

# SMART F/IT

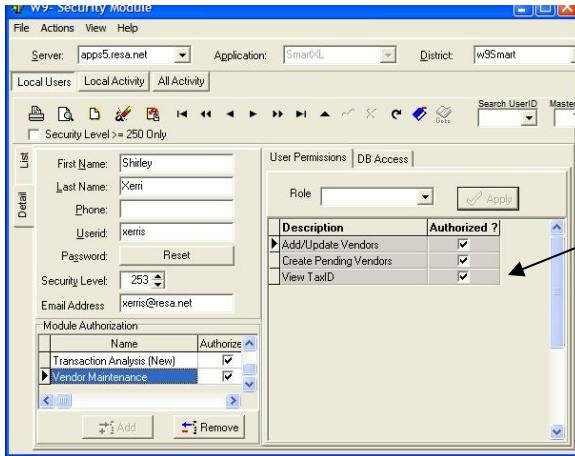
## Vendor Maintenance

Simplified  
Management  
Analysis  
&  
Reporting Tool

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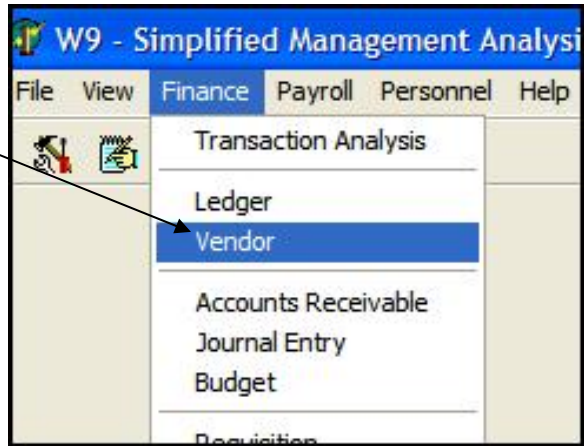
# Security for Vendoring



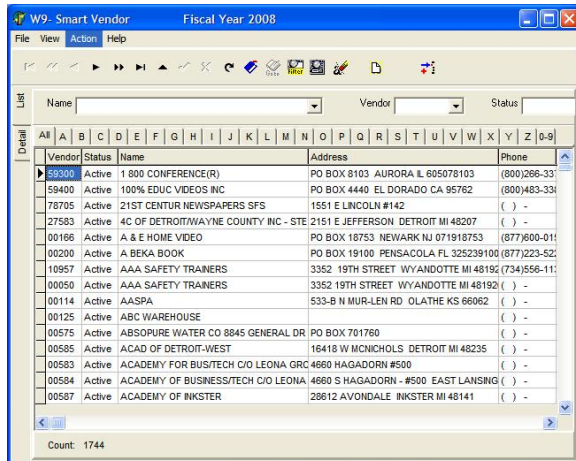
Security for Vendoring is done in the security module. Assign User permissions.

# Opening the Vendor Maintenance Module

From the Menu Select Finance, and Vendor



A list of all vendors is displayed. Click on any column heading to sort.



# Navigating the module

## Navigator

Move to First Record Add New Address

Move back 10 records

Prior Record

Next Record

Forward 10 records

Last Record

Edit Record

Go to Bookmark  
Bookmark

Locate Record  
Filter Data

Create New Vendor

Erase



## Quick Search

Name  Vendor  Status

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0-9

Name michigan Vendor  Status

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0-9

Vendor	Name	Address	Status	TaxID	TaxIDType	Web Address
04762	MICHIGAN ASSO OF STATE AN	24403 CROWLEY TAYLOR MI 48180	Active	000000000		
04886	MICHIGAN HOSA		Active	000000000		
04897	MICHIGAN MEMORIAL		Active	000000000		
04909	MICHIGAN NORTH CENTRAL AS	950 VICTORS WAY SUI ANN ARBOR	Active	000000000		
04950	MICHIGAN SCHOOL BUSINESS	11001 CENTENNIAL WAY LANSING MI	Active	000000000		
04949	MICHIGAN SCHOOLS BAND/OR		Active	000000000		
04970	MICHIGAN STATE UNIVER		Active	000000000		

Count: 7

**Select by any Alpha Tab or Number**

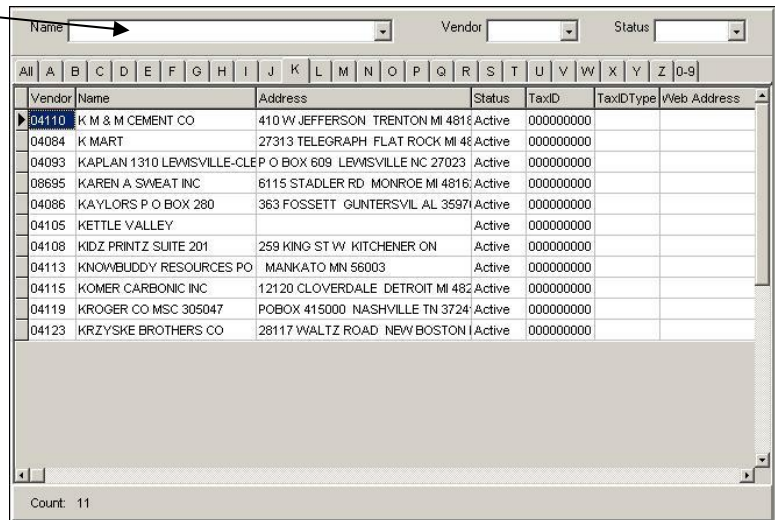
Click on a tab that has a **Letter** of the Alphabet to see only Vendors starting with that letter. Click on the number tab to see Vendor names starting with a number.

Click **All** or use the eraser to see all Vendors.

## Search by Name

Type in part or all of vendor **NAME** and press **ENTER** to narrow the selection. To see all vendors click the **ALL** button or the **ERASER** and all vendors will be shown.

