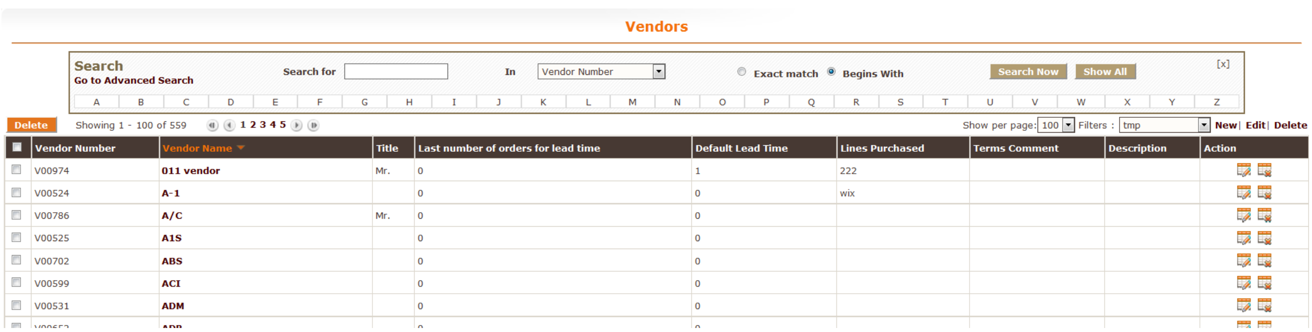
Product Management

Vendors / Vendor Set Up

In Fuse5 the vendors are the people and companies you buy product from. In order to create a purchase order to a vendor, they must be in the vendor database. Each vendor has a record in the database, and that record has several important settings which will be covered in this section. Information on Vendor Invoice Reconciliations is contained in a separate chapter dedicated to that subject.

Navigate to Vendor listing page in Fuse5 by going to PRODUCT MANAGMENT tab > VENDORS from the drop down



You can then choose to create a vendor (by clicking PRODUCT MANGAGEMENT > VENDORS > CREATE VENDOR or by using the orange + button on the Vendor listing page. You can also edit existing vendors by clicking on the vendor name or using the edit button under the action column.

Create Vendor – you can create a vendor by clicking on the appropriate tab, however your previous vendors should be inputted into Fuse5 to make the process easier. If you add additional vendors in the future, you may have to manually enter.

Vendor Information

Vendor Information:

Vendor Number (Required) - This is a unique number that is generated by Fuse5 for each new Vendor you create. While this number is generated by Fuse5, you can modify it at the time you create the Vendor Record if you wish it to be something other than what Fuse5 came up with (the system will check to ensure that you are not duplicating another Vendor Number). However, once the Vendor Record has been created, this field can no longer be edited.
Vendor Name (Required) - The name of the vendor that will appear on Purchase Orders. This is NOT a unique field. Potentially, you could have multiple Vendor Records with the exact same Vendor Name, either by accident or by design.

Vendor Abbreviation - This is a vendor abbreviation that can be a combination of letters and numbers. It is used in three primary ways:
1. When creating a purchase order you can search for a vendor using their abbreviation.
2. When assigning primary suppliers to part records you MUST use their abbreviation.
3. When adding or importing Equivalent Part records you must use the vendor abbreviation in addition to their name.

Unlike Product Line Codes, there is no three character limit placed on Vendor Line Codes.

12FEB13: Strip Product Numbers Setting (This is NOT done in the actual vendor record, rather it is done at Product Management > Products > Product Line Code Description)

Fuse5 will now allow you to not strip product numbers. By default Fuse5 strips product numbers of special characters (; ~ ' " \ / { } < ? > + , -) so that you don't accidentally create duplicates within a line due to different product number formats from different suppliers on the same line. However, in certain cases this can be needed such as two different products on a linecode where the only difference in their product number is a dash. Example: 12-345 and 12345. In that case you can change this to NO, and then fuse5 will not strip the dash. This is the only scenario in which you might want to choose to do this. Keep in mind that if you choose NOT to strip the products, you must enter special characters when searching at the point of sale.

You can make this change on the Product Linecode Description page (Product Management > Products > Product Linecode Description). Under the new column 'Strip Product Numbers' you will see options to enable this feature. If a linecode doesn't contain products with a Sales History or a Purchase History you will see two radio button options of Yes and No. 'Strip Product Numbers' can NOT be turned off for lines containing SH or PH.

