



**ERP Consulting
Web Development
Custom Programming Solutions
Desktop & Web Applications for Manfact**

NorthClark Computing, Inc.

Buyer's Workbench User Guide

**Web and Desktop Applications
for Manfact by Epicor**

December 2, 2006

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Introduction

NorthClark's *Buyer's Workbench* and web based *Supplier Portal* are designed to improve communication between Buyers and Suppliers, and streamline the process of obtaining quotes for parts and custom engineered components. *Buyer's Workbench* features include:

- ❑ Procurement Workflow Management
- ❑ Requisition Maintenance
- ❑ Purchase Order Entry
- ❑ Rules Based PO Routing and Approval Process (optional)
- ❑ Requests for Quote
- ❑ Sealed and Auction Style Bidding
- ❑ Award Based on Price and Supplier Performance Criteria
- ❑ Generate PO/RFQ as Electronic Document and Email to Suppliers
- ❑ Prepare and Email Regret Notices to Suppliers
- ❑ Supplier Performance Tracking (QCD)
- ❑ Contract Pricing
- ❑ View Purchasing History
- ❑ Link Drawings and Other Attachments to a PO or RFQ
- ❑ Maintain All Documents in the BWB Data Store
- ❑ Use with Supplier Portal for Web Based Communication

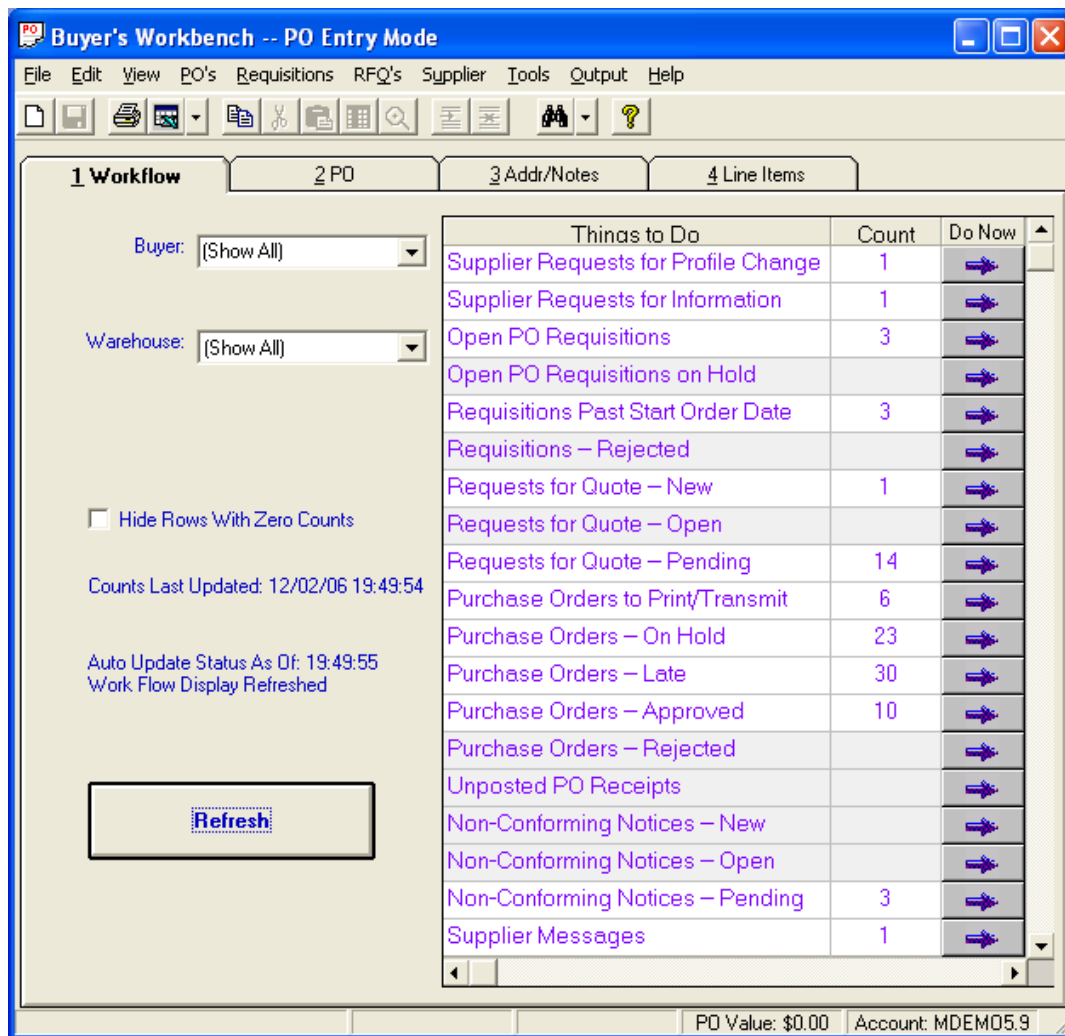
Whether your requisitions are generated manually, automatically by the MRP process, or from an external application, your Buyers will create purchase orders faster and with greater accuracy using NorthClark's Buyer's Workbench.

Buyers Workbench

Main Screen

Work Flow Display

The Workflow view is displayed when the Buyer's Workbench Application is launched. This screen provides immediate visibility to tasks requiring your attention, and may be used to navigate to each item.



When the program is started, the Buyer and Warehouse ID will default to the last entry used. Use the pull-down menus to select the desired Buyer and Warehouse.

The *Count* for each *Things to Do* item represents items that may require attention. The count is refreshed automatically according to a user defined time interval (e.g., refresh every 15 minutes). You can set the time interval using the **Workflow** option found on the **Tools** menu. You may also request an immediate update by clicking the **Refresh** button. If there are no items to be displayed for a given task, the count column will be blank and the row will be grayed. If desired, tasks with zero counts can be hidden from view by selecting the option, **Hide Rows with Zero Count**.

Clicking the **Do Now** button activates a search and displays a list of records requiring attention/action for the corresponding task. The tasks that are accessible from the Workflow screen include:

- ❑ **Supplier Requests for Profile Change:** If *Supplier Portal* is installed, this option will display the **Supplier Requests** view where both *Supplier Requests for Profile Changes* and *Supplier Requests for Information* may be accessed.
- ❑ **Supplier Requests for Information:** If *Supplier Portal* is installed, this option will display the **Supplier Requests** view where both *Supplier Requests for Profile Changes* and *Supplier Requests for Information* may be accessed.
- ❑ **Open PO Requisitions On Hold:** Populates the **Line Items** tab with a list of PO Requisitions that are on Hold.
- ❑ **Open PO Requisitions:** Populates the **Line Items** tab with a list of all open PO Requisitions.
- ❑ **Requisitions Past Start Order Date:** The Start Order Date is the date the item is required, minus the part lead-time. This option populates the **Line Items** tab with a list of open PO Requisitions that have a Start Order Date prior to today's date.
- ❑ **Requisitions – Rejected:** When the *Purchase Order Approval* feature is enabled, this option will populate the **Line Items** tab with a list of open PO Requisitions that have been rejected during the approval process..
- ❑ **Requests for Quotes – New:** This count represents the number of RFQs in New status, though the resulting display lists RFQs in New and Open status.
- ❑ **Requests for Quotes – Open:** The count represents the number of RFQs in Open status, though the resulting Display lists RFQs in Open and New status.
- ❑ **Requests for Quotes - Pending:** Displays a list of RFQs that are in Pending or Award status.
- ❑ **Purchase Orders to Print/Transmit:** This count represents Purchase Orders that are ready to transmit to the Supplier, based on the following criteria: the PO record has been flagged for printing by clicking the **Print** checkbox on the PO Entry tab, the Purchase Order is not on hold, and all necessary approvals have been obtained. When you choose this option, the **Batch Purchase Order Printing** screen is displayed.
- ❑ **Purchase Orders - On Hold:** The number of Purchase Orders currently on Hold.
- ❑ **Purchase Orders – Late:** The number of Purchase Orders that are past due.
- ❑ **Purchase Orders – Approved:** Displays a list of POs that are in Approved status, but not yet received.
- ❑ **Purchase Orders – Rejected:** Displays a list of Purchase Orders that have been rejected during the approval process.

- ❑ **Unposted PO Receipts:** Displays a list of POs that have been received, but not yet posted into inventory. This is an error condition. Use Manfact's REC.A to post the receipts and receive them into inventory.
- ❑ **Non-Conforming Notices – New:** Displays a list of NCCAN records that have been created, but not yet sent to suppliers for action.
- ❑ **Non-Conforming Notices – Pending:** Displays a list of NCCAN records that have been sent to suppliers for action, but for which an answer has not been received.
- ❑ **Non-Conforming Notice – Open:** Displays a list of NCCAN records that have been reviewed and responded to by suppliers and are awaiting closure by the appropriate individual/action.
- ❑ **Supplier Messages:** This count represents pending Supplier Performance Notifications, giving you the opportunity to approve or reject them before they are sent to the Supplier. When you choose this option, the system will launch the NCC_QCDMsgs application (must be installed separately).

Main Menu Options

Following is a brief description of the options available from the Main Menu of the *Buyer's Workbench* application.

Menu	Option	Description
File	Clear	Clear all data on current displays.
	Save	Save changes/new entries to the database.
	Print	Print the current active spreadsheet.
	Import	Import data from Excel to populate the active spreadsheet.
	Export	Export data from the active spreadsheet.
	Exit	Close the application.
Edit	Copy	Copy data to <i>Windows</i> clipboard.
	Cut	Cut data from the field and copy it to <i>Windows</i> clipboard.
	Paste	Paste data from <i>Windows</i> clipboard.
	Fill	Update all of the selected cells from <i>Windows</i> clipboard.
	Zoom	View, print and/or edit the expanded contents of a field.
	Insert Row	Insert a Row above the current position of the cursor.
	Delete Row	Delete the selected Row from the active spreadsheet.
View	Unhide All Columns	Expose all columns previously hidden.
	Auto Fit Columns	Automatically adjust the width of each column to accommodate your data.
	Hide Cancelled Rows	Cancelled rows will not be displayed.
	Display Options	Set user preferences affecting the appearance of the screen.
POs	Switch to PO Mode	Switch to <i>Purchase Order Entry</i> mode.
	Purchase Order Search	Locate Purchase Orders in your system using a variety of search criteria.

Menu	Option	Description
	Copy a Purchase Order	Copy information from an existing PO record to create a new Purchase Order.
	Create New PO from RFQ	Use an awarded RFQ to create a new PO.
	Cancel Entire Purchase Order	Cancel an entire PO.
	Cancel Remaining Line Item Schedule	Cancel remaining items to be received on a PO.
Requisitions	Switch to Requisition Mode	Switch to <i>Requisition Entry</i> mode.
	Select Requisitions	Locate Purchase Requisitions in your system using a variety of search criteria.
RFQs	Switch to RFQ Mode	Switch to <i>RFQ Entry</i> mode.
	Sample RFQ Mode	Create, view or edit a sample RFQ.
	RFQ Search	Locate Request for Quote records in your system using a variety of search criteria.
	Copy from RFQ	Copy an existing RFQ to create a new RFQ.
	Copy from Sample RFQ	Copy a sample RFQ to create a new RFQ.
	Open Bidding	Change an RFQ to open status to begin bidding.
	Bid Detail	Manually enter bid submissions, view or edit bid details.
	Award RFQ	At the close of bidding, award a RFQ.
	Regret Notices	Send Email Regret Notices to suppliers.
	Refresh Bid Detail	Refresh the information on the Bid Detail screen to view recently received bids.
	Reopen an RFQ	Reopen a previously awarded RFQ.

Menu	Option	Description
	Cancel RFQ	Cancel an entire RFQ.
Supplier	Maintenance	Enter or edit supplier data and supplier history.
	Notifications	Send Email notifications to one, a group or all suppliers.
	Contract Pricing	Enter, edit, search or view Contract Pricing for suppliers/parts.
	Supplier Search	Search for suppliers that meet specified criteria.
Tools	Attach Files to PO/RFQ	Enter and/or verify attachments to a PO or RFQ.
	Display Drawing for Part number	Locate and Display a drawing associated with a part.
	Load Parts to Supply (Made From)	Enter parts to be supplied to a manufacturer of a component.
	Load Parts to Supply From BOM	Using a Bill of Materials to load parts to supply to a manufacturer of a component.
	Cost History for Part #	View cost information for a Part Number including Purchase Orders, Receipts, and Quotes.
	G/L Number Lookup	Locate General Ledger Account Numbers in your system using a variety of search criteria.
	Part Number Search	Locate Part Numbers in your system using a variety of search criteria. Note, NorthClark's Part Number Search application must be installed to use this feature.
	Requestor Lookup	Locate a Requestor Name in your system using a variety of search criteria.
	Favorites	Store/access line items that are used frequently.
	System Messages	Suppress or allow display of specified error messages.
	Workflow	Set parameters for <i>Buyer's Workflow</i> display.
Output	Create PO Document	Create an electronic Purchase Order Document and file it in the BWB Data Store.

Menu	Option	Description
	View Existing PO Documents	View electronic Purchase Order documents located in the BWB Data Store. The documents may be in either Word or PDF format.
	Create RFQ Document	Create electronic Request for Quote documents and file them in the BWB Data Store.
	View Existing RFQ Documents	View electronic Request for Quote documents located in the BWB Data Store. The documents may be in either Word or PDF format.

Right Click Menu - Row

When a line item has been selected from the PO, Requisition or RFQ entry mode the following Right Click Menu options are available.

Copy	Copy data to <i>Windows</i> clipboard.
Cut	Cut data from the current field and copy it to <i>Windows</i> clipboard.
Paste	Paste data from <i>Windows</i> clipboard.
Fill	Update all of the selected cells from <i>Windows</i> clipboard.
Zoom	View, print and/or edit the expanded contents of a field.
Insert Row	Insert a Row above the current position of the cursor.
Delete Row	Delete the current Row from the active spreadsheet.
Attach Files	Add and/or verify attachments to a PO or RFQ.
Cancel Remaining Line Item Schedule	Cancel remaining items to be received on a PO.
Cost History for Part #	View cost information for a Part Number including Purchase Orders, Receipts, and Quotes.
Display Drawing for part number	Locate and display a drawing associated to a part.
G/L Number Lookup	Find a General Ledger Accounting number
Part Number Search	Search for a Manfact part number with or without the specific part number.
Requestor Lookup	Search for the name of a Requestor.
Save Row <i>X</i> as Favorite	Save the current row as a favorite for streamlined entry on another record.

Right Click Menu – Column

When a column has been selected from the PO, Requisition or RFQ entry mode the following Right Click Menu options are available.

Copy	Copy data to <i>Windows</i> clipboard.
Cut	Cut data from the current field and copy it to <i>Windows</i> clipboard.
Paste	Paste data from <i>Windows</i> clipboard.
Fill	Update all of the selected cells from <i>Windows</i> clipboard.
Sort by Ascending	Sort the selected column in ascending order.
Sort by Descending	Sort the selected column in descending order.

Purchase Orders

Purchase Order Entry mode is used to create, view and update Purchase Orders. By default, you will be in Purchase Order Entry mode when the program starts. If you are not currently in this mode, select **Switch to PO Mode** from the **PO's** menu. Note, the mode you are currently in is displayed in the caption at the top of the screen.

Entering a New Purchase Order

If you were previously viewing an existing record, click the **Start New PO** button to clear the screen.

The screenshot shows the 'Buyer's Workbench -- PO Entry Mode' window. The '2 PO' tab is selected, displaying various fields for entering a purchase order. The fields include PO# Prefix (PC), PO Number (PC104), PO Date (8 / 1 / 2006), Blanket#, Vendor Code (1), Remit To (1), Warehouse (NDF = Fargo), Ship Via (Best Way), F.O.B. (ORIGIN), and Freight (P = Prepaid). There are also sections for PO Type (New, Confirming, Change), Partial Delivery (Partial OK, NO Partials, (Not Apply)), and Early Delivery (Early OK, NO Early, (Not Apply)). Other fields include Print (checked), Buyer (GLC = Gary Cla), Requestor (MATT), Deliver-To (RECEIVING DOCK), Terms (A = COLLECT ON C), Hold (None), Tax Codes, Currency (None), Date to Use (1 = PO Date), Exchange Rate, and PO Entered By. At the bottom, there are buttons for Start New PO, Load Req's for Vendor, Save to ManFact, E-Mail or Print PO, and PO Approval. The status bar at the bottom shows PO# PC104, MATTHEW'S MACHINING, PO Value: \$1900.00, and Account: MDEM05.9.

Purchase Order Number Assignment

There are three methods for assigning Purchase Order Numbers:

Manually Assigned by the User: Purchase Order numbering is controlled outside the system.

Manfact System Assigned Sequential Numbers: A sequential number will be assigned by the Manfact system when the PO is filed. Use Manfact's TABLE.LIID procedure to enabled this option.

NorthClark System Assigned Sequential Numbers with a Prefix: A list of valid Prefixes is defined using the *BWB Administration* program. During Purchase Order entry, the user selects a prefix, and the NorthClark system assigns the next number for that prefix. Note, to use this option, Manfact's TABLE.LIID procedure must be used to disable Manfact's auto-number feature.

Using a Reserved Purchase Order Number

You may reserve a Purchase Order Number for a given Supplier in advance of creating the actual Purchase Order. See the ***Reserve a PO Number*** feature on the ***Tools*** menu for more information.

When you are ready to use a Reserved PO Number, simply enter it at the PO Number prompt. The system will display a message asking you to confirm that you wish to use the Reserved Purchase Order Number.

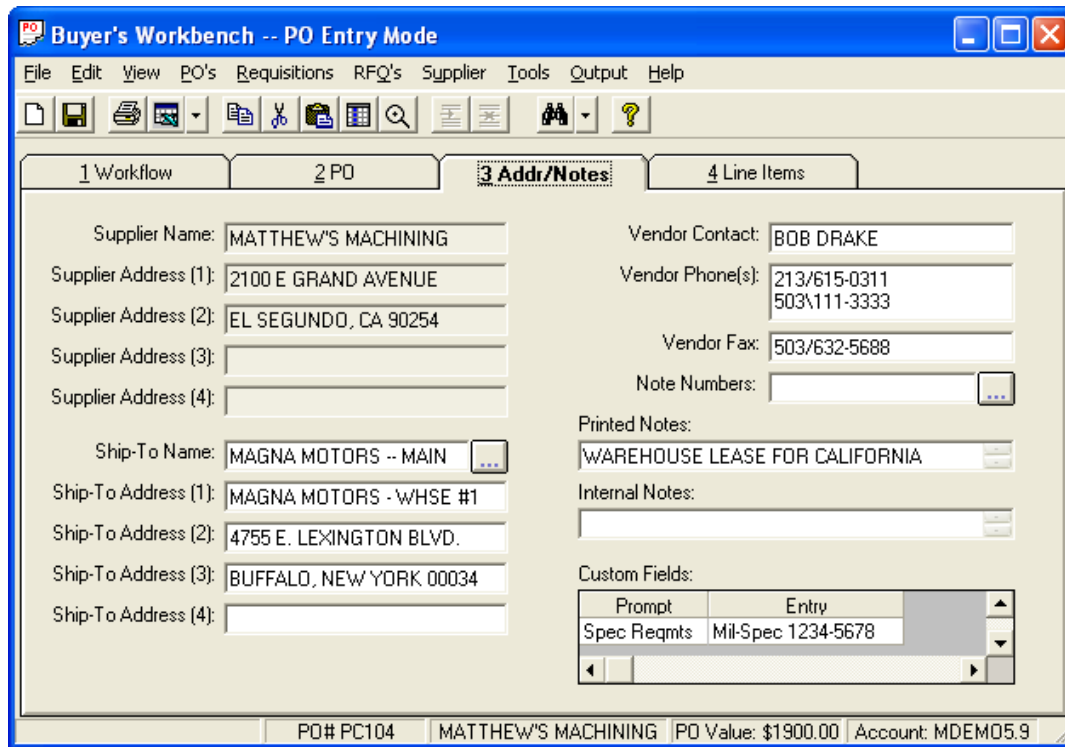
PO Tab Header Fields

PO# Prefix	If you are using <i>NorthClark System Assigned Sequential Numbers With a Prefix</i> , select the Prefix you wish to use from the drop-down list.
PO Number	Purchase Order Numbers may be either manually or system assigned, depending on how your system is configured. You may access an existing Purchase Order record by entering the PO# here.
PO Date	The date the PO was created.
Blanket #	Identifier of a Blanket Purchase Order record created using Manfact's POQ.N entry procedure
Vendor Code	Enter the Vendor Code used to identify the Supplier. Click on the icon to the right of the entry field to access the <i>Locate A Supplier</i> function.
Remit To	Enter the Vendor Code that identifies the Supplier to whom payments will be sent.
Warehouse	The default Ship-To Warehouse for the purchase order is displayed. Use the pull-down menu to select a different warehouse. This action will change the Ship-To Address for the PO. If the Ship-To Warehouse is modified a confirming message will appear. Select <i>yes</i> or <i>no</i> to Confirm or deny the change.
Ship Via	Method of Shipment.
F.O.B.	The location where ownership of the goods is transferred, e.g., destination or shipping point.
Freight	Freight Terms of payment.
PO Type	Indicate the type of PO by selecting New, Confirming, or Change. This setting causes the message " <i>Confirming PO</i> " or " <i>Change Order</i> " to be printed on the Purchase Order document.

Partial Delivery	Allow or disallow partial deliveries.
Early Delivery	Allow or disallow early deliveries.
Print?	Check this box to queue this record for batch printing.
Buyer	Select the Buyer ID to be assigned to this purchase order.
Requestor	Enter the Code for the person requesting the item to be purchased. Click on the search icon to the right of the field to find the requestor's code.
Deliver To	Enter the location where this order is to be delivered upon receipt.
Terms	Terms of payment are defaulted from the vendor file. Select a code from the pull-down list to override the terms of payment.
Hold	Select a hold code, which indicates the reason for the hold, to place the entire PO on hold.
Tax Codes	Enter any applicable Sales Tax Codes.
Currency	Select the Foreign Currency Code, if applicable.
Date to Use	Select the Date Code, which will determine when to lock-in the foreign currency exchange rate. Used only if a foreign currency code is entered.
Exchange Rate	The foreign currency exchange rate will default from the Currency file only if a foreign currency code is entered.