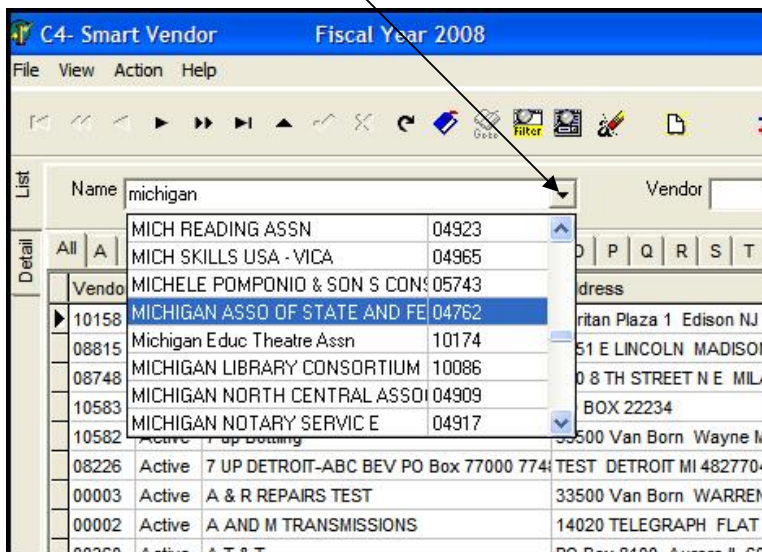
*Use an \* for a wild card search, such as \*MICHIGAN will find any vendor that has Michigan anywhere in the name or address.*



Vendor	Name	Address	Status	TaxID	TaxIDType	Web Address
04110	K M & M CEMENT CO	410 W JEFFERSON TRENTON MI 4816	Active	000000000		
04084	K MART	27313 TELEGRAPH FLAT ROCK MI 46	Active	000000000		
04093	KAPLAN 1310 LEWISVILLE-CLEP	O BOX 609 LEWISVILLE NC 27023	Active	000000000		
08695	KAREN A SWEAT INC	6115 STADLER RD MONROE MI 4816	Active	000000000		
04086	KAYLORS P O BOX 280	363 FOSSETT GUNTERSUIL AL 35971	Active	000000000		
04105	KETTLE VALLEY		Active	000000000		
04108	KIDZ PRINTZ SUITE 201	259 KING ST W KITCHENER ON	Active	000000000		
04113	KNOWBUDDY RESOURCES PO	MANKATO MN 56003	Active	000000000		
04115	KOMER CARBONIC INC	12120 CLOVERDALE DETROIT MI 482	Active	000000000		
04119	KROGER CO MSC 305047	POBOX 415000 NASHVILLE TN 3724	Active	000000000		
04123	KRZYSKY BROTHERS CO	28117 WALTZ ROAD NEW BOSTON I	Active	000000000		

## Scroll when Selecting

Pull down the arrow before typing to scroll down the vendor list when searching.



Vendor	Name	Address	Status	TaxID	TaxIDType	Web Address
	MICH READING ASSN			04923		
	MICH SKILLS USA - VICA			04965		
	MICHELE POMPONIO & SON S CON			05743		
10158	MICHIGAN ASSO OF STATE AND FE			04762		
08815	Michigan Educ Theatre Assn			10174		
08748	MICHIGAN LIBRARY CONSORTIUM			10086		
10583	MICHIGAN NORTH CENTRAL ASSO			04909		
10582	MICHIGAN NOTARY SERVIC E			04917		
08226	7 UP DETROIT-ABC BEV PO Box 77000	774	TEST	DETROIT MI 4827704		
00003	A & R REPAIRS TEST			33500	Van Born	WARREN
00002	A AND M TRANSMISSIONS			14020	TELEGRAPH	FLAT P
00260	A T & T			PO Box 8100	Aurora	IL 601

## Select by Vendor Number

Type in the Vendor Number or use the pull down arrow to select the vendor

The screenshot shows a software interface for selecting a vendor. At the top, there are three input fields: 'Name', 'Vendor', and 'Status'. The 'Vendor' field contains the number '00021'. Below these fields is a grid of letters (A-Z) for filtering. Below the grid is a table of vendor information. A dropdown menu is open from the 'Vendor' field, showing a list of vendor numbers and names. The entry '00021 ABOLINS' is highlighted in blue. An arrow points from the text above to the dropdown arrow.

Vendor	Name	Address	Status
00021	ABOLINS	2811 S 12TH ST TACOMA WA 98405 Ac	

00000	VOID CHECK
00003	A & R REPAIRS
00010	A & R BAKERS KNEADS
00018	ABDO PUBLISHING CO
00019	ABSOLUTE FILTER
00020	ABC SCHOOL SUPPLY P O BOX 10142
00021	ABOLINS
00022	ABSOLUTE QUALITY INC

## Select by Status

Status allows selection of vendors by status code: active, inactive, deleted, or pending vendors.

The screenshot shows the same software interface as above, but with the 'Status' dropdown menu open. The dropdown shows a list of status options with corresponding counts: 'Not Specified' (0), 'Active' (1), 'Inactive' (2), 'Deleted' (3), and 'Pending' (4). An arrow points from the text above to the dropdown arrow.

Vendor	Name	Address	Status	TaxID	TaxIDType
MSC21	2003 GOVERNOR'S CONF		Active	000000000	
08748	3-M SERVICE PARTS CENTER	560 8 TH STREET N E MILACA MN 56	Active	888888888	
00010	A & R BAKERS KNEADS		Active	000000000	

Not Specified	0
Active	1
Inactive	2
Deleted	3
Pending	4

Active – Active vendor

Inactive – Vendor inactivated

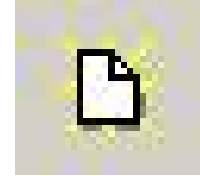
Deleted – Do not use this Vendor

Pending – New Vendor not made Active yet

# Vendor Adds and Changes

## Adding a Vendor

If the vendor is not in the list add a new vendor by clicking on the Create New Vendor Icon.



Notice the address default for a new vendor is a remit or pay address. The first address defaults to a remit address. Each Vendor must have one remit address. If there is more than one address then the remit address may be changed.

