proteus
mmx

Training/User Manual – Vendors

3.8

eagle
TECHNOLOGY

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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.

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.

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.

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.


Assets Tab
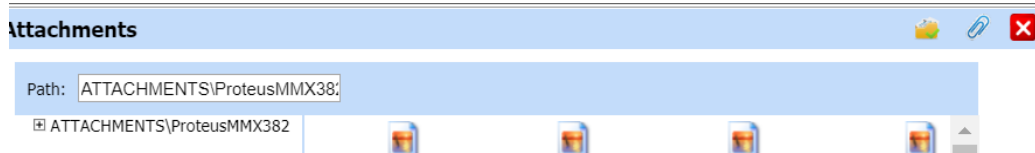
Attachments

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.
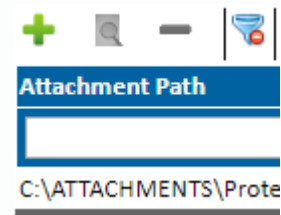
Return Log

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.

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	Henry Kingston
Facility Maintenance and Supply	Purchasing Manager
18950 W. Tudor Oaks Rd.	(311) 560-7198
Atlanta, GA 30333 USA	FAX: (311) 560-7097
www.fmas.com	henryk@fmas.com

HVO01	Jenny Schmidt
HVAC Outfitters	Sales Manager
5463 S. Emory Rd.	(414) 481-6985
Milwaukee, WI 53207 USA	FAX: (414) 747-3500
www.hvac.com	jennys@hvac.com

PES01	Grant Thompson
Petroleum Specialties	Account Specialist
11 Petrol Way	(281) 233-8756
Houston, TX 77205 USA	FAX: (281) 233-3000
www.petrolspec.com	grantt@petrolspec.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.

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.

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.

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.

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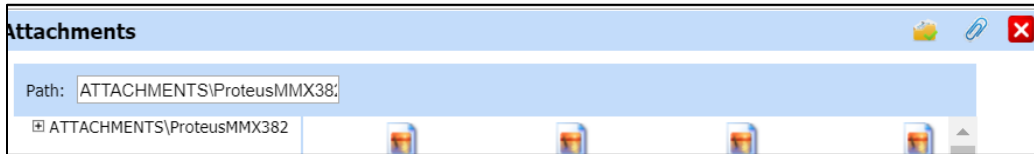
The fields listed on the Work Orders Tab are: Job Number, Work Order Number, Activation Date, From Date, and Required Date.

Attachments

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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.

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 contractor. The remaining icons on the tab are view, delete, and associate with every contractor. These Icons will only be active if one or more attachments are selected.