



**Training/User
Manual –
Vendors**

3.8



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Vendors

The *Vendor* page in the *Providers* Functional Area is used to record and continually maintain all information relevant to the suppliers of assets, tools, parts, contracted services, or any other purchased commodity. Vendors supply goods that are vital to daily operations controlled by maintenance.

When combined with the functions of the *Purchasing* area, vendor records are able to analyze, plan, and manage the equipment maintenance and inventory operations.

Every vendor is identified by a unique Vendor Code.

For new branches or divisions, if there is not an existing vendor database that can be converted to a Proteus MMX database, each vendor must be manually entered into *Vendors* or imported via the import template.

The fields listed in the Record Navigator are: Vendor Code, Vendor Name, Address 1, Address 2, City, State, Zip Code, Region, Country, Contact Phone, contact Email, and Web Page.

Vendor Code	Vendor Name	Address 1	Address 2	City
NZZ-Vendor -01	Watch Vendor	89	67	noida
CON-01	Zahid Cont	Sector 4	sector 5	NOida
VCDG-01	Zahid Chandigarh	Phase 1	Phase 2	Chandigarh
ZNN-Contractor -01	Contractor Gurgaon	sec-01	sce-3	noida
Ven-01	Florida Vendor-01			
Vendor-Oct 04	Name- Vendor-Oct 04			
SAV-01	South Vendor	Sector 26	Sector 27	Chandigarh
SAV-02	Africa Vendor			

Record Navigator (Vendors)

E-mail a Vendor

To send an E-mail to a Vendor:

1. Open *Vendors* from the *Providers* Functional Area.
2. Select a vendor.



4. Enter message.



Details

The Details Tab consists of basic vendor fields and information about the specific vendor. These fields are: Vendor Code, Vendor Name, Address 1, Address 2, City, State, Country, Zip Code, Lead Time, Web Page, Contact Phone, Contact Email, Alternate Contact Phone, Alternate Contact Email, and Region.

Note: The required fields are Vendor Code and Vendor Name. All other fields are optional. We recommend using the same Vendor Code that is used by the Purchasing Department.

Note: Leaving information fields blank will decrease Proteus MMX's effectiveness in building complete maintenance history records. Make sure all available information has been gathered prior to recording.

Vendor 30014091-010

Details Parts Assets Attachments Return Log

Vendor Code: 30014091-010

Vendor Name: GRAINGER

Address 1: 3640 INTERCHANGE RD

Address 2: N/A

City: COLUMBUS

State: OH

Country: UNITED STATES

Contact Phone: (61-4) 276-5231

Contact Email:

Alternate Contact Phone:

Alternate Contact Email:

Web Page: HTTPS://WWW.GRAINGER.COM/

Contact Name: CUSTOMER SERVICE

Alternate Contact Name:

Region: GREAT LAKES REGION

UserField 2:

UserField 3:

UserField 4:

UserField 5:

UserField 6:

UserField 7:

UserField 8:

UserField 9:

UserField 10:

Is Contractor:

Facility:

Notes: VENDOR

Details Tab

Parts

The Parts tab contains a list of all parts that have been purchased from this Vendor. The association of a part to a vendor is made in *Stockrooms*. This data is read-only and is used for references purposes only.

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mx

Home | Assets | Inventory | Associates | Providers | Purchasing | Reports | Service Requests | Work Orders | Company

Quick Links Providers - Vendors >> Vendor

Vendor 30014091-010

Details Parts Assets Attachments Return Log

Sort By Sort Order

Vendor Part Number	Part Number	Part Name
02-103L	02-103L	3 BUTTON ASSEMBLY FOR GARAGE DOORS
3BA63	110581	BULB
11Z161	11Z161	TAPE, FLOOR
120812	VYX9004153	SPROCKET, DRIVE
12D524	12D524	TAPE, FLOOR
12R236	12R236	SIGN, NO PARKING
15F754	15F754	TAPE, DOUBLE SIDED
33L957	17805660	FENCE, SAFETY
1A624	1A624	LINK, CONNECTING
1A704	1A704	FUSE
1E522	1E522	SLEEVE, BULB
1PEP4	1PEP4	ELBOW
1RCK4	1RCK4	HOOK
1VMA4	1VMA4	FITTING
1WRP2	1WRP2	MIRROR

Parts Tab

Assets

The Assets tab contains a list of all assets that have been or can be purchased from this Vendor. The association of an asset to a vendor is made in *Assets*. This data is read-only and is used for references purposes only.

