

Adding and Maintaining Suppliers

Suppliers are crucial to a company's ability to meet consumer demand while securing the most competitive price available in the supply chain. Having more buying options gives you more control over your purchasing budget.

In this course, we show you how to add and maintain suppliers.

Objectives

- Adding a Supplier
- Maintaining Suppliers

Adding a Supplier

You will need to add suppliers before you can create purchase orders. To add a new one, select **Suppliers** and then tap **Suppliers** in the sub-menu.

If your default view is **Form view**, select the **Table view** icon. This view gives you several filters and export functionality. Now, tap the **Add** button.

Back in form view, select *this* **Add** button.

In either case, the **Add New Supplier** window displays.

Enter the details in the **Supplier Information** section. Fields denoted with a red asterisk are mandatory.

Enter the *supplier's name* and their website *URL*.

Enter the unique supplier number or leave it blank to generate an auto-assigned number.

Enter your *customer number* assigned by the supplier. This is your account number used when ordering from this vendor.

Choose the supplier *type* and *terms* from the drop-down menus.

Terms determine the payment due for items purchased or any discount for early payment.

Based on jurisdiction and applicability, Propello has pre-defined *tax codes*. Choose one from the drop-down menu.

To create purchase orders for this supplier, add stores *here*.

Add tags for better search capability.

Enter the primary contact information, including name, title, address and email.

Use the toggles to set the address as the **Postal**, **Return**, **Order**, or **Remit to**.

Activate *this* toggle to use this contact's email to send purchase orders.

Enter the phone details and use the **Primary** toggle to set this number as the primary contact number.

Finally, tap **Save & Edit**.

You can also select **Save & Add More** to save this supplier and add another.

Maintaining Suppliers

A supplier might change, merge, or even go out of business. Keeping suppliers' information up to date is necessary for higher profit margins and just-in-time inventory methods.

From the *main menu*, select **Suppliers > Suppliers**.

Use the *search field* to search for a specific supplier or select **Table View** to view all suppliers.

Use the available filters to search for a supplier or tap **Search** to list all suppliers.

Check the box next to a supplier or check *this* box to select all suppliers.

Tap **Export** if you want to export the supplier details to an Excel file.

Tap **Edit** to update the details.

The **Edit Supplier** screen displays.

You can scroll through suppliers using the *forward and backward* buttons if you've selected more than one supplier to edit.

Select the tabs you want to update, make the necessary changes, and then select **Save**.

Account Information displays the supplier's details.

Tap the fields to edit information.

You can also activate or deactivate a supplier account using the **Active** toggle.

These blue links allow you to edit general information.

Select any link to open the **Contacts** form.

Review and edit the details.

Finally, tap **OK**.

The **Open PO's** link lets you view all open purchase orders for this supplier.

Tap **Close** to return to the main page.

To add an image for this account, tap **Actions > Manage Images**.

Here, you can add, remove, and set any image as the primary one.

You can view or change the credit terms code from the **Terms and Policies** section.

Choose a *default defective policy code* from the drop-down menu or add a new policy.

You can provide supplier-specific defective instructions *here*.

While you can add, edit or delete contact details using the **Account Information** tab, you can also do the same *more conveniently* using the **Contacts** tab.

More information about adding and maintaining supplier contacts is available in other related agendas and courses.

The **History** tab displays the read-only history for the selected supplier.

Select the store from the drop-down menu to view its information.

Tap the **Add to Additional Stores** and then tap the **Add to All Stores** button to add the supplier to all the stores and click **Save**.

You can filter by using **This Week, This Month, This Year, Last Year** to view specific details in the grid, alongside the totals and statistics.

Tap **Export** to export any information to Excel.

The **Store Info** tab displays location-specific information for this supplier. **Store Info** has three sections.

In the **Store** section, you can edit the account number this store uses for the supplier, the time duration for the order to arrive, and activate or deactivate the supplier. Choose the *Tax Code* for taxable purchases. Use *this* toggle to determine if backorders are allowed.

Enter the minimum amount required to send a purchase order to the supplier in the **PO Minimums** section.

In the **Freight Policy** section, enter a minimum amount to maintain free freight.

Don't forget to click **Save** at the end.

You can delete suppliers that are no longer required and are not a part of any outstanding purchase order. Check the box to select a supplier or check *this* box to select all suppliers. Tap **Actions > Delete Suppliers**. Select **Yes** in the confirmation prompt to delete the supplier.

Recap

Suppliers play an important role in the purchasing and receiving cycle. For more information, refer to the help articles, videos, and guided learning.

In this course, we showed you how to add and maintain your valuable supplier data.

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