PO Addr/Notes screen

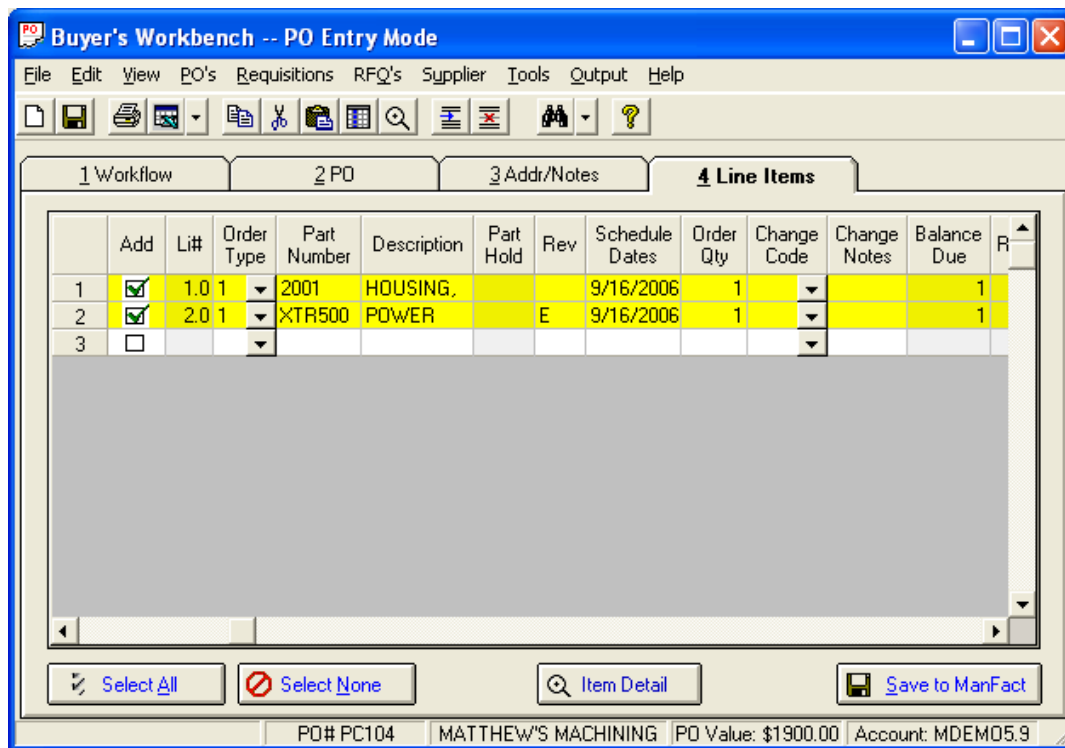
The Addr/Notes screen contains specific Vendor, Ship-To, and Notes information, based on the selections made in the PO Display.



- ❑ **Supplier Name and Address:** Defaults to the Supplier Name and Address in the Supplier File. The supplier name and address fields may not be overridden. Use *Supplier Entry and Maintenance* mode to change these fields.
- ❑ **Ship-To Name and Address:** Defaults to the Warehouse Name and Address in the Warehouse file. Any change can be entered directly or search for the Name and Address by clicking on the icon to the right of the Ship-To Name field.
- ❑ **Vendor Data:** You may change the vendor contact, telephone, and fax information with this display. Changes made will only apply to the current PO. Use *Supplier Entry and Maintenance Mode* to make permanent changes to Supplier Data.
- ❑ **Notes Fields:** Any notes to be included on the PO may be entered in the text boxes or use the Note Numbers box to enter previously defined Codes.
- ❑ **Note Numbers:** To add Note Numbers click on the icon to the right of the field and select the notes to appear on the PO. The numbered codes were previously defined in the Manfact PURTEXT.N function. If Note Numbers have been added to *Buyer's Workbench Administration*, the note number will default from the Order Type specified on the Line Item.
- ❑ **Printed Notes:** These notes will appear on the PO.

- ❑ **Internal Notes:** These notes will appear only on internal PO documents.
- ❑ **Custom Fields:** If your company has defined Header Level Custom Fields for your Purchase Orders, these fields will appear in the “**Custom Fields**” section of this window. These fields are user defined and were created by your System Administrator in the *Buyers Workbench Administration* procedure. Enter the appropriate information for these fields as defined by your company's policy.

Purchase Order Line Items Multi-Line View



There are several ways to add line items to a Purchase Order:

- ❑ From the PO tab click the **Load Reqs for Vendor** button. The system will load all open requisitions for this vendor and switch you to the *Line Items Display*, where all or any of the items may be selected to be included on the PO.
- ❑ To select requisitions using a broader range of selection criteria, use the **Select Requisitions** option from the **Requisitions** menu. After the search is completed the open requisitions will appear as rows on the spreadsheet. Add a requisition item to the PO by clicking on the **Add** Box next to the appropriate line item.
- ❑ If an RFQ has been awarded to the supplier indicated on this PO, the RFQ line items may be added to the Purchase Order by entering the RFQ number in the appropriate field. A message will appear asking you to confirm loading all Line Items to this PO.

- If a Vendor Quote (POQ) was created in Manfact via POQ.N, the POQ line item may be added to the Purchase Order by entering the POQ number and POQ line item number in the fields provided. The purchase order quantity will need to be entered. The unit price will be updated to the quoted price as stored in the POQ record.
- To add a line item that was not previously created via a Purchase Requisition, RFQ, or POQ, type the information into the next available blank row or select a Favorite from the Favorites menu located in the Tools menu or the Right Click menu.

If the supplier will be manufacturing an item using parts supplied by your company, there are three methods available for loading the part number(s) and quantity information:

1. Type the Part Numbers and Quantities in the Parts to Supply column on the Purchase Order.
2. Copy the information from the “Made From” list entered on the Manfact PARTS file.
3. Copy the list of Parts from a Manfact Bill of Material (BOM) record.

You’ll find the “Load Parts to Supply” options on the Tools menu.

To remove a line created in error, click the **Add** box to change the status from a checkmark to a blank value.

Different Order Types have different required fields. If you add an item that is missing one or more required fields, the system will prompt you to enter the necessary information before the purchase order can be filed.

A running total for the "PO Value" will be visible in the status bar. The total purchase order amount is calculated and displayed as you make changes to the order.

Multi-line cells use the Zoom feature for editing. Double-click on the cell, or click the icon on the toolbar to display a pop-up window allowing you to edit multiple lines of information.

Column data may be edited and/or viewed using the Single Item Detail feature. Click the **Item Detail** Button to view the selected line. Two tabs will be available to view all of the column details. The fields displayed on the Single Item Detail are the same as the columns presented in the Line Item entry, although they may be presented in a different sequence.

Once all of the data has been entered, click on the **Save to Manfact** button to create the Purchase Order.

Purchase Order Line Items Single-Line View

Line Item Detail [Window Title]

File Edit Help

2 of 2

1 Item Detail | 2 More

Add Row: Line#: 2.0

Part Number: XTR500 Part Rev: E

Description: POWER DRIVE ASSY. Part Hold:

Poreq Date: 9/28/2006 Supplier: [Redacted] Line Hold: [No]

Need Dates: 09/01/06*1 Request Qty: 1 Tax Type: R =

Sched Dates: 9/16/2006 Sched Qty: 1 U/M: EA

Balance Due: 1 U/M Factor: 1.0000

Order Type: 1 Chg Code: Resource: ADJ Price Per: 1

Buyer: [Redacted] Whse: W1 = MAG Unit Price: 900.000 Price Conv: 1.0000

Requestor: MATT Inv. Loc: STK-1 Foreign: 0.0000 Ext. Price: 900.000

Deliver To: [Redacted] Work Order: [Redacted] Last Cost: [Redacted]

G/L Acct#: [Redacted] Projects: [Redacted]

Account: MDEM05.9

Line Item Detail [Window Title]

File Edit Help

2 of 2

1 Item Detail | 2 More

Material Furnished:

Supply Parts: AML

OP Location: OUT-1 Receipts

Parts to Supply

Ship Id: [Redacted] Print Line

Ship Li#: [Redacted] Inspect

Early Days: 0 Netting

Overship%: 0 Files Attached

A/P Acct# 01.000.2005

PO Notes: [Redacted]

Change Notes: [Redacted]

Note Numbers: N1, N2

Custom Fields:

Prompt	Entry
MSDS	<input checked="" type="checkbox"/>
Category	CAT1 = CATEGORY 1
Mtl/Mfg	M1 = Material #1

Account: MDEM05.9

Column Descriptions:

Add	<p>Add, Delete, or Cancel the entire row.</p> <p>This checkbox has three possible values while entering a PO:</p> <ul style="list-style-type: none"> ❑ A green checkmark means the line item has been (or will be) included on the order. ❑ An empty checkbox is displayed when an item has been loaded, but not added to the order. When the purchase order is saved, items with a blank value in the checkbox field will not be added to the PO. ❑ A red "X" means the line item is to be deleted or cancelled. If no receipts have been made against the item, it will be deleted. If receipts exist, the remaining scheduled items will be cancelled.
LI#	<p>The line item number is assigned by the system and may not be changed. The system will automatically re-sequence the line item numbers if you insert or delete lines and no receipts have been made against the PO.</p>
Requisition #	<p>If applicable, the PO Requisition ID Number is the source document for the item to be purchased.</p>
Poreq Date	<p>The date on which the PO requisition was generated.</p>
Req Li#	<p>The PO Requisition line item number (Manfact 5.8 and higher) associated with the source document for the item to be purchased.</p>
Requestor	<p>The user ID code for the requestor.</p>
Supplier	<p>If the line item you are viewing is a requisition, the suggested Supplier is displayed. Note, if the Supplier Number is different then the one entered on the Header of the Purchase Order, a warning message is displayed.</p>
RFQ #	<p>If the PO line item was created from an RFQ, the associated RFQ Number is referenced here.</p>
RFQ Li#	<p>If the PO line item as created from an RFQ, the associated RFQ Line Item Number is referenced here. In <i>Line Item Detail</i> display this number will be in the unlabeled box to the right to the RFQ#.</p>
POQ#	<p>If applicable, the PO Quote ID Number that is the source document for the item to be purchased.</p>

POQ Li#	The PO Quote line item number associated with the source document for the item to be purchased.
Order Type	<p>Using the pull-down window, select the appropriate Manfact numeric code for the purchase order:</p> <ul style="list-style-type: none"> 1 - Inventory or Production Material shipped to a physical inventory location. 2 - Expense Items charged to a specific General Ledger account. 3 - Capital Items charged to a specific account. 4 - Inventory or Production Material received to a specified Work Order (A Part Number is Required). 5 - Inventory or Material that is Drop Shipped from the Vendor/Supplier directly to the Customer and is tied to a specific Sales Order. 6 - Inventory or Material that is Drop Shipped from the Vendor/Supplier to another Vendor and is tied to a specific PO. 7 - Non-inventory Material or costs received into Work Order (No Part Number is Required). 8 - Outside Processing charged to a Work Order.
Part Number	A valid Manfact part number is a required field for Order Types 1, 4, 5, and 6 purchases.
Description	<p>Description of the part or item to be purchased. This information will default for inventory purchases and may be overridden by the user.</p> <p>A pop-up box is displayed when you begin typing in the Description field, or when you double-click on the Description cell.</p>

<p>Part Hold</p>	<p>The Hold Code from the Manfact Parts file is displayed. Hold Codes include:</p> <ul style="list-style-type: none"> U - Discontinued, but flagged for "use until exhaust". D - Discontinued item, no orders should be recommended. O - Obsolete part, should not be issued to work orders. <p>Additional Hold Codes may be defined by your company as needed. This field is updated by the system and may not be overridden by the user.</p>																				
<p>Rev (Revision)</p>	<p>Revision Level of the part. This information will default from the Manfact Parts file and may be overridden by the user.</p>																				
<p>Schedule Dates</p>	<p>The scheduled delivery date(s) for the item. When entry or editing occurs, an editing window appears, where multiple scheduled deliveries may be entered.</p> <div data-bbox="699 905 1271 1297" data-label="Image"> <table border="1" data-bbox="732 1052 1247 1220"> <thead> <tr> <th></th> <th>Schedule Date</th> <th>Quantity</th> <th>Request Date</th> <th>Promise Date</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>09/16/06</td> <td>1</td> <td>09/01/06</td> <td>09/16/06</td> </tr> <tr> <td>2</td> <td>09/30/06</td> <td>1</td> <td>09/01/06</td> <td>09/16/06</td> </tr> <tr> <td>3</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> </div> <p>Optionally, you may enter a Request Date and a Promise Date for each delivery. If left blank, the system will update these fields with the Schedule Date when the PO is filed. The Promise Date will be used to evaluate the Supplier's performance when measuring on-time deliveries.</p>		Schedule Date	Quantity	Request Date	Promise Date	1	09/16/06	1	09/01/06	09/16/06	2	09/30/06	1	09/01/06	09/16/06	3				
	Schedule Date	Quantity	Request Date	Promise Date																	
1	09/16/06	1	09/01/06	09/16/06																	
2	09/30/06	1	09/01/06	09/16/06																	
3																					
<p>Order Quantity</p>	<p>The total quantity ordered is the sum of all scheduled delivery quantities. If multiple schedule dates have been entered, this field may not be updated. Use the Schedule Dates field to access the editing window.</p>																				
<p>Request Dates</p>	<p>The date that the item is needed.</p>																				

Change Code	Select the Change code from the pull-down menu. The change code is used to indicate why a PO line item was changed and whether the change should affect vendor performance. Valid Change Codes are defined using the Manfact TABLE.PUR procedure. The following <i>Change Notes</i> are examples only.
Change Notes	Free form notes to describe the reason for the change to the PO line item. Enter the notes into the following editing window. A record of the user, date and time will be recorded on each note.
Balance Due	The total quantity remaining to be received. This information is maintained by the system and may not be overridden by the user.
Receipts	If Receipts have been posted for a given line item, double-clicking this field will open a window showing a list of all Receipt Dates and Receipt Quantities for the line item.
Buy U/M	Select the Buy Unit of Measure required by the supplier from the pull-down menu. This unit of measure can be different from the stocking unit of measure.
Buy U/M Factor	Enter the multiplier used to convert from the purchasing (buy) unit of measure to your company's stocking unit of measure for this part. For example, if you stock an item in discrete units (each), but purchase it by the dozen, the Buy U/M Factor would be 12. Therefore, when you purchase 1 package, you will receive 12 units to stock.
PO Price	The unit price for this PO line item. This price must be entered based on the Buy Unit of Measure. The system will automatically convert the pricing to the equivalent stocking unit price. The pricing may be entered in multiples of a single buy unit of measure. Entering the appropriate Price Per and Price Conversion factors performs this additional conversion.
Price Per	The number of units that the PO Price refers to. The PO price entered for this line item will be multiplied by the total quantity and then divided by this factor.
Price Conversion	Used to convert the PO price to a factor other than the Buy Unit of Measure. This information will default from the Parts file.
Ext. Price	Extended Price = Order Qty * PO Price * Price Conversion / Price Per.

Foreign Price	As applicable, the unit PO Price in Foreign Currency.
Tax Type	Select a Tax type using the pull-down menu. Tax types are defined in the Manfact TABLE.TAX procedure. This information will default to the tax type assigned to the part number being purchased but may be overridden.
Resource Code	Select a Resource Code using the pull-down menu. Valid resource codes are defined using the Manfact TABLE.WO entry procedure.
Whse	The Warehouse Code identifies the location where materials are to be delivered. Select the Warehouse Code from the pull-down menu.
Project	The Project Number will be displayed automatically for purchases to a work order or inventory location. For expense and capital purchases, you may enter one or more project numbers to be charged with the expense. If multiple project numbers are entered, you must also specify the percentage of cost to be allocated to each project.
Work Order	The Work Order Number that will receive the material or services. For Order Types 4, 7 and 8, specify the WO to be charged.
InvLoc	Manfact physical Inventory Location identifier. For Type 1 purchase orders, you must enter a valid Manfact Inventory Location.
G/L Account	The General Ledger Account Number to be charged for expense (type 2) or capital (type 3) purchases. If the G/L Account Number is not known, you may access the G/L Lookup feature from the Right Click menu.
Deliver To	Free form user defined name of the location where the item is to be delivered. (e.g. Guard Shack, Bob Jones, Loading Dock, etc).
Last Cost	The last actual cost recorded for the part from either a purchase order or work order.
Printed Notes	Free form notes to be printed on the purchase order line item.
Note Numbers	Identifiers for user defined notes from Manfact PURTEXT file. The associated notes will be printed on the purchase order document. Double click on the field to open a window displaying available note codes. Check the appropriate box(s) next to the note number(s) to be included on the PO.

AML	<p>Enter the list of acceptable Manufacturer Names and associated Part Numbers. A pop-up window will be displayed allowing entry of multiple lines of information.</p> <p>This information defaults from the Manfact PARTS file, but may be modified for specific orders if required. Manufacturer Names must exist on Manfact's MANFR file.</p>
Ship To Doc. #	<p>Ship To Document number: Purchase Order or Sales Order Number. A required field when drop shipping directly to a customer (order type 5) or to a vendor (order type 6).</p>
Ship To Line #	<p>Line number corresponding to the item on the Ship To Doc.</p>
Supply Parts?	<p>Check this box if your company will supply parts to the vendor for manufacture of the item ordered. Once checked, the Outside Processing (<i>OP</i>) Location and Parts To Supply information must be filled in.</p>
OP Location	<p>If you are supplying parts to the vendor on this order, a valid Manfact outside processing inventory location must be selected from the pull-down window.</p>
Parts To Supply	<p>If you are supplying parts to the vendor on this order, enter the list of Part Numbers, and the quantity per assembly, to be supplied to the Vendor. Refer to the Tools menu for more options available for loading part numbers into this field.</p>
Print?	<p>Check the <i>Print?</i> box if you want this line item to print on the Purchase Order document.</p>
A/P Acct#	<p>The Accounts Payable account associated with the line item being purchased. Defaults from the INVLOC for inventory related purchases and from the TABLE.AP for Expense (type 2) and Capital (type 3) purchases.</p>
Early Days	<p>The number of days in which the delivery can be early to the scheduled delivery date. Receipts occurring earlier than the days allowed would automatically be placed on hold.</p>
Over Ship %	<p>Percentage of acceptable over-shipment. Receipts containing quantities more than the allowable percentage will automatically be placed on hold.</p>

Hold Code	Any entry will place the purchase order line item on hold. Select one of the following codes from the pull-down menu: (Blank = "No Hold") A - Accounting C - Credit E - Engineering M - Manufacturing P - Purchasing
Inspect	Check the <i>Inspect</i> box if inspection is required upon receipt.

Copy a Purchase Order

This feature allows you to copy information from an existing Purchase Order. The system will prompt you for the PO Number to be copied when you select ***Copy a PO*** from the ***PO's*** menu.

When you are finished editing the order, click the ***Save to Manufact*** button. This will assign the PO Number (if applicable), and update the Manufact system with the new information. A confirmation message will be displayed indicating the new PO number.

If you have installed the Purchase Order Approval System, the order will be analyzed to determine signature requirements at this time. See the ***Purchase Order Approval*** section for more information.

Create a Purchase Order from an RFQ

A Purchase Order may be created from an existing RFQ by selecting ***Create New PO From RFQ*** from the ***POs*** menu.

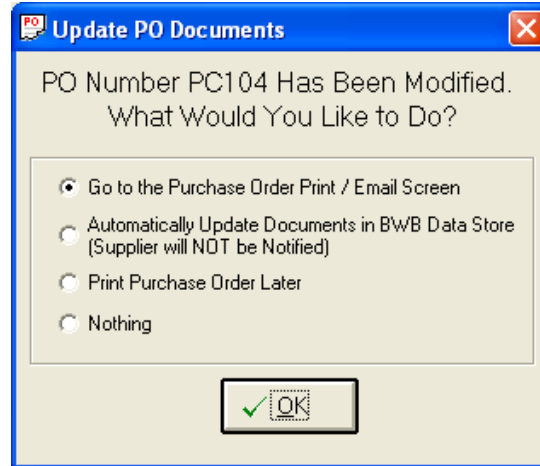
If the RFQ has not been awarded, an error message will be displayed. The PO cannot be created until the RFQ has been properly awarded.

Modifying an Existing Purchase Order

You can access in existing Purchase Order either by entering the identifier directly, or by clicking on the search icon to the right of the PO Number entry field to access the ***Purchase Order Search*** function.

If Purchase Order Approval is installed, you may need to follow the approval processes again for any changes that affect the sign-off requirements, such as quantities and/or pricing changes.

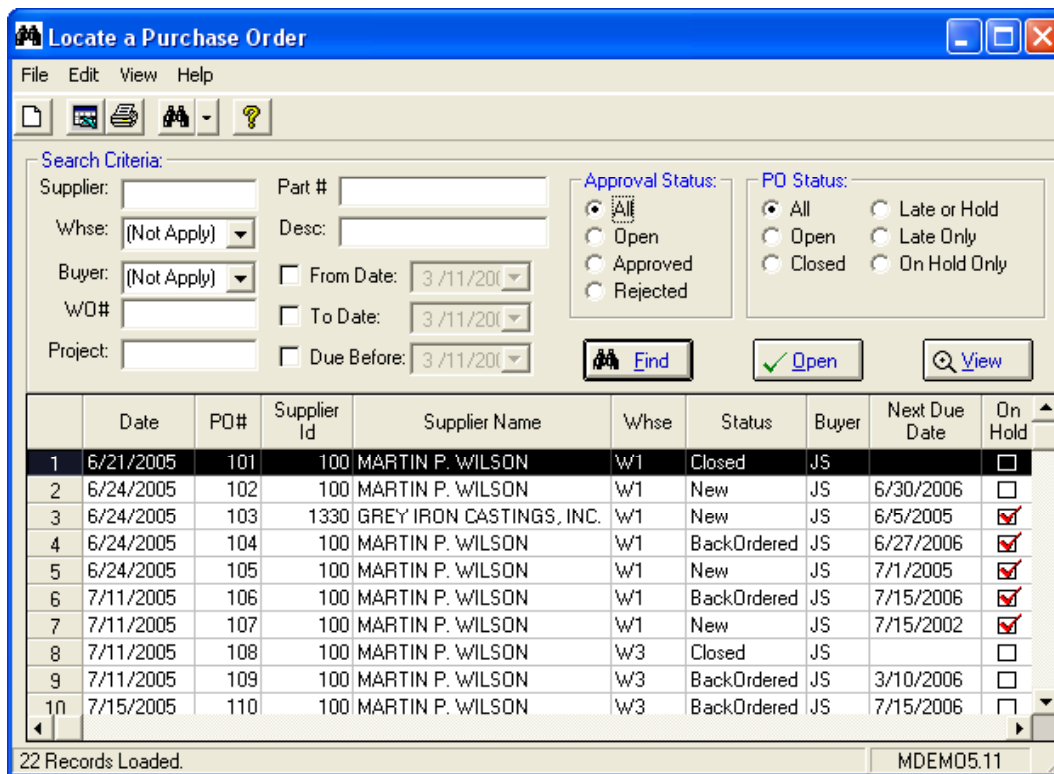
The following options are presented when the Purchase Order is filed:



The *Buyer's Workbench* allows you to generate the PO as an electronic document, and optionally email it directly to your Supplier. Refer to the *Output – Electronic Documents* topic for more information.