The screenshot shows the Vendor form with the following details:

- Vendor No: 10002
- Status: Pending
- Tax ID: (empty)
- Name: UNSPECIFIED
- Address: (empty)
- Country: United States of America
- Phone: ( ) - ( ) - ( ) - ( )
- Fax: ( ) - ( ) - ( ) - ( )
- E-Mail: (empty)
- Web page: (empty)
- Print to this address:

Fill in all the information for this vendor.

The screenshot shows the Vendor form with the following details:

- Vendor No: 10008
- Status: Pending
- Tax ID: (empty)
- Name: Wayne Book Nook
- Education Department: Education Department
- Address: 33500 Van Born
- Wayne MI 48184
- Country: United States of America
- Phone: (734)334-1300
- Fax: ( ) - ( ) - ( ) - ( )
- E-Mail: (empty)
- Web page: (empty)
- Print to this address:

## Changing the Vendor Number

The vendor number may be changed to match sorting by vendor number before making a vendor active.

## Make Pending Vendor ACTIVE

The vendor is a pending vendor and must be made active. Pull down the status and change to **Active**

The screenshot shows the 'Vendor' detail form for Vendor No. 10005. The status is currently 'Pending'. A dropdown menu is open, showing options: Not Specified (0), Active (1), Inactive (2), Deleted (3), and Pending (4). The 'Active' option is highlighted. The form includes fields for Name (Wayne School Supplies), Address (35920 Van Born, Wayne MI 48184), and Contact Information (Phone: [734]334-9999).

The screenshot shows the 'Vendor' detail form for Vendor No. 10005. The status is now 'Active'. A 'Smart Maintenance' dialog box is open, displaying 'File Transferred.' and an 'OK' button. The form fields for Name, Address, and Contact Information are visible.

The message will appear **File Transferred and Status is Active**

The screenshot shows the 'Vendor' list view. The vendor 'Wayne School Supplies' (Vendor No. 10005) is listed with a status of 'Active'. The list view includes columns for Vendor Name, Address, Status, TaxID, and Web Address.

Vendor Name	Address	Status	TaxID	TaxIDType	Web Address
10000 Wayne Block Nook Education De 33500 Van Born Wayne MI 48184		Pending			
09160 WAYNE CO ASSOC OF SCHOC33500 VAN BORN RD WAYNE MI 481		Active	000000000		
09170 WAYNE CO HEALTH DEPT FINA33000 VAN BORN RD TAYLOR MI 48		Active	000000000		
09182 WAYNE CO TREASURER 400 MONROE DETROIT MI 482262942		Active	000000000		
09100 WAYNE COUNTY & WASHSTEN 24875 VAN HORN ROAD BROWNST		Active	000000000		
09105 WAYNE COUNTY SCHOOL BUS		Active	000000000		
09180 WAYNE COUNTY STATE AND F24875 VAN HORN BROWNSTOWN MI		Active	000000000		
09103 WAYNE INDUSTRIES PO DRAW CLANTON AL 350462100		Active	000000000		
10005 Wayne School Supplies 35920 Van Born Wayne MI 48184		Active			

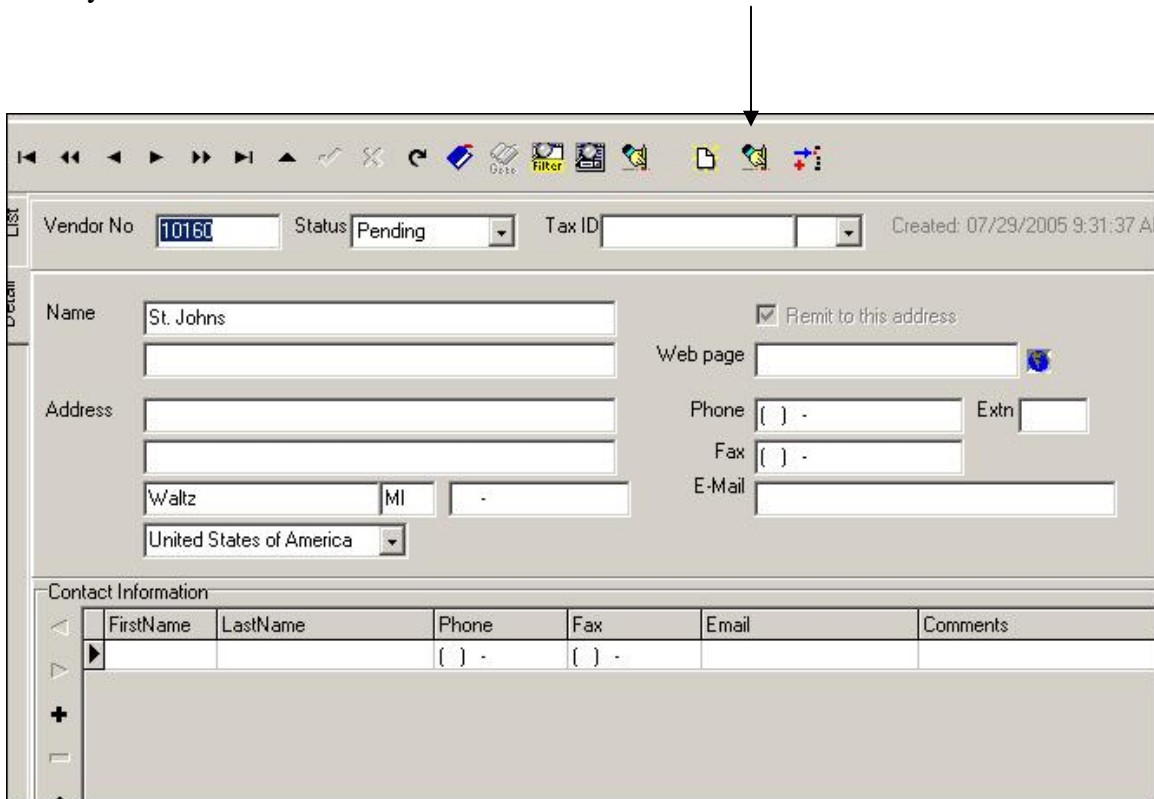
The vendor appears on the list view as active

## List of Pending Vendors

From the List screen, use the filter to select all of the Pending vendors that need to be activated or deleted. Change Pending to Active or on the detail screen, use the Delete Vendor Button.