VERY IMPORTANT: Once you have changed this setting to 'No', you can NOT change it back to Yes because it could break processes and functionality in the system. Only change this setting if you are sure you really do not want to strip product numbers on the linecode you have selected.

Line Code Description (Optional) - This is intended to be a concise description of the Vendor or Vendor Line Code. For example, you could put "Centric Brakes and Accessories". However, this field is only used for your own informational purposes and can be used however you desire.
Title (Optional) - The title for the Vendor contact name (Mr., Mrs., Ms., etc.).
First Name (Optional) - First name of the primary contact for this Vendor.
Last Name (Optional) - Last name of primary contact for this Vendor.
Phone (Optional) - Primary contact phone number for this Vendor.
Email (Optional) - Primary email address for this Vendor.
Website (Optional) - The website for the Vendor, if applicable.
Category (Optional) - This is a category, determined by you, which you assign this Vendor to. This is simply a text entry field and is for your informational purposes only. It has no integrated functionality within Fuse5 besides the ability to search for Vendor records by what you have entered in this category field.
Our Account # (Optional) - This is the account number that the vendor has on file for your business, to which they will charge your orders.
Created Time (Informational) - Date generated by Fuse5 that the vendor record was created.
Modified Time (Informational) - Date generated by Fuse5 that the vendor record was last modified.

Vendor Information:

Vendor Number	V00974	Phone	
Vendor Name	011 vendor	Email	
Vendor Line Code	011	Website	
Line Code Description	011 vendor linecode description	Category	
Title	Mr.	Our Account #	
First Name		Created Time	02-11-2013 09:45:31
Last Name		Modified Time	02-11-2013 09:45:31

Custom Information:

Manufacturer/Supplier (Selection) - Select whether this Vendor is a manufacturer, a supplier, or both. Default is Manufacturer.
Customer Service Phone (Optional) - Phone number to the Vendor’s customer service center, if it is different than the vendor’s contact information.
Customer Service E-Mail (Optional) - E-mail address to the Vendor’s customer service, if it is different than the vendor’s contact information.
Customer Service Fax (Optional) - Fax number to the Vendor’s customer service center.
You now have the option of faxing SO's and PO's through Fuse5. We have partnered with a 3rd party company called **Interfax**, who will handle the faxing. In order to fax through Fuse5 you will need to go to http://register.interfaxus.com/fuse5 and set up an account with them. Once you have created your Interfax account and set up a payment method with them (currently .06 cents a page) you will be able to fax. You will need to enter your Interfax user name and password into the Fuse5 custom setting 'InterFax Details'. Interfax has their own portal to allow you to see your faxing history and status. They also have some other neat features that you can take advantage of outside of Fuse5.

To set up a fax number on an Account, open the account record and enter the fax number into the 'Fax' field. To set up a fax number on a Vendor, open the vendor record and enter the fax number in the the fax field of your choice (Customer Service Fax, CSR Fax, Tech line Fax, or Sales Rep Fax). Once you have entered a fax number into your vendor record go to the 'Fax PO Using' field and select the vendor fax field you wish to use.

Once these settings are in place you will be able to set an account's document preference to 'eFax Invoice' and use eFax functions through out Fuse5.

CSR Name (Optional) - Customer Service Representative’s name, if you have a specific representative that handles your account with this vendor. *This name will be displayed on Purchase Orders as Attn:xxxxxx.*
CSR Phone (Optional) - Customer Service Representative’s phone number, if you have a specific representative that handles your account with this vendor. *This phone number will be displayed on Purchase Orders.*
CSR Email (Optional) - Customer Service Representative’s e-mail address, if you have a specific representative that handles your account with this vendor. *This email address will be displayed on Purchase Orders.*
CSR Fax (Optional) - Customer Service Representative’s fax number, if you have a specific