Purchase Order Search

The *Purchase Order Search* option may be selected from the *PO's* menu, or by clicking the icon next to the Purchase Order Number prompt on the main screen.



Enter your selection criteria, then click the **Find** button. You may use as many fields as desired to narrow your search, and *wildcarding* is supported for text fields.

When the search is complete, you will be presented with a list of purchase orders that can be selected for review. Double-click on a row to open a Purchase Order, or if you prefer, highlight the row and click the **Open** button.

To view the electronic Purchase Order Document, highlight the row and click on the **View** button. The document will be located in the BWB Data Store, and will be in either Word or PDF format.

Note that when the search window is closed and reopened, the results of your last search are redisplayed. This is a useful feature for selecting and updating groups of records without having to search again and again. However, the information on this display is refreshed only when the search is performed, so care should be taken as the data could become stale.

Column Field Descriptions

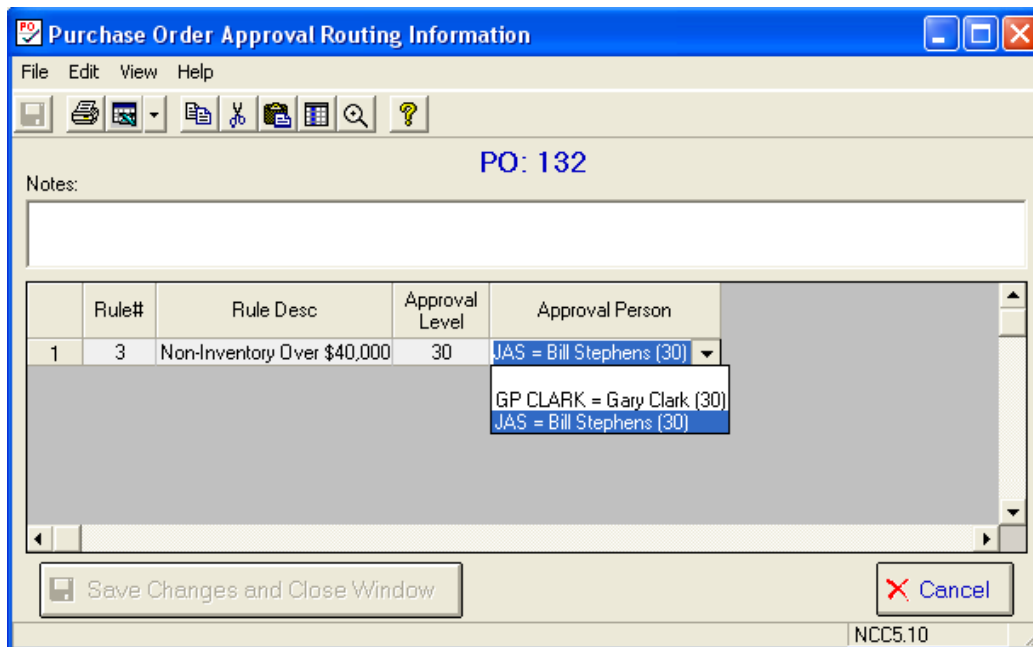
Date	The creation date for the PO
PO#	The identification number for the PO.
Supplier ID	Number or Code assigned to a specific Supplier. (Vendor ID)
Supplier Name	Name of the Supplier/Vendor
Whse	The Ship To Warehouse(s) for line items on this Purchase Order.
Status	The current status of the Purchase Order: <ul style="list-style-type: none"><input type="checkbox"/> New: There have been no receipts against the purchase order.<input type="checkbox"/> Backordered: There has been a receipt against the purchase order and there is quantity remaining to be received.<input type="checkbox"/> Closed: All line items have been fully received.<input type="checkbox"/> Closed and Paid: All line items have been fully received and paid for.
Buyer	The buyer ID assigned to this purchase order
Next Due Date	The earliest due date of an open or backordered line item with remaining quantity to be received.
On Hold	If a checkmark is found in this column, there is a “hold” code assigned to either the purchase order header or an open or backordered line item.

Late	If a checkmark is found in this column, there is an open or backordered line item that is past due to the scheduled delivery date.
PO Value	The total value of the Purchase Order.

Purchase Order Approval

If you have installed the *Purchase Order Approval System*, the system will search the rules maintained in the *Purchase Order Approval System Administration* file to determine if the order requires further approvals. If signatures are required, the PO will be placed on hold and the **Purchase Order Approval Routing Information** screen will be displayed.

The procedure will default the routing to the authorized person based on the rules established in *Purchase Order Approval System Administration*. You may select a different person to route the PO to by selecting the name from the drop-down list. You may also enter notes that will be included in the email.



If you have made changes, click the **Save Changes and Close Window** button, otherwise just click **Cancel** to close the window.

Cancel an Entire Purchase Order

This command will cancel the entire Purchase Order by setting all order quantities to zero. If a line item has receipts, the order quantity will be reduced to the actual receipt quantity. To use this procedure:

- ❑ Open the purchase order you wish to cancel
- ❑ Select ***Cancel Entire Purchase Order*** from the ***POs*** menu.
- ❑ Save the Purchase Order

Cancel a Selected Line Item

Use this command to cancel the balance due on a specific line item:

- ❑ Open the purchase order you wish to cancel
- ❑ Switch to the ***Line Items*** view and click on the row you wish to cancel
- ❑ Select ***Cancel a Selected Line Item*** from the ***POs*** menu.
- ❑ Save the Purchase Order

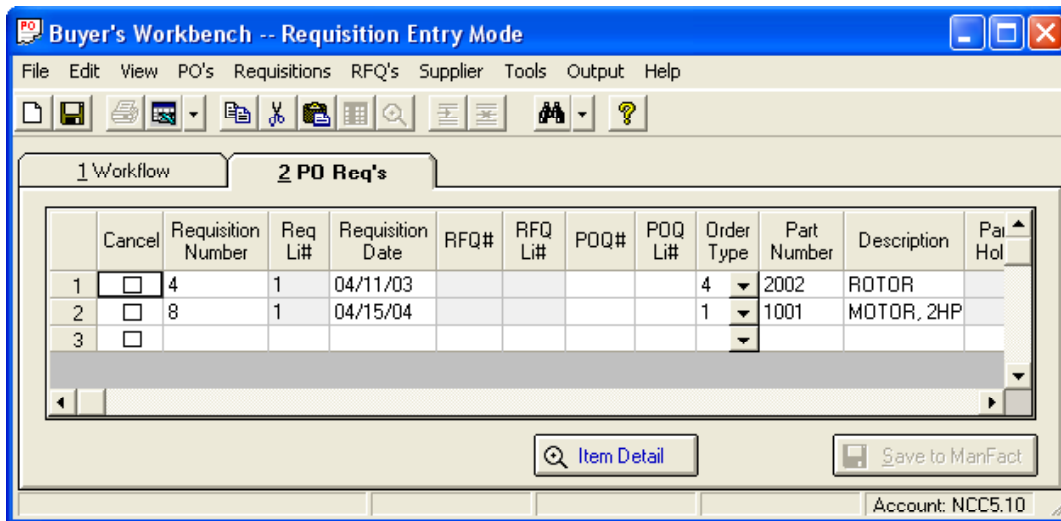
Requisitions

Requisition Entry is used for creating, viewing or updating Purchase Requisitions. All requisitions are available for processing, whether generated by the Material Requirements Planning (MRP) system, entered manually using POREQ.N, created during Requisition Entry, or posted to Manfact from an external source such as a Web based Requisition system.

Multiple requisitions may be viewed and updated at the same time, making it easy to modify groups of related requests. New requisitions may be created, and existing requisitions may be closed at the Buyer's discretion.

Create or Update a PO Requisition

Begin by choosing **Switch to Requisition Mode** from the **Requisitions** menu.



Requisitions may be entered into the spreadsheet in the same fashion as Purchase Order Line items. See the *PO Line Item Column/Field Definitions* for information on the columns displayed. The system will automatically assign new Requisition Numbers when you click the **Save to Manfact** button.

To access an existing record, type the identifier in the **Requisition Number** column. You may also select a population of Requisitions using the various options on the **Workflow** tab, or by choosing **Select Requisitions** from the **Requisitions** menu.

When a row is changed, the line item will be highlighted, indicating that a change has been made but not saved.

Click the **Item Detail** button to switch to a single-line view. The navigator bar in the upper-right corner of the screen may be used to scroll through the list of Requisitions:

Line Item Detail

File Edit Help

1 of 2

1 Item Detail **2 More**

Cancel: Part Number: 2002 Part Rev:

Line#: Description: ROTOR ASSEMBLY Part Hold:

Poreq Date: 4 /11/2003 Supplier: 100 MARTIN P. WILSON Line Hold: =

PO Req#: 4 1 Need Dates: 04/30/03 Request Qty: 10 Tax Type: R =

RFQ#: Sched Qty: 10 U/M: EA

BPO#: Sched Dates: 04/30/03 Balance Due: 10 U/M Factor: 1.0000

PO#: Chg Code: Resource: MTL Price Per: 1

Order Type: 4 Whse: W3 = MAGN Unit Price: 12.0000 Price Conv: 1.0000

Requestor: Inv. Loc: WIP-3 Foreign: 0.0000 Ext. Price: 120.000

Deliver To: Work Order: 1 Last Cost: 12.0000

G/L Acct#: Projects: 100.2*100.00

Account: NCC5.10

Line Item Detail

File Edit Help

1 of 2

1 Item Detail **2 More**

Material Furnished:

Supply Parts: AML

OP Location: Receipts

Parts to Supply

Ship Id: Print Line

Ship Li#: Inspect

Early Days: Netting

Overship%: Files Attached

A/P Acct# 01.000.2005

PO Notes:

Change Notes:

Note Numbers:

Custom Fields:

Prompt	Entry
Priority	<input type="text"/>
Requestor's E-Mail	<input type="text"/>
Statement of Work	<input type="text"/>

Account: NCC5.10

Search for Requisitions

This screen is displayed when you choose the *Select Requisitions* option from the *Requisitions* Menu.

The screenshot shows a dialog box titled "Load List of PO Requisitions". It features a "Selection Criteria" section with fields for Project Number, Work Order Number, Warehouse, Inventory Location, Part Number, Part Description, Product Class, Sub Class, Part Type, Category, Resource, and Hold Status. There is also an "Approval Status" section with radio buttons for All, Open, Approved, and Rejected. An "Order Types" section contains a list of checkboxes for 1 - Inventory, 2 - Expense, 3 - Capital, 4 - Work Order, 5 - Direct Ship, 6 - Drop to Vendor, 7 - Non Inv. to WO, and 8 - Outside Process. Other fields include Buyer, Planner, Requestor, Vendor Number, and RFQ Number. A checkbox for "Start Order Date Within" is followed by a text box and the word "Days". At the bottom are "Clear", "OK", and "Cancel" buttons.

You may use any combination of the available fields to narrow your search. For text fields, *wildcarding* may be used to search on a portion of the field. To exclude a particular field from the search, leave it blank or select the “(Not Apply)” option from the drop-down list.

A section has been provided to select the Manufact Order Type Codes that can be used to narrow the search. If you don't select any Order Types, all Order Types will be included in the search.

You may also limit the search to records that have a start order date within the number of days specified on the search entry. The Start Order Date is the latest date the order may be placed and still have the parts arrive on time based on the Part Lead Time: $\text{Start Order Date} = 1^{\text{st}} \text{ Schedule Date} - \text{Lead Time}$.

Closing/Canceling a Requisition

To cancel an existing Requisition, click the *Cancel* checkbox in the first column of the spreadsheet. A large red X will appear in the checkbox and the row color will change to grey. Click the *Save to Manufact* button.

Selecting Requisitions in PO or RFQ Mode

You must be in “Requisition Mode” to modify or cancel a Purchase Requisition.

Selecting Requisitions in PO or RFQ mode allows you to easily append them to a new or existing Purchase Order or Request for Quote. Clicking the “Add” checkbox while in Purchase Order or RFQ mode has the affect of adding or removing the Requisition from the PO or RFQ.

Purchase Order Approval System

If you have installed the Purchase Order Approval System, the system will search the rules maintained in the Purchase Order Approval System Administration file to determine if the requisition requires approval. If approvals are required, the requisition will automatically be placed on hold. For further information regarding the Purchase Order Approval System procedures, see the user guide for this application.

Requests for Quote (RFQ)

The Request for Quote Module provides a formal process for soliciting quotations from multiple suppliers, and awarding business based on a combination of best price, and supplier performance criteria.

This module is closely linked to the *Supplier Portal Web Site* (sold separately), that allows suppliers to place bids on-line. Whether or not the Supplier Portal is installed, bids may be manually entered using the *Bid Detail* entry screen.

Request for Quote Procedure Summary

Here is a summary of the normal sequence of steps involved in the Request for Quote process:

- ❑ Enter a new RFQ
- ❑ Generate the electronic RFQ document and post to the BWB Data Store
- ❑ E-mail and/or Print RFQ
- ❑ Open Bidding
- ❑ Resolve Supplier Questions – If the Supplier Portal is installed, questions may be received electronically from the web site.
- ❑ Enter or Review Bid Detail
- ❑ Select a Supplier and Award the RFQ
- ❑ Send Regret Notices
- ❑ Convert the RFQ to a Purchase Order

Creating a New RFQ

There are several ways that a new Request for Quote may be created. You may enter the information directly, load Purchase Requisitions, copy from an existing RFQ, or copy from a Sample RFQ. The RFQ tab on the Main screen is used to enter, view, update and award Request for Quotations. Begin by selecting *Switch to RFQ Mode* from the *RFQs* menu.

To begin entering a new record, click the *New* button located at the bottom left of the screen (the system will assign an RFQ number when you save the record).

Enter or select appropriate Description, Warehouse, Buyer, and Requestor information. The RFQ Date RFQ Bidding Type and Duration data are selected using the pull-down menus. If the RFQ Bidding Type is Auction, you will need to select the Blackout time and Bid increment.

To add a new line item, switch to the *Line Items* tab, and begin typing on the last row of the spreadsheet. You may optionally specify a Purchase Requisition Number, and the system will copy all of the available information to the current row.

Another way to add line items is to select a population of Purchase Requisitions using the available Work Flow and/or Search features, then append each line item to the RFQ by clicking the “Add” checkbox in the first column.

Different Purchase Order Types have different required fields. If you add an item that is missing one or more of these, the system will prompt you to enter the necessary information before the RFQ can be filed.

Column data may alternately be edited and/or viewed using the Single Item Detail feature. Click the ***Item Detail*** to view the selected line. Two tabs will be available to view all of the column details. The fields displayed on the Single Item Detail are the same as the columns presented in the Line Item entry, although they may be presented in a different sequence.

If you plan to furnish material to the Supplier, you will need to enter the list of Part Numbers and associated Quantities on the line item. Options on the Tools menu allow you to load this list using the “Made From” information in the PARTS file, or from an existing Bill of Material.

Removing Line Items

The “Add” checkbox in the first column of the spreadsheet is used to append line items to the RFQ, and also to delete line items from an existing RFQ. Note that a line item may not be deleted if bids have already been entered, however you may elect to cancel the line item by setting the Quantity to zero.

Inviting Suppliers to Bid

The next step is to enter the list of suppliers that will be invited to bid. You may type the Vendor Numbers directly into the spreadsheet, or click the ***Supplier Search*** button at the bottom of the screen to locate vendor records using a variety of search criteria.

RFQ Entry and Maintenance

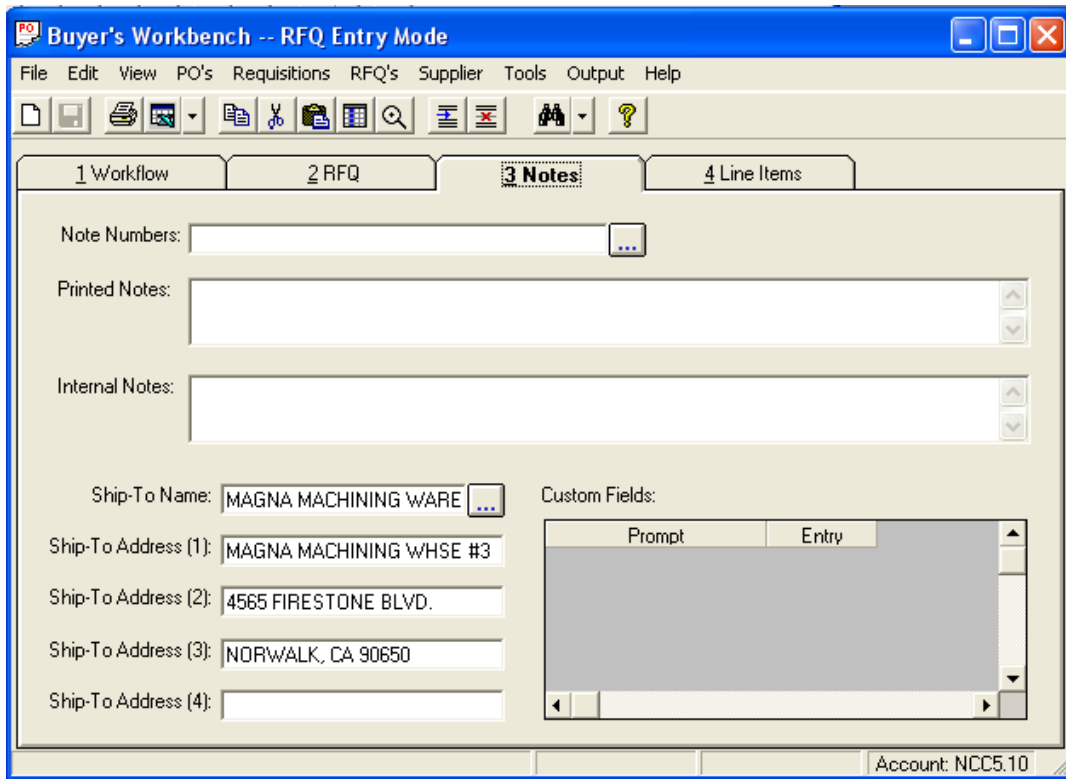
This screen is used to create, edit, view, and award Requests for Quote:

The screenshot shows the 'Buyer's Workbench -- RFQ Entry Mode' window. It features a menu bar (File, Edit, View, PO's, Requisitions, RFQ's, Supplier, Tools, Output, Help) and a toolbar with various icons. The main area is divided into four tabs: 1 Workflow, 2 RFQ (selected), 3 Notes, and 4 Line Items. The RFQ tab contains several input fields: RFQ Number (3), RFQ Date (3/27/2003), Open Date (4/12/2003), Description (Project Material), RFQ Type (S = Sealed), Open Time (10:28:10), Warehouse (W3 = MAGNA MACH), Duration (8 Hours), Close Date (4/12/2003), Buyer (JS = Jo Savage), Black Out (1 Hour), Close Time (18:28:10), Requestor (George Jones), Bid Increment (1.00), Black Date, and Black Time. The Status is 'Pending'. Below these fields is a table with columns: Award, Vendor Number, Vendor Name, Security Level, Q Rating, D Rating, Q+D Rating, Bid Amount, Weighted Cost, Schedule Met?, and B Ty. The table contains three rows of data. At the bottom, there are buttons for New, Suppliers, Email/Print, Open Bidding, Questions, Bid Detail, and Award. The status bar at the bottom shows 'RFQ# 3' and 'Account: NCC5.10'.

Award	Vendor Number	Vendor Name	Security Level	Q Rating	D Rating	Q+D Rating	Bid Amount	Weighted Cost	Schedule Met?	B Ty
<input type="checkbox"/>	100	MARTIN P. WILS	4	100.0	0.0	50.0				
<input type="checkbox"/>	1330	GREY IRON CAS	4	-100.0	-100.0	-100.0				
<input type="checkbox"/>										

Enter the RFQ Number for the Request for Quote you wish to view or edit. Click the button to the right of the prompt to access the RFQ Search screen.

Modify Notes and Ship-To information on the Notes Display:

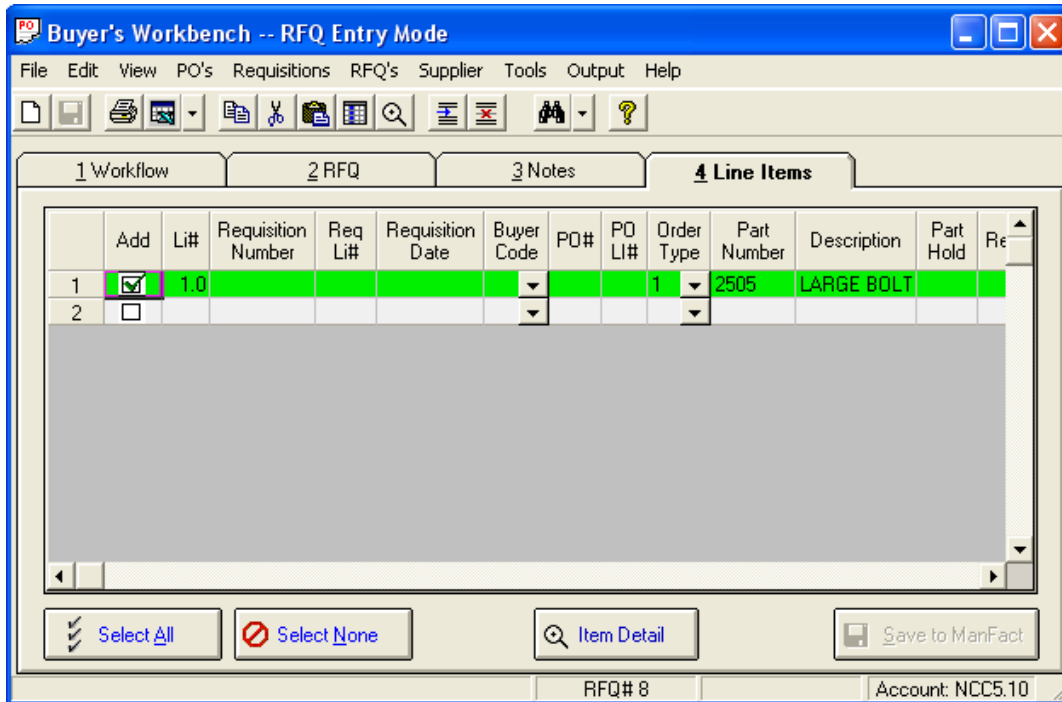


This screen contains Ship-To information, and notes to be included with the RFQ. The Printed Notes will be included on the RFQ Document, while the Internal Notes are displayed only on this screen. Both fields accommodate an unlimited amount of free-form text entry.

