

Vendor Administrator Training

Vendor Administrator Home

Vendor Administrator Home

Vendor Settings



Configure Vendor System Settings
This section is used to configure vendor system settings including options for vendor registration.

Maintain Vendors
This section is used to maintain vendor accounts



Maintain Vendor Categories
This section is used to maintain vendor categories

Maintain Certification Sources
This section is used to maintain vendor certification sources



Maintain News
This section is used to maintain news items

Maintain Vendor Status Change Reasons
This section is used to maintain vendor status change reasons.



Maintain In-Progress Vendors
This section is used to maintain in-progress vendor registrations.

Exit

Configure Vendor System Settings

Configure Vendor System

General
Vendor Interface

Allow agency role to add new vendor to master vendor list from document:

Force vendor tax ids to be unique:

Enforce vendor mini-registration upon bid acknowledgement:

Require PO acknowledgement to view Purchase Orders:

Require Change Order acknowledgement to view Change Orders:

Validate Vendor Bid Amendment Acknowledgment:

Display All Bids and Quotes to Vendors:

Display All Contracts/Blankets to Vendors:

Vendor Administrator

Basic Purchasing

Internal Administrator

Agency Administrator

Program Administrator

Organization Administrator

Department Access

Inquiry

Accounts Payable

Inventory Administrator

Inventory User

Allow: Electronic Quote

Vendor Online Informal Quote Submission

Vendor Online Formal Quote Submission

Reverse Auction

Vendor to update Company Name and Vendor Legal Name

Vendor to update Tax ID

Vendor Profile Attachments

Disk Allocation: Unlimited

Configure Vendor System Settings

Registration

Show "Commodity Codes" section Show "Regions" section Show "Categories" section Allow International Tax ID Support Mandatory Registration

Required Required Maintain Vendor Categories

Vendor Registration File Path: /opt/Periscope/repository/vendor_reg

Vendor Initial Status:

DBA Vendor Initial Status:

Registration Notification User:

Vendor Disclaimer:

Maintain Vendor Categories

Maintain Vendor Categories

ID	Label	Status	Required
TYPE	Business Type	Active	No

Add New Category

Exit

Maintain Vendor Category: Business Type

ID*: TYPE

Label*: Business Type

Status: Active

Description:

Hyperlink:

Required

Allow Multiple Selections

Restrict Registration to Vendor Administrator

Show Category to Seller Administrator

Values

Value*	Label*	Status	Certification Enabled
CORP	Corporation	Active	<input type="checkbox"/>
INDIVIDUAL	Individually Owned	Active	<input type="checkbox"/>
PARTNER	Partnership	Active	<input type="checkbox"/>
		Active	<input type="checkbox"/>

Save & Exit

Save & Continue

Reset

Cancel & Exit

Maintain Certification Sources

Maintain Certification Source

Source #	Description	Status	Show On Web
SMALLBUS	<input type="text" value="Small Local Business Program"/>	Active ▼	<input checked="" type="checkbox"/>
<input type="text"/>	<input type="text"/>	Active ▼	<input checked="" type="checkbox"/>

Maintain News

Maintain News for: Organization 1 for Training

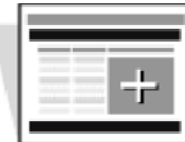


Maintain News Items

This section is used for maintaining existing news items.

Add News Items

This section is used to add new news items.



