



## Supplier Commitments

This section describes how to create supplier commitments and use the prices within in ProjectVIEW.

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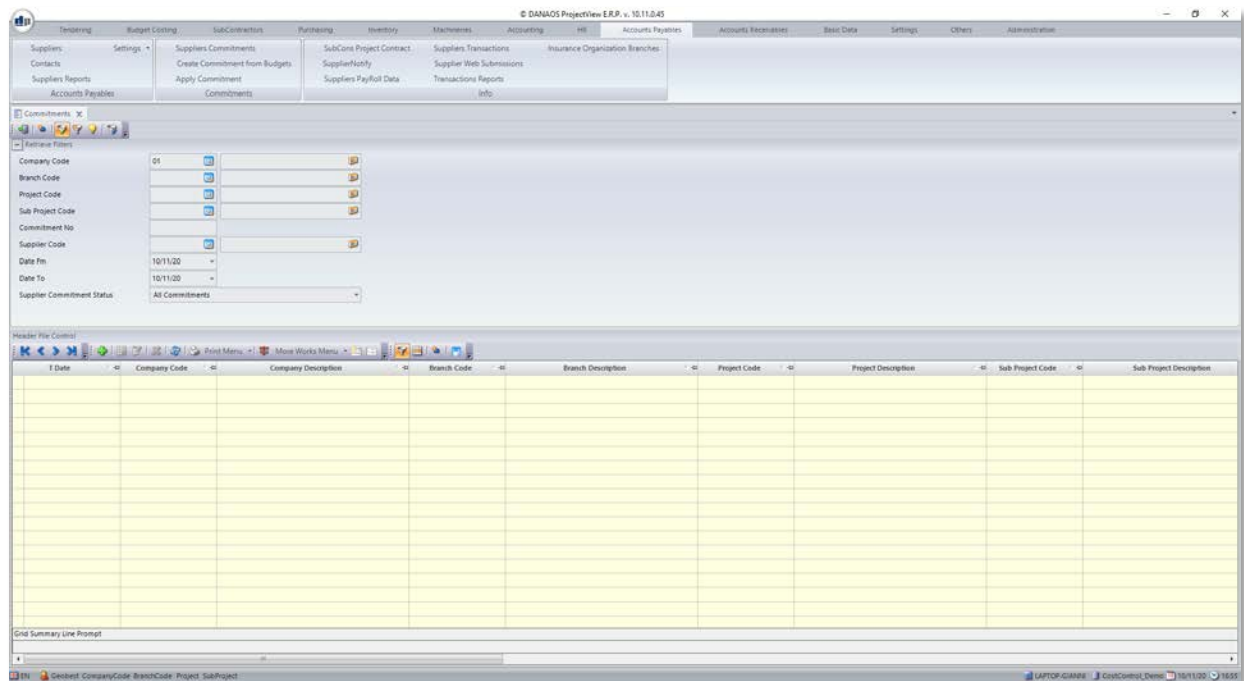
# 1 Supplier Commitment

In ProjectVIEW, a supplier commitment is a list with items along with their prices. It can be considered as the supplier’s pricelist.

Commitments are used throughout ProjectVIEW and especially in the Tendering and Purchasing Departments.

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

*“Accounts Payables” > “Commitments” > “Supplier Commitments”*



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

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

## 1.1 Commitment Form

When a new commitment is created or an existing one edited, the following form is displayed:

### 1.1.1 Basic Data

This tab contains the commitment's basic information.

The following fields are mandatory:

- ✓ T Date
- ✓ Commitment No
- ✓ Company Code
- ✓ Date Start
- ✓ Date Finish
- ✓ Supplier Code
- ✓ Active Commitment
- ✓ Department Code

It is also recommended to add a "Commitment Subject" to better describe the commitment

The "Date Start" and "Date Finish" fields describe the validity period for the commitment. If the commitment is invalidated during this period, the "Active Commitment" check box should be unticked.

The "Exclusivity" check box informs the system that the items included in the commitment are exclusively supplied by this supplier.

Having provided the above, the user must save.

The user must now add items in the commitment grid. The mandatory fields are:

- ✓ Item Code/Machinery Code/Specialty Code
- ✓ Quantity
- ✓ U Price

#### 1.1.1.1 *Change Validity Period*

If at any time the validity period changes, the user must do the following:

- ✓ Enter the new “*Date Start*” and “*Date Finish*” values
- ✓ Click on the “*Update Detail Dates*” button, found in the “*Related Works*” menu of the toolbar

#### 1.1.1.2 *Duplicate Commitment*

Sometimes, the company might request the same pricelist from different suppliers. Normally, the user would have to create a new commitment for each supplier and perform the aforementioned actions all over.

To avoid repetition of said actions, the user can click on the “*Supplier Commitment Copy*” button, found in the toolbar:



#### 1.1.1.3 *Commitment from Groups*

Another timesaving option is the user has is the ability to create a commitment from an item group. This is very useful in case the company has requested a price list of an entire item group from one or more suppliers. To do that, the user must do the following:

- ✓ Create a new commitment
- ✓ Enter the “*Item Group Code*” value and save
- ✓ Click on the “*Create Supplier Commitment Detail From Item Group*”:



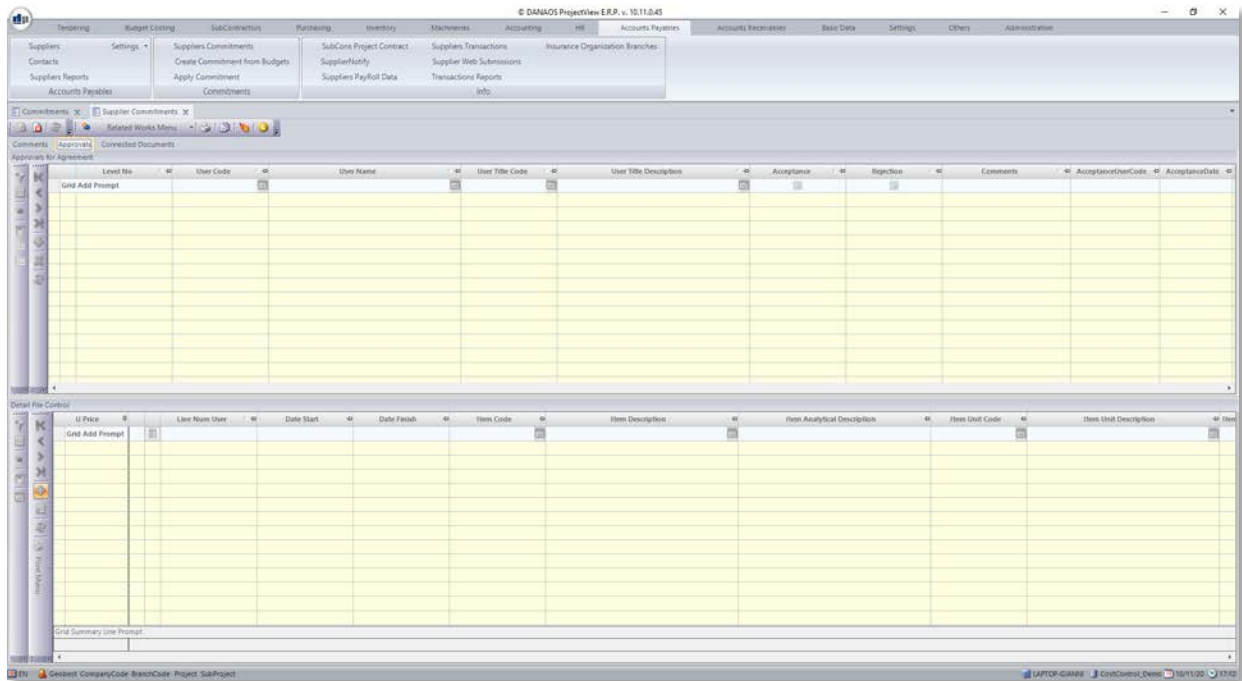
#### 1.1.1.4 *Update Supplier Contract*

As explained in manual “*03 02 Supplier Contracts & Certificates*”, a supplier contract can be created using one of the same supplier’s commitments as a source for the contract’s items. If that is done, the contract will have a price connection to the commitment.

This means that whenever a user updates the price in the commitment, the change will be reflected in the contract.

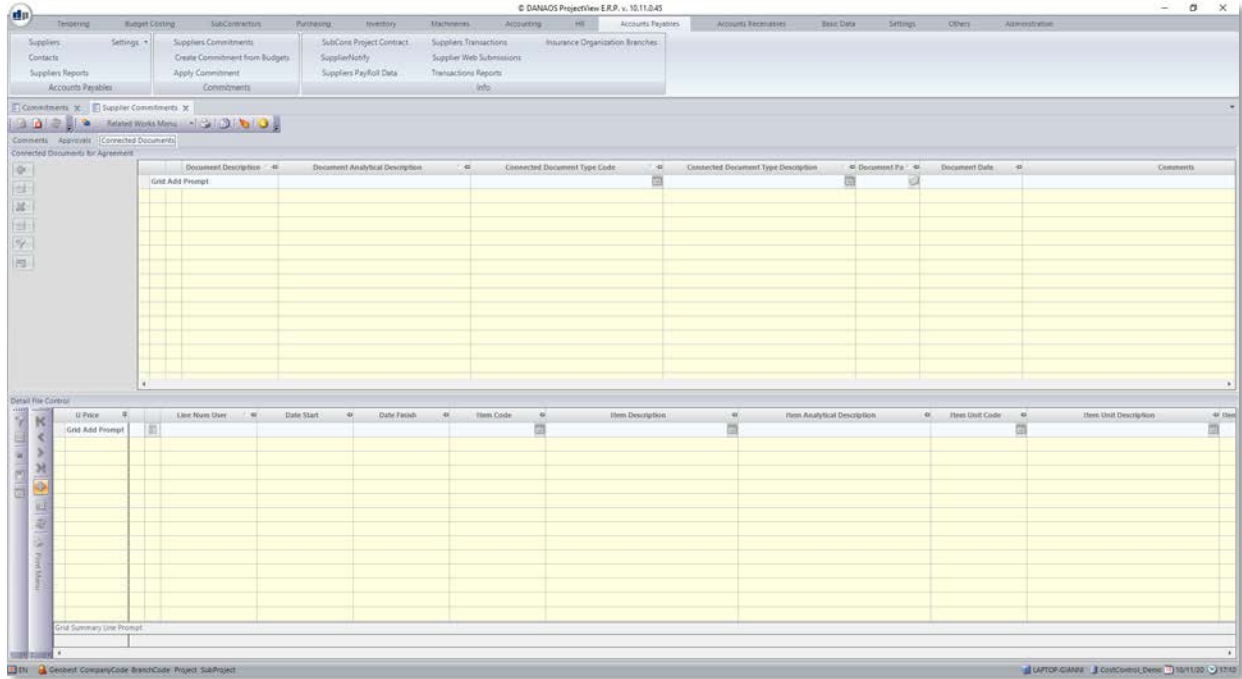
## 1.1.2 Approvals

This tab allows user to approve or reject a supplier commitment.



### 1.1.3 Connected Documents

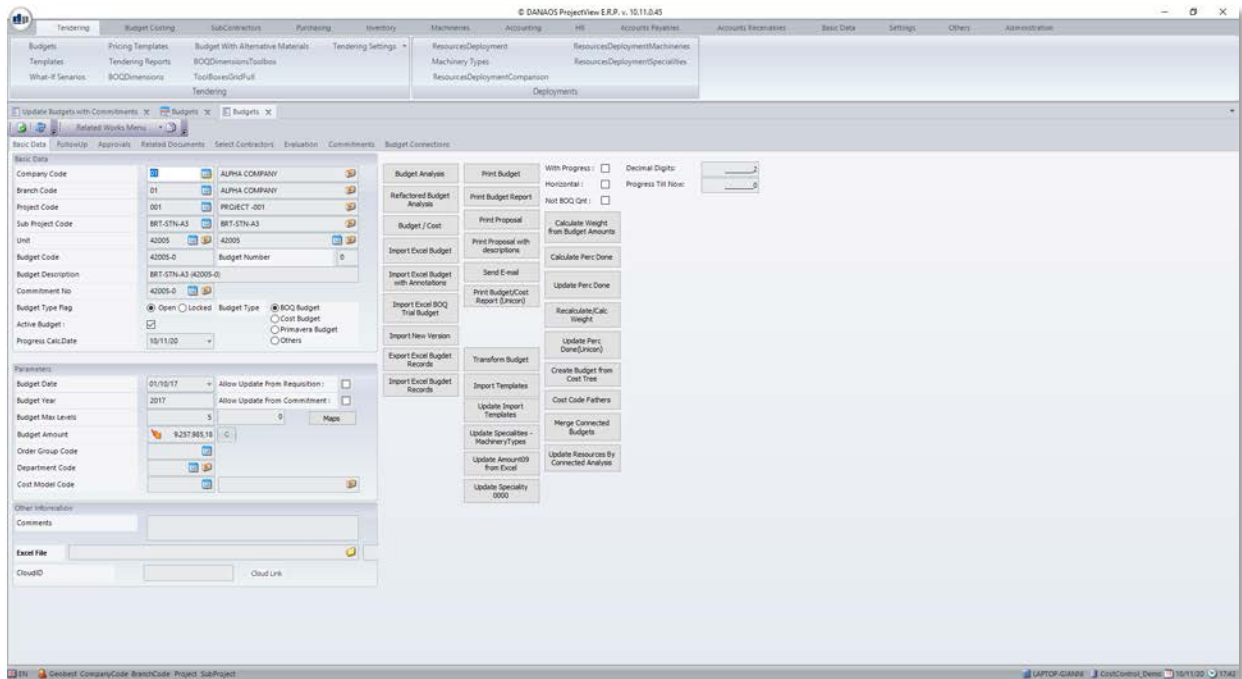
It is possible to associate a commitment with one or more documents (e.g. Manuals). This tab allows for these documents to be associated with the commitment.



## 2 Commitments and budgets

As also explained in manual *“01 01 Tendering”*, each budget can be connected to a commitment. This means that the prices in the budget’s analysis will be retrieved from that commitment (for all items that exist in the commitment).

To do so, the user must enter a *“Commitment No”* in the appropriate field inside the budget form:



Commitment No

## 2.1 Updating Budgets from commitments

A budget can be updated when the prices of the commitment change. This option is not available by default. If however the user wants to enable it, the *“Allow Update From Commitment”* check box in the budget form should be ticked.

Allow Update From Commitment :

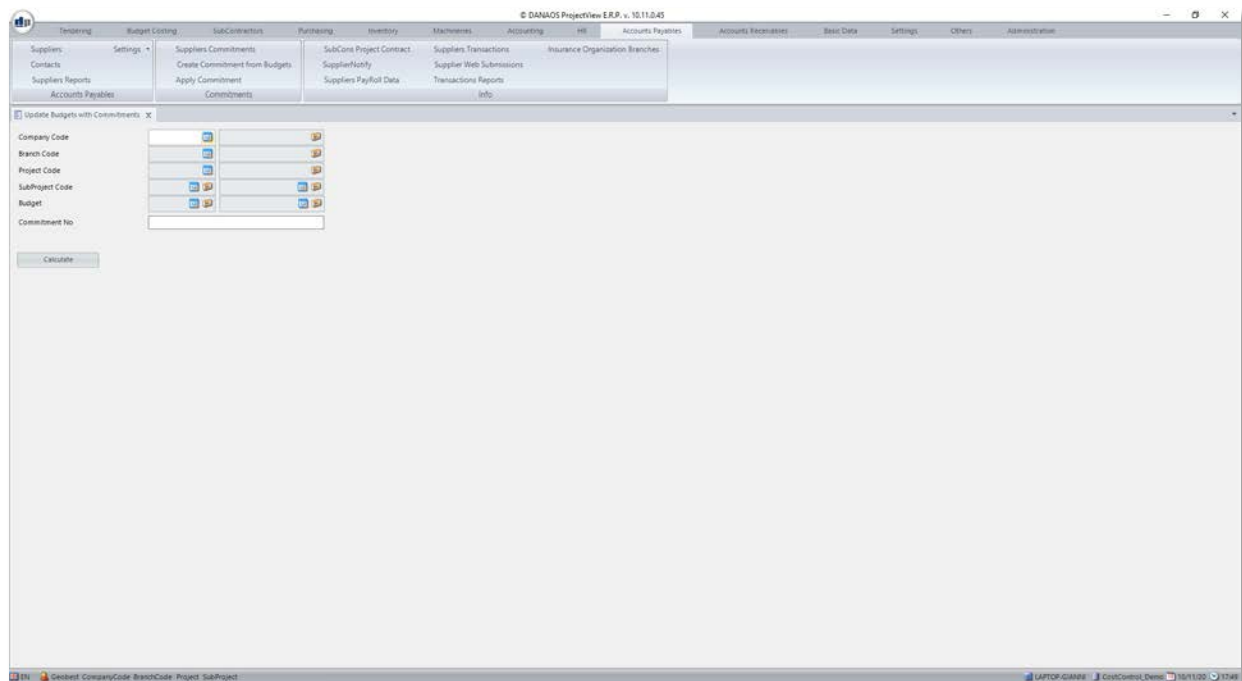
Updating the budget can be done through the budget analysis grid, as explained in manual *“01 01 Tendering”*, by clicking on the *“Update from Commitment”* button in the *“Updates”* menu of the toolbar.