Note Numbers may be used to add standard text to the RFQ Document. Note Numbers and associated text are entered using Manfact's PURTEXT.N entry screen. Click the browse button next to the prompt to select from the list of pre-defined Note Numbers.

If custom fields have been created, they will appear on this display. Enter or update the custom fields as required.

Modify line item information on the RFQ using the Line Items Display tab:



Once all of the data has been entered, click on the **Save to Manfact** button. At this point, the RFQ will have a Status of “New”.

The **Open Bidding** button changes the RFQ Status to "Open", allowing the selected suppliers to bid on the current RFQ. If the Supplier Portal is installed, Suppliers may review open RFQs and submit bids via the web-site. Otherwise, bids may be entered using the Bid Detail screen.

For auction items, the status is changed to "Pending Award" when the scheduled close date/time has passed. For sealed bids, the status is changed when all invited suppliers have submitted bids, or when the close date/time has passed, whichever is earlier.

RFQ Display - Field Descriptions

RFQ Number	The system assigns a sequential identifier when the RFQ is filed.
Description	Enter a description for the Request for Quote.

Warehouse	<p>The Default Ship To Warehouse for the RFQ. This information can be overridden at the line item level. Select the correct Warehouse from the drop-down list.</p> <p>If the Ship To Warehouse is modified, a message may be displayed “You have Changed the Warehouse Code. OK to Update the Ship-To Address?” A “Y” response will cause the address to be updated automatically. Of course you can always verify or change the Shipping Address using the Address/Notes tab.</p>
Buyer	Select the Buyer Code from the list.
Requestor	The individual or department requesting the purchase. Use the search button to select from a list of active employees.
RFQ Date	The creation date for the RFQ. The system will default to today’s date when creating a new RFQ.
RFQ Type	Defines whether the bidding on the RFQ will be by a sealed bid or by an open auction.
Duration	<p>The length of time that the RFQ will be open for bidding. A list of common lengths has been provided and can be selected from the drop-down list.</p> <p>You are not limited to the selections in the list. For example, you may enter the length and description (for example, 20 Days) and the system will calculate the proper scheduled close date for bidding.</p>
Black Out	<p>For Auctions Only. This is the amount of time where bidding information will not be available for view by Supplier Portal users.</p> <p>The blackout period is not limited to those listed in the pull-down menu. If desired, you may enter the length and description (for example, 3 Days) and the system will calculate the appropriate Blackout Dates.</p>
Bid Increment	<p>For auctions only, you may specify the minimum allowable bid increment. When a Supplier places a bid, it must be better (less) than the current best bid by an amount greater than or equal to the Bid Increment. For example, if the bid increment is \$5.00, and the current best bid is \$100, the next bid must be \$95.00 or less to be accepted.</p> <p>The bid increment is not limited to those included in the list, you may enter any dollar amount.</p>

Status	<p>The current status of the RFQ:</p> <p>New: RFQ has been created but not Open for Bidding</p> <p>Open: RFQ has been Opened for Bidding</p> <p>Pending: Bidding is closed and the RFQ is Pending award.</p> <p>Awarded: The RFQ has been awarded to a supplier but not converted to a Purchase Order</p> <p>Closed: The RFQ has been converted to a Purchase Order or Cancelled.</p>
Open Date	The date the RFQ was opened for bidding.
Open Time	The time that the RFQ was opened for bidding.
Close Date	The calculated date that the RFQ will be closed for further bidding.
Close Time	The calculated time that the RFQ will be closed for further bidding.
Black Date	For Auctions Only. The calculated blackout date where auction information will not be visible in Supplier Portal.
Black Time	For Auctions Only. The calculated blackout time where auction information will not be visible in Supplier Portal.
Award	When the RFQ is ready to be awarded, this column may be checked to select the supplier that will be awarded the RFQ. If the award is system selected, this field will be updated with a check once the selection has been performed.
Vendor Number	The Supplier Id number for the supplier invited to bid.
Vendor Name	The name of the Supplier.
Security Level	The Suppliers current Security Level. This value is assigned using the Supplier Maintenance screen.
Q Rating	Quality Rating
D Rating	Delivery Rating
Q + D Rating	Combined Quality & Delivery Rating
Bid Amount	Total value of the bid submitted by the supplier.

Weighted Cost	The Bid Amount is weighted by the Supplier's current Quality and Delivery Ratings. For example, if a Supplier submits a bid of \$100, and his composite quality and delivery rating is 90%, the Weighted Cost will be (100 / .90) or \$111.11.
Schedule Met?	Yes or No, depending on whether the Supplier has promised to meet the requested delivery date.
Bid Type	How the bid was submitted (e.g., phone, fax, email, web, mail).
Bid Notes	Any notes entered by the supplier on the bid. If No Bid was submitted, a message indicating NO BID will be presented in this field.
Buyer's Notes	Any notes entered by the buyer on the bid.
Open PO \$	Current value of all Open PO line items for the supplier.
RFQ View Date	The date the RFQ was viewed by the supplier via the Supplier Portal application.
Submit Date	The date the bid was submitted.
Submit Time	The time the bid was submitted.

RFQ Notes Field Descriptions

Note Numbers	Note Numbers (<i>Select Note Numbers</i>)
Printed Notes	Free Form Notes that will print on the RFQ
Internal Notes	Free Form Notes that will print on internal RFQ documents only.
Ship To Name	Ship To Name
Ship To Address	Ship To Address
Custom Fields	The System Administrator may add Custom Fields to the application using the <i>BWB Administration</i> program.

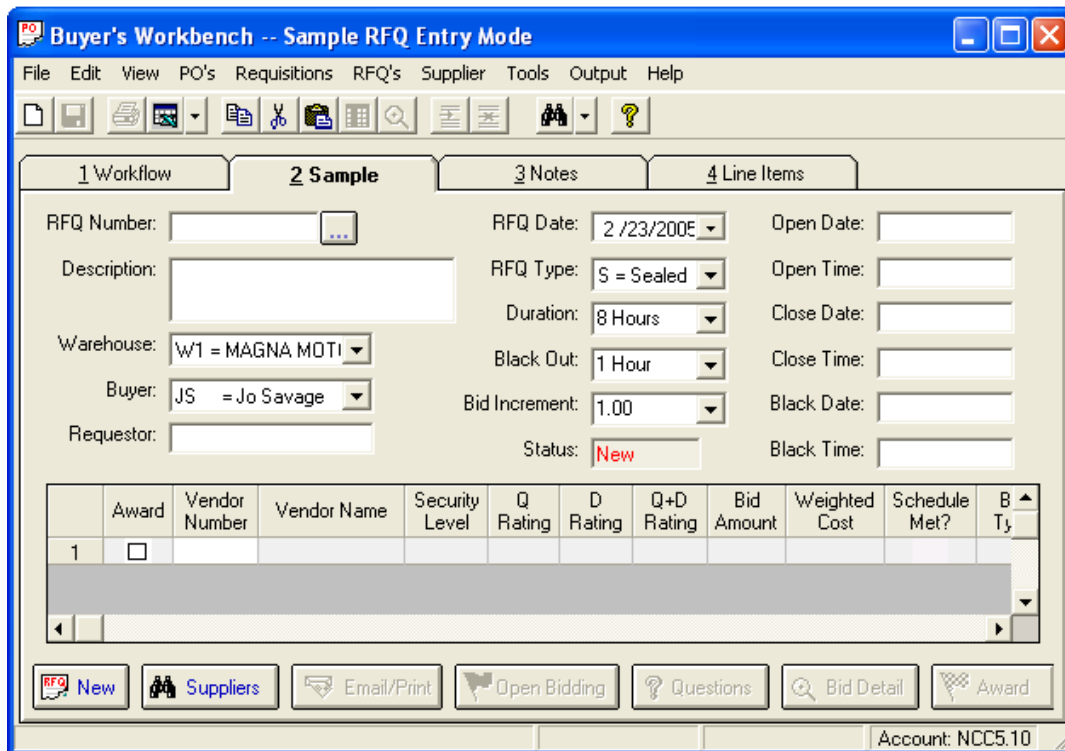
RFQ Line Items - Field Descriptions

Please refer to the Line Item Field Descriptions topic under the Purchase Order section for a description of each column displayed on the line item screen. The following additional columns are pertinent to RFQ Entry Mode:

PO #	The Purchase Order Id Number that has been assigned when the RFQ is converted to a Purchase Order.
PO Li#	The Purchase Order line item number.

Create a Sample RFQ

Sample RFQ Mode allows you to create Request for Quote examples for training and demonstration purposes.



Sample RFQs are created from the Buyer’s Workbench in the same manner as a real RFQ. A supplier with level 3 security or above may view the list of samples, view and download drawings, and enter bids in the same manner as the actual supplier bidding process. The Sample RFQ will clearly state that this is only a sample, and no actual work will be awarded based on this submittal.

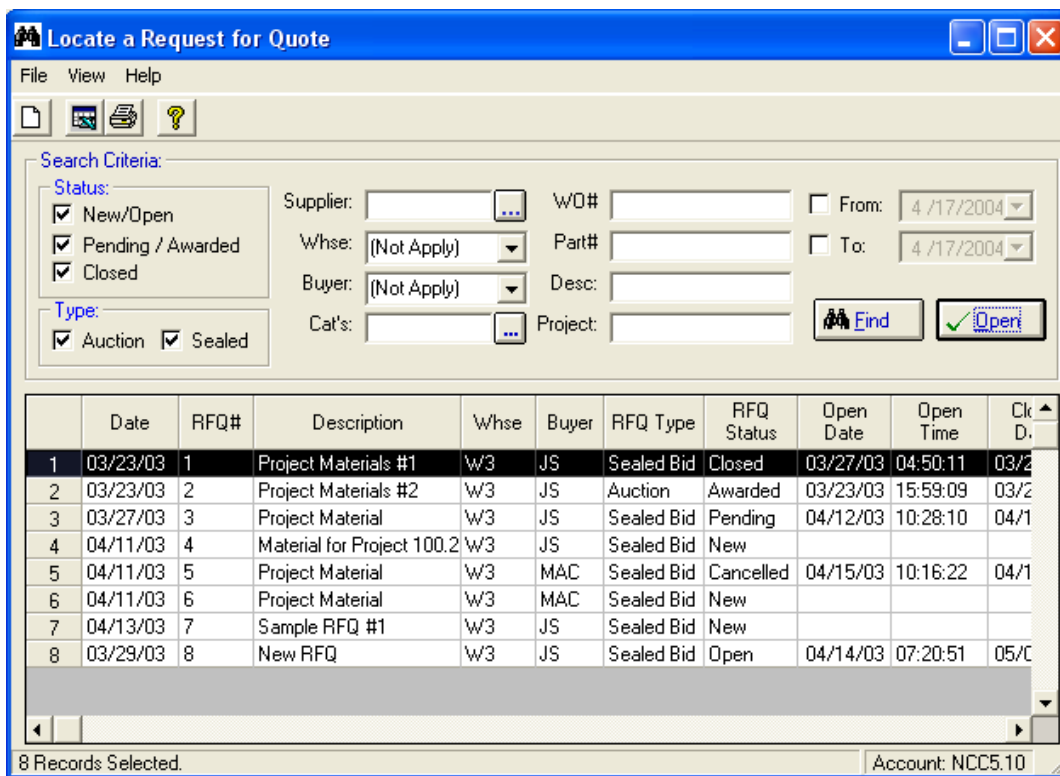
Although samples are structurally equivalent to a real RFQ and bids, the information is stored in separate files so they cannot be confused with legitimate orders. The Sample RFQ is useful for both

evaluating potential suppliers, as well as training current suppliers who are new to the Supplier Portal application.

While actual RFQs are only visible to those suppliers whom the Buyer has invited to bid, sample RFQs are available to be viewed by all suppliers. Sample RFQs remain open until the close date and time specified by the Buyer. A Buyer may specify a close date far into the future in order to keep the sample open indefinitely.

Search for RFQs

Choose the RFQ Search option from the RFQs menu on the main screen, or by clicking the search button next to the RFQ Number prompt on the RFQ Display screen.



You may fill in as many or as few of the fields as you wish to narrow your search. Wildcarding is supported for text fields.

You may select any combination of the following RFQ Status options, and you must select at least one:

- New/Open** - RFQ's that have a status of New or Open for Bidding
- Pending/Awarded** - Bidding is closed, and the RFQ is either waiting to be awarded or converted to a Purchase Order.

Closed - Request for Quotes that have either been converted to a Purchase Order or cancelled.

Once the search criteria have been entered, click the **Find** button. To open an RFQ, double-click on the desired row, or if you prefer, highlight the row and click the **Open** button.

Column Descriptions:

Date	The creation date for the RFQ
RFQ#	The identification number for the RFQ.
Description	Description of the Request for Quote
Categories	You may limit your selection based on the Part Category assigned to the RFQ line item.
Whse	The Ship To Warehouse(s) for line items on this RFQ.
Buyer	The buyer id assigned to this RFQ
RFQ Type	Sealed Bid or Auction
RFQ Status	The current status of the RFQ: New: The order has been entered but not opened for bidding. Open: The RFQ has been opened for bidding. Pending: The RFQ is closed for bidding, and pending award by the Buyer. Awarded: All bids have been recorded and a Supplier has been selected. Closed: The RFQ has been closed and converted to a Purchase Order.
Open Date	Date RFQ was open for bidding
Open Time	Time that the RFQ was opened for bidding
Close Date	The date the RFQ was closed to further bidding.
Duration	The amount of time that the RFQ was open for bidding.

Copy from an Existing RFQ

This feature allows you to copy information from an existing RFQ record. The system prompts you for the RFQ Number to be copied, then loads all available information into the current record. A new RFQ Number will be assigned when you Save the RFQ.

Copy from a Sample RFQ

This feature allows you to copy information from an existing Sample RFQ to a regular RFQ. See: *Create a Sample RFQ* for more information on creating Sample RFQs.

Open Bidding

The Open Bidding Command changes the status of the RFQ to "Open", indicating that bids may now be accepted. If the Supplier Portal is installed, the RFQ will be available for Suppliers to view, download drawings, ask questions, and place bids.

Click on the ***Open Bidding*** button at the bottom of the RFQ or select Open Bidding from the RFQ Menu option. The RFQ will be updated with the Open and Close Date(s) and Time(s).

Each RFQ will have a type code identifying it as either an "Auction" or a "Sealed Bid". To submit a bid, the supplier must enter a price and a promised delivery date for each part on the RFQ. Submitted bids are posted to the NCC_RFQBID file. The Supplier Portal displays real-time status of active auctions including current "best bid".

If the Supplier does not have access to the Supplier Portal application, they may submit their bids via traditional methods such as phone, e-mail, fax or mail. Bids that have not been submitted online can be entered via the RFQ procedure by clicking Bid Detail.

Once the RFQ has been opened for bidding, be sure to Save the record by clicking on the Save icon located on the Toolbar.

Displaying Bid Detail

Clicking the **Bid Detail** button on the RFQ Display or selecting Bid Detail from the RFQ Menu accesses the Bid Detail Screen, shown below. Use the Navigation Bar on the upper-right corner of the screen to scroll through the bids for each Supplier listed on the RFQ.

Manual entry of bid information is available for email, fax, telephone, or mail submissions. Bid submissions made via the Web will automatically update from the Supplier Portal application. Select the Submit Method from the pull-down menu, enter the submit date and time and any notes provided by the supplier.

If the supplier has chosen not to bid, click on the No Bid box to indicate that the supplier is not submitting a bid. A message will be presented confirming that the bid prices will be set to zero.

Enter the Suppliers promise date and quoted unit price for each line item. The system will automatically calculate the extended price. Save the bid by clicking on the Save icon located on the Toolbar. A message will be presented indicating that the bid was filed.

Column Descriptions:

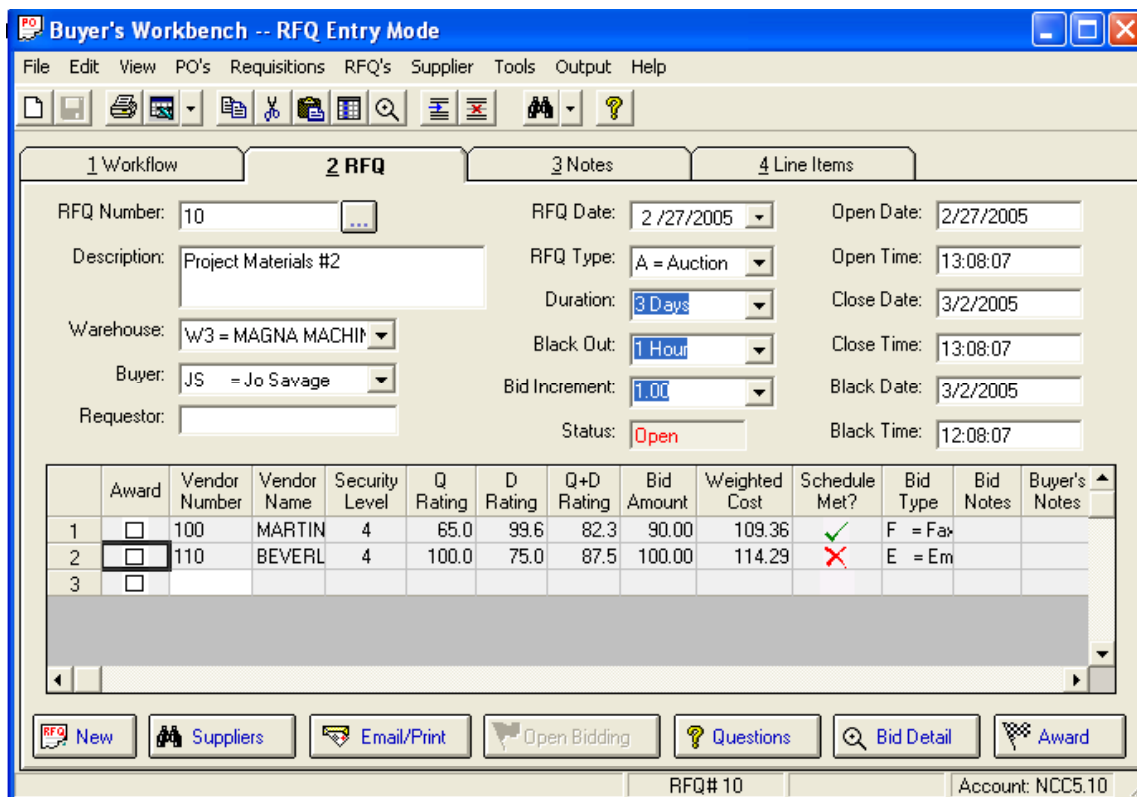
RFQ Number	RFQ ID Number
Supplier	Supplier ID and Name

NorthClark Computing, Inc.

Security Level	Supplier Portal Security Level
Open PO \$	Current Open PO Value for Supplier
Quality Rating	Supplier Quality Rating
Delivery Rating	Supplier Delivery Rating
Q+D Rating	Weighted Quality and Delivery Rating
RFQ View Date	Date Supplier viewed RFQ
RFQ View Time	Time Supplier viewed RFQ
Bid Amount	Total RFQ Bid Amount for All Line Items
Weighted Bid	Total Bid Amount divided by Q&D Rating
Schedule Met	Did Supplier commit to promise date that meets the schedule date. Yes or No.
Submit Method	Bid Submittal Method E - Email F - Fax M - Mail P - Phone W - Web
Bid Submit Date	Date bid was submitted
Bid Submit Time	Time bid was submitted
No Bid	If checked supplier declined to bid.
Bidder's Notes	Free Form Notes from bidder
Buyer's Notes	Free Form Notes from buyer
Part Number	Part Number being bid on
Description	Description of item being bid on
Category	Product Category of Part
Request Date	Requested Date for delivery
Quantity	Quantity Requested

U/M	Unit of Measure
Promise Date	Bidder's Promise Date
Unit Price	Bidder's Unit Price
Ext Price	Bidder's Extended Price
Contract Price?	Does a contract price exist? Yes or No

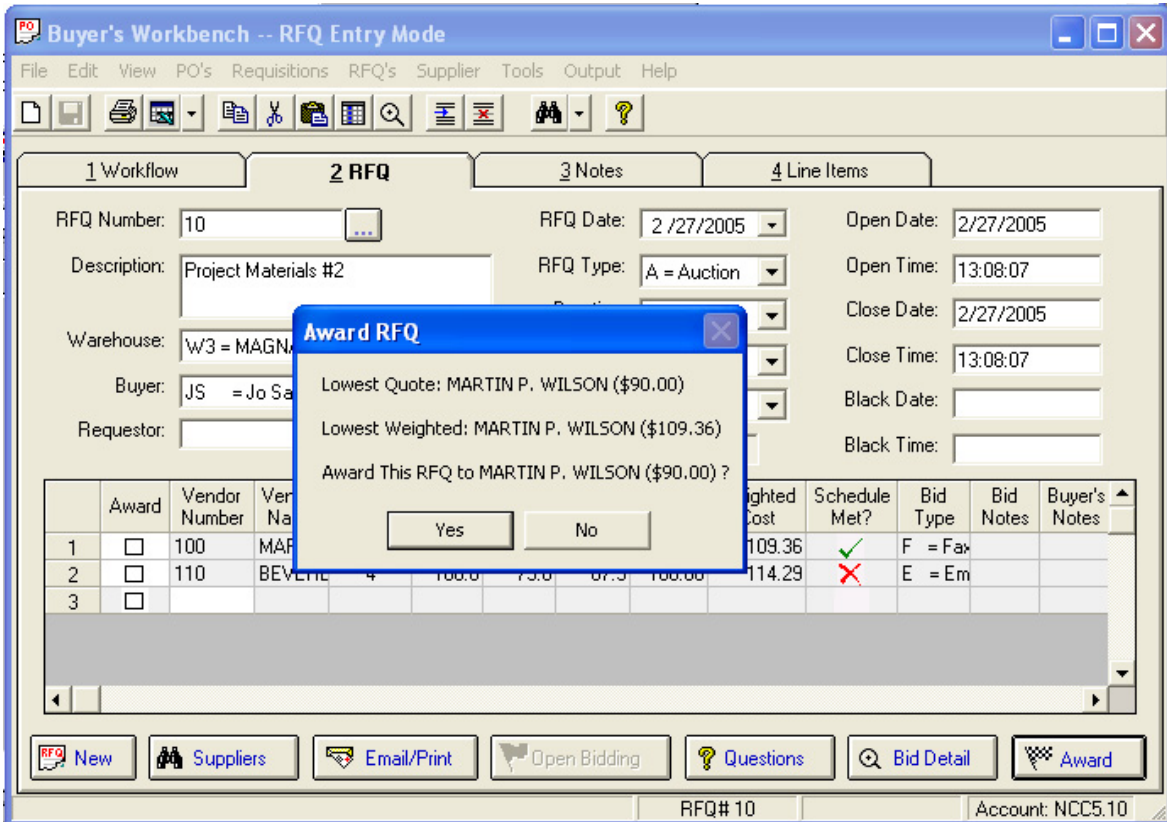
Once bids have been entered the header screen will be updated as illustrated below:



Once all of the bids have been recorded, or the bidding is closed, the RFQ will be ready to award.

