



## Suppliers & Subcontractors

This section describes how suppliers and subcontractors are managed in the Subcontractor module in ProjectVIEW

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## 1 Introduction

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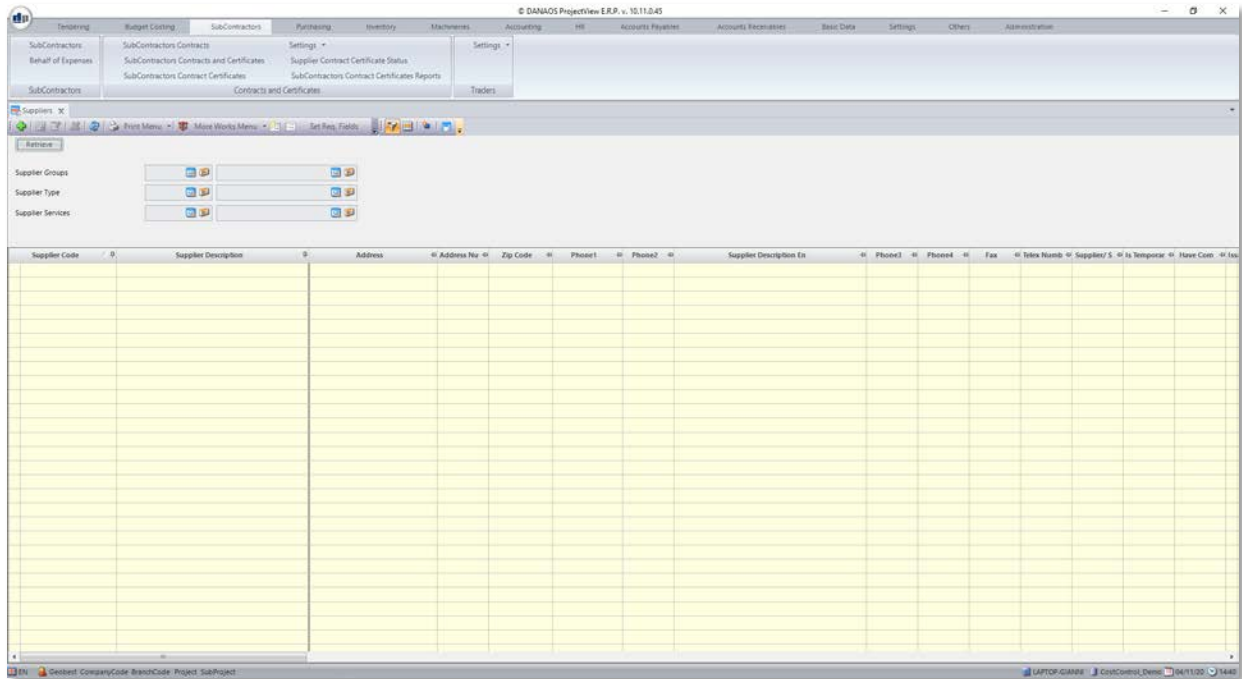
ProjectVIEW is an ERP that recognizes the importance of suppliers and subcontractors. It has therefore two modules dealing with them. The first one is the Subcontractors module, while the second one is Accounts Payables module.

ProjectVIEW treats suppliers and subcontractors in a similar manner. Therefore, for the purposes of this manual, they will both be referred to as “*Vendors*”. Whenever a field or functionality has been designed to specifically target suppliers or vendors, it will be mentioned.

## 2 Vendors

To view a list of the vendors, the user must navigate to:

*“SubContractors” > “SubContractors” > “SubContractors”*



Clicking on the *“Retrieve”* button will populate the grid with all the items matching the parameters (if any parameters are set).

Editing or creating a new vendor will display the vendor form.

## 2.1 Vendor Form

As mentioned in the introduction, vendors in ProjectVIEW can suppliers, subcontractors or both. The following section explains how to create or edit a vendor.

### 2.1.1 Basic Data

This tab contains the vendor's basic information.

