

# Creating a Supplier Record

Supplier records are powerful. In addition to maintaining basic info on a supplier's name and contact information, they can activate functionality throughout Kinetic. All the available functionality spans a few courses. We will cover the basics here.

First, we add a supplier record, focusing on the information on the Detail card.

Next, we explore entering address information in two ways, on the Address card and in Purchase Points.

This leads us to supplier Contacts where we discuss how you add, store, and select these individuals for use with purchasing.

## Objectives

- Entering Details
- Entering Address and Purchase Points
- Entering a Contact

## Entering Details

When you launch the Supplier application, you see the current list of suppliers on the Landing Page.

To add a supplier, tap the New button.

Enter an ID.

Next, enter the supplier's name and tap Save.

Select the primary Currency and Language this company uses. The system uses this language and currency on purchase orders and other documents you send to this supplier.

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.

Someone in accounting set up these options using Tax Liability Maintenance. Tap the Search icon. In the search panel tap Search to see all results. Select the Tax Liability code that applies.

Select a Supplier group. These groups typically classify suppliers – however your company chooses to do so! You enter groups in Supplier Group Maintenance.

The Terms field holds the purchasing terms that define the frequency, number of payments, and discounts that apply to invoices for this supplier. You set up terms in Purchasing Terms Maintenance.

In the Ship Via field, choose how this supplier ships the material you purchase to you.

In FOB, 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.

Remember that to see descriptions for each field, select Display Field Level Help. You have the question mark next to each field. Tap to see a description and details about that field.

## Entering Address and Purchase Points

Addresses contain payment and purchase information. For the supplier's main location, enter address information on the Address card. You use this address for payments to the supplier.

If your supplier has multiple locations from which you receive goods and services, enter Purchase Points. A supplier ships material or provides services from these locations. Purchase Orders use these different addresses. For each purchase point, you enter separate addresses, contacts, and manifest information.

On the Purchase Points card tap New.

Enter an ID for this purchase point, such as initials for the location. Here's a tip: When thinking about purchased point IDs, remember some reports have limited space, so instead of displaying the name, they display the purchase point identifier. So, give this some thought.

If this is the location from where you purchase goods or services to most, select Primary Purchase Point. Only one purchase point can be the primary location.

Next enter the address for the purchase point. Tap Save.

For each purchase point, you can also maintain a separate Manifest Info. Each manifest includes delivery information, handling and COD options, international shipping details, billing codes, and specific FedEx and UPS information.

This manifest information is the same as what you enter for the overall supplier. Find more details on Manifest information in another course and in the Help & Support panel.

## Entering a Contact

Add new contacts or associate existing contacts for each purchase point and the main address.

In Kinetic, you use contacts in many places. To make sure you are entering the contact in the right card, look at the Nav Tree.

Enter the contact for the Main supplier address in this card, Contacts, found under Details.

Then enter contacts for the purchase points here, in a card also called Contacts under Purchase Points.

Both Contacts cards work the same way.

Let's use the Detail > Contacts card.

Tap New.

Enter the contact's name and role. Enter the values you need to contact this person, like the phone and fax numbers.

Since you can enter multiple contacts for a purchase point, select the Primary Contact check box for the person you talk to the most.

This person is also the contact at a purchase point. Select the Purchase Point, then in Contacts, tap New.

If the contact is someone already in the Kinetic system, search for and select that person/contact from the database instead of re-entering the contact record.

When you finish entering the supplier, tap Save.

## Recap

Let's recap what we did. We added new a supplier, and we reviewed what information you enter in Detail card.

Next, we entered address information for both the main location and a Purchase Point.

Then we rounded out those records with Contact data and discussed how the system stores contacts.

Supplier records are powerful, and there is more to learn. Take other courses in the Epicor Learning Center and don't forget to check out the Help & Support panel for Articles, Videos, and Guided Learning.

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