## Deleting a Pending Vendor

To Delete Pending Vendors Press the Delete Vendor Button. Do not change the status from Pending to Delete because the vendor will stay on the system for two years and no activity on the vendor.

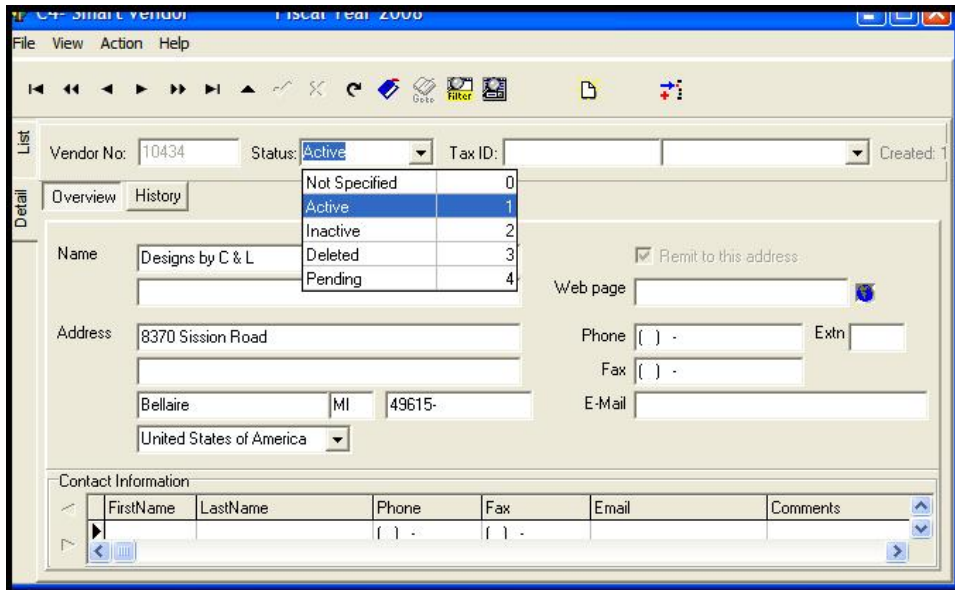


The screenshot shows a software interface for managing vendors. At the top, there is a toolbar with various icons, including a 'Filter' icon. Below the toolbar, the 'Vendor No' is 10160, 'Status' is Pending, and 'Tax ID' is empty. The 'Created' date is 07/29/2005 9:31:37 AM. The vendor's name is 'St. Johns'. The address is 'Waltz, MI, United States of America'. The phone and fax numbers are empty. The 'Remit to this address' checkbox is checked. At the bottom, there is a 'Contact Information' table with columns for FirstName, LastName, Phone, Fax, Email, and Comments. The 'Delete Vendor' button is highlighted by a black arrow pointing to it from the text above.

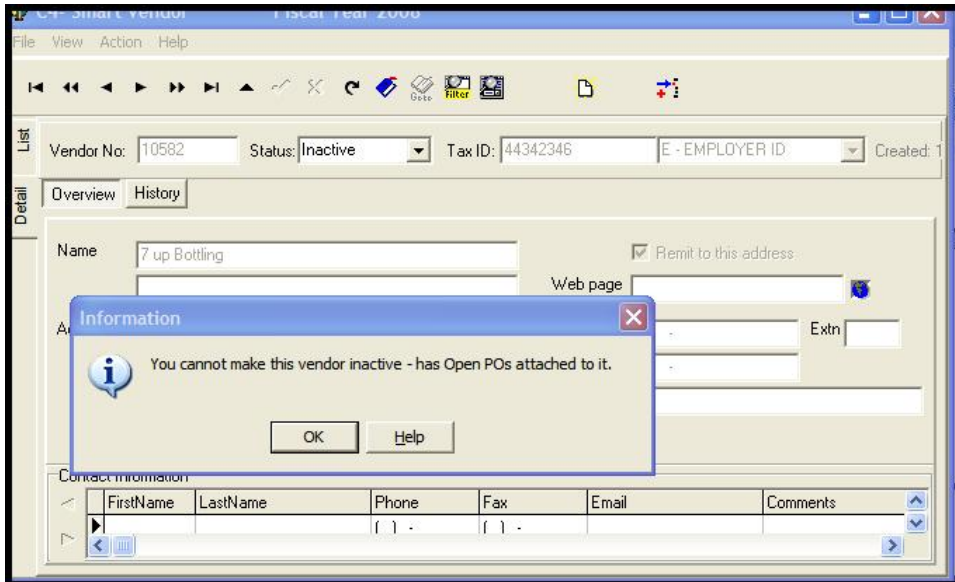
FirstName	LastName	Phone	Fax	Email	Comments
		( ) -	( ) -		

## Inactivating Vendors

To Inactive a vendor, on the detail screen, pull down the Status and change to Inactive.



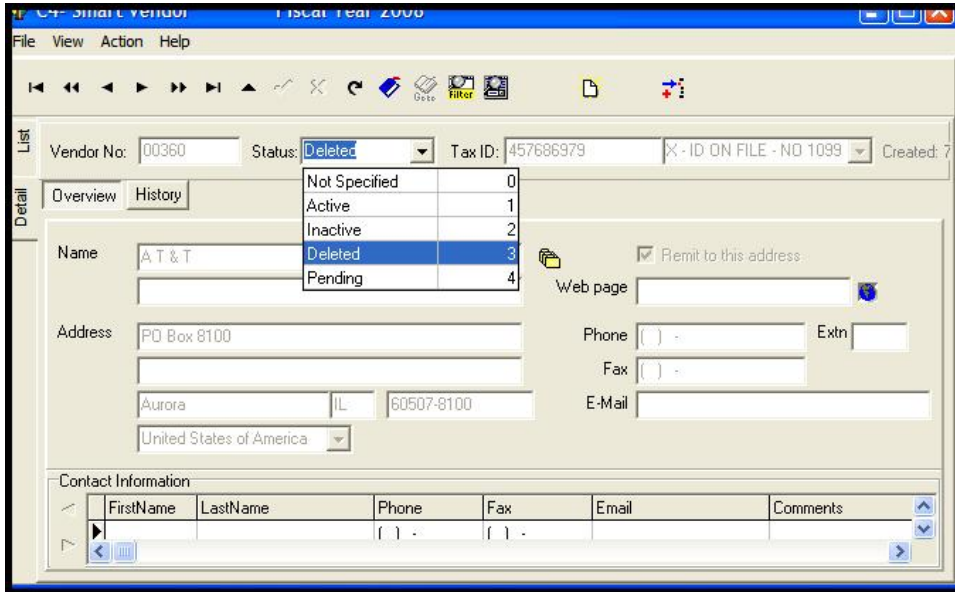
Changes may not be made to a vendor that is inactive. It must be Active to make changes.