The screenshot shows the 'SubContractors' form in ProjectVIEW ERP. The 'Basic Data' tab is active, displaying the following fields and sections:

- Basic Data:**
  - Supplier Code: 00001
  - Supplier Description: Data Entry
  - Supplier Description En: Data Entry
  - Supplier Type Code: [Dropdown]
- Parameters:**
  - Supplier/SubContractor: Supplier
  - Supplier Status: 1
  - Po Box: [Field]
  - Discount Percent: 0.00%
  - Supplier Group Code: [Field]
  - Number Of Days: 0
  - Payment Way Flag: Have Commitment
  - Supplier Code From Ext ERP: Issue Credit Invoice
  - Currency Code: [Field]
  - Payment Terms: [Field]
- Address Data:**
  - Address: [Field]
  - Area Code: [Field]
  - City Code: [Field]
  - State Code: [Field]
  - Country Code: [Field]
  - City Name: [Field]
  - Zip Code: [Field]
  - Phone1: [Field]
  - Phone2: [Field]
  - Phone3: [Field]
  - Phone4: [Field]
  - Fax: [Field]

The mandatory fields are:

- ✓ Supplier Code
- ✓ Supplier Description
- ✓ Supplier/Subcontractor

The rest of the fields are optional but it is recommended that, in order for the Purchasing module to work efficiently, that a "Supplier Type Code" be also provided.

## 2.1.2 More Data

This tab contains additional supplier information.

All fields are optional. However, the following are mandatory if the e-Procurement system is to be used in the Purchasing module:

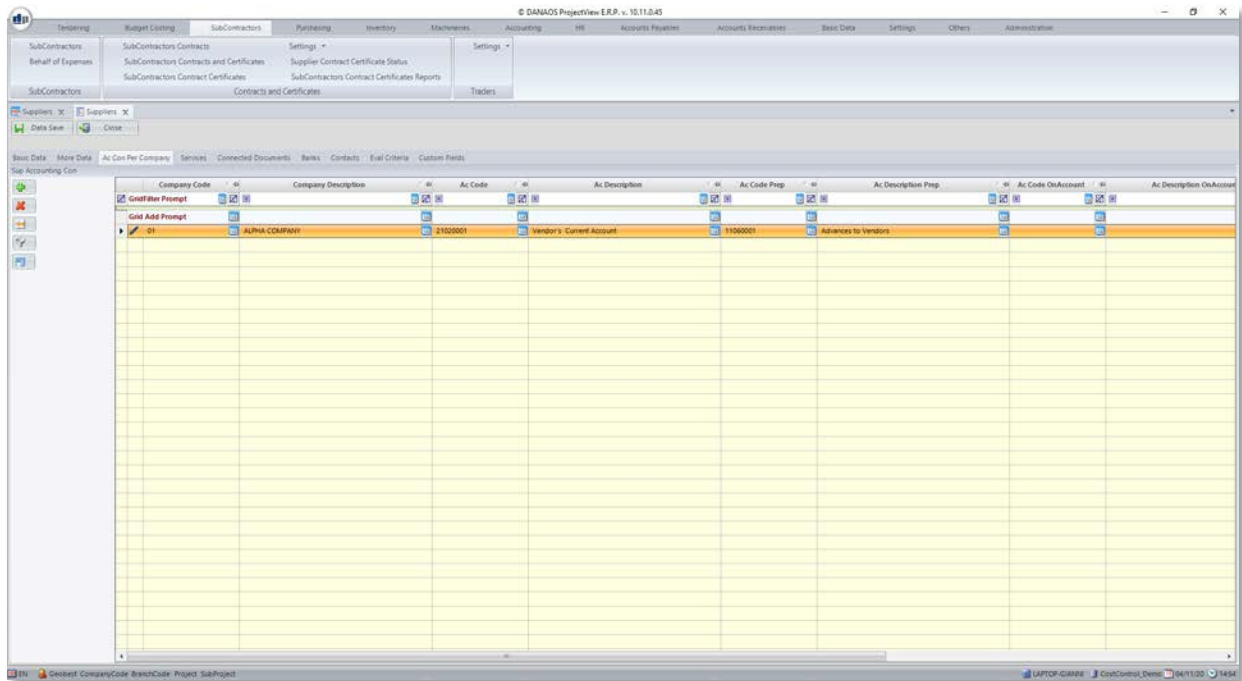
- ✓ VAT Number
- ✓ VAT Registration Number
- ✓ Email