Exit

Maintain News Item

Maintain News Items

News ID	Effective Date	Category	Title
0	03/11/2013	Notices	Test Notice

Add News Item Exit

Add News Item

Add News Item

News ID

Effective Date* August ▼ 29 ▼ 2013 ▼

End Date* August ▼ 29 ▼ 2013 ▼

Category* Notices ▼

Title* News Item

News* Sample News Item
(max 250 characters)

Link

Save & Exit Reset Cancel & Exit

Maintain Vendor Status Change Reason

Maintain Vendor Status Change Reason

Type	Description	Status
<u>Incorrect Contact</u>	Incorrect Contact Information (Mail/Email/Phone/Fax)	Active
<u>No Bid/Qte Response</u>	Lack of Bid/Quote Response	Active
<u>No Tax Clearance</u>	No Authorized Tax Clearance	Active
<u>Out of Business</u>	Out of Business	Active
<u>Vendor Request</u>	Vendor Request	Active

Maintain Vendor Status Change Reason

Type

Description

Status

Maintain In-Progress Vendors

Maintain In-Progress Vendors

Search using	ALL of the criteria ▼
Search Fields:	Vendor Name <input type="text"/> Vendor ID <input type="text"/>
	Email Address <input type="text"/>
	Vendor Tax ID <input type="text"/>
Browse By:	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
<input type="button" value="Find It"/> <input type="button" value="Clear"/>	

Results

Vendor ID	Name	Tax Id	Email Address
00000010	Bo apostrophes BBQ	444992222	ejacobsen@periscopeholdings.com
00000001	Eric's Bait and Tackle	987653456	ejacobsen@periscopeholdings.com
00000003	Eric's Bait and Tackle	111223333	ejacobsen@periscopeholdings.com
00000002	Kennedy Consulting	234333333	ckennedy8@austin.tx.com
00000006	Really Good Company	987656789	srac@periscopeholdings.com
00000004	Test Vendor	444778899	ejacobsen@periscopeholdings.com

Exit

In-Progress Vendor Registration

Register - Test Vendor - ejacobsen@periscopeholdings.com

Company Information Administrator Address Terms Categories & Certifications Commodity/Service Codes Summary

Overall Validation Errors

- [Company information is required.](#)
- [Administrator information is required.](#)
- [NIGP Code is required, please select at least one.](#)

Company Information

Vendor ID:	00000004	Alternate ID:	Company Name:	Test Vendor
Status:	Active	Status Change Reason:	Tax ID#:	*****8899
Tax ID Type:	EIN	Incorporation Details - State:	Year of Incorporation:	0
Business Description:		Preferred Delivery Method:	Vendor Email:	ejacobsen@periscopeholdings.com
Emergency supplier:	No			
Emergency Phone:				
Emergency Contact:				
Emergency Email:				
Emergency Info Comment:				

Address Information

Name	Address Type	Address Information	Status	Default for Type
General	General Mailing Address	US Email: ejacobsen@periscopeholdings.com	Active	Yes

Terms

Payment Terms: N/A
 Freight Terms: N/A
 Shipping Method: N/A
 Shipping Terms: N/A

Delete Registration

Exit

Maintain Vendors

Maintain Vendors

Search using: ALL of the criteria Status: Any

Search Fields:

Vendor Name: Vendor Legal Name:

Vendor Tax ID: Vendor ID:

Alternate Id: Class Code:

Class Item Code: NIGP Keyword:

Reference Vendor

Browse By: 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

Find It Clear

Results

Vendor ID	Name	Tax Id	Alternate Id	Reference Vendor	Status
00000005	Jacobsen Bait and Tackle	*****3333		No	Active
00000011	Rao Trading and Holding	*****2333		No	Active

Add Vendor Exit

Maintain Vendors

Maintenance Home Page for: Jacobsen Bait and Tackle

General Alerts

Maintain Organization Information



This section is used for maintaining organization information.

Maintain Users on this Account



This section is used to maintain users for the organization.

Add Users on this Account



This section is used to add users to the organization.

Add Associated Organization



This section is used for adding an organization with the same Tax ID.

Exit

Maintain Organization Information for: Jacobsen Bait and Tackle

Maintain General Organization Information



This section is used for maintaining general organization information.

Maintain Addresses



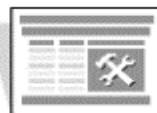
This section is used to maintain addresses.

Maintain Commodity Codes & Services



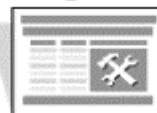
This section is used to maintain commodity codes and services.