Vendors may not be inactive if there is activity against that vendor.

# Deleting Vendors

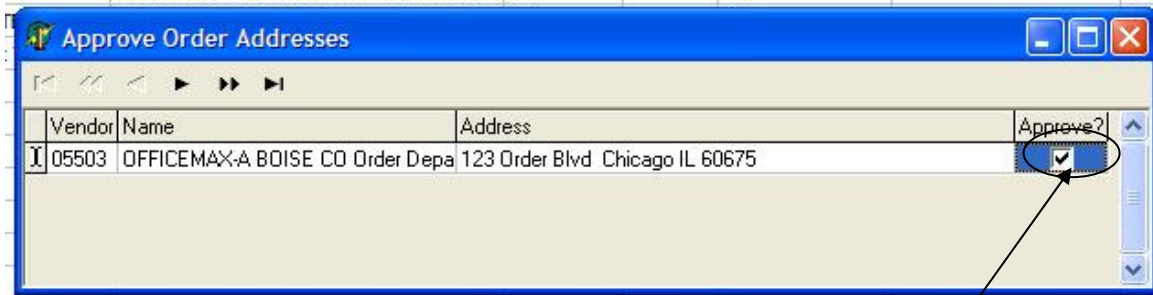
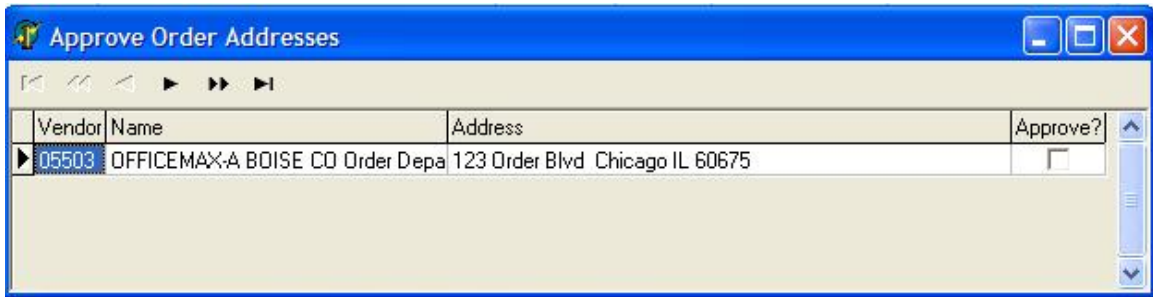
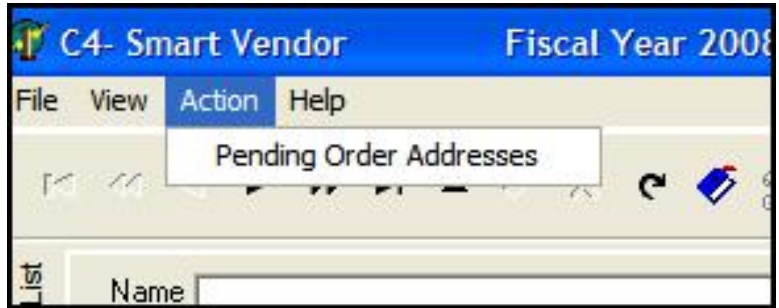
Vendors may be marked for delete if there no activity for the current or prior year.