representative that handles your account with this vendor. *This fax number will be displayed on Purchase Orders.*
Tech Line Phone (Optional) - Technical Support phone number, if it is different than primary contact or customer service information.
Tech Line Email (Optional) - Technical Support e-mail, if it is different than primary contact or customer service information.
Tech Line Fax (Optional) - Technical Support fax number, if it is different than primary contact or customer service information.
Sales Rep Name (Optional) - Full Name of the vendor's sales representative who handles your account, if applicable.
Sales Rep Phone (Optional) - Phone number of the vendor's sales representative who handles your account, if applicable.
Sales Rep Mobile (Optional) - Mobile phone number of the vendor's sales representative who handles your account, if applicable.
Sales Rep Fax (Optional) - Fax number for the vendor's sales representative who handles your account, if applicable.
Sales Rep Email (Optional) - E-mail for the vendor's sales representative who handles your account, if applicable.
Default Lead Time (Required) - Used for forecast Purchase Orders calculations. This is the amount of time between when you submit a Purchase Order to the Vendor, and when that vendor ships your order.
Terms (Selection List) - The terms you have arranged with this vendor for payment. The options are net 10th, 15, 30, 60, or CC. These are standard accounting finance terms that are not defined in this manual. The CC option is for a credit card (or other funding source) that you have set up with the vendor (this information is not actually transmitted to the vendor, so this must be arranged on their end by you)
Terms Comment (Optional) - Any special notes regarding the terms, such as what account you use if you have CC selected in the Terms list of the Vendor Record.
Warehouse Code (Optional) - If the vendor has supplied you with a warehouse code that needs to appear on a purchase order to them, put that here.
Sub Vendors (Optional) - Here you can create a list of sub-vendors that you can purchase from via this vendor on a Purchase Order. To add a vendor to the list, start typing the vendor name in the text entry field above the list box (this field can be easy to miss if you are not looking for it). Fuse5 will provide a drop down of one or more vendor names containing what you typed for you to select from. Click one of the names and it will be added to the list.
This operates in a similar fashion to the Primary Supplier concept (see *Vendor Information: Primary Supplier* for a description of this functionality) except that this is a way to set up that relationship from the Primary Supplier down to the sub-vendor, rather than from the sub-vendor up to the Primary Supplier.
For example, if you designate a Primary Supplier within a sub-vendor file, all the entries from the "Vendor Line Code" field of the sub-vendor would be pushed to the "Lines Purchased" field of the Primary Supplier. This sub-vendor is NOT automatically added to the "Sub Vendors" list in the Primary Supplier's vendor file. Likewise, designating a sub-vendor in a Primary Supplier's Vendor file does NOT add this Primary Supplier to the sub-vendor's file or grab the Vendor Line Code(s) it, rather it allows you to access the sub-vendor's "Lines Purchased" from a purchase order started under the Primary Supplier by enabling the "Based on: Sub Vendors" option for selecting line codes (see

Purchase Orders for more information). This also will cause the Pre Paid Freight to be figured from the sub-vendor's information file.

Lines Purchased (Required) - This is a comma separated listing of the product line codes and any sublines that you purchase from this vendor. This list is used by Fuse5 for all of the automated purchase order functionality, so ensuring its accuracy is vital. You can only have line codes listed that are actually carried in your product database. When you edit this field, you are presented with a checkbox-style selection window from which to choose all the lines that this vendor carries. It IS possible for more than one vendor to carry the same line codes. The ramifications of what you list here will become more evident when you understand the different types of vendor purchase orders you can create and have Fuse5 create for you (see *Purchase Orders* for more information).

Order in Vendor Order Qty Increments (Yes/No) - Select "Yes" to automatically adjust order quantities according to the vendor's order increment requirements during Purchase Order generation.

Auto Update Line Purchased (Yes/No) - If you want the ability to buy every item you stock from this vendor, then selecting "Yes" in this field will automatically add new line codes into this vendor's "Lines Purchased" Field when they are added to the system.

Custom Information	
Manufacturer/Supplier	Manufacturer
PRIMARY SUPPLIER	**[Set Primary Supplier]**
Customer Service Phone	
Customer Service E-Mail	
Customer Service Fax	
CSR Name	
CSR Phone	
CSR Email	
CSR Fax	
Tech Line Phone	
Tech Line Email	
Tech Line Fax	
Sales Rep Name	
Sales Rep Phone	
Sales Rep Mobile	
Sales Rep Fax	
Sales Rep Email	
Last number of orders for lead time	
Default Lead Time	1
Terms	Net 60
Terms Comment	
Warehouse Code	
Sub Vendors	
Lines Purchased	222
Order in Vendor Order Qty Increments	No
Auto Update Line Purchased	no