Vendor 30001777-

Details Parts Assets Attachments Return Log

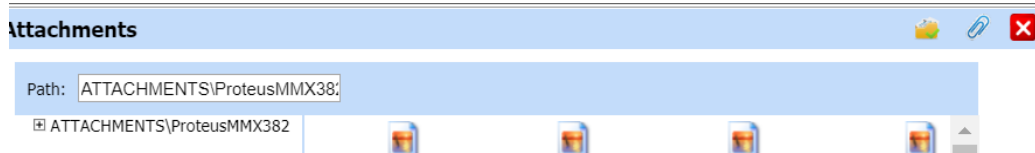
Sort By Sort Order

Asset Number	Asset Name
010-STRP-STRP-09	STRP-09


Assets Tab

Attachments

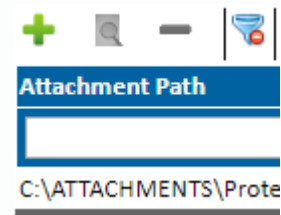
Attachments



If it is not in the current folder, you can select *choose file*, which allows you to search any drive/folder and add a file to the vendor attachments. Selecting the file to be attached, and then

select the upload icon.  The attachment will be uploaded to the vendor attachments, and appear in the attachments folder in the future. Any type of file can be attached to a vendor. It can be viewed as long as the person trying to view the attachment has the proper tool to view the file type on their specific device.

There is no limit to the number of attachments on a vendor. The remaining icons on the tab are view, delete, and associate with every vendor. These Icons will only be active if one or more attachments are selected.



Return Log

The Return Log tab contains a list of all parts that have been returned for this Vendor. The association of a return to a vendor is made in *Receiving Purchase Orders*. This data is read-only and is used for references purposes only.

Date Of Return	Part Number	Part Name	Quantity	Reason for Return
09/21/2018	IN1131664	BAR, GUIDING	0	
09/21/2018	10195532	CLEVIS	1	Eagle_Test
09/21/2018	IN3401636	CONNECTOR	0	
09/21/2018	IN3801663	SWITCH, PROXIMITY	0	
09/21/2018	IN1005775	CUP, SUCTION	0	
09/21/2018	IN5920137	FAN	0	
09/21/2018	SLO54068_01_000001	SWITCH RBC	0	
09/21/2018	IN5200458	LAMP, SIGNAL	0	
09/21/2018	10195624	CYLINDER	0	
09/21/2018	IN3701156	COUPLER	0	
09/21/2018	IN1003407	90 DEGREE AIR FITTING	0	
09/21/2018	IN5980503	CONNECTOR	0	
09/21/2018	SLO27474_01_000001	CLAMP, BELT	0	
09/21/2018	KIN1002034	PNEUMATIC PLUG IN CONNECTOR	0	
09/21/2018	IN1002036	ANGLE CONNECTOR	0	

Entering Vendor Data

To enter a new Vendor into the database, follow these steps:



2. Enter the Vendor Code with branch suffix, Vendor Name (make sure if it is used in other branches you use the same identical spelling of the vendor name- check with your DFM), and any other relevant information.

Note: Each Vendor Code must be unique and comes from SAP along with your branch identification suffix.

Note: You can select the *Is Contractor* icon on the Details screen if the vendor is also a contractor that services any of your assets. When you select this icon, the vendor will also be added to the Contractors module automatically. You will need to add a labor craft to the contractor record to add the contractor to a workorder.

3. Select the *Save* icon on the top right of the screen. (You can also select the *SaveAndContinue* icon on the top right of the screen if you wish to add another new Vendor at this time.)

Exercises

Add 3 records to the Vendor Master File using the examples below:

FMS01
Facility Maintenance and Supply
18950 W. Tudor Oaks Rd.
Atlanta, GA 30333 USA
www.fmas.com

Henry Kingston
Purchasing Manager
(311) 560-7198
FAX: (311) 560-7097
henryk@fmas.com

HVO01
HVAC Outfitters
5463 S. Emory Rd.
Milwaukee, WI 53207 USA
www.hvac.com

Jenny Schmidt
Sales Manager
(414) 481-6985
FAX: (414) 747-3500
jennys@hvac.com

PES01
Petroleum Specialties
11 Petrol Way
Houston, TX 77205 USA
www.petrospec.com

Grant Thompson
Account Specialist
(281) 233-8756
FAX: (281) 233-3000
grantt@petrospec.com

Contractor

Every contractor is identified by a unique Contractor Code.

The fields listed in the Record Navigator are: Contractor Code, Contractor Name, Address 1, Address 2, City, State, Zip Code, Region, Country, Contact Phone, contact Email, and Web Page.