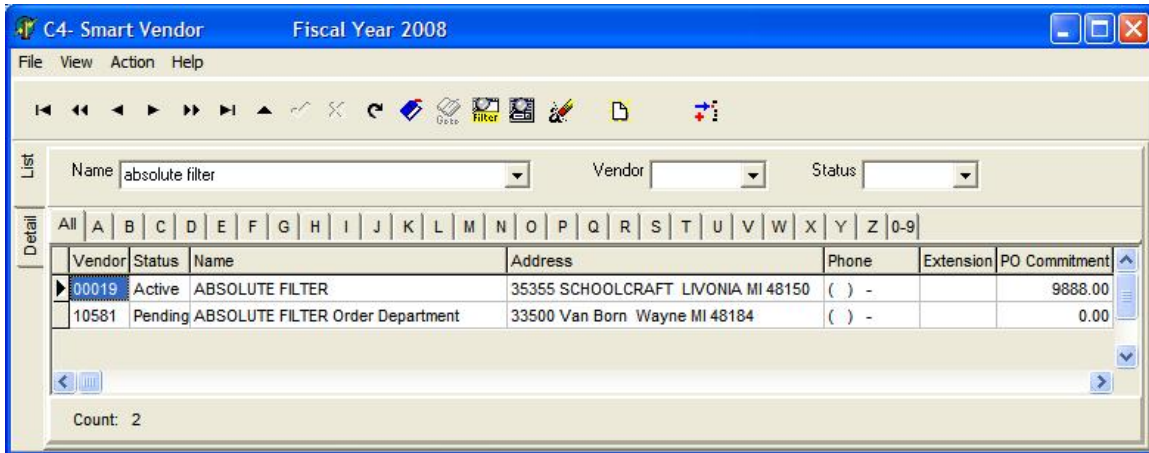
# Order Addresses

## *Adding Pending Order Addresses*

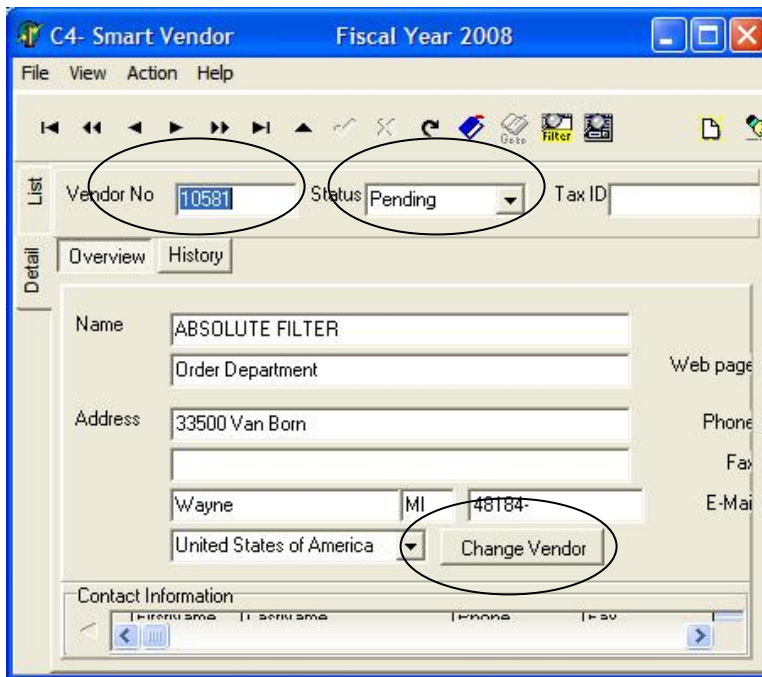
Pending order addresses may be added from the vendor module.

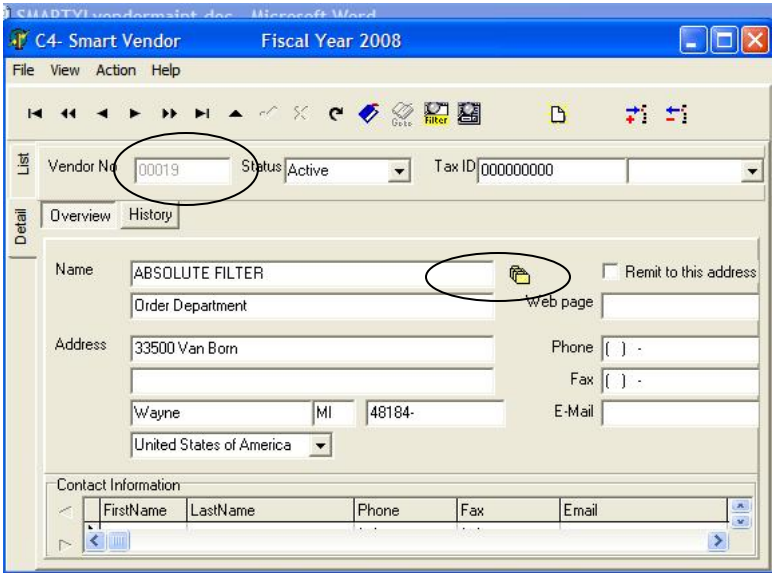
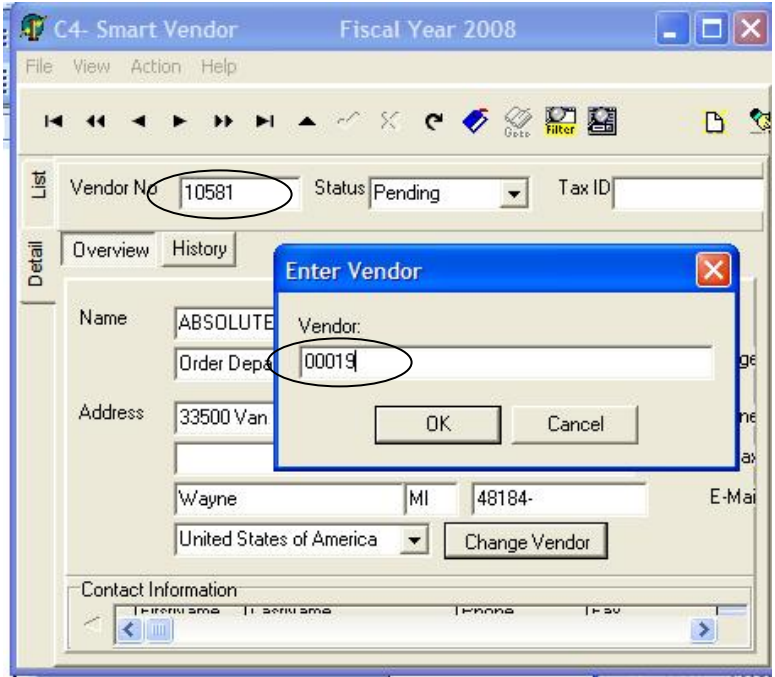


## Changing pending vendor to order address of existing vendor



Pending vendors added thru the requisition system, could be order address of existing vendors. This can be changed to an order address for an existing vendor by pressing the **Change Vendor Button**.

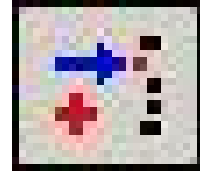




This is added as an order address, not a remit address.

## Adding additional addresses

After making a vendor Active, add another address by clicking on the **Add New Address** button



A new Screen appears to put in the address. Fill in the information for the next address and add other addresses and vendor names associated with this vendor. Many times a vendor may have more than one address to order from, and sometimes this secondary company has a different Vendor Name.

