Vendor Maintenance Transcript

Andrew: Man, we order stuff from a lot of different vendors. This one doesn't allow returns and that one says their invoices are due the same day. Robert, can you help me make sure I'm doing this right?

Robert: I sure can. Vendor maintenance is pretty simple when you look at each area. Choose one of the options and we'll go over it together.

Topics-

- Adding Vendors
- Vendor Maintenance Tabs
- Editing or Deleting Vendors

Adding Vendors

When you have new vendor, you can add them by selecting Inventory from Eagle Homepage, and then choosing Vendor Maintenance. You can also type MVR in the launch bar. This top area of the screen contains the vendor basics.

Start by assigning a vendor code. This consists of one to five letters or numbers in any combination. Best practice is to keep a consistent pattern when assigning vendor codes. This makes it easy for your staff to locate vendor records. Next, enter a sort name. This is a ten character string with no spaces. Type as much of the vendor's name as will fit. This helps you locate the vendor later if you do not know the vendor code.

If you send payments to a third party instead of directly to the vendor, select them here. Otherwise, leave this field blank. If you have a multi-store system, select the store that this vendor is primarily associated with. In the Name field, enter the full name of the Vendor. This is the name that will print on any AP checks, so make sure it is accurate. Once all of the fields have been filled in, press the Add button. The vendor has now been added to the designated store. If you need to add it to additional stores, change the store field and press Add again.

Vendor Maintenance Tabs

The Vendor Maintenance Tabs let you add and edit different information about your Vendors. Let's take a look at them.

The Main Tab contains basic contact data for the vendor. This allows you to enter things like an address, your Assigned Customer Number, or codes to group and organize your vendors. If you communicate via EDI, the connection requirements are added here as well.

Best Practice is to select Change before moving on to a new tab. That way you know your information has been saved successfully. The Order Info tab shows information that is necessary for creating Purchase Orders. In the left column, you can enter PO Minimums for your orders. The right column lets you enter codes that relate to those minimums.

For example, if your vendor offers free freight for any order of 100 units or more, you might put 50 in the P.O. Minimum Units box and the letters FF, for free freight, in the Code column to the right. This information is used to create a warning in MPO. You can also set Lead times, whether or not backorders are allowed, and the default buyer's ID on purchase orders.

If you have purchased Accounts Payable, you will have an A/P Tab. Full information about this tab can be found in the accounts payable Agendas in the Epicor Learning Center. The next tab collects the vendor's history.

When you finalize a purchase order with this vendor, the quantity, cost and any additional fee figures are updated here. Here on the Notes tab, you can add instructions that can attach to Purchase Orders or even appear in Point of Sale. The Contacts tab lets you add, change, or delete individual contacts for your vendor.

The allowances tab lets you take advantage of any allowances given to you by the vendor. It also lets you specify how you should be reimbursed for any defective items. The Programs Tab helps you easily encode vendor specific pricing information. You can also track vendor rebate and seasonal programs.

Editing or Deleting A Vendor

If information about a vendor changes, you can edit it in Vendor Maintenance. From the Vendor dropdown list select the correct supplier. Locate the field you want to edit and enter the new information. Press Change to save your work.

All information about your vendor can be changed in this way except for the Vendor Code. If you have incorrectly entered a vendor code, you will need to delete it and re-add it. Simply select Delete from the ribbon menu and confirm the action. Note that you cannot delete a vendor with open orders.

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