Contractor Code	Contractor Name	Primary Contact	Address 1	Address 2
NZZ-Vendor -01	Watch Vendor	nazish	89	67
CON-01	Zahid Cont	8999797897	Sector 4	sector 5
VCDG-01	Zahid Chandigarh	Zahid Iqbal	Phase 1	Phase 2
ZNN-Contractor -01	Contractor Gurgaon	47852	sec-01	sce-3
vendor through	Contractor			
SAC-01	South Contractor			
SAC-02	Africa Contractor			
500-south korea	south korea			
FLD-Cont	Flordia Test			
SA-89	South Cont			
PNCON-01	Haryana Contractor	Contractor 1	Block C	Block C1
PNCON-02	Punjab Contractor	Contractor 2	Block D	Block D1
hh	55			
IN1001078	IN1001078			
123	riyaz			

Record Navigator (Contractor)

E-mail a Contractor

To send an E-mail to a Contractor:

1. Open Contractor from the *Providers* Functional Area.
2. Select a Contractor.



4. Enter message.



Details

The Details Tab consists of basic Contractor fields and information about the specific Contractor. These fields are: Contractor Code, Contractor Name, Address 1, Address 2, City, State, Country, Zip Code, Lead Time, Web Page, Contact Phone, Contact Email, Alternate Contact Phone, Alternate Contact Email, and Region.

Note: The required fields are Contractor Code and Contractor Name.

Contractor CON-01

Details | Labor Crafts | Work Orders | Attachments

Contractor Code: CON-01

Contractor Name: Zahid Cont

Address 1: Sector 4 | Address 2: sector 5 | Primary Contact: 8999797897

Country: Dubai | City: hapur | Region: North East

Postal Code: 6546454 | Contact Phone: +01 (02) 03- x04 | State: DEL

Alternate Contact Phone: +11 (22) 33- x44 | Alternate Contact Email: test@gmail.com | Contact Email: Info@gmail.com

UserField 1: | UserField 2: | Web Page: www.google.com

Details Tab

Labor Crafts

The Labor Crafts Tab consists of a location to add labor crafts to a contractor. Multiple labor crafts can be added to a single contractor.

Contractor CON-01

Details | Labor Crafts | Work Orders | Attachments

Sort By: | Sort Order: |

Labor Craft Code	Description	Negotiated Labor Craft Rate 1 Amount	Negotiated Labor Craft Rate 1 Currency	Negotiated Labor Craft Rate 2 Amount	Negotiated Labor Craft Rate 2 Currency	Negotiated Labor Craft Rate 3 Amount	Negotiated Labor Craft Rate 3 Currency	Negotiated Labor Craft Rate 4 Amount
Lab-01	Labor 01	5.00	USD	5.00	USD	5.00	USD	
Lab-02	Labor 02	50.00	USD	100.00	USD	150.00	USD	

Labor Craft Tab

To add a Labor Craft to a Contractor:

1. Open the Contractor page from the Providers Functional Area.
2. Under the Labor Crafts tab, select Labor Craft from the drop-down.
3. Give Negotiated Labor Craft Rate 1, Negotiated Labor Craft Rate 2, Negotiated Labor Craft Rate 3, Negotiated Labor Craft Rate 4, and Negotiated Labor Craft Rate 5.
4. Confirm your selection and select the Save icon.

The screenshot shows the Proteus MMS interface with the 'Providers - Contractors >> Contractor' page. A 'Labor Craft' modal window is open, displaying a list of labor craft codes and their descriptions. The modal includes a dropdown for 'Labor Craft' and five input fields for 'Negotiated Labor Craft Rate 1' through 'Negotiated Labor Craft Rate 5'. In the background, a table shows labor craft codes and their negotiated rates:

Labor Craft Code	Description	Craft	Negotiated Labor Craft Rate 3 Amount	Negotiated Labor Craft Rate 3 Currency
Lab-01	Labor 01		5.00	USD
Lab-02	Labor 02		150.00	USD

Work Orders

When a contractor is used on a work order, the information will be displayed in this tab. This data is read-only and is used for references purpose only.

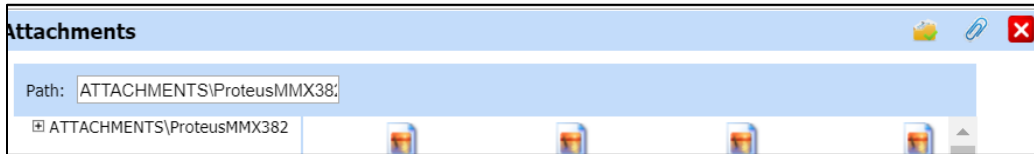
The fields listed on the Work Orders Tab are: Job Number, Work Order Number, Activation Date, From Date, and Required Date.


The screenshot shows the Proteus MMS interface with the 'Providers - Contractors >> Contractor' page. The 'Work Orders' tab is selected, displaying a table of work orders for contractor 'ZNN-Contractor -01'. The table has columns for Job Number, Work Order Number, From Date, Activation Date, and Required Date. The data shown is:

Job Number	Work Order Number	From Date	Activation Date	Required Date
	20190225001		02/25/2019	03/25/2019

Attachments

Attachments



If it is not in the current folder, you can select *choose file*, which allows you to search any drive/folder and add a file to the contractor attachments. Selecting the file to be attached, and then select the upload icon.  The attachment will be uploaded to the contractor attachments, and appear in the attachments folder in the future. Any type of file can be attached to a contractor.

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