Check EP (Yes/No) - Selecting "Yes" will direct Fuse5 to check for equivalent parts entries in the files

of products that are added to a purchase order for this vendor. If there is an equivalent part entry for this vendor, then Fuse5 will use the cost from that entry on the purchase order.
Return Tracking Field (Optional) - If this vendor has supplied you with a blanket tracking number that you use with them when you create a “Returned Goods Number”, you would put that here.
Approved Vehicle Expense Vendor (Yes/No) - Here you can designate whether or not this vendor is used for purchasing parts for repairs and maintenance on your company vehicles.
Minimum Order Amount (Optional) - If the vendor has a minimum dollar amount for purchase orders, enter it here.
Small Order Charge (Optional) - If the vendor allows you to place purchase orders below their minimum order amount, but charges a small order charge, enter that here.
Freight PPD Based on (Selection List) - If the vendor covers freight below a maximum weight, above a certain purchase order dollar amount, or beyond a certain purchase order unit count, select the appropriate option here. Currently you can only choose one method at a time.
Freight PPD Amount (Optional) - Enter the amount that applies to the “Freight PPD Based on” field here. Fuse5 will automatically apply the number as a weight, dollar amount, or unit count based on your selection in that field.
Freight Product # (Optional) - Use this field to list a product number that you use to designate freight charges with this vendor.
Misc Fee Product # (Optional) - Use this field to list a product number that you use to designate miscellaneous fees with this vendor.
Backorder/Cancel (Backorder/Cancel) - Use this selection to designate the pre-arranged course of action established between you and the vendor for when they don’t have a product from a purchase order in stock. Backorder establishes that they will ship what they have in stock, and then ship the remaining item(s) from the purchase order at a later date when they receive them. Cancel means that the vendor will ship what they have in stock, and then just cancel the rest of the purchase order. NOTE: This field is a reflection of the relationship that you have previously established with the vendor, it does NOT transmit this preference to the vendor.
Pull Cost Price From (Selection List) - If you purchase certain products from multiple vendors, you can import the vendor price files into multiple fields in the product file. You can then use this field to designate where this vendor’s prices have been imported (see *Importing Products* for more information).
Invoice (Selection list) - If you have a multiple location configuration, you can use this field to designate if you want to receive one invoice from this vendor for all locations, or if you wish to receive separate invoices for each individual location.

Aconnex Update:
Mar 7, 2013

Aconnex Update:
If you notice that the Aconnex fields in your vendor records have disappeared, have no fear. We have taken the Acconex information fields from the Vendor Record and moved them to the into their own window that you access from within the vendor record. There is now an Icon on the right side of the Vendor record called 'Aconnex Information'. The reason for the change is to allow you to set up multiple Aconnex connections through a single vendor record.

'?' help files are coming soon to fully explain each field in the new Aconnex Information window. We'll put out another update to let you know as soon as they have been added.

Transnet PO Vendor ID (Optional) - If this vendor utilizes the Transnet EDI, then enter the Transnet Vendor ID here. In order for Transnet to work properly, there are several settings that need to be set. All of them come from Transnet as a result of signing up for their service. Please contact Transnet to set up your account and get the credentials required to access their system. These will be placed in the **'Transnet EDI Settings'** on the Fuse5 custom settings page. Also, every vendor that uses Transnet will have it's own unique **'Transet PO Vendor ID'** that will make the connection between you and them (something like **'FL#####'**). This is set up in the vendor record settings.
You need to contact EACH vendor you want to use Transnet with and ask to be validated to their FL##### number. The FL##### vendor should then contact Transnet and ask for the validation of your Transnet Customer ID to their FL79xxx ID.
Transnet Use Linecodes -A vendor that is a single line manufacturer only has a single line code if you order from them, so they do not require (or expect) it. It is implied. However, if the vendor is a supplier of many lines, then the line code needs to be included in the PO you send (set to "yes"). This is often dictated by what the vendors system is capable of accepting. Some antiquated systems do not use line codes.
BabelPart Customer Account # -used if you use BabelPart as your EDI
Uni-select Default Delivery Method -Only valid for Uni-Select. Delivery method is part of EDI order.
BabelPart Vendor Backorder / Cancel --used if you use BabelPart as your EDI
BabelPart Seller ID --used if you use BabelPart as your EDI
Gcommerce Test / Production flag -Set to "Test" when gcommerce goes through testing between sub and vendor. Normally this will be production once the vendor is set up. Gcommerce will tell the sub when to switch this back and forth. New vendors should be set to "Test" until Gcommerce says to change to "Production".
Gcommerce Seller ID (Optional) - If this vendor utilizes the G-Commerce EDI, then enter the G-Commerce Seller ID here.
Gcommerce Seller Qualifier (Optional) - - If this vendor utilizes the G-Commerce EDI, then enter the G-Commerce Seller Qualifier here.
Corecentric Seller ID - If this vendor utilizes the Corecentric EDI, then enter the Corecentric Seller ID here.
Corcentric Seller Qualifier - If this vendor utilizes the Corecentric, then enter the Corecentric Seller Qualifier here.
Allow to Send Buyout PO through EDI -Yes or No, should EDI option be available when completing a PO from the Buyout screen at Point of Sale.
Allow to Send Normal PO through EDI -Yes or No, should EDI option be available when completing a PO.
Fax PO Using - Which (of all the fax numbers on the vendor) do you send the fax to.
Buyout Markup % - this is the default mark up % that will be used when creating buyout sales order transactions from this vendor. Users with the appropriate permissions to edit sell price will still have the ability to do so.
(Sell Price) Exchange Rate Factor - ####.### (this is a multiplier).
The Markup Factor and Exchange Rate are used to change the sell price of products that are from this