Awarding an RFQ

When you are ready to Award an RFQ, click the checkbox in the Award column next to the selected Supplier, then click the **Award** button. If you click the Award button without selecting a Supplier, the system assumes you want the lowest quote. A message box is displayed to confirm you choice.

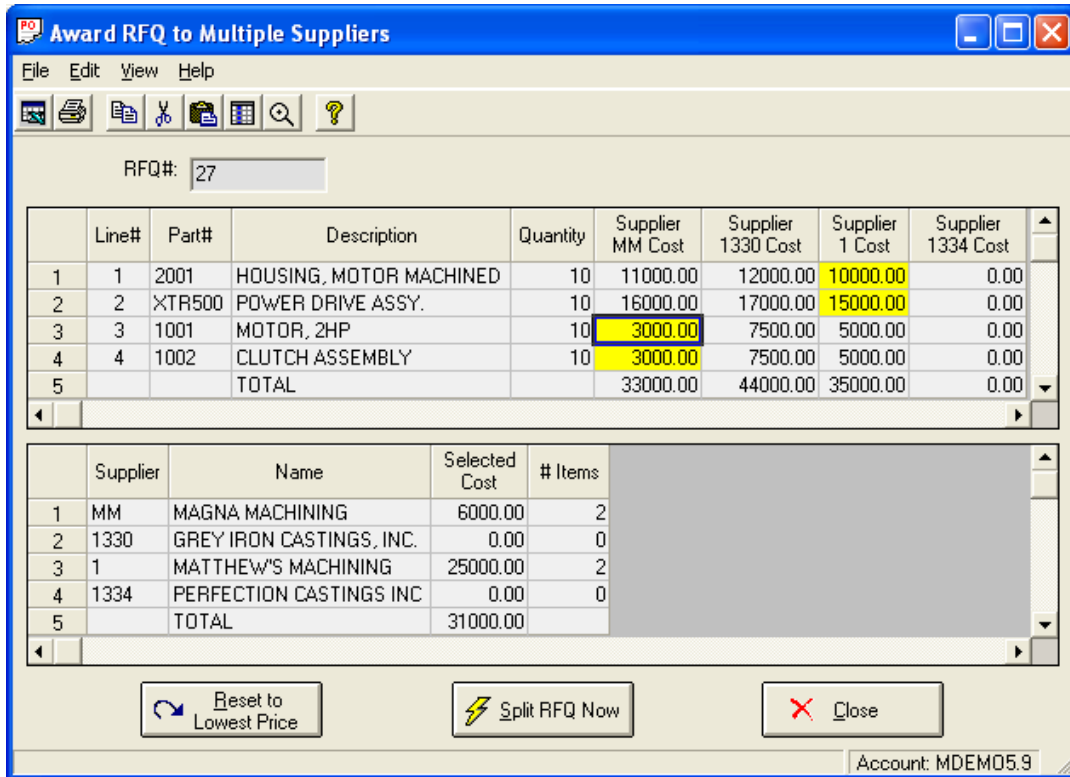


After awarding the RFQ you will be prompted to **Send Regret Notices**. Please refer to this topic for more information.

Select **Create New PO From RFQ** from the **PO's** menu to convert the Request for Quote to a Purchase Order.

Award to Multiple Suppliers (Split an RFQ)

When a Request for Quote has multiple line items, it may be that the most cost effective option is to award the business to more than one Supplier. While the Buyer must take into account other procurement costs such as purchase order processing and shipping charges, the **Award to Multiple Suppliers** display makes it easy to determine the lowest *unit cost* based on the bids submitted .



The upper grid displays one row for each line item on the RFQ, with each Supplier’s bid displayed as a column on the spreadsheet. The yellow highlighting marks the currently selected bids. The lower grid displays a summary showing the number of items and dollar values to be awarded to each Supplier.

When the screen is initially displayed, the system will have pre-selected the best price for each part number. When you click on any cell, that Supplier’s bid becomes the selected cost, and the totals are updated accordingly. Click the **Reset to Lowest Price** button at any time to return to the default best price selections.

When you click Split RFQ Now, the system will create two or more new RFQ records, depending on the number of Suppliers included in your selection. In the above example, the first two rows would be copied to RFQ# 27-1 and the last two rows would be copied to RFQ# 27-2. All of the bid information is automatically copied to the new RFQ records, and the original RFQ is cancelled.

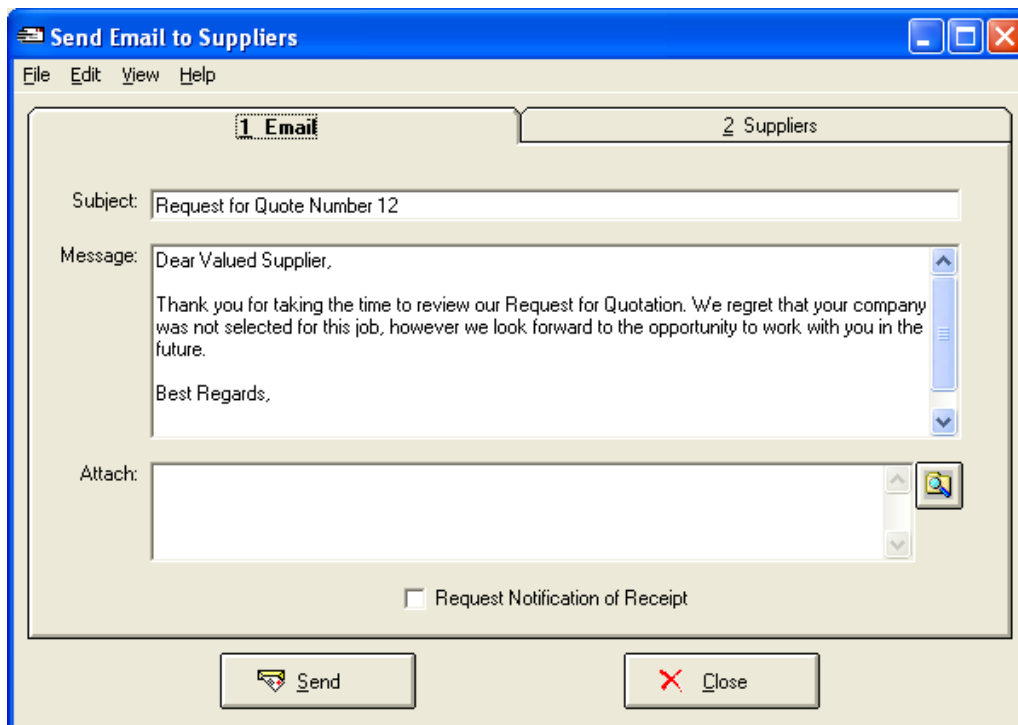
Once the new RFQ records are created, they can each be awarded separately and converted to Purchase Orders. Note that this method of *splitting* an RFQ for the purpose of awarding to multiple suppliers allows the system to maintain accurate bid history and win/loss statistics.

Restore a Split RFQ

If you split a Request for Quote (see *Award to Multiple Suppliers*), then later change your mind, the ***Restore a Split RFQ*** option will allow you to restore the RFQ to its pre-split condition. All RFQ records that were created as a result of the split are automatically cancelled, and the quantities are restored to the original RFQ record.

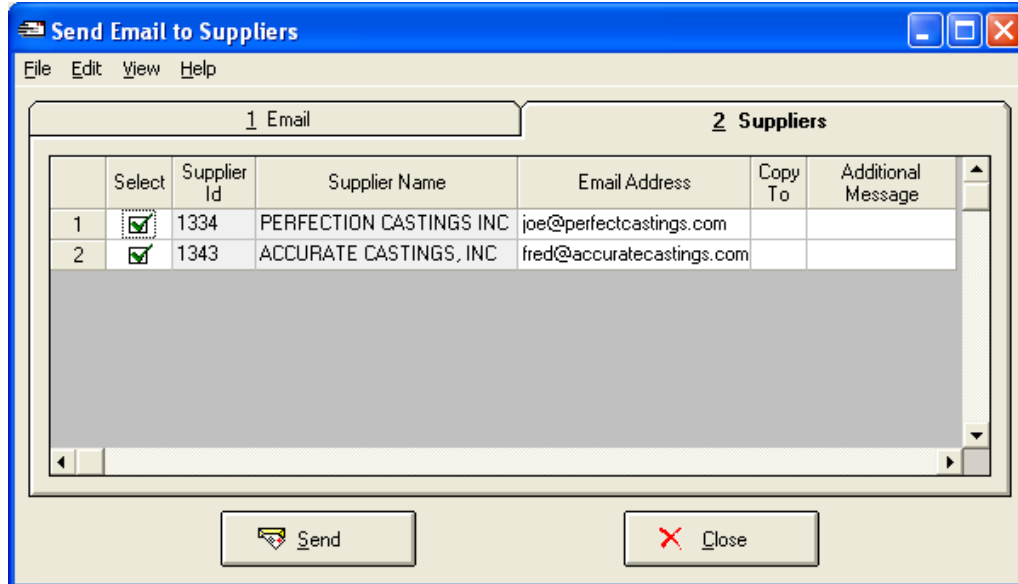
Sending Regret Notices

After the RFQ is awarded, you will be presented with a message asking if you want to send regret notices to the suppliers that did not win the bid. You may also access this screen from the ***RFQs*** menu.



The default regret message is defined in the BWB System Administration application and may be modified here as desired.

The list of Suppliers who will receive notification is displayed on the second tab:



Refresh Bid Detail

If you have been viewing an RFQ on your screen for a period of time, it is possible that bids may have been received via the Supplier Portal Web Site in the meantime. Choose the ***Refresh Bid Display*** option to ensure you are viewing the most up to the moment bid information.

Note, the bid information is always current at the moment you access an existing RFQ record, so it is not necessary to choose this command if you have just accessed the record, or if bidding was closed prior to accessing the current record.

Reopen an RFQ

An RFQ may be reopened after it has been awarded. Access the desired RFQ record in the RFQ Display, then select ***Reopen an RFQ*** from the ***RFQs*** menu. Be sure to update the Close Date and Time or the RFQ may close again when filed. Save the record to Manfact.

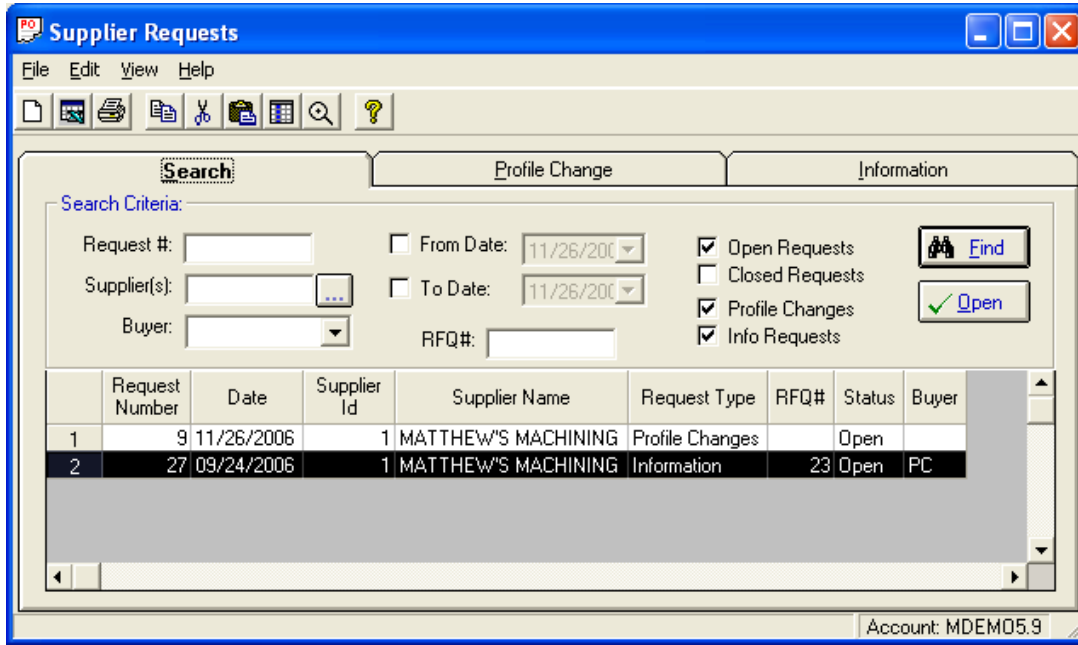
Cancel an RFQ

This command will cancel the entire RFQ. Note, cancelled RFQs are not visible from the Supplier Portal Web Site. To cancel an RFQ enter the desired RFQ number in the RFQ Display. Select ***Cancel RFQ*** from the ***RFQs*** menu. Save the record to Manfact.

Suppliers

Supplier Requests (from Supplier Portal)

Use this view to reply to *Supplier Requests for Information* and *Supplier Requests for Profile Changes*. These requests are submitted by Suppliers using the *Supplier Portal Web Site*.



Requests for Information always pertain to a specific Request for Quote (RFQ) Number. The Supplier's questions may be submitted from the *Bid Entry* page on the Supplier Portal Web Site. From the Buyer's Workbench, you can review and answer these questions, email your answer to one or all of the Suppliers on the RFQ, and optionally post your answer on the Supplier Portal Web Site where it may be viewed by all Suppliers who have been invited to bid on the RFQ.

Requests for Profile Change may be submitted by the Supplier at any time to update their company contact and profile information. You will have the opportunity to review these requests, make adjustments if necessary, and then automatically update your database (VENDOR and NCC_VENDOR files) with the revised information.

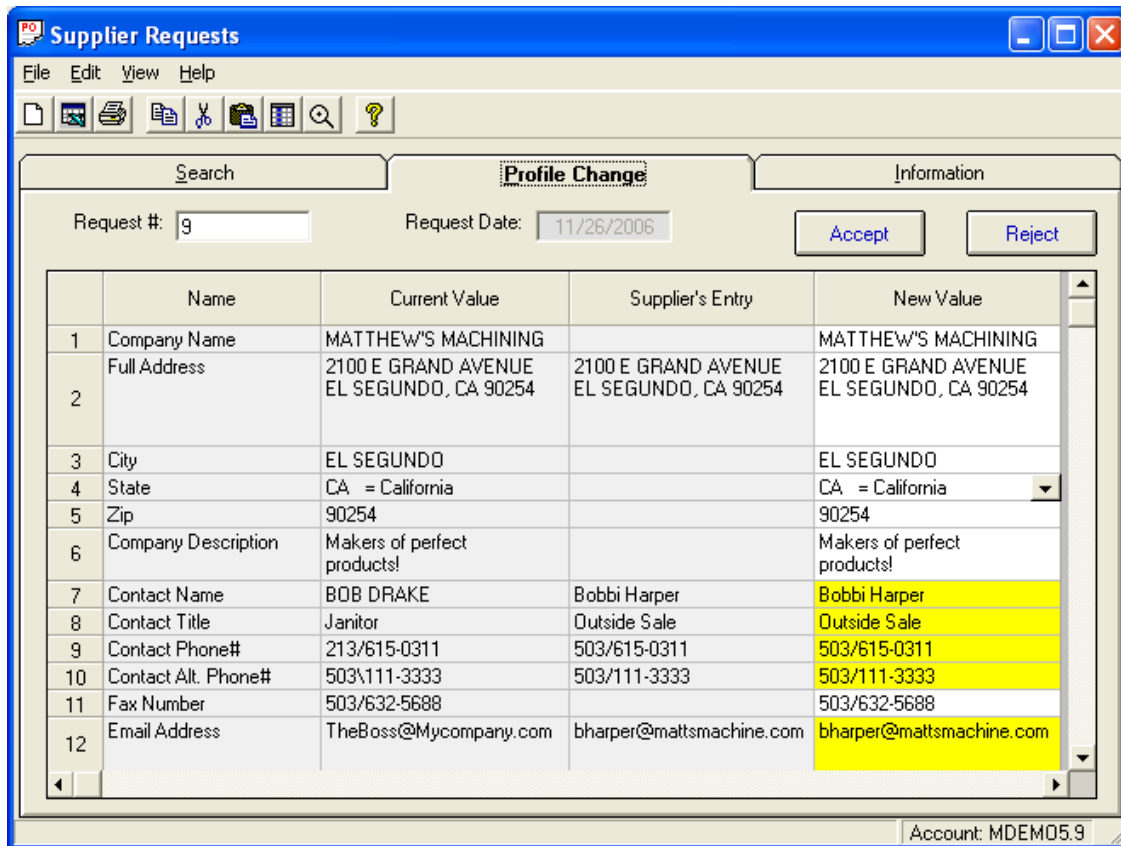
The Search Display

This view may be accessed from the *Workflow* display, or by selecting *Requests* from the *Supplier* menu. If you selected one of the Workflow options, the list of requests awaiting your attention will be automatically displayed. Otherwise, you may enter any combination of the available selection criteria to locate existing records.

To open a Request for editing, double-click on the desired row. You may also highlight the row and click the *Open* button.

The Profile Change Display

Current Supplier Profile values and requested values are displayed, and changed values are highlighted. You may Accept or Reject the changes by clicking on the appropriate button.



If you want to accept a portion of the change, or make minor modifications to the record, this can be accomplished by entering the correction in the “New Value” column.

If the change is rejected, the NCC Supplier Request Profile Change file is updated as “Denied”. This record can still be viewed by requesting “Closed” records. A Denied request can be accepted later if needed.

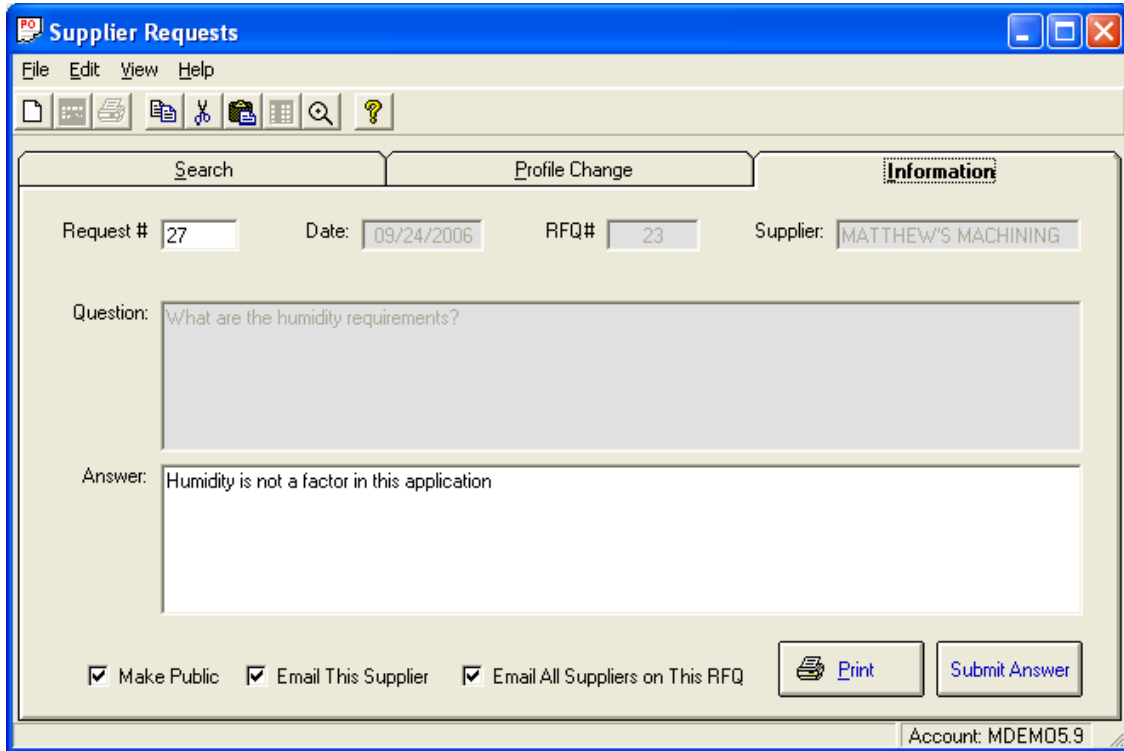
Creating a New Supplier Profile

A Request for Profile Change may be received from a Supplier who is not yet defined as a Manfact Vendor. A new login id would have been created in *Supplier Portal Administration*, without a reference to a Supplier ID number. This allowed the new supplier access to request or submit information via the Supplier Portal applications.