Furthermore, the following are recommended for the Accounting and Accounts Payables modules to work efficiently:

- ✓ Ac Code
- ✓ Bank Code
- ✓ Bank Account

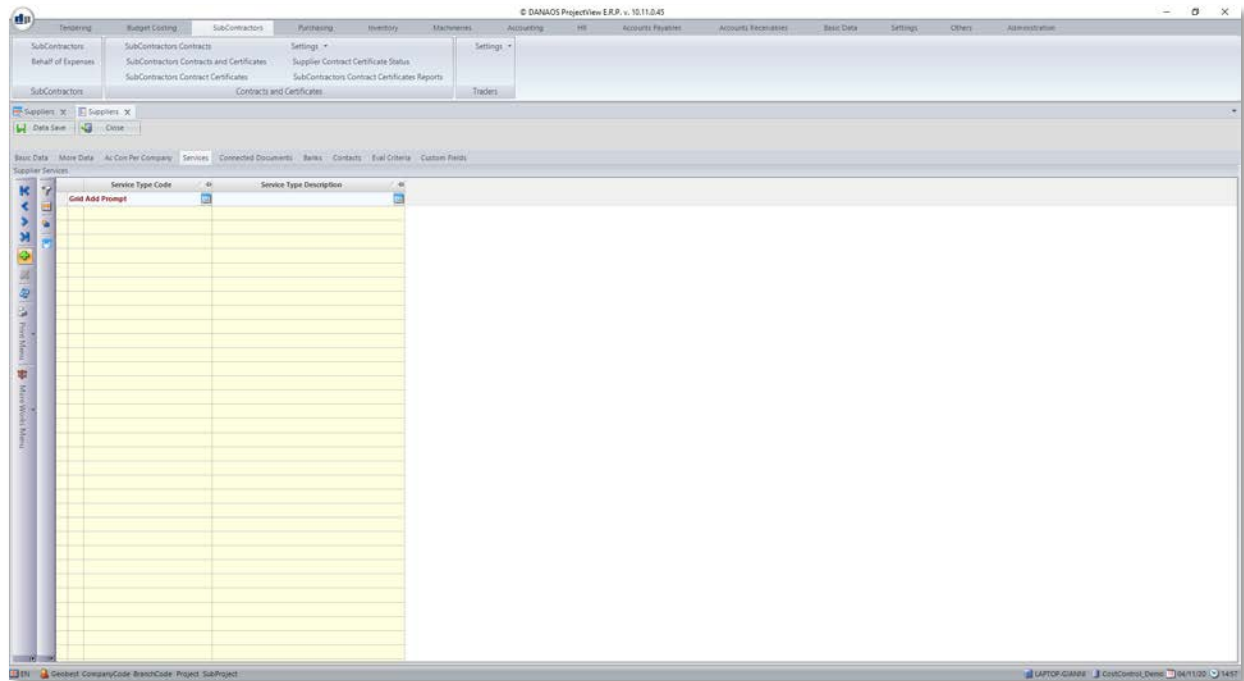
### 2.1.1.3 Ac Con Per Company

Some vendors can have multiple Accounts. This tab allows the user to add them.



## 2.1.4 Services

ProjectVIEW uses the package/service system to associate vendors with BOQ lines, items etc. In this tab, the user can associate a number of services with this vendor. This becomes very useful when used in conjunction with packages in the Tendering and Purchasing modules since it allows the automatic selection of vendors in the requisition stage.

