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Parent Vendor Overview

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Purpose of this document

This document explores the Parent Vendor functionality in Ceres 2009.

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Purpose

Food banks purchase product and services throughout the year and need an accurate method of keeping track of what was purchased from each Vendor. Many of the vendors are retail chain stores and the Food Banks need to track purchases for the entire chain. To accomplish this, a Parent Vendor/ Vendor structure was created. The individual chain store would be setup as a Vendor and the parent company as the Parent Vendor. The Vendor can be linked to the Parent Vendor for tracking and reporting purposes.

Ceres object release 4.00.00 is required for some of the functionality described in this document.

Accessing Parent Vendors

1. Parent Vendors can be accessed from Departments → Purchase → Planning → Parent Vendors.
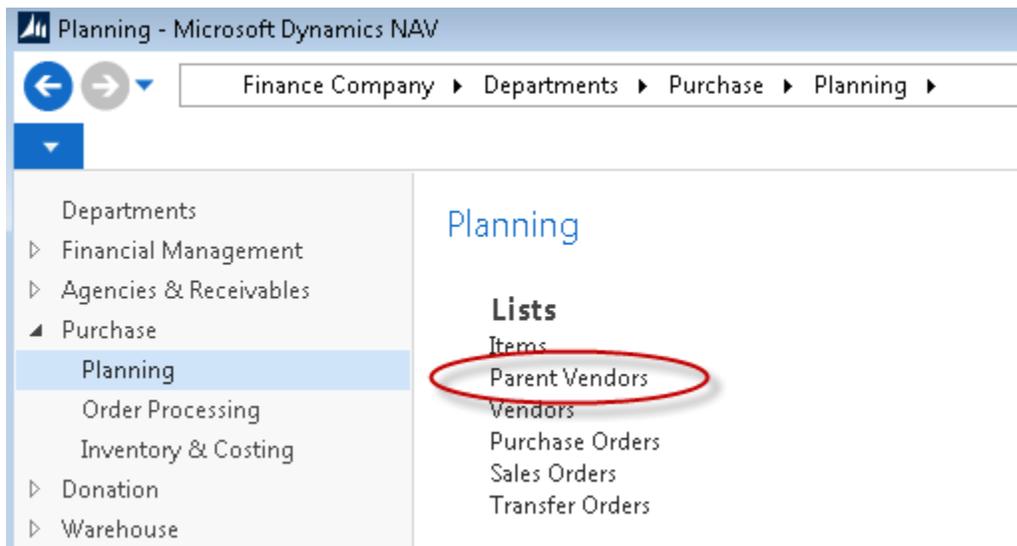
2. Click New in the Action Pane to create a new Parent Vendor. Parent Vendors may be edited by highlighting a Parent Vendor in the List, then right clicking and selecting Edit.

General FastTab

No.: This is the main identifier for the Parent Vendor, which can be entered as any combination of text and numbers. Ceres can be set up to automatically number each Parent Vendor for you, or you can enter the number manually.

Name: This field provides the main name of the Parent Vendor. Up to 50 characters can be added here, using any type of text or numbers. Therefore enter the name as you want it to

appear on documents. Once a Parent Vendor has been setup, by default the Name is not editable. However, if the User needs to edit the Name field, navigate to Related Information → Parent Vendor → Edit

Name 2: An extension of the Name field. This field can be used for names longer than 50 characters. This field is also 50 characters in length.

Address: This field would typically be the street number and street name of the Parent Vendor. Up to 50 characters can be added here, using any type of text or numbers. The contents of the Address field are often used when you print something, so enter it as you want it to appear.

Additional addresses, phone numbers, and contact information can be setup using the Supplement Address functionality.   A Supplemental Addresses FactBox will display to the right of the Card. This FactBox provides a link to any Supplemental Addresses that have been setup for this Parent Vendor.   See the Supplemental Address documentation for more information.

City: Enter the City of the Parent Vendor. Up to 30 characters can be added here, using any type of text or numbers.

State: Enter the state of the Parent Vendor. Up to 30 characters can be added here, using any type of text or numbers. Enter it as you want it to appear in printed documents.

Zip Code: Enter the zip code of the Parent Vendor.