Maintain Regions



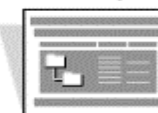
This section is used to maintain regions.

Maintain Terms and Categories



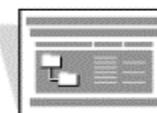
This section is used to maintain terms and categories.

Maintain Quote Attachment Repository



This section is used to maintain files in the quote attachment repository.

Credit Memo List



This section is used to view credit memos.

Exit

Maintain Vendor General Information

Maintain General Organization Information

Vendor ID: 00000005

Alternate ID:

Company Name*: Vendor Legal Name*:

DBA for Vendor:

Status: Status Change Reason:

Tax ID #*: Show Country Code for Tax ID*:

Is Tax ID # an Employer Identification Number (EIN) or a Social Security Number (SSN)? EIN SSN

Incorporation Details: State: Year of Incorporation:

Business Description:

Preferred Delivery Method:

Vendor Email:

Vendor Fax:

In Compliance

1099 Vendor

Comments:

Emergency Supplier: Yes No

Emergency Phone*: Ext.:

Emergency Contact Name*:

Emergency Email*:

Emergency Info Comment:


Reference Vendor

User Last Updated: Administrator System

Date Last Updated: 02/06/2013 11:22:54 PM

Maintain Vendor General Information

Attachments

Download	File	Description	Size	Uploaded By	Uploaded Date	Confidential	Delete
	Test Attachment.txt		73 bytes	Shashank Rao	03/11/2013 05:44:31 PM	<input type="checkbox"/>	<input type="checkbox"/>

File:

Description:

Confidential:

Maintain Addresses

Maintain Addresses for: Jacobsen Bait and Tackle

Name	Address Type	Address Information	Status	Default for Type
General	General Mailing Address	Eric Jacobsen 1815 Stanley Avenue Austin, TX 78745 US Email: ejacobsen@periscopeholdings.com Phone: (555)555-5555 Id: 4	Active	Yes

Add Another Address

Exit

Address Book - Jacobsen Bait and Tackle

Enter a New Address

Address Type: Bid Mailing Address

Name this Address*:

Contact Name*:

Address Line 1*:

Address Line 2:

Address Line 3:

Address Line 4:

Country*: US - United States of America

City*: State/Province*:

ZIP*: County:

Phone*: Ext:

Toll Free: Mobile:

Fax: Email*:

Id: Alternate Id:

EDI Address:

Status: Active

Default address for this address type

Web Address: (Begin with http:// or https://)

Save & Exit

Reset

Cancel & Exit

Maintain Commodity Codes & Services

Commodity Maintenance Home Page for: Jacobsen Bait and Tackle

Maintain Commodity Codes
This section is used to add or remove commodity codes.



Display Inactive Commodity Codes
This section is used to display inactive commodity codes.



Exit

Commodity and Service Codes

Current Codes - Jacobsen Bait and Tackle

Deactivate	Code	Description	Date Added
<input type="checkbox"/>	120-12	Bait, Fish	02/08/2013
<input type="checkbox"/>	120-80	Rods, Reels and Tackle Supplies	02/08/2013
<input type="checkbox"/>	450-11	Blocks: Snatch, Tackle, etc.	02/08/2013

Deactivate Selected Items

Add Additional Codes

Cancel & Exit

Commodity and Service Codes

Inactive Codes for Jacobsen Bait and Tackle

Activate	Code	Description	User Last Updated	Deactivated Date
<input type="checkbox"/>	998-91	Sporting and Athletic Equipment, Sale of Surplus and Obsolete Items	SRAO@PERISCOPEHOLDINGS.COM	03/11/2013

Save & Exit

Save & Continue

Exit

Maintain Vendor Terms & Categories

Terms, Categories, and Certifications - Jacobsen Bait and Tackle

Terms

Payment Terms: 10% Net 10 ▾
 Freight Terms: Freight Allowed ▾
 Shipping Method: Federal Express ▾
 Shipping Terms: Cost, Insurance and Freight ▾