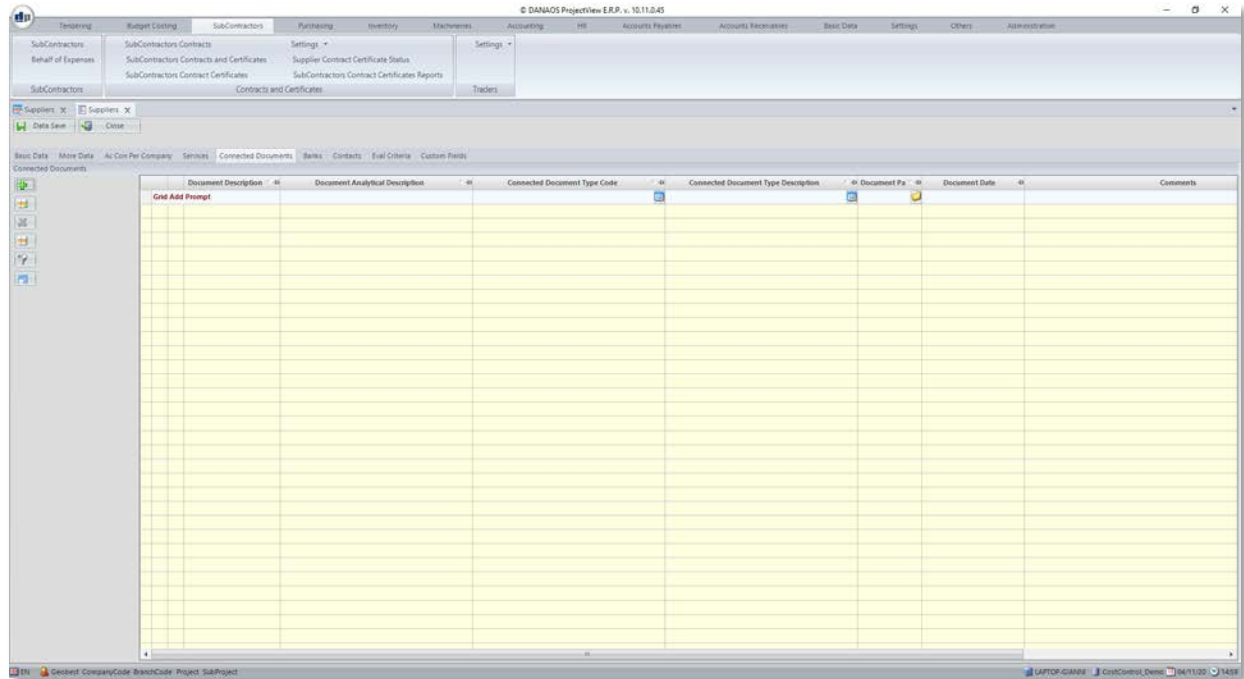


### Note

- ✓ Services are different for suppliers and subcontractors. The services that will be available for selection in this tab are determined by the Supplier/Subcontractor field in the “Basic Data” tab.
- ✓ Services can be added/edited from the Accounts Payables. Please refer to that manual for further information.