It can also be updated without opening the budget.

To do so, the user must navigate to:

*“Accounts Payables” > “Commitments” > “Apply Commitment”*

The following form will be displayed:



The user can select the budget that they want updated and then select the *“Commitment No”*.

Clicking on the *“Calculate”* button will update the budget.

## 2.2 Creating a Commitment from a Budget

Another useful option is to create a new commitment directly from a budget. This will create a new commitment and copy all items, prices and quantities from the budget.

To do so, the user must navigate to:

*“Accounts Payables” > “Commitments” > “Create Commitment From Budget”*

The following form will be displayed:

The screenshot displays the 'Create Commitment From Budget' form within the ProjectVIEW ERP application. The form is titled 'Insert Commitment From Budgets - 30'. It features several input fields and a button:

- Company Code:** A text input field with a search icon.
- Branch Code:** A text input field with a search icon.
- Project Code:** A text input field with a search icon.
- SubProject Code:** A text input field with a search icon.
- Budget:** A text input field with a search icon.
- Date Start:** A date picker field showing '10/11/20'.
- Date Finish:** A date picker field showing '10/11/20'.
- Commitment No.:** A text input field.
- Supplier:** A text input field with a search icon.
- Insert Commitment:** A button located at the bottom left of the form area.

The application's menu bar is visible at the top, with 'Accounts Payables' > 'Commitments' > 'Create Commitment From Budget' selected. The status bar at the bottom shows the user's name 'LAPTOP-GANAR' and the current date and time '10/11/20 17:51'.

The user can select the budget that they want to use as a source, the validity period for the new commitment (by entering the *“Date Start”* and *“Date Finish”* values), the supplier and then select the *“Commitment No”*.

Clicking on the *“Insert Commitment”* button will create the new commitment.

Then we can visit budget analysis and click on the material or subcontractors details to see the analysis.

The screenshot shows a software interface window titled 'Cost : Under foundations (100 mm thick) Reinforced concrete'. The window contains a toolbar with various icons for actions like 'Add Rec', 'Data Sa', 'Delete R', 'Refresh', 'Print Dir', 'Print Pre', 'Data Im', 'Export T', 'Export T', 'ReCalcul', 'Filters', 'Groups', and 'Grid Col'. Below the toolbar is a table with the following columns: Item Code, Item Description, Qty For One Unit, Qty, U Price, Amount, and Discount Perce. The table contains three rows of data, with the first two rows highlighted in orange.

Item Code	Item Description	Qty For One Unit	Qty	U Price	Amount	Discount Perce
Grid Add Prompt						
03310001	Readymix Concrete Type-II, 15 Mpa	2,0000	68,0000	32,000	2,176,00	0,00 %
03310001	Readymix Concrete Type-II, 15 Mpa	1,0000	34,0000	34,000	1,208,72	0,00 %

By entering a new item that does not exist in the commitment, the system automatically will insert a new row to the commitment with the price of this item. It will happen if the item does not appear in the commitment.



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