



# Supplier Record Creating

## Introduction

This is a guide that explains how to Create a new supplier record in Indicator.

## Where to find this

Headoffice>Purchasing>Suppliers

## Overview

A supplier record is required for suppliers with or without catalogues. Within the supplier record there are various options that can be selected. These are detailed further in the user guides related to the actual process

## Select Add

Group Suppliers

[+ Add](#) [View All](#)

Supplier Type

Supplier Direct or via Consortia

Consolidated Supplier

# Populating the supplier record

The screenshot shows a web form titled "Add Supplier". It contains several input fields and checkboxes. Red arrows originate from a single point at the bottom left and point to the following fields: "Company Name", "Supplier Code", "Account No", "Product/Service", "Pseudo Supplier", "Allow Back Order", and "Default Purchasing Category".

Company Name	SUPPLIERS NAME
Supplier Code	CODE THAT REPRESENTS SUPPLIER IN FINANCE PACKAGE
Account No	ENTER IF ONLY ONE ACCOUNT USED
Product/Service	USED FOR INFORMATION ONLY
Pseudo Supplier	<input type="checkbox"/>
Allow Back Order	<input type="checkbox"/>
Default Purchasing Category	Wet ▼

Complete fields as above

Select Default purchase category for purchases by this supplier

Client Options

# Populating the supplier record

Supplier will now appear in the list.

Select to complete further information Explanations below for each field

## **Explanations**

**Company Name** – the supplier name. If you have multiple supplier records for the same supplier the Company Name should identify the catalogue it relates to, eg Zenith Gross

**Supplier Code** – this is any code assigned to the supplier in your accounting application. This can be the same across multiple supplier records

**Account Number** – this is your account number

**Product/Service** – this can be used to add a description of the products supplied, eg Food

**Outlet Brand** – this should be completed if you want to restrict the supplier to a specific outlet brand

**Name** – this should be your account manager

# Populating the supplier record

**Email address** – this is the email address that supplier orders should be sent to. Multiple email addresses can be added and they will all receive a copy of the orders placed. If we have order integration set up with the supplier, eg Bidfood or Brakes, this email address is still required as will be used for credit note requests. If your supplier delivers from multiple depots, the orders and credit note requests will go to the email address set up for the depot. See Additional Addresses section below.

**Contact details** – to be completed as required however having a phone number enables IndiCater to contact the supplier if we have queries so please include this as a minimum

**EDI supplier** – to be ticked for EDI suppliers only

**EDI Activation** – the date the EDI is to be active from

**Account Number Matching** – not required

**Export Exclusion** – not required

**Bank Holiday Delivery** – this should be ticked if the supplier will deliver on bank holidays

# Populating the supplier record

**Minimum Order Value** – this determines the minimum order value required before an order can be placed with the supplier. This will apply to all outlets

**Auto Adjustment Book Off** –this enables the user to adjust the total value of an order at book off instead of line by line. Only recommended for suppliers who supplier product by weight

**Catalogue Approval options** – Options to hide or view selections

**Integrated Supplier Manual Email Order** - EDI supplier also receives email order

**Notes Per item** – Add notes per item in requisition basket

**Order Non catalogue item** – Add Non catalogue item to requisition

**Archive** – this archives the supplier records Add non catalogue item in requisition

**Additional Management Info** – this is for your information only and is to be entered as required

**Complaints** – outlets have the ability to raise supplier complaints in the Suppliers sections in outlet mode. This sends the complaint to a tagged person in IndiCater and not directly to the supplier. This sections shows the recent complaints

# Populating the supplier record

**Document Library and Update Document** – a tool for use as required

**Contact Record** – a tool for use as required

**Additional Contacts** – this should be used if the supplier sends electronic invoices into IndiCater. A contact with the role EDI Disputes should be created here and the Primary contact box ticked. If EDI Roles does not appear as an option, please contact IndiCater support.

**Additional Addresses** – this should be completed for depots used by the supplier. As a minimum the depot name is to be added and Add Address clicked. The depot will then be available for you to click on. Once clicked on, you will need to add the order email addresses that the orders/credit note requests are to be sent to.

***To complete delivery set up - See related User guide***

# Populating the supplier record

Pop will appear to assign to outlets.  
Select Yes or No

**Indicator**

Would you like to assign this supplier to your outlets?

Assign new to the Outlets

<input type="checkbox"/> All Outlets	<input type="checkbox"/> Ades Outlet Manchester	<input type="checkbox"/> Alan Training Outlet
<input type="checkbox"/> Ades Outlet	<input type="checkbox"/> Cellar bar	<input type="checkbox"/> Central Stores
<input type="checkbox"/> Catering Outlet	<input type="checkbox"/> Coffee Kiosk	<input type="checkbox"/> Coffee Shop1
<input type="checkbox"/> Coffee Kiosk	<input type="checkbox"/> Fountain cafe	<input type="checkbox"/> Horizons restaurant
<input type="checkbox"/> Consolidated Outlet	<input type="checkbox"/> Natalies outlet	<input type="checkbox"/> Orangery
<input type="checkbox"/> Kiosk	<input type="checkbox"/> Prince pub	<input type="checkbox"/> Private Boxes
<input type="checkbox"/> Outlet 123	<input type="checkbox"/> Retail Shop	<input type="checkbox"/> Staff Restaurant
<input type="checkbox"/> RCS:Playfair Building	<input type="checkbox"/> Test South	<input type="checkbox"/> Test121
<input type="checkbox"/> Ten Hill Place	<input type="checkbox"/> The Queens Head	<input type="checkbox"/> Training Outlet
<input type="checkbox"/> testing reports		
<input type="checkbox"/> TRAINING OUTLET (P)		

Select all outlets or check box for outlet to assign to. Select update to assign

Update