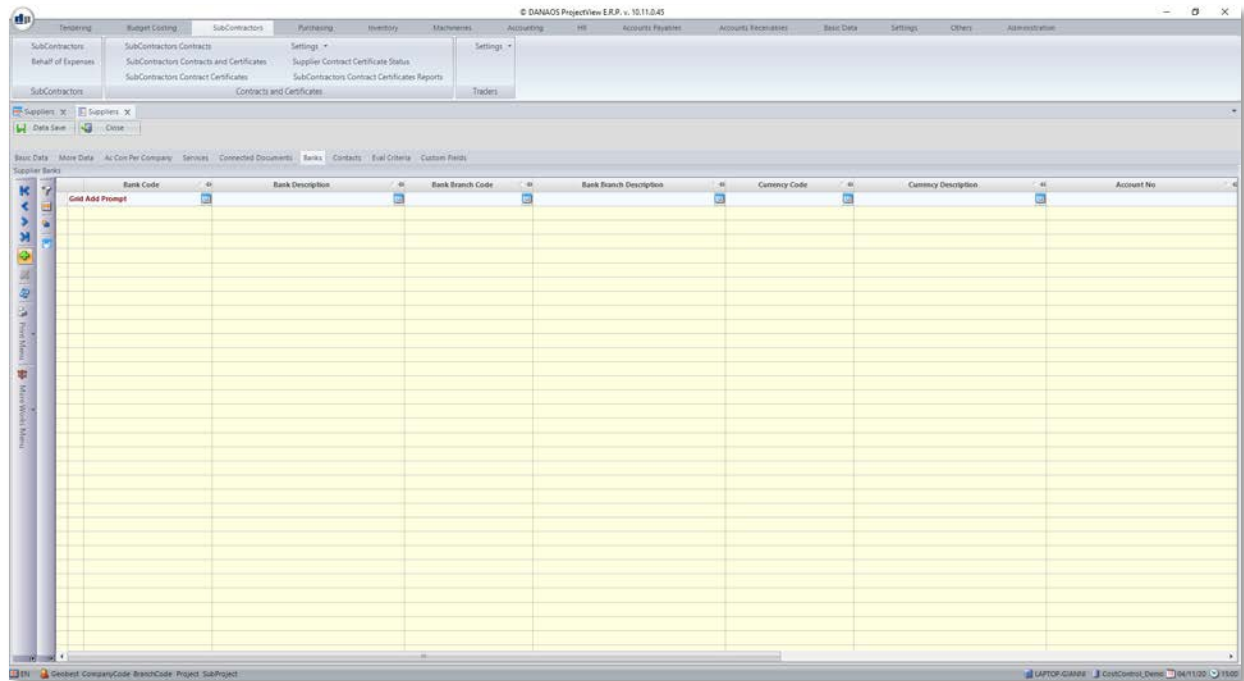
## 2.1.5 Connected Documents

It is possible to associate a vendor with one or more documents (e.g. certificates). This tab allows for these documents to be associated with the vendor.



## 2.1.6 Banks

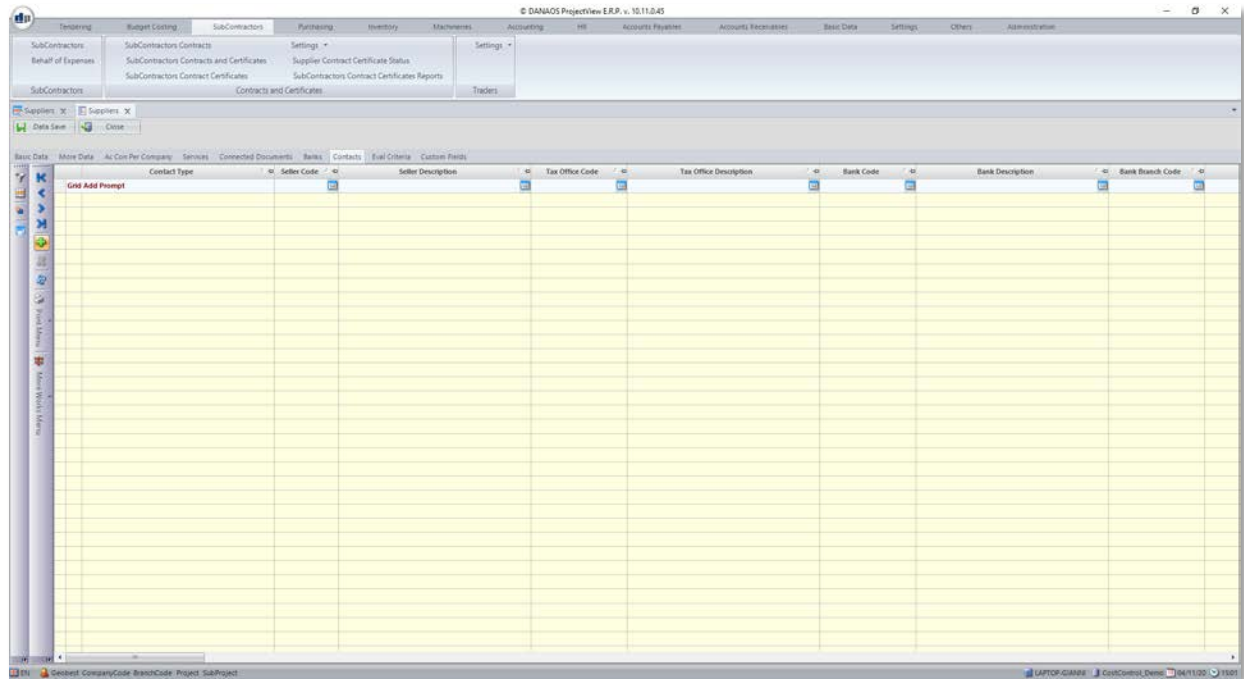
It is possible to assign multiple banks to a vendor. This tab allows for these banks to be added.