vendor IF this vendor is the primary supplier for the product being sold.
Markup Factor and Exchange Rate are BOTH applied successively. Exchange rate is dictated by exactly that, the exchange rate that vendor has, which only you know.
The Markup Factor is for anything else that needs to be considered, like additional shipping.
These markups are applied IN ADDITION to the normal sell price plan.
In order for the vendor settings MARKUP FACTOR and EXCHANGE RATE to take effect,
you also need to change the setting 'Adjust Sell Price by Primary Supplier ERF & MUF' to 'Yes' in the Product Linecode Descriptions for the linecode of the products you want these factors to apply to.

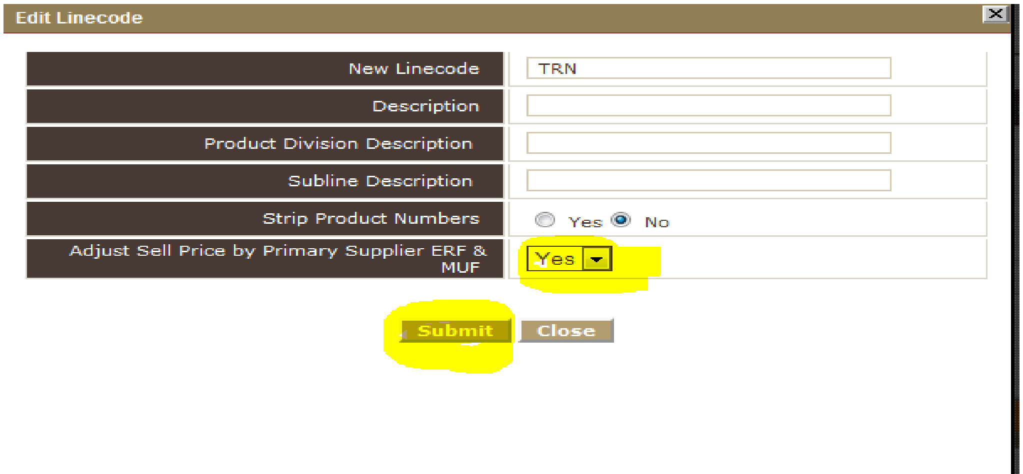
Mark-Up Factor - ####.### (this is a multiplier).
The Markup Factor and Exchange Rate are used to change the sell price of products that are from this vendor IF this vendor is the primary supplier for the product being sold.
Markup Factor and Exchange Rate are BOTH applied successively. Exchange rate is dictated by exactly that, the exchange rate that vendor has, which only you know.
The Markup Factor is for anything else that needs to be considered, like additional shipping.
These markups are applied IN ADDITION to the normal sell price plan.
In order for the vendor settings MARKUP FACTOR and EXCHANGE RATE to take effect,
you also need to change the setting 'Adjust Sell Price by Primary Supplier ERF & MUF' to 'Yes' in the Product Linecode Descriptions for the linecode of the products you want these factors to applied to.

Exchange Rate & Mark-up Factor -
In the product record, there is a field called "Primary Supplier". User will select a vendor in this field. When we're generating a sell price for this product (regardless of customer). Look in primary supplier, check these 2 fields "ERF & MUF". Find sell price plan rule. This tells us the field we price off of. Could be CC, M1-M10. Find that field. Then multiply it first by ERF, then by MUF. Now take that value, which is like what price-off field value is, and THEN apply the sell price plan rule TIMES to it.

Exchange rate	1.250 ?
Mark-up Factor	1.250 ?