Note: If you fill in the zip code field with a zip code that is linked to a single city in the zip code table, Ceres will fill in the city field automatically. If there is more than one city linked to the zip code, Ceres displays a list of the relevant cities for you to choose from. If the zip code is not set up in the zip code table, you must enter the city manually.
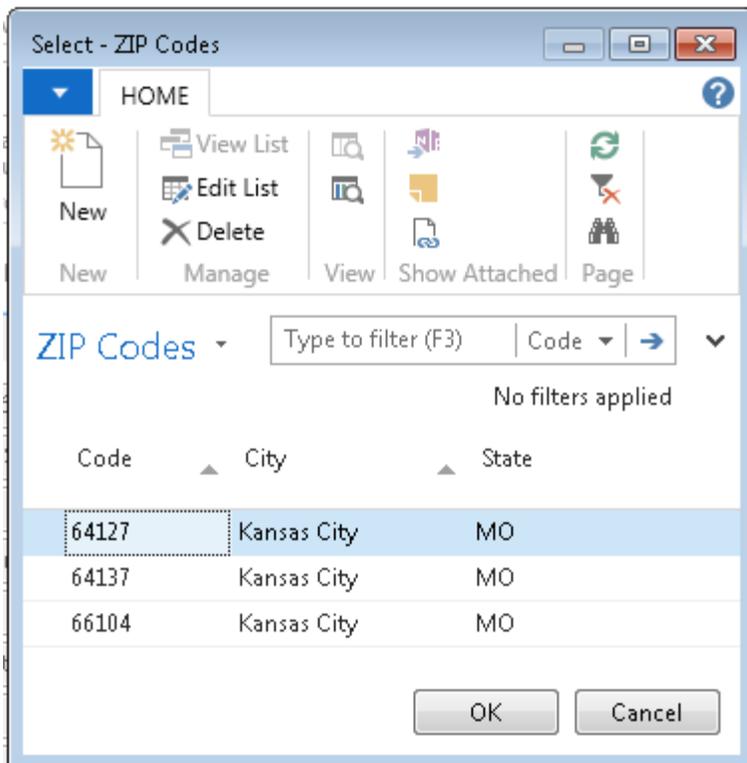
Phone No.: Enter the primary phone number for the Parent Vendor. The field is 30 characters in length. A consistent format when entering the number, such as: (123) 456-7890, recommended. The value entered here will also appear on the Communication FastTab.

Contact: Enter the primary contact name for this Parent Vendor if not populated by entering the Primary Contact No. above. Up to 30 characters can be added here, using any type of text or numbers.

Fax No.: Enter the fax number of the Parent Vendor. The field is 30 characters in length. A consistent format when entering the number, such as: (123) 456-789, is recommended.

E-Mail: Enter the e-mail address of the Parent Vendor. Up to 80 characters can be added here, using any type of text or numbers, in a standard e-mail address format.

Home Page: Enter the Internet home page for this Parent Vendor. Up to 80 characters can be added here, using any type of text or numbers.

Last Date Modified: This field is maintained by Ceres and displays the date the Parent was last modified.

Last Modified By: This field is maintained by Ceres and display the login identification of the user that last modified the Parent Vendor

Search Name: Automatically defaults to the Name field but can be overridden. This can be used as an alternative field from which to search or find the Parent Vendor.

Location Code: Enter the default Location Code used to receive product from this Vendor.

3. To see a list of all Vendors related to this Parent Vendor, navigate to navigate → Vendor List.
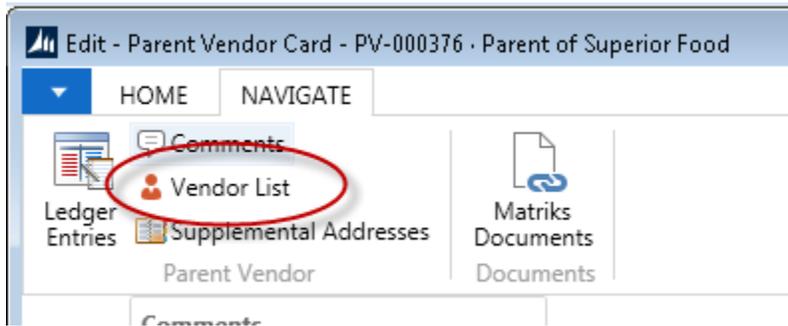
Related Topics:

1. Vendor Overview
2. Purchase Order Overview
3. Location Overview
4. Branch Overview
5. Supplemental Addresses