If Vendor Numbers are system assigned, (per Manfact’s TABLE.LIID procedure) the system will assign the next sequential Vendor Number. Otherwise, you will be prompted for the new Supplier ID. When the new Supplier record is created, the system will automatically promote the Security Level to "4" and update the Supplier Portal Administration files with the new Supplier Id.

Requests for Information

Use this screen to view and post answers to requests for information received from the Supplier Portal Web Site.



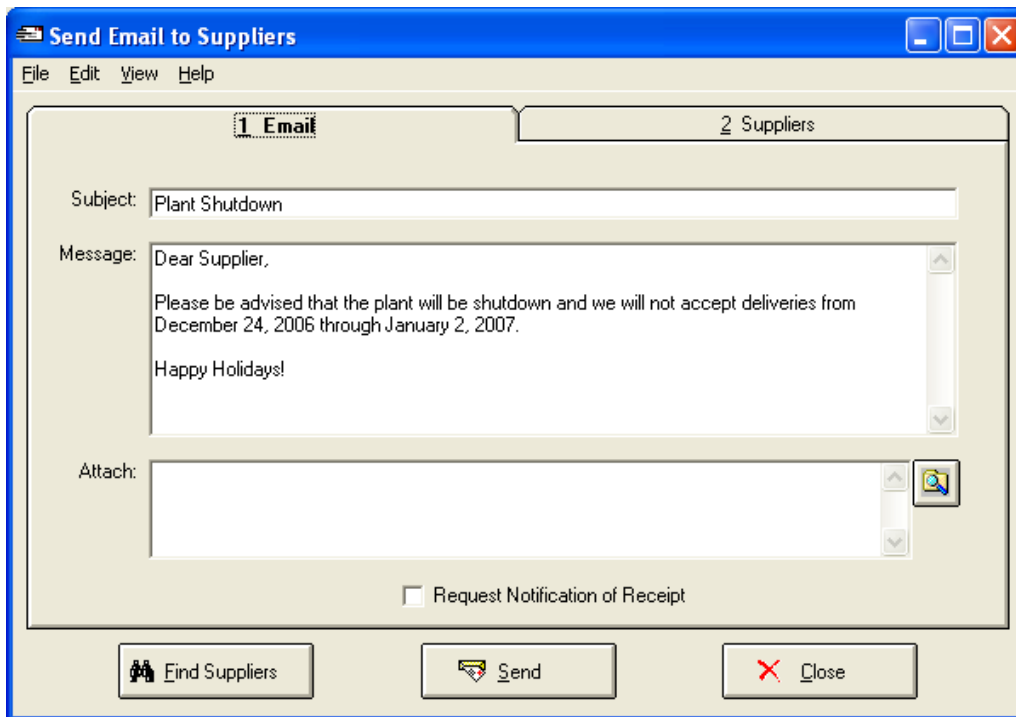
Once you have typed your answer, click the checkboxes to determine how this information will be disseminated:

Make Public	Makes this question and answer visible on the Supplier Portal Web Site. All Suppliers who were invited to bid on the RFQ may view the information.
Email This Supplier	Sends an Email message to the Supplier who asked the question.
Email All Suppliers on This RFQ	All Suppliers who were invited to bid will receive an email.

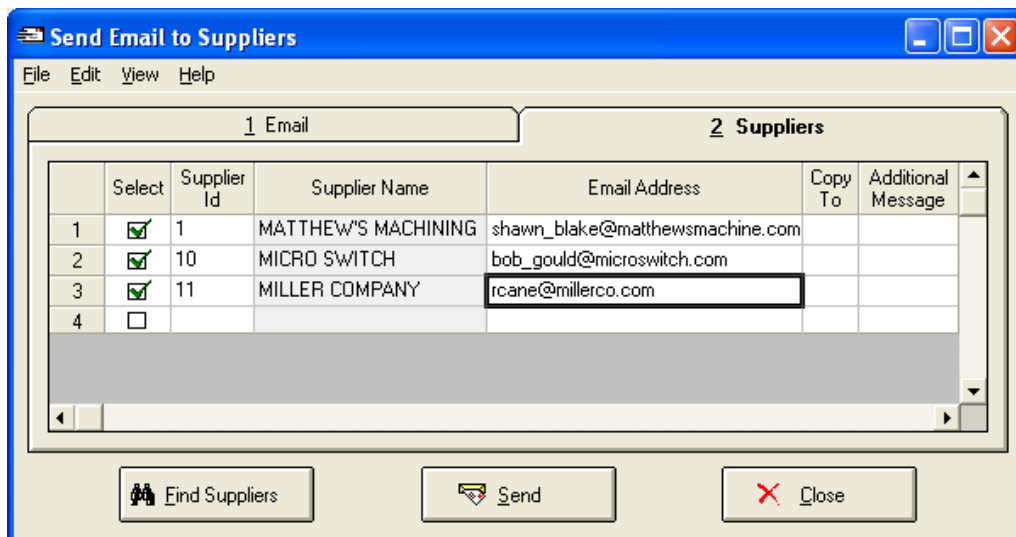
If you have selected one of the options to send email, the **Supplier Notifications** screen will be displayed when you click the **Submit Answer** button. The process of sending email messages to a group of Suppliers is discussed in the next section.

Supplier Notifications

Use this procedure to send an email notification to a selected group of Suppliers.

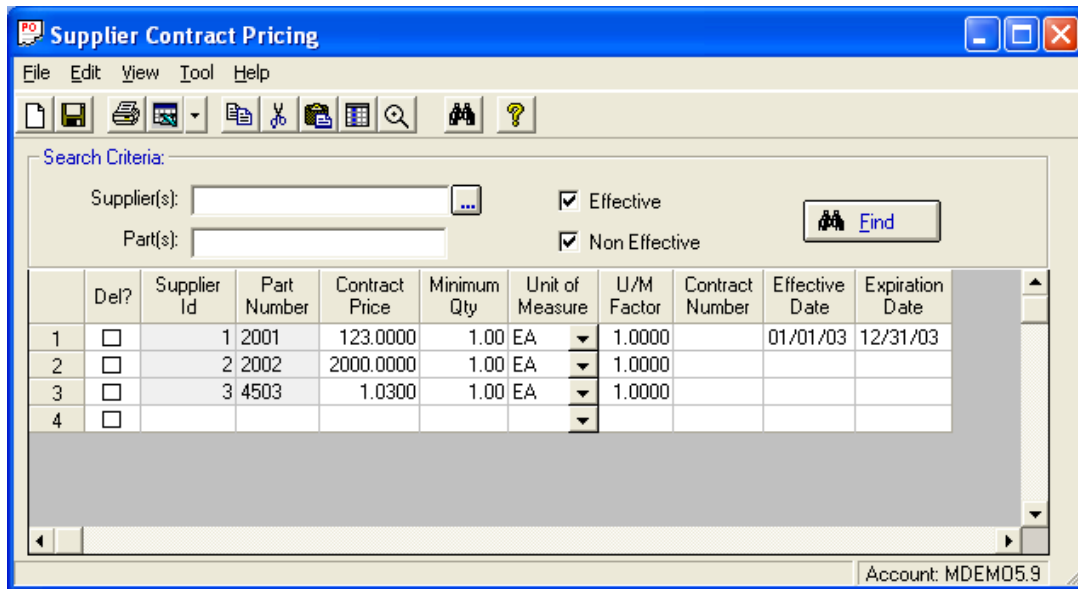


You may access this view from the **Supplier** menu, or you may arrive here after responding to a **Supplier Request for Information**. Complete the email tab by entering the Subject Line, Message, and add any attachments as required. If a notification receipt is needed, be sure to check the Request Notification of Receipt box. Use the Supplier tab to create a list of Suppliers that will receive the Notification. The **Supplier Search** procedure is available to locate Suppliers. Click the **Send** button to send the E-mail.



Contract Price Entry and Maintenance

Use this screen to add, search, view and maintain Contract Pricing information for specific Suppliers and Part Numbers.



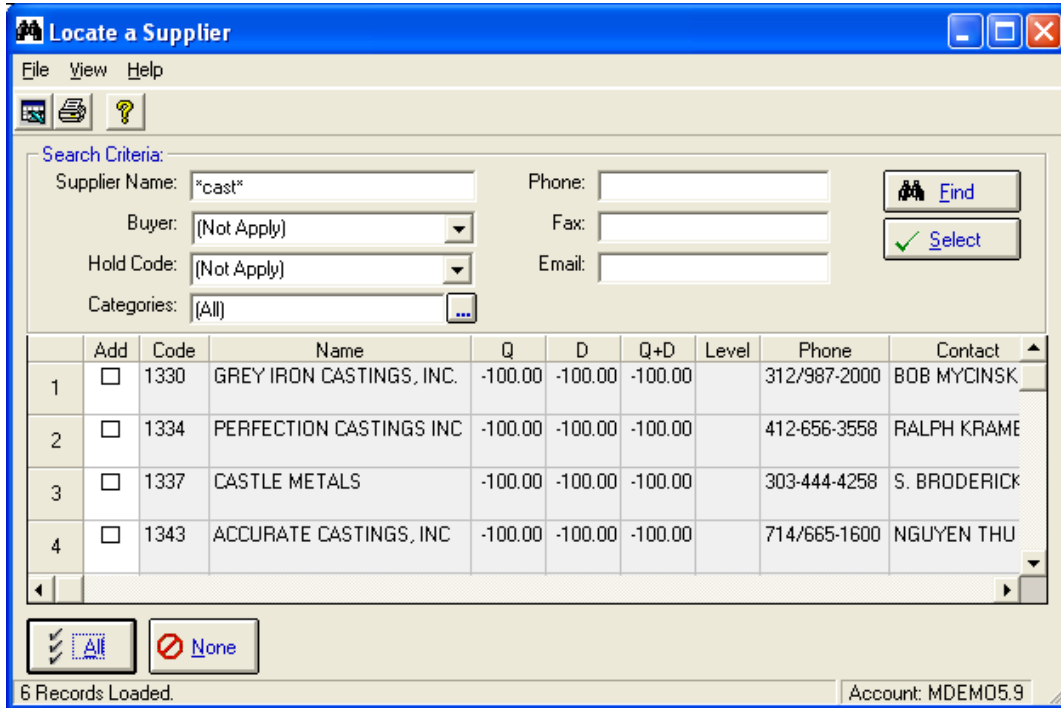
Use any combination of the available search criteria to locate existing records. To create a new record, begin typing in the last row of the spreadsheet. To delete a record, click the checkbox in the *Del?* Column. You must click the *Save* icon on the toolbar before any of your changes or deletions will take affect.

Column Definitions:

Supplier Id	The supplier (vendor) identifier.
Part Number	The part number for the contract item.
Contract Price	The unit contract price.
Minimum Quantity	The minimum quantity that must be purchased for the pricing to be in effect.
Unit of Measure	The Buy Unit of Measure.
Unit of Measure Factor	Conversion Factor to convert Buy U/M to Stocking U/M
Contract Number	The suppliers assigned contract number.
Effective Date	The start date that this contract becomes effective.
Expiration Date	The end date of this contract.

Locate a Supplier

Use this screen to locate a Supplier record using various search criteria. This screen may be accessed from numerous locations throughout the Buyer’s Workbench, including the **Suppliers** menu on the Main screen.



Note, a performance rating of –100 indicates there is no data available for the Supplier.

Use as many or as few fields as you want to narrow your search. If you don’t know the exact spelling of the supplier name, you can use *wildcarding* to enter only a portion of the name. Press the **Search** button to begin searching the Manfact database for the suppliers that meet your criteria.

In some cases, it will be appropriate to select more than one Supplier from the list, such as when you are inviting suppliers to bid on an RFQ, or sending email notifications to a group of suppliers. In these cases, a checkbox will appear in the first column of the spreadsheet.

To select multiple suppliers, check the desired rows, then click the **Select** button. To select a single supplier, double-click on the desired row, or highlight the row and then click the **Select** button.

Column Descriptions:

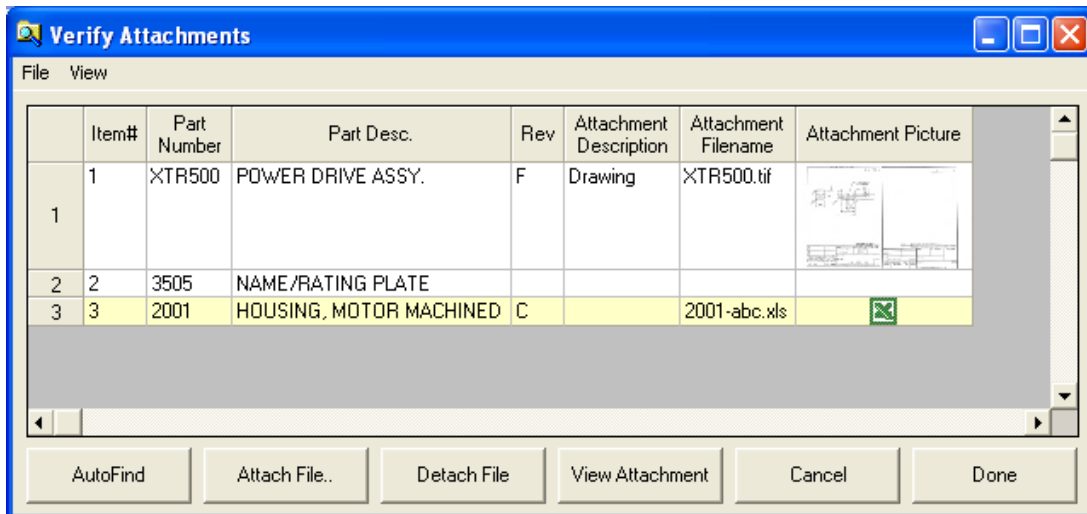
Code	Supplier ID Number that has been assigned to this record.
Name	Supplier Name
Q	Quality Performance Percentage. Note, a rating of –100 indicates there is no

D	Delivery Performance Percentage
Q + D	The combined Quality & Delivery Performance Percentage.
Level	Supplier Portal Security Level
Phone	The contact Phone Number
Contact	The contact name
Address	A right click will present the full address for this supplier.
Notes	A right click will present all notes recorded for this supplier.
Fax	The contact Fax Number
Email	The contact Email address
Hold Code	<p>The hold code for a Vendor.</p> <ul style="list-style-type: none"> Q RFQ and Quote type transactions (POQ.N) B Blanket Purchase Orders (POQ.N) P Purchase Orders (PO.N) R Purchase Order Receipts (REC.N, REC.A) I Accounts Payable Invoices (AP.N) C Accounts Payable Checks (CHECKS.SET, CHECKS.N) A Enable All the above hold codes

Tools

Attach Files to PO/RFQ

Use this screen to view or update the list of electronic files attached to a Purchase Order or Request for Quote. You may attach virtually any type of file, including drawings, spreadsheets, documents, etc.



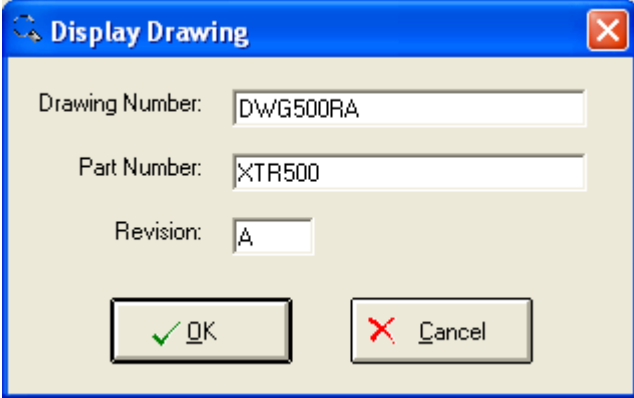
You may attach multiple files to each Purchase Order or RFQ line item.

- ❑ Click on the desired row to highlight it, then click the **Attach File** button to browse your network..
- ❑ Click **AutoFind** to locate drawings associated with the Part Number. The system will search for drawing files using standard naming conventions. Please refer to the **Displaying a Drawing for a Part #** topic for more information on how the system locates these files.
- ❑ The **Detach File** button will disassociate the current file from the selected line Item.
- ❑ Click **View Attachment** to see a full size rendering of the file.
- ❑ Click **Done** to apply the changes you have made.

When the Purchase Order or Request for Quote is filed, a copy of each electronic attachment will be placed in the BWB Data Store. This makes the information centrally available for viewing and emailing. Various applications, including the Supplier Portal Web Site, will have access to the PO or RFQ Document and all of its associated attachments.

Displaying a Drawing for a Part #

Use the screen below to enter the Drawing Number, Part Number, and Revision Number for the drawing you wish to see.



The screenshot shows a dialog box titled "Display Drawing". It has a blue title bar with a magnifying glass icon on the left and a red close button on the right. The main area is light beige and contains three input fields. The first is labeled "Drawing Number:" and contains the text "DWG500RA". The second is labeled "Part Number:" and contains "XTR500". The third is labeled "Revision:" and contains "A". At the bottom of the dialog are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

How the System Locates a Drawing:

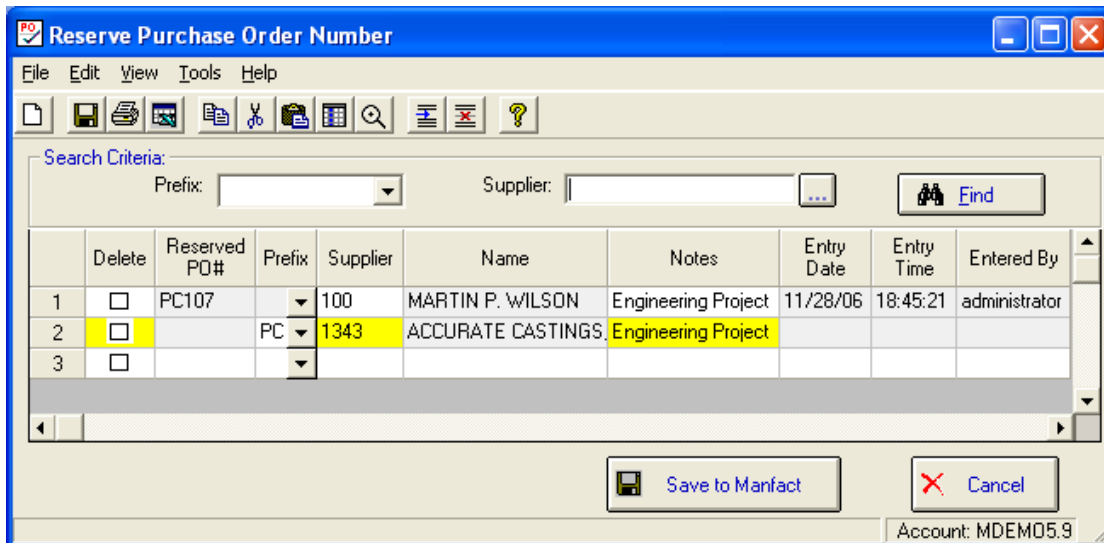
When you choose the ***Display Drawing*** option, the system searches for an image file and then displays the drawing using the image viewing software associated with the file type.

The search begins at the first "root" folder for your Warehouse, as defined by your System Administrator. Each root folder is searched as follows:

- ❑ First, the system looks for a folder name matching the Project Number. If found, the search continues within the Project folder. Otherwise, the search continues from the root folder.
- ❑ Next, the system looks for a folder name matching the Part Number. If found, the search continues within the Part Number folder. Otherwise, the search resumes from the root or Project folder located in the previous step.
- ❑ Finally, the system attempts to locate the image file, using a combination of Part Number and Revision Level. For example, the image file for Revision B of Part Number 12345 would be called "12345RB.*".
- ❑ If the system is unable to locate the file using these search rules, a dialog box will be displayed and you will be given the opportunity to browse for the file yourself.
- ❑ Once located, the part is displayed using the image viewing software associated to the file type.

Reserve a PO Number

Sometimes it may be necessary to give a Purchase Order Number to a Supplier in advance of creating the actual Purchase Order document. For example, you may be placing a phone order, and plan to follow-up with a confirming document later. Select **Reserve a PO Number** from the **Tools** to display this view:



Use the **Find** button to locate existing Purchase Order Number Reservation records. If you are using **Prefixes** as part of your PO numbering scheme, you may select one from the drop-down list to narrow your search. You may also enter a list of Suppliers (separated by commas) to include in the search. Click the icon to the right of the Supplier prompt to access the **Locate a Supplier** function.

To Reserve a new PO Number, begin typing in the last row of the spreadsheet. Select the Prefix if applicable, and enter the Supplier Number along with any Notes describing the reason the PO# is being reserved. When you click the **Save to Manfact** button, the system displays your new PO Number in the **Reserved PO#** column.

To delete a record, click the checkbox in the first column. The record will be deleted after you click **Save to Manfact**.

When you are ready to create the actual Purchase Order, simply follow the instructions for **Entering a New Purchase Order**, and enter the Reserved PO# at the PO# prompt.

Loading Parts to Supply (Made From)

If the supplier will be manufacturing an item using parts supplied by your company, you will want to list the part numbers and associated quantities to be shipped. The "Made From" part numbers and quantities can be entered in the Manfact system using the PARTS.EN or PARTS.ALL entry procedure.

When you select the Load Parts to Supply (Made From) option, the parts and quantities will be automatically loaded into the Parts to Supply field. The information contained in the fields can be updated as required.

Loading Parts to Supply from BOM


If the Supplier will be manufacturing an item using parts supplied by your company, you may include a list of parts to supply with the Purchase Order. This option allows you to load the list using an existing Manfact Bill Of Material record.

Load Parts to Supply From B.O.M.