Categories & Certifications

Category: Business Type

Please select at most one category value

Select	
<input checked="" type="checkbox"/>	Corporation
<input type="checkbox"/>	Individually Owned
<input type="checkbox"/>	Partnership

Notes:

Save & Exit Save & Continue Reset Cancel & Exit

Add Vendor Certification - American Express Corporate Services

Vendor ID: 000000001
 Category: MBI
 Category Type: Small, Woman Owned Business
 Certification Source: Bureau of Contracts Administration ▾
 Certification ID *:
 Effective Date (MM/DD/YYYY) *:
 Expiration Date (MM/DD/YYYY):
 Certification Status: Active ▾
 Certification Description:


Save & Exit Save & Continue Reset Close Window

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Maintain Quote Attachment Repository

Attachment Repository

Repository Location:

 **quote** Add File | Create Folder
(empty)

Exit

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Add File

i Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name of the file on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

Name*:

Description:

File*: Browse...

Location: vendor/000000001/quote

Save & Exit

Save & Continue

Reset

Cancel & Exit

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Attachment Repository - Create Folder

Location: vendor/000000001/quote

Folder Name:

Save

Cancel

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Maintain Users on this Account

User Maintenance for: Jacobsen Bait and Tackle

Search Using:	ALL of the criteria ▼		
Search Fields:	First Name	<input type="text"/>	Last Name <input type="text"/>
	Login ID	<input type="text"/>	Status <input type="text" value="▼"/>
	User Role	<input type="text" value="Seller"/> <input type="text" value="Seller Administrator"/>	
Browse by:	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 1 2 3 4 5 6 7 8 9 10		
<input type="button" value="Find It"/> <input type="button" value="Clear"/> <input type="button" value="Add User"/>			

Login ID	First Name	Last Name	Status	Role(s)
BUYSPPEEDVENDOR	Eric	Jacobsen	Active	Seller Seller Administrator

Maintain Vendor Users

User Maintenance: Eric Jacobsen - Jacobsen Bait and Tackle

Salutation	<input type="text"/>		
First Name*	<input type="text" value="Eric"/>	Last Name*	<input type="text" value="Jacobsen"/>
Job Title*	<input type="text" value="test"/>	Department	<input type="text"/>
Phone*	<input type="text" value="555"/> <input type="text" value="555"/> <input type="text" value="5555"/> - <input type="text"/>	Email*	<input type="text" value="ejacobsen@goperiscope.com"/>
Login ID	<input type="text" value="BUYSPEEDVENDOR"/>	Status:	<input type="text" value="Active"/>
New Password*	<input type="password" value="*****"/>	Confirm Password*	<input type="password" value="*****"/>
Login Question*	<input type="text"/>	Login Answer*	<input type="text"/>

Roles

- Seller
- Seller Administrator Can Upload Contract

Save & Exit

Save & Continue

Reset

Cancel & Exit

Add Users on this Account

New Vendor User for Jacobsen Bait and Tackle

Salutation	<input type="text"/>		
First Name*:	<input type="text"/>	Last Name*:	<input type="text"/>
Job Title*	<input type="text"/>	Department	<input type="text"/>
Phone*	<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/>	Email*	<input type="text"/>
Login ID*:	<input type="text"/>	Status*:	Active <input type="text"/>
New Password*	<input type="text"/>	Confirm Password*	<input type="text"/>
Login Question*	<input type="text"/>	Login Answer*	<input type="text"/>

Roles

- Seller
- Seller Administrator Can Upload Contract

Save & Exit

Reset

Cancel & Exit

Add Associated Organization

Send Mail

i Use the email form below to request that the associated organizations register in BSO. The link provided below must be used in order to register with the same tax ID.

To*:

CC:

Send confirmation email to srao@periscopeholdings.com

From:

Subject*:

Text: