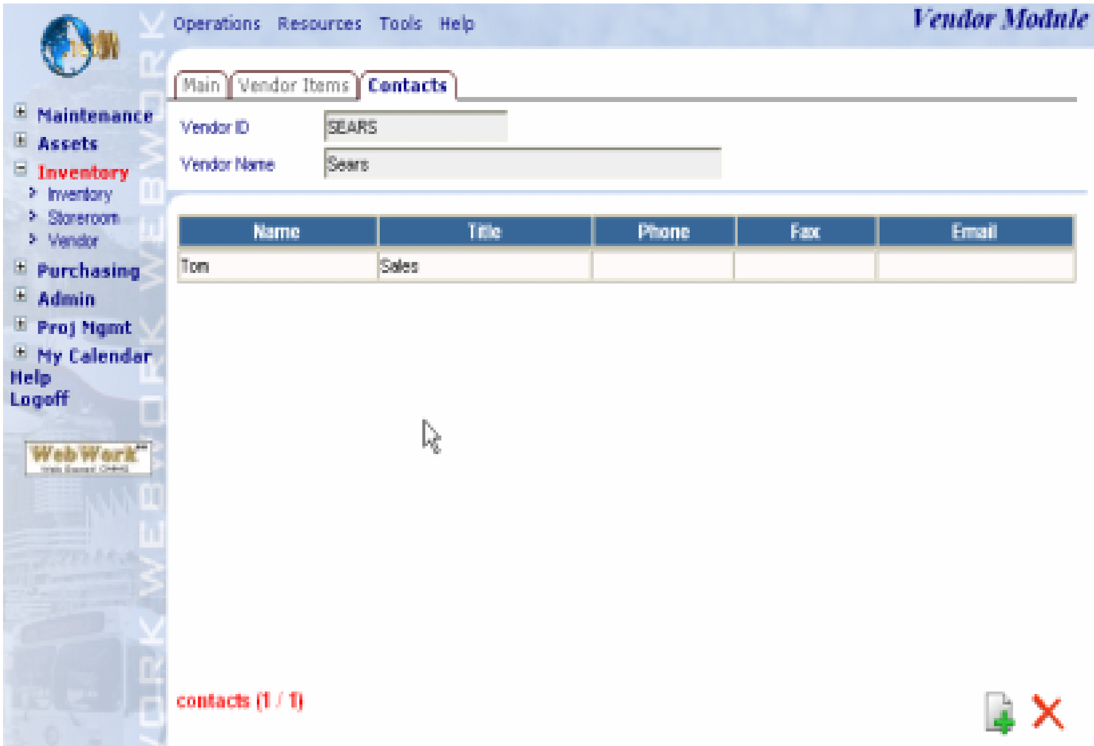
- Perform a vendor query to locate and open the applicable vendor record.



- Move the mouse over the 

menu and select Contacts from the drop down menu.

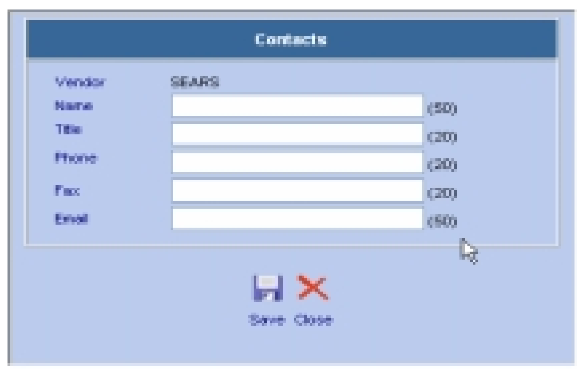
- The vendor record will open in Contacts mode.



- 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 <u>Editing Vendor Contacts</u>

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 <u>Deleting Vendor Contacts</u>

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 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 <u>Creating Vendor Reports</u>

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 <u>Printing Vendor Reports</u>

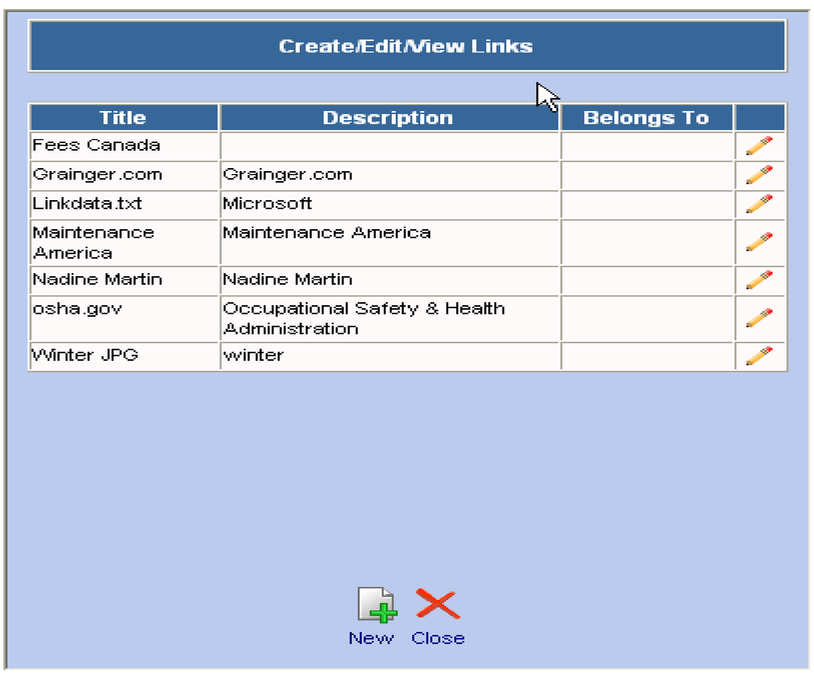
Vendor reports can be printed from the Vendor module or from the Reports module.

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.