Production (BOM)

Engineering (ENGBOM) ECO Number:

Work Order (WOBOM) WO Number:

Assembly Number: 

Plant:

Effective Date:

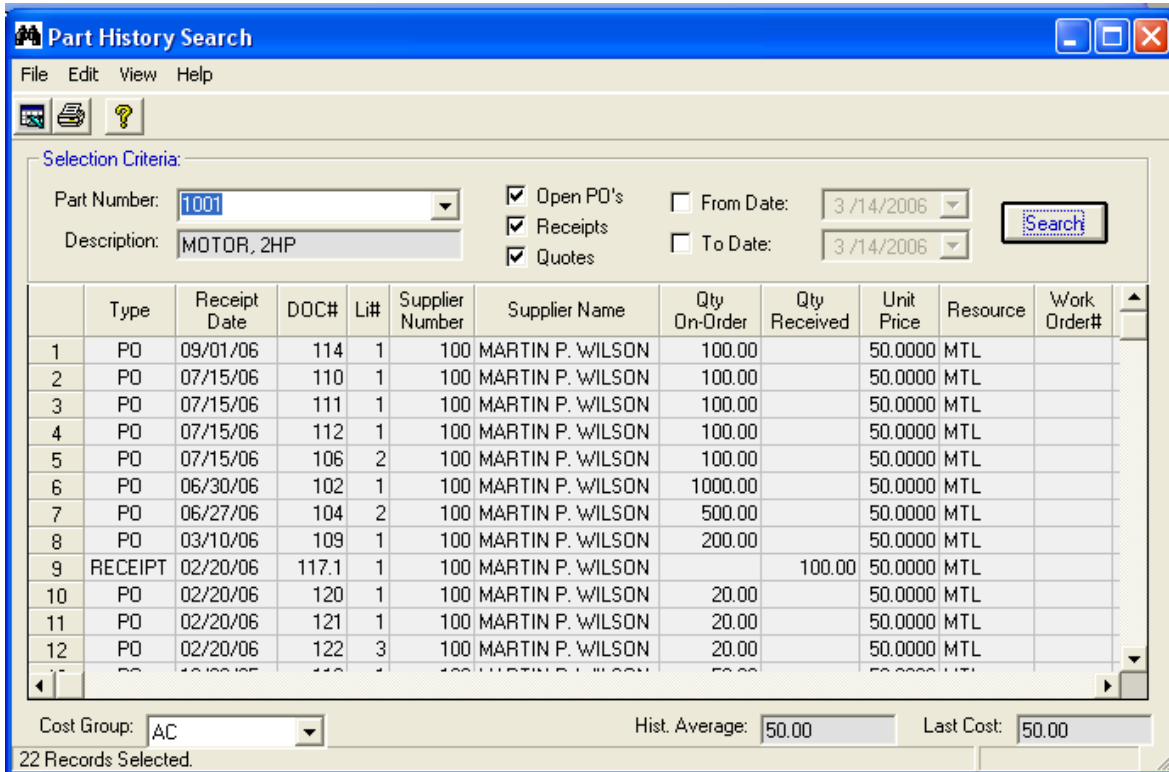
As Required Quantity:

Explode Bill of Material Beyond First Level

- ❑ Select the file from which to load this data. You may use a Production BOM, an Engineering ENGBOM (requires ECO Number), or a Work Order WOBOM (requires WO Number).
- ❑ Enter the Assembly Number. If you have the Part Number Search application installed you may launch the Part Number Search feature by clicking the icon to the right.
- ❑ When multiple BOM files exist for the same assembly, you may need to specify a Plant.
- ❑ Check the box if you wish to Explode the Bill of Material beyond First Level.
- ❑ Set the Effective Date. The system will default to today's date.
- ❑ If the Bill of Material Line Item contains an “AR” (As Required) in the quantity field, you must enter a quantity to use for the purchase order.
- ❑ When you have entered all necessary data, Click OK to load the BOM data.

Part Cost History

Selecting Part Cost History from the Tools Menu accesses the following screen. It displays a list of recent purchase orders and receipts for a selected part number.



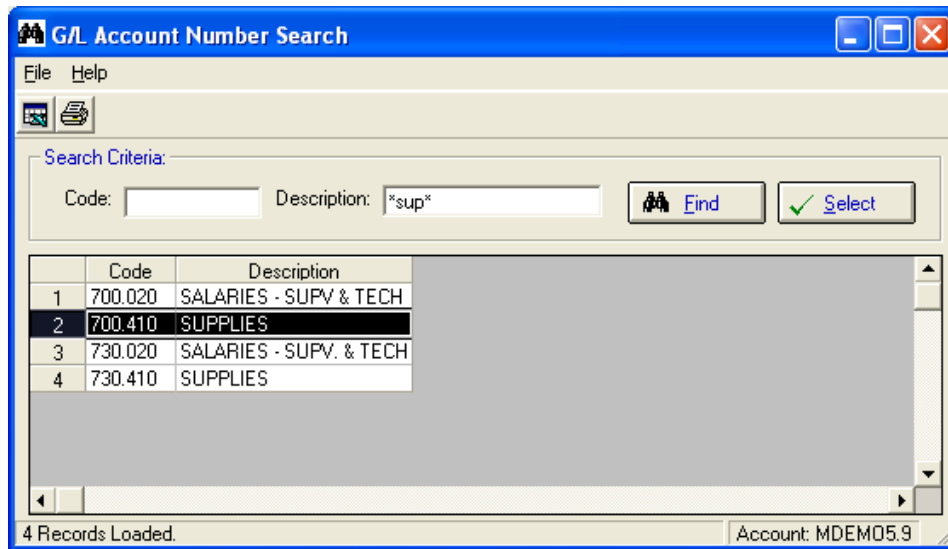
- ❑ Enter the Part Number or use the pull-down menu to select a part number. Part Numbers currently included on the PO, RFQ, or PO Requisition line item display will be included in the list, or you may type any valid Part Number.
- ❑ Decide if you wish to include Open Purchase Orders, Receipts, or Quotes in the list. You must select at least one of these.
- ❑ You may enter a date range by clicking the appropriate checkbox(s) and entering the desired date(s). The 'To Date' defaults to today's date when searching. *Note: the search is performed on the date the PO/Quote was filed.*
- ❑ Click the **Search** Button when you are ready to search. A message will be displayed indicating that the search is being performed.

Column Definitions:

Type	The source of the transaction PO = Receipt against a Purchase Order Quote = A quotation entered on a Request for Quote (RFQ)
PO/RFQ Date	The creation date for the PO or RFQ
DOC#	The identification number for the PO or RFQ
LI#	The line item ID # assigned to the Receipt or RFQ item being reported
Supplier Number	Number or Code assigned to a specific Supplier. (Vendor ID)
Supplier Name	Name of the Supplier/Vendor
Order/RFQ Qty	The total quantity ordered is the sum of all scheduled delivery quantities for the line item.
Qty Received	The total quantity received is the sum of all the receipt quantities for the line item.
Unit Price	The unit price entered on the PO or Quote. The unit price <u>does not</u> reflect any changes to price that may have occurred during Accounts Payable processing
Resource	The resource code assigned to this PO or RFQ line item.
Work Order#	The work order number that the Receipt or RFQ line item is being assigned to.
Line Notes	Notes entered against this specific PO or RFQ line item. This field will contain the word "NOTE" if there is a line item note. Click on this field and the note will be displayed.
Change Notes	Change notes entered against this specific PO line item. This field will contain the word "NOTE" if there is a line item note. Click on this field and the note will be displayed.
Cost Group	Cost Group used for Part Cost History Information
Hist. Average	Historical Average for the Cost Group
Last Cost	Last Cost for the Cost Group

Looking up a G/L Number

Use this option to locate a General Ledger Account number. This view is accessible from the **Tools** menu, or by right-clicking on the G/L field during line item entry.



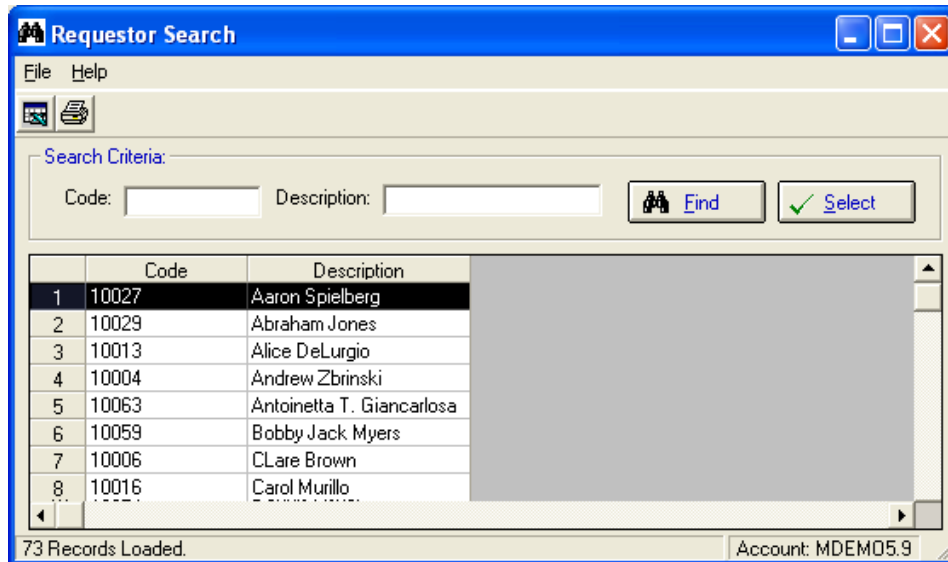
Part Number Search

The Part Number Search Query helps you locate a Manfact Part Number using a variety of search criteria. Please see the *Part Number Search Query User Guide* for more information.

Note: The NCC Part Number Search Query is sold and installed separately. If this option is not currently available, please contact your System Administrator or NorthClark Computing, Inc. to obtain a copy of NCC_PARTSQ.

Looking up a Requestor

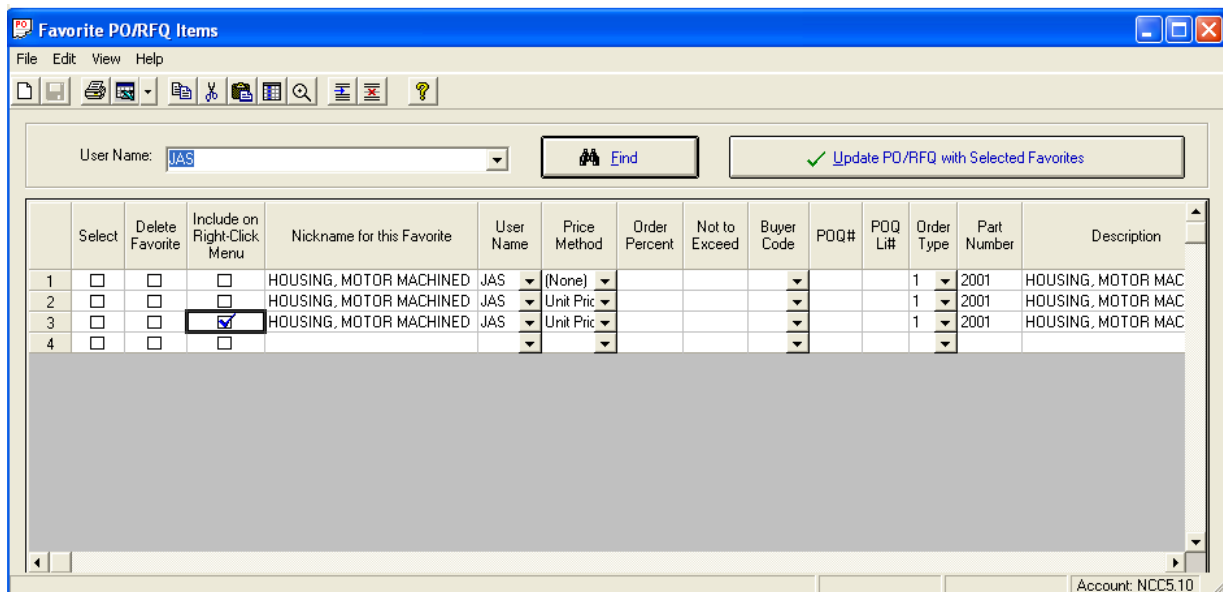
You may access this view from the Tools menu or by right-clicking on the Requestor field during line item entry.



The information on this display comes from Manfact’s “OPER” file. You may narrow the list by entering all or part of the person’s name at the *Description* prompt.

Create and Maintain PO/RFQ Favorites

The favorites feature allows the user to store line items that are used frequently. This eliminates the need for repetitive entry of the same information and facilitates the streamlining of entry procedures. This view may be accessed from the *Tools* menu, or from the Right-Click Menu during line item entry.



This screen serves multiple purposes. You can:

- Create new “Favorite” records
- Locate and update existing records
- Select items from the list to append to a Purchase Order or Request for Quote

Favorites may either be Global or Personal. Global Favorites are available to all users of the system, while you may create Personal Favorites for your own exclusive use. Note, you must have System Administration privileges to update Global Favorites. Select one of the following at the User Name prompt, where *UserName* is your personal login identifier:

(Show All)	Selects the entire NCC_BWB_FAVS file.
(Global)	Create or Select Favorites that will be available to all users of the system.
<i>UserName</i>	To create Personal Favorites, select your login name.
(Global), <i>UserName</i>	Selects you personal Favorites, plus any Global Favorites that are on file.

The **Price Method** defines how the system will update the pricing on a Purchase Order when the Favorite is selected. Choose from one of the following options:

- None - The system will use default pricing
- Unit Price - The price entered on the Favorite record
- Percent of Order - Calculate the price based on the total order value up to the Not to Exceed amount entered on the Favorite record.

Create a New Favorite from an Existing Line Item

You can easily create a new favorite from an existing line item by clicking on the line item, then right clicking the mouse and selecting the option “**Save Row X as Favorites**”. The new record will be created as a Personal Favorite.

Deleting Favorites

Favorites that are no longer needed can be deleted by clicking on the “Delete Favorite” checkbox. This will cause the row to turn red. The record will be deleted from the file after you click the **Save** button.

Adding a Favorite Line Item to a PO or RFQ

Select Favorites from the **Tools** menu. Check the select box next to the line item you wish to add to the PO or RFQ. Click on the **Update PO/RFQ with Selected Favorites** button.

System Message Maintenance

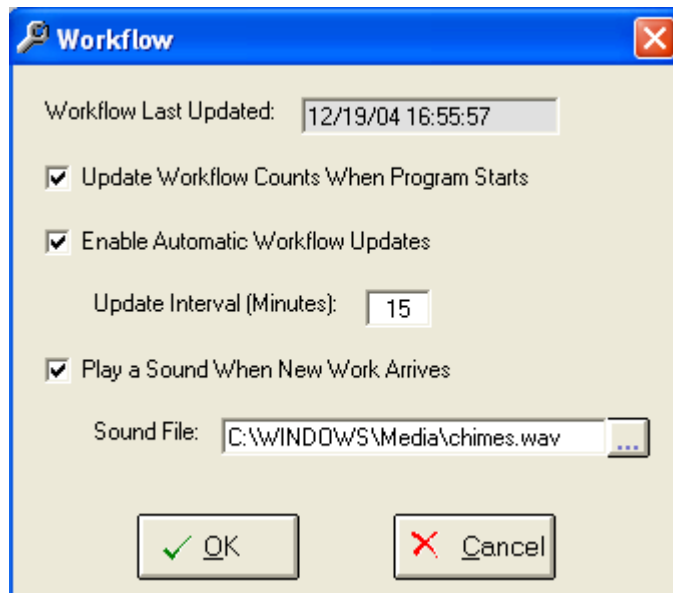
System Message Maintenance allows you to control whether certain standard error messages are displayed or not. If you do not wish an error message to display simply place a check in the box provided.

These settings are stored in the Registry, so each user may set their own preferences.

	Suppress Message	Mode	Condition	Sample Message
1	<input type="checkbox"/>	PO	When an existing purchase order is modified and filed, the user is given the option to reproduce PO documents.	PO 99999 Has Been Modified. What Would You Like to Do?
2	<input type="checkbox"/>	PO	When a PO is filed, and a Line Item Warehouse is different than the Header Warehouse.	Line Item Warehouse XXX does not match the header warehouse XXX on Line Item 999. Okay to file?
3	<input type="checkbox"/>	PO	When a PO is filed, and one or more line items have not been flagged for printing.	One or More Line Items Have Not Been Flagged to Print on the Purchase Order. Okay to file?
4	<input type="checkbox"/>	PO	When a PO is filed, the user is warned if any Projects have been finalized.	Warning! The following Projects have been finalized: XXXX, XXXX
5	<input type="checkbox"/>	REQ	When this program is started, the user does not have security clearance to Manfact's PO.N entry procedure.	You are not authorized to access Purchase Order Entry. You will be restricted to Requisition Mode only.
6	<input type="checkbox"/>	RFQ	When an RFQ is filed, and one or more line items is missing attachments.	One or More RFQ Line Items Do Not Have Files Attached. Okay to file?
7	<input type="checkbox"/>	RFQ	When an RFQ is filed, and a Line Item Warehouse is different than the Header Warehouse.	Line Item Warehouse XXX does not match the header warehouse XXX on Line Item 999. Okay to file?
8	<input type="checkbox"/>	RFQ	When an RFQ is Awarded, the user is prompted to send Regret Notices.	Would You Like to Send Regret Notices Now?

Setting Workflow Parameters

Select **Workflow** from the **Tools** menu to enter options that affect the Buyer's Workflow Display.



Workflow Last Updated	The system displays the date and time when the workflow counts were last refreshed.
Update Workflow Counts When Program Starts	Check this box to refresh the counts automatically on startup.
Enable Automatic Workflow Updates	Check this box to allow the system to automatically refresh the counts at specified time intervals
Update Interval	The number of minutes between automatic count updates.
Play a Sound When New Work Arrives	Check this box to have the system play a sound anytime the workflow counts change.
Sound File	Use the browse button to locate a sound file.

Output – Electronic Documents

The Buyer's Workbench may be used to create electronic Purchase Orders and Request for Quote documents. These files may be deposited in the *BWB Data Store*, where they may be viewed by internal personnel, emailed from the Buyer's Workbench, or downloaded from the Supplier Portal Web Site.

The PO or RFQ is initially created as a Microsoft Word™ document, and may optionally be converted to a PDF file. Note, you must install Adobe Acrobat™ if you wish to create PDF files.

The format of the document is dictated by a *Microsoft Word Template*, along with a variety of settings your System Administrator can control through the Buyer's Workbench Administration procedure. Standard templates are delivered as part of the NorthClark solution, and may be modified to include your company's logo, color choices, and other preferences.

In addition to the electronic document, you may also output the information in the form of an Excel™ spreadsheet. If your supplier's system supports importing data from Excel, they may appreciate being able to load the information directly into their system without having to re-key the information. For Purchase Orders, the Excel Workbook will also include a Packing List and Labels the supplier may choose to print for shipping purposes.

Options for Creating Electronic Documents

The options defined in this section are common to all three modes of electronic document processing:

- Individual Purchase Orders
- Batch Purchase Order Processing
- Request for Quote

To locate the **Template Path** and **Template Name**, click the browse button located next to the Template Name field. This will initiate a standard browse function that will help you locate your PO or RFQ template. Once you've located the template the first time, the system will remember your entries, and you will not need to find it again in the future.

The **Save in Folder Name** and **Document Name** prompts determine where your finished document will be stored. If your company has implemented the BWB Electronic Data Store, these values will be filled in by the system and may not be changed. Otherwise, you may specify a folder on your network or local hard drive where you want the files to be saved.

If you want to preview the document before printing, check the box next to **Display Word Document When Created**.

If you want to print or email the document without previewing, check either the box next to **Print Word Doc Automatically When Created** or **E-Mail Word Doc Automatically When Created**.

If you would prefer to send the PO or RFQ as an *Adobe Acrobat PDF file* instead of a Word document, choose the option to **Create PDF When Word Doc Posted**. Please refer to the Technical Notes below for more information.

If you select the **Generate Excel Worksheet When Created** option, the system will automatically create a new Excel Spreadsheet containing the line item data from the PO or RFQ, which may be attached to the email you send to your Supplier.

Data is loaded into the Word Document using *Field Codes* that have been embedded in the template (this concept is similar to creating Word templates for mail merge applications). You may change the location where data is printed on the form by moving the appropriate Field Code on the template. Click the **View List of Word Field Codes** button to view a list of fields that may be included in your Word Document.

Review the information on the Email tab. Use this tab to enter the recipient's email address, edit the subject line text, edit messages for the body of the email, and edit the list of files to be attached. Email addresses default according to the entries made in the Supplier Maintenance screen. The message in the body of the email defaults according to the entries made using the Buyer's Workbench Administration utility.

There are two ways to attach files to the email:

- If you have attached drawings or other files to individual PO/RFQ line items using the **Attach Files** feature on the main screen, a list of these files will be displayed in the grey text box near the bottom of the E-Mail Tab. Click the **Send All Files Attached to This Purchase Order** option to include these files in your email transmission.
- In the center of the screen, you will find a text box labeled **Attach**. Use the Browse button to the right of this area to locate any additional files you wish to send.