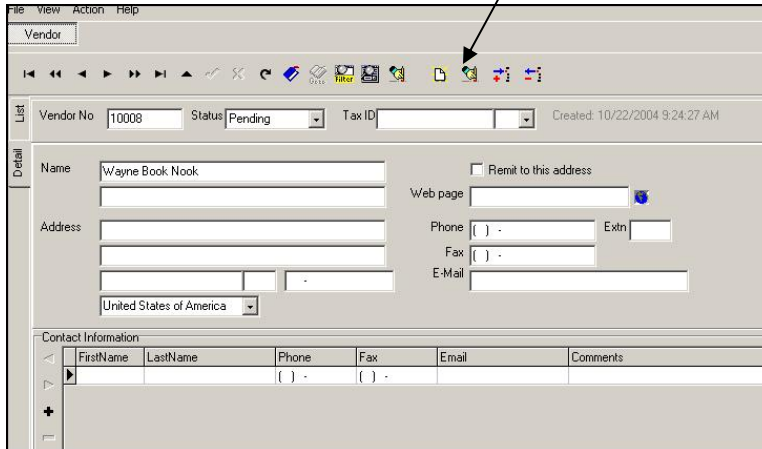
When more than one address is associated with a vendor there will be an envelope icon next to the Vendor Name. View all addresses by clicking on the envelope. Double click on the address to change or delete.

The screenshot shows a software interface for managing vendors. The main window displays the details for a vendor named 'Wayne School Supplies' with Vendor No 10005 and Status Pending. The address is 35920 Van Born, Wayne, MI 48184. A checkbox 'Remit to this address' is checked. A list of addresses is shown below, with an envelope icon next to the vendor name. An 'All Locations' dialog box is open, showing the following data:

FullName	Remit	Address
Wayne School Supplies	<input checked="" type="checkbox"/>	35920 Van Born Wayne MI 48184
Wayne School Supplies	<input type="checkbox"/>	PO BOX 1356 Wayne MI 48184

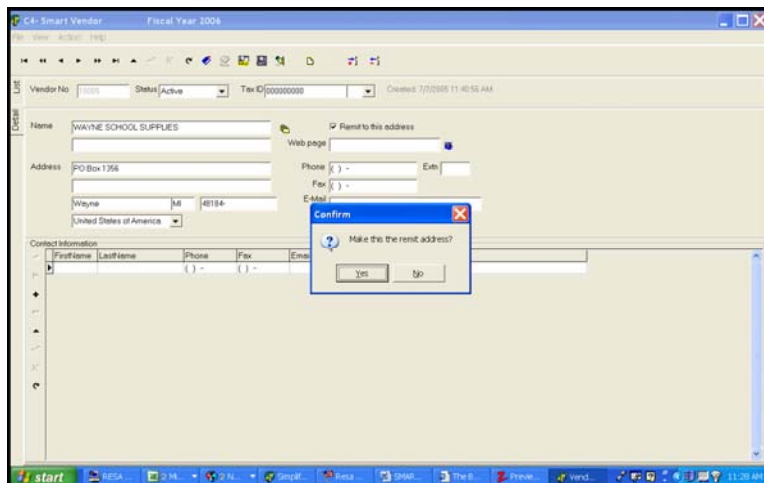
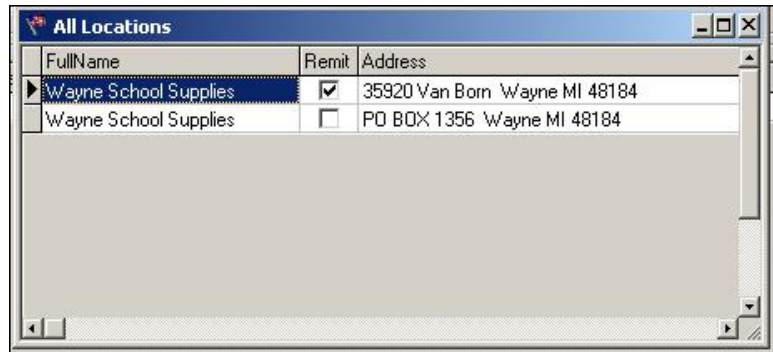
## Deleting Addresses

After adding more than one address a **Delete Address** button will also appear and may be used to delete addresses.



## Changing remit address

There must always be one remit address. If there is more than one address the remit address may be changed by clicking the multiple address book icon and selecting the correct remit address. Put a check in the remit to address and a message will appear. Choose **YES**.



# Tips

## Vendor Field size

Wise vs. SMART

### Vendor Field Sizes WISE

### Vendor Field Sizes SMART

<i>Vendor Number</i>	<i>Vendor Number</i>
1. 5 byte alphanumeric field	1. 5 byte alphanumeric field
<i>Order Vendor (Name 1)</i>	<i>Order Vendor (Name 1)</i>
1. 22 byte alphanumeric field	1. 50 byte alphanumeric field
<i>Order Vendor (Name 2)</i>	<i>Order Vendor (Name 2)</i>
1. 21 byte alphanumeric field	1. 50 byte alphanumeric field
<i>Address (Address 1)</i>	<i>Address</i>
1. 20 byte alphanumeric field	1. 50 byte alphanumeric field
<i>Address (Address 2)</i>	<i>Address</i>
NOT AVAILABLE	Not Currently Available
<i>City</i>	<i>City</i>
1. 10 byte alphanumeric field	1. 30 byte alphanumeric field
<i>State</i>	<i>State</i>
1. 2 byte alphanumeric field	1. 2 byte alphanumeric field
<i>Zip</i>	<i>Zip</i>
1. 9 byte numeric field, divided 5-4	1. 9 byte numeric field, divided 5-4
<i>Attention (Vendor Contact)</i>	<i>Attention (Vendor Contact)</i>
1. 25 byte alphanumeric field	1. 25 byte alphanumeric field

## Canadian zip code

The screenshot shows the 'C4 - Smart Vendor' application window for 'Fiscal Year 2007'. The 'List' section shows 'Vendor No' 10358 and 'Status' Active. The 'Detail' section shows the following information:

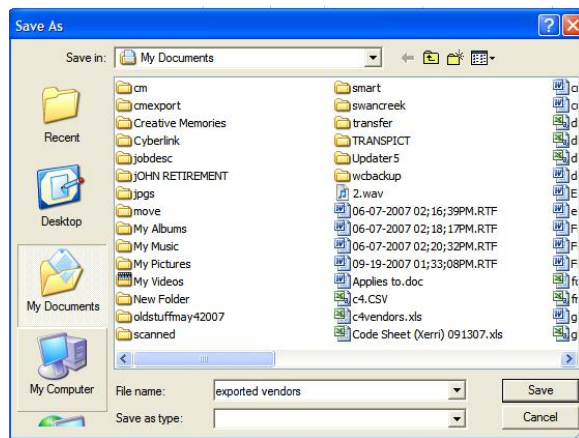
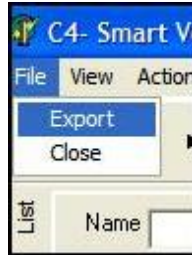
- Name: HOTEL ONTARIO
- Address: 430 Duelle Ave
- City: Windsor
- State: ON
- Zip: N9A 1B2
- Country: Canada (dropdown menu is open showing 'United States of America' and 'Canada')

The 'Contact Info' section is partially visible at the bottom, showing columns for 'FirstName', 'LastName', 'Phone', and 'Fax'.