## 2.1.7 Contacts

A vendor can have multiple contacts or departments, each with an email, phone number etc.

This tab allows for these contacts to be added to the vendor.

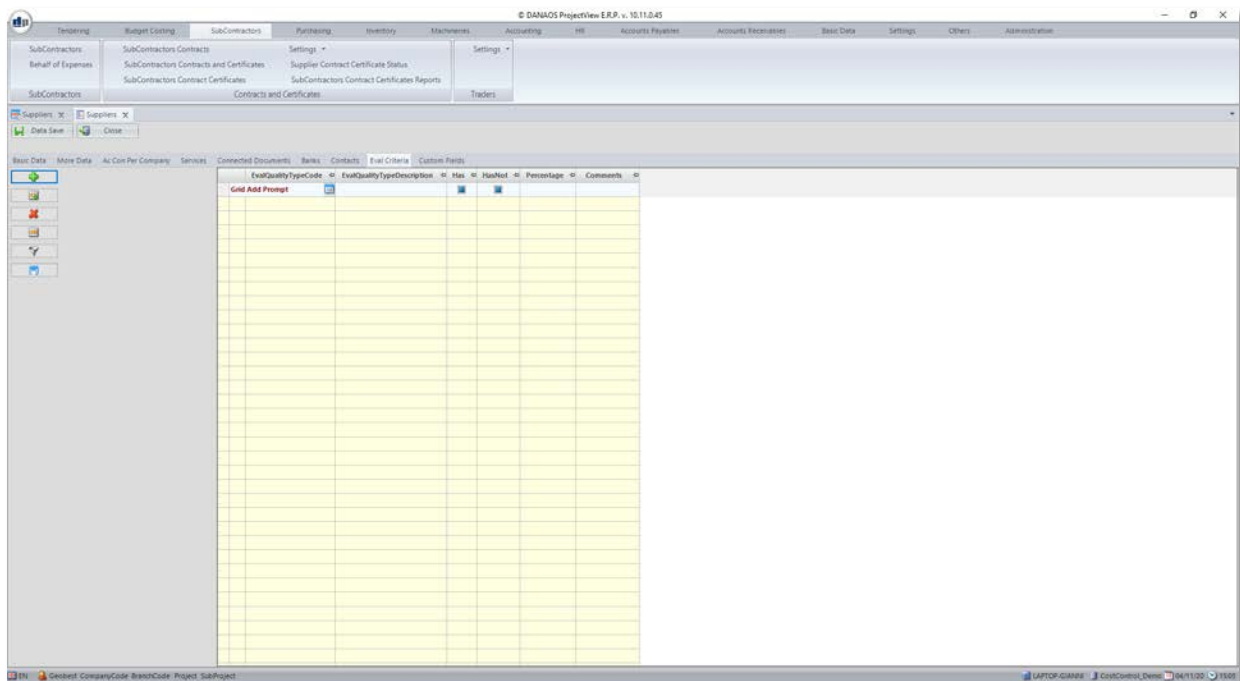


## 2.1.8 Eval Criteria

Evaluation criteria are used in the Purchasing module and specifically during the requisition stage to ensure that a vendor fulfills all required standards. Examples of these are:

- ✓ Employment of certified engineers
- ✓ Company-approval
- ✓ ISO

This tab allows for these criteria to be associated with the vendor.





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