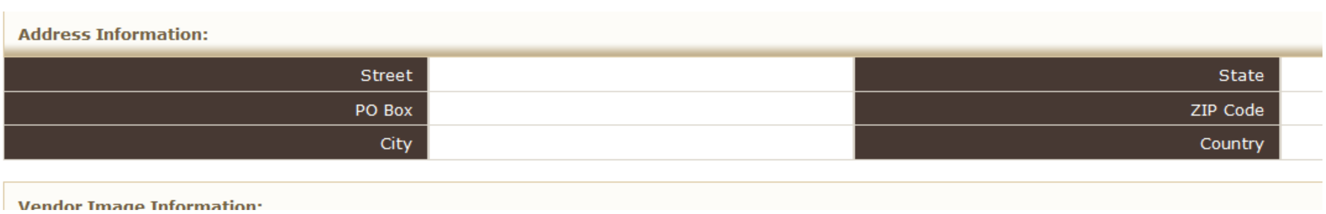
You must also adjust a setting under PRODUCT MANAGEMENT > PRODUCTS > PRODUCT LINE CODE DESCRIPTION. Ensure that you have selected the "Adjust Sell Price by Primary Supplier ERF & MUF in your filter. The filter will tell you if it is On (Yes) or Off (No). Click edit to adjust the line code and then use the "Adjust Sell Price by Primary Supplier ERF & MUF.

Default Currency -This is the vendors default currency and used in conjunction with the Currencies module in custom settings. This is only used if you order from vendors that use a different currency that what your business uses.



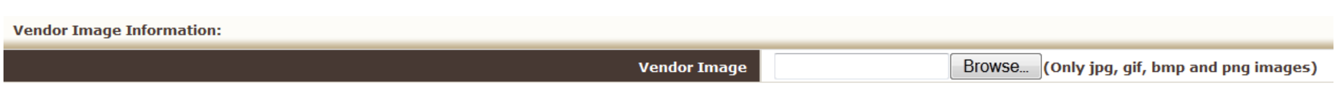
Address Information

Enter the address information for this vendor in these fields. *This address will be displayed on Purchase Orders.*



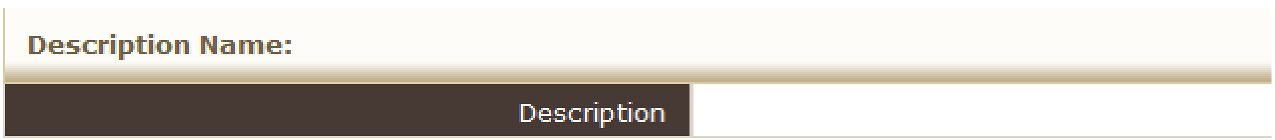
Vendor Image Information

Load an image for this vendor here if you desire. (Must be in EDIT mode – top left of vendor record)



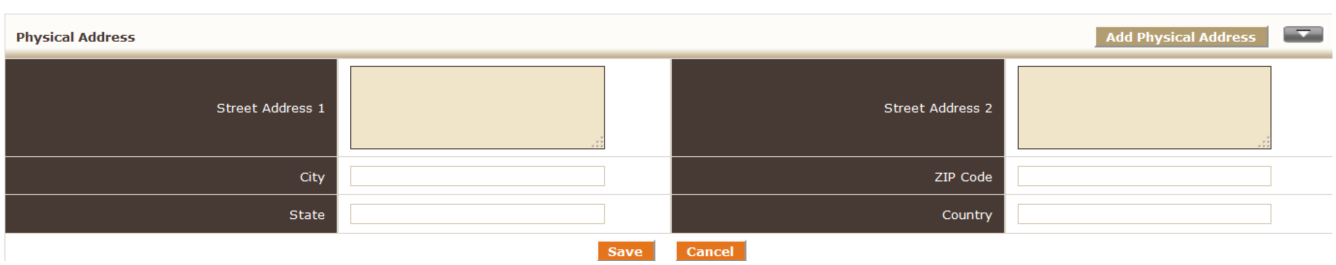
<u>Description</u>

This is an area that you can use however you desire to place information about this Vendor. You can also use this area to keep notes about the vendor.



Physical Address

If you desire to keep address information on physical addresses of this vendor's locations, you can do that here. This is often done if you pick up parts from the vendor locations yourself. These addresses can be coordinated with the Elite Extra delivery solution plug-in.



Purchase Order

This section contains a list of the purchase order that you have placed with this vendor. You can begin a purchase order with the vendor right from this section by clicking the "Create Purchase Order" Button.

Contacts

If you use the "Contacts" module in Fuse5, then you can access and add a contact to the vendor record using the SELECT CONTACTS button. You will get a pop up and can select the appropriate contacts.