

Creating a New Supplier in Supplier Maintenance

Most companies, yours included, will purchase goods and services from suppliers. It is essential to maintain accurate and up-to-date records on these suppliers so that you can order what you need, get the best quality and prices, and pay the invoices for goods and services on time.

Use Supplier Maintenance to create records in the Epicor ERP application for your suppliers. Once you enter a supplier's information, you can then select this supplier to create purchase orders and designate them as an approved supplier for a part, part class, or a customer record.

In this course, we're going to give you some background about the power of supplier records. We'll also take a good look at Supplier Maintenance and explain the basic info you must enter for each supplier.

No time like the present, so let's get to it.

Topics

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The Power of a Supplier Record!

Supplier records are powerful little things. In addition to maintaining basic info on a supplier's name and contact information, they can activate functionality throughout Epicor ERP. For example, you can define how taxes are levied and payments are made against purchases from each supplier. And . . . if you buy parts from multiple locations within a supplier, you can define each purchase point! Supplier records also contain shipping manifest info, so you can indicate how these organizations ship part quantities to your company.

You can keep a scorecard on your suppliers using something called attributes – or traits – about the supplier, as well as rate the supplier's performance.

Another thing that you can do is to set up your GL Controls to determine how transactions with this supplier are posted to the General Ledger and to Journals. And there is another financial sheet in the program where you enter tax exemptions that apply to the supplier.

All of this functionality cannot fit into one Epicor University course – though we try to squeeze in as much as possible! We have other courses you can take to learn about purchase points, banking details, and other neat things related to suppliers.

Entering a Supplier

This is the Supplier Maintenance window. We're going to jump in and add a supplier record, focusing on the information on the Supplier Detail sheet and a few others.

To create a new supplier, click the New. In the Supplier field, enter a unique supplier ID. Enter up to 8 characters for the ID, like this.

Let's stop a second and talk about the importance of creating consistent and meaningful IDs – for all the records you create in Epicor ERP. Use something that will be easy for your coworkers to recall, like initials or a certain subset of the supplier's name. Whatever rule you choose, make sure you and your coworkers stick to the plan and stay consistent!

Continuing the Supplier Record

Let's continue with our supplier record. The next required field in a supplier record is Tax Liability. A tax liability represents taxes a company handles when they trade with customers and suppliers. These can be taxes liable due to your company's tax status and/or the tax status of the customer or supplier.

Here's a neat thing. Someone in accounting at your company will set up the options for this field using Tax Liability Maintenance. You can select the appropriate choice from the dropdown. Many of the fields on this sheet work this way.

Now let's look at the Group field. You select a Supplier group from the options. They typically are used to classify suppliers – however your company chooses to do so! You or someone else at your company will set up supplier groups, using a window called Supplier Group Maintenance.

Next, the Terms field. This holds the purchasing terms that define the frequency, number of payments, and discounts that apply to invoices for this supplier. Terms can be set up in Purchasing Terms Maintenance, and the options will display in this dropdown.

In the Ship Via field, choose how the material you purchase from this supplier will be shipped to you. You or others at your company set these up too, using Ship Via Maintenance.

The last field we're going to look at is FOB. In this field, select Free On Board term descriptions and delivery term codes. Free-on-board (FOB) is the point where legal title of goods passes from your company to a customer or from a supplier to your company. FOB terms are set up--you guessed it--in FOB Maintenance.

Entering a Supplier's Address

Enter all address information on the Address sheet. This is the address you will use for payments to the supplier. If this supplier has different locations from where you purchase goods and services, you'll set up different purchase points. We'll explore those in another course.

You can play with the format of the address too. Do this on the Address Format sheet.

Using the mouse, highlight an address element from the list on the left. In the Address Format area on the right, select the line where the selected element should be placed. Then click the right arrow to move the element.

To place several address elements on the same line (such as City, State, and Postal Code), keep this same line highlighted within the Address Format area, and move other elements to it.

Oops. If you misplace any address element, highlight the element and click the Left Arrow. The element returns to the left list; it no longer appears on the Address Format.

Entering a Contact

The last thing we're going to do here is set up a main contact for this supplier. Select New, and New Contact. On the Contacts sheet, you can enter the name, address, phone, and email information for this person.

You can also select a person or contact you've already entered into Epicor ERP as this supplier's contact. To do this, click the Person/Contact button and find the person you need. Neat, huh?

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