# Vendor Reports

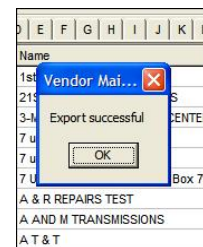
## Exporting Vendor File

Select File Export to Export to Excel



Save the file

This will take a few minutes. Wait for the messages, Export successful. Open the file in Excel.



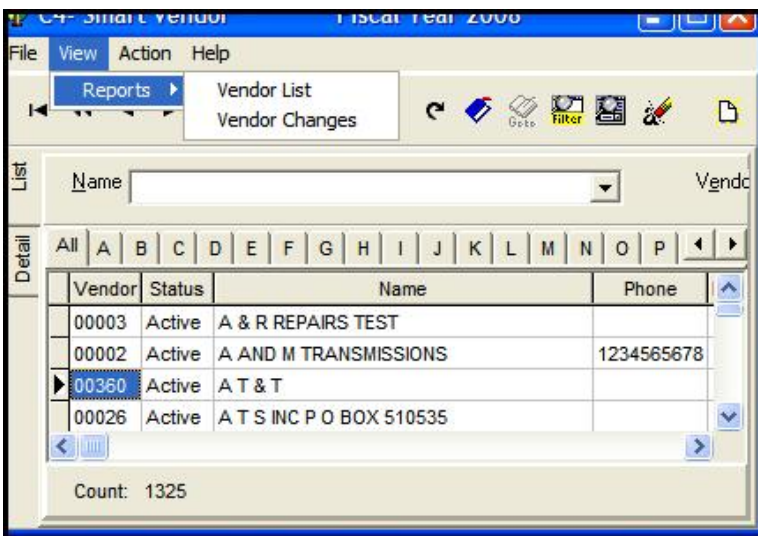
## Vendor List



**All** will list pay/remit address and order addresses.

04520	PAY	MACUL	
04525	PAY	MADONNA UNIVERSITY	
04531	ORDER	THE MAILBOX	
04531	ORDER	THE MAILBOX P O BOX 8341	Red Oak IA 515913341
04531	PAY	THE MAILBOX P O Box 8341	1607 BATTLEGROUND AV GREENSBORO NC 27429
04542	PAY	MALECKI MUSIC P O BOX 150	GR RAPIDS MI 495010150

## Vendor Tracking Report



Choose View Reports,  
Vendor Changes

Report 1 - rVendor-16200-History

1 of 57 Total:1431 100% 1431 of 1431

5/9/2008 10:35:19AM

### Vendor Tracking Report

Page 1 of 57

Vendor	Name1	Name2	Address	City	State	Zip	Tax ID	Status	Change Date	Username
	Xmas Tree Sales Rebates							Deleted	01/29/2008	Shirley Xerri
	Xmas Tree Sales Rebates							Active	08/21/2007	Shirley Xerri
00000	VOID CHECK						000-00-0000	Active	07/27/2007	
00000	VOID CHECK							Active	07/27/2007	
00002	A AND M TRANSMISSIONS		14020 TELEGRAPH	FLAT ROCK	MI	48134	38-3388279 E	Active	07/27/2007	
00003	Order Address 2						223-33-4445 X	Active	04/28/2008	Shirley Xerri
00003	A & R REPAIRS TEST		33500 Van Bom	WARREN	MI	48091-3899	223-33-4445 X	Active	04/28/2008	Shirley Xerri
00003	Order Address 2						223-33-4445 X	Active	04/21/2008	Shirley Xerri
00003	A & R REPAIRS TEST		33500 Van Bom	WARREN	MI	48091-3899	223-33-4445 X	Active	04/21/2008	Shirley Xerri
00003	A & R REPAIRS TEST		33500 Van Bom	WARREN	MI	48091-3899	223-33-4445 X	Active	08/29/2007	Shirley Xerri
00003	Order Address 2						223-33-4445 X	Active	08/29/2007	Shirley Xerri
00003	A & R REPAIRS TEST		33500 Van Bom	WARREN	MI	48091-3899	223-33-4445 X	Active	08/29/2007	Shirley Xerri
00003	A & R REPAIRS TEST		5510 E TEN MILE ROAD	WARREN	MI	48091-3899	111-22-2333 S	Active	08/21/2007	Shirley Xerri
00003	A & R REPAIRS TEST		5510 E TEN MILE ROAD	WARREN	MI	48091-3899	223-33-4445 X	Active	08/21/2007	Shirley Xerri
00003	A & R REPAIRS TEST		5510 E TEN MILE ROAD	WARREN	MI	48091-3899		Active	08/13/2007	Sudha Addepalli
00003	A & R REPAIRS TEST		5510 E TEN MILE ROAD	WARREN	MI	48091-3899	324-44-5586 S	Active	07/27/2007	
00003	A & R REPAIRS TEST		5510 E TEN MILE ROAD	WARREN	MI	48091-3899	324-44-5586 S	Active	07/19/2007	Sudha Addepalli

Tracking can be done by date or person.

Vendor History Report

Date Range

From 5/9/2008 To

By Use

May, 2008

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

lose

Vendor History Report

Date Range

From To

By User:

JANN STAHR

Shirley Xerri

Smart Master

Karen Keliher