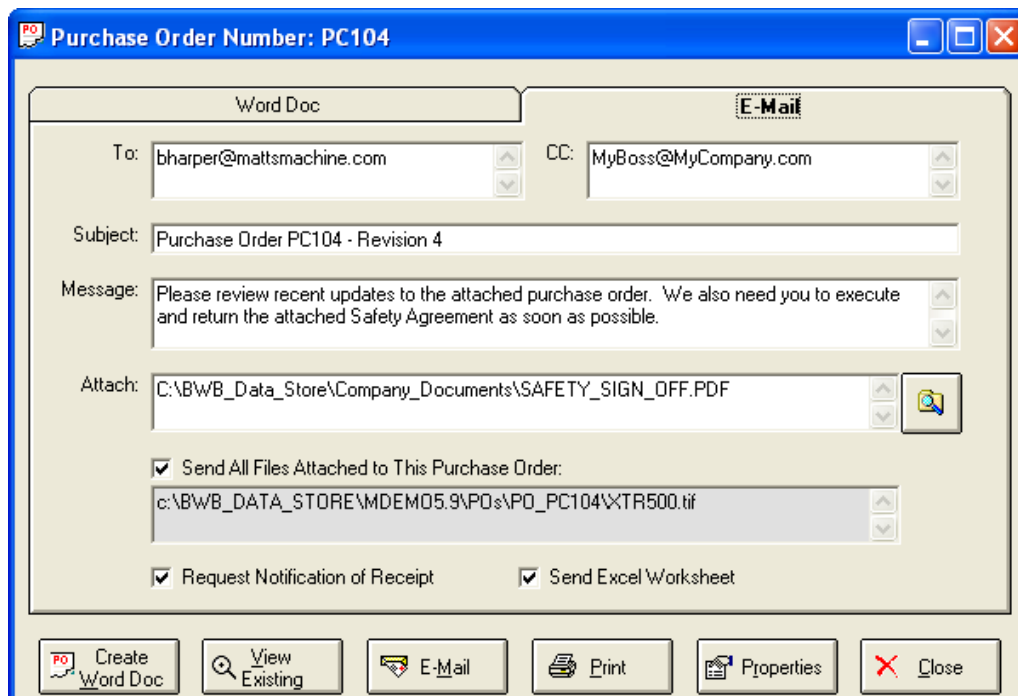
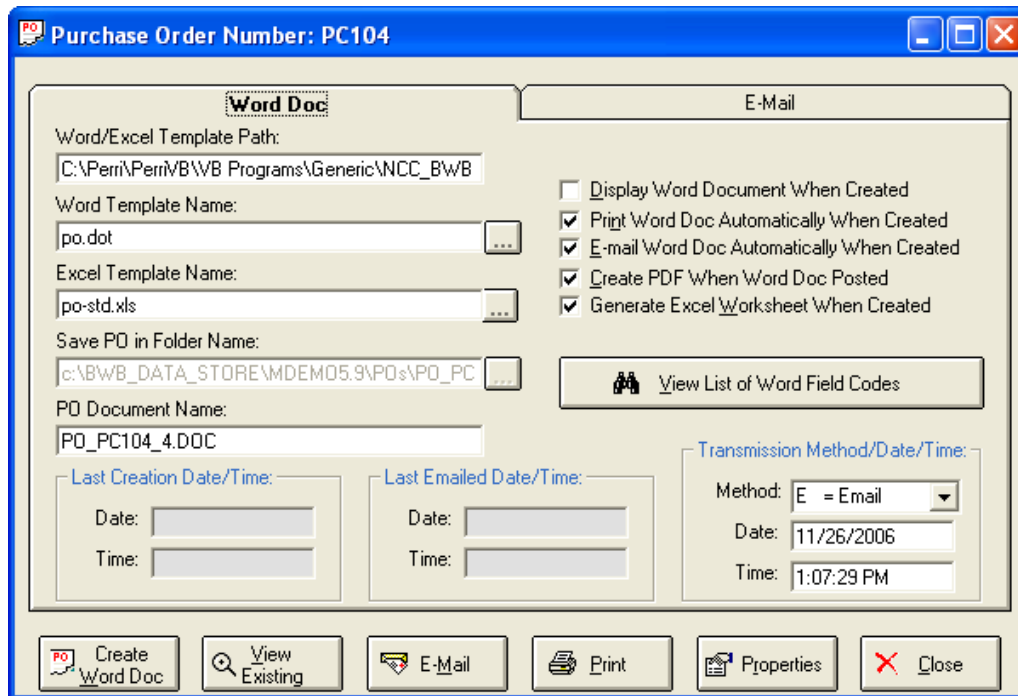
Note, email attachments may be sent as a WinZip file (see Technical Notes below for more information).

If you have never sent email before, you will want to update your **Email Options**, by selecting **Display Options** from the **View** menu on the main screen. Please refer to the *Email Options* topic in the *General Information* section of this document.

If you plan to print the document(s), use the **Properties** button to select a Windows Printer.

Creating a Purchase Order Document

This option may be selected from the **Output** menu, or by clicking the **Email or Print PO** button on the Purchase Order Header (PO) tab of the main screen.



Creating an Excel Spreadsheet

This is an example of an Excel Workbook that may be generated along with the electronic Purchase Order document. The Workbook contains three spreadsheets: PO Data, Packing Slip, and Labels.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	PO#	PO LI#	Schedule Dates	Part Number	Description	Work Order	Qty Ordered	Qty Received	Category	Resource	Unit Price	Ext. Price	Delivery To	Requestor
2														
3	PC104	1	9/16/2006	2001	HOUSING, MOTOR MACHINED		1	0		ODC	1000	1000		MATT
4	PC104	2	9/16/2006	XTR500	POWER DRIVE ASSY.		1	0			900	900		MATT
5														
6														
7														

PACKING SLIP

VENDOR: MATTHEW'S MACHINING
 2100 E GRAND AVENUE
 EL SEGUNDO, CA 90254
 1

SOLD TO: - WDR ENTERPRISES -
 21 TECHNOLOGY SUITE 200
 IRVINE, CA 92618

SHIP TO: Fargo
 Fargo

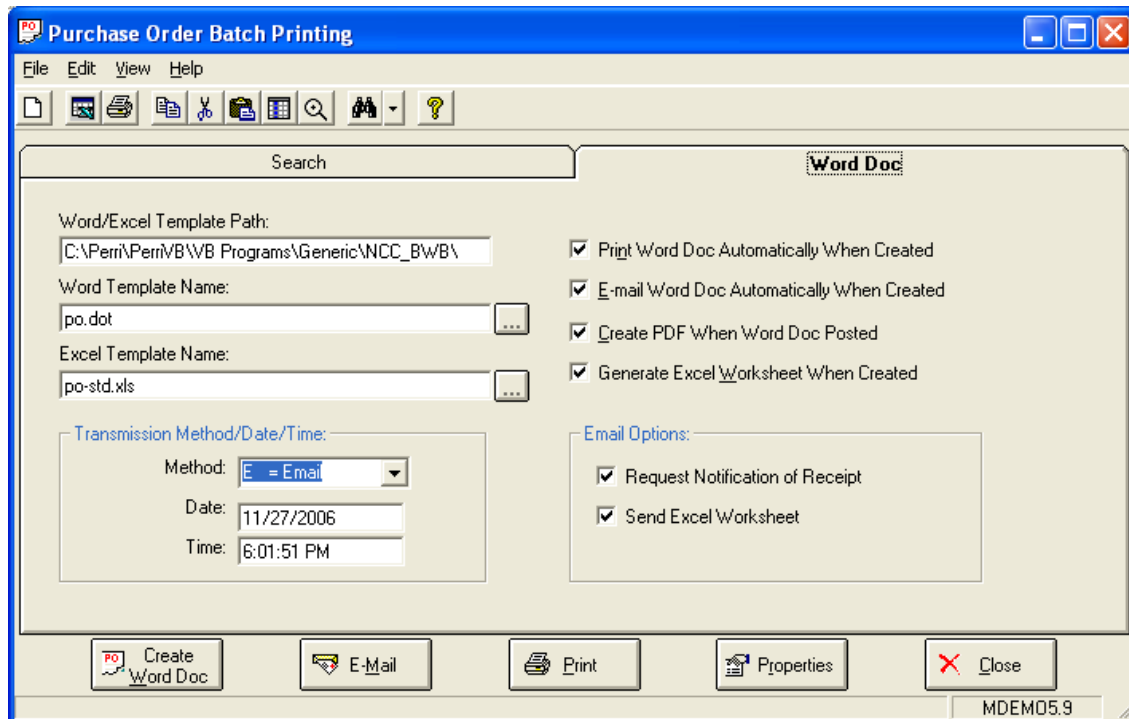
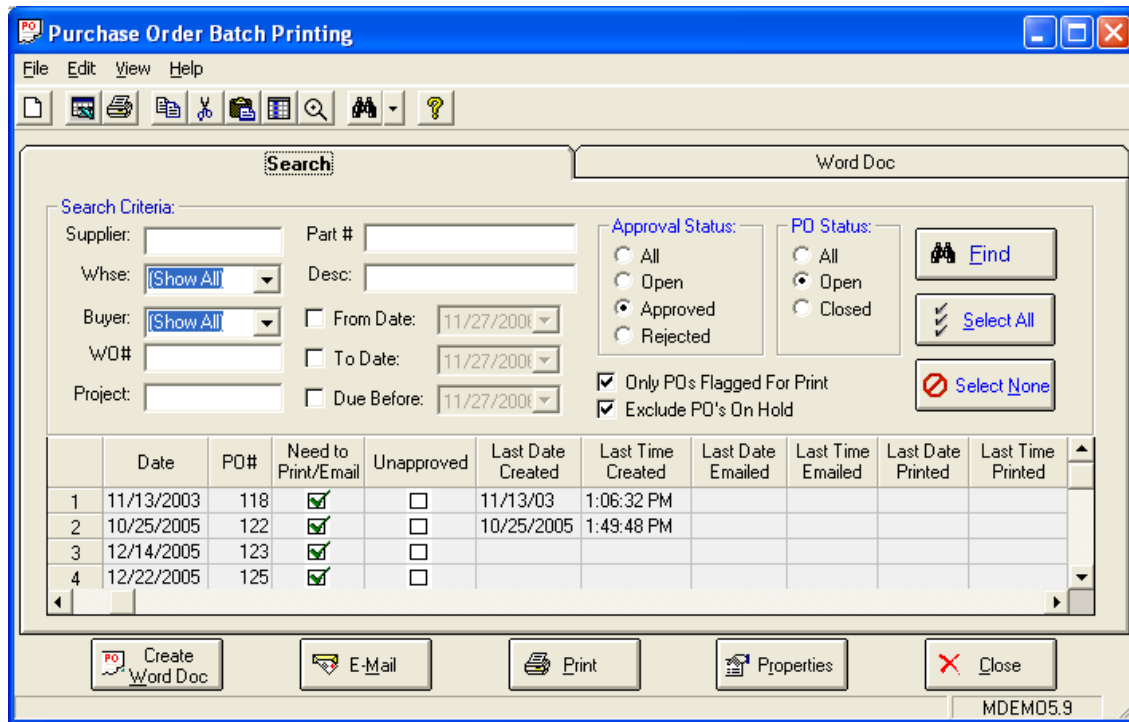
PO# PC104

PO LI#	Part Number	Description	Work Order	Qty Ordered	Qty Shipped	Schedule Dates	CAT	RES	Delivery To	Requestor
1	2001	HOUSING, MOTOR MACHINED		1	0	9/16/2006		ODC		MATT
2	XTR500	POWER DRIVE ASSY.		1	0	9/16/2006				MATT

1										
2	PO-LI:	PC104-1				PO-LI:	PC104-2			
3	Supplier:	MATTHEW'S MACHINING				Supplier:	MATTHEW'S MACHINING			
4	Part Number:	2001				Part Number:	XTR500			
5	Description:	HOUSING, MOTOR MACHINED				Description:	POWER DRIVE ASSY.			
6	Qty Shipped:					Qty Shipped:				
7	Work Order #:		Attn To:			Work Order #:		Attn To:		
8										
9										

Batch PO Document Processing

This option allows you to select a population of Purchase Order records, and create electronic documents for the entire batch all at once.



View a Purchase Order Document

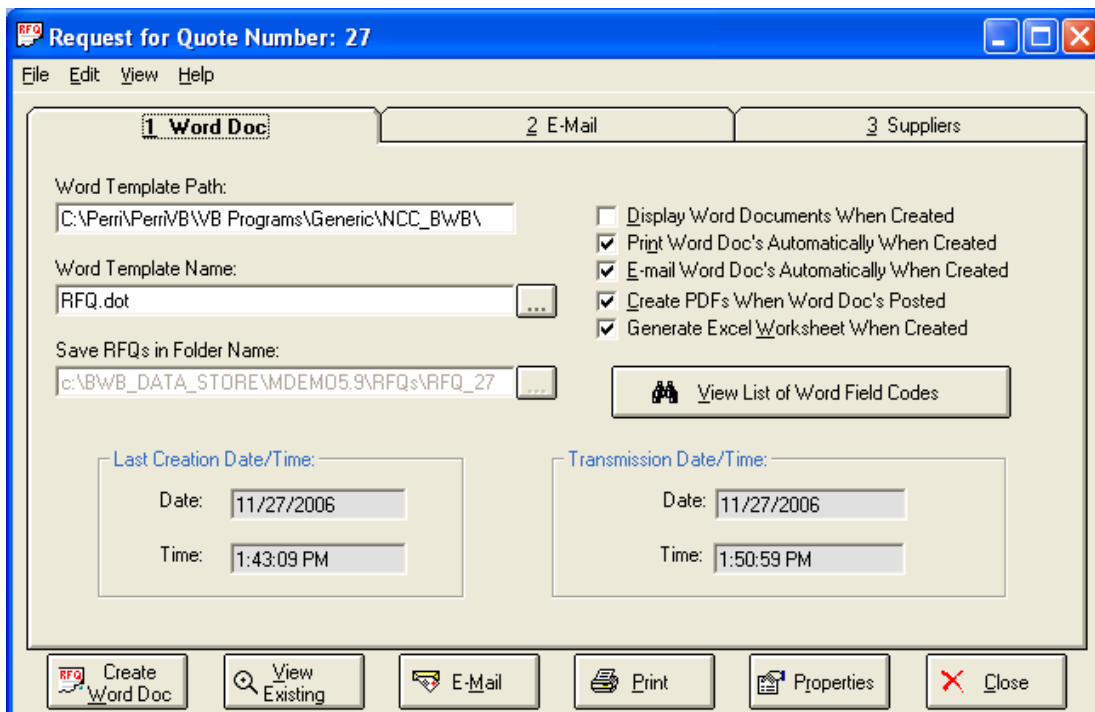
This option allows you to view electronic documents that currently reside in the BWB Data Store. This option is available on the Output menu of the main screen, and is also accessible from the Purchase Order printing screens.

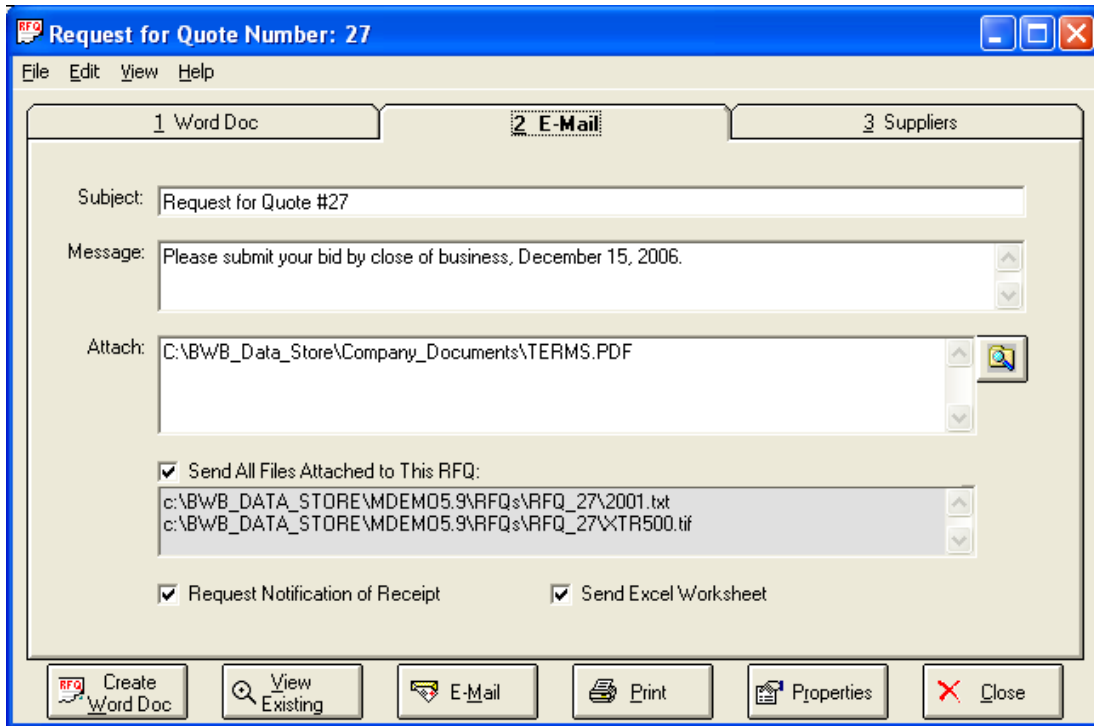
If there is more than one revision of the Purchase Order on file, you will be prompted for the Change Level to print. This prompt defaults to the latest revision.

The document will be displayed in either Word or PDF format, depending on the options chosen at the time it was created.

Creating a Request for Quote (RFQ) Document

Use this screen to generate Request for Quote documents. One electronic document will be created for each Supplier invited to bid on the RFQ.





Creating an Excel Spreadsheet

This is an example of an Excel spreadsheet that may be generated and sent along with the electronic Request for Quote document:

	1	2	3	4	5	6	7	8	9	10	11
1	RFQ#	RFQ LI#	Required Dates	Part Number	Description	Work Order	Qty Required	Category	Resource	Attention To	Requestor
2											
3	27	1	09/01/2006	2001	HOUSING, MOTOR MACHINED		10.00	ACD			
4	27	2	9/1/2006	XTR500	POWER DRIVE ASSY.		10.00	DEL			
5											
6											

Viewing an RFQ Document

This option allows you to view electronic documents that currently reside in the BWB Data Store. This option is available on the Output menu of the main screen, and is also accessible from the **Create an RFQ** screen.

Typically, multiple suppliers are invited to bid on an RFQ, so there will be multiple document in the BWB Data Store. When you choose the option to **View an Existing RFQ**, the document for each supplier is opened in a separate window.

The documents will be displayed in either Word or PDF format, depending on the options chosen at the time they were created.

Technical Notes

You must have Microsoft Office available on your desktop computer to use the features described in this section.

You can change the appearance of your company's Purchase Order and RFQ Documents by modifying the Word Document Template. The default templates, *PO.DOT* and *RFQ.DOT*, can be found in the application path where the Buyer's Workbench application has been installed.

Your System Administrator may add custom fields to this application using the Buyer's Workbench Administration Utility. The settings in Ncc_BWBAdmin allow you to select whether your custom fields are to be included on PO and RFQ documents. Please refer to the *Buyer's Workbench Administrator's Guide* for more information on changing the appearance of your Purchase Order and Request for Quote documents.

An Excel Template called *po-std.xls* is delivered with the application. This is used for Purchase Orders only, and it produces a Packing List and Labels that may be emailed to the supplier.

In order to create PDF files, you must have the full version of Adobe Acrobat installed (not just the reader). If this option is grayed out, it means the application was unable to activate Adobe Acrobat. For more information on Adobe Acrobat, please visit their web site at: www.adobe.com.

If you wish to send attachments as a WinZip file, you must install version 8.0 or higher of the WinZip software on your client computer or terminal server. You will also need to download the WinZip Command Line Support Add-On from their web site: www.winzip.com. Once the software is installed, the System Administrator must use the Buyer's Workbench Administration utility to enable this feature.

General Information

BWB Data Store

The Buyer's Workbench Data Store is a directory on the network where various electronic documents are stored. These documents include:

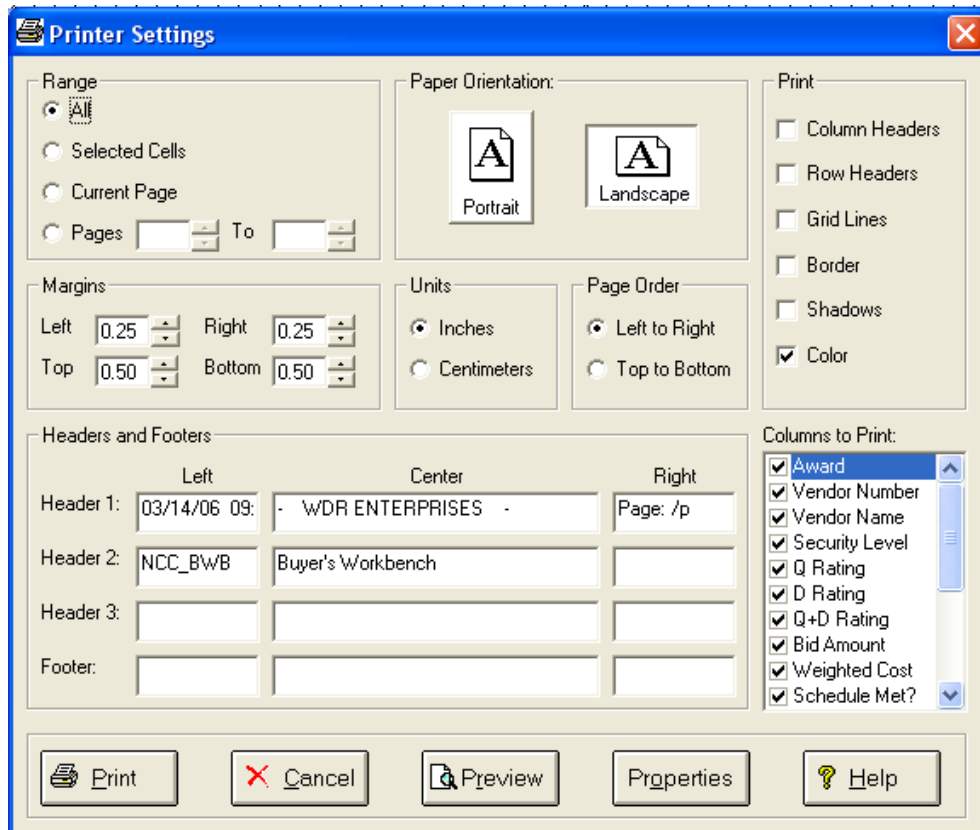
- ❑ Purchase Orders and RFQs (Word and Acrobat files)
- ❑ Drawings and other attachments
- ❑ Legal & Informative Documents

The BWB Data Store serves as a central repository that may be accessed from both the Buyer's Workbench and the Supplier Portal web site. The root folder, or the entrance to the data store, is defined using the Ncc_BWBAdmin routine. Within the BWB Data Store, sub-folders are used to organize the data.

Document Type	Format	Definition
PO Document	PO_nnn_ccc.doc PO_nnn_ccc.pdf	Work Document (.doc) or Adobe Acrobat (.pdf) file, where <i>nnn</i> is the PO Number, and <i>ccc</i> is the Change Level.
RFQ Document	RFQ_nnn_sss.doc RFQ_nnn_sss.pdf	Work Document (.doc) or Adobe Acrobat (.pdf) file, where <i>nnn</i> is the RFQ number and <i>sss</i> is the Supplier Id.
Drawing Attachment	xxx.tif xxx Thumb.jpg xxx 11X17.jpg	When the Buyer attaches a .TIF file, the system automatically converts it to .JPG format in two sizes. A small (thumb) version for display on screens, and a larger size for printing on 11x17 paper.
Other Attachments	User Defined	Any other attachments linked to the PO or RFQ using the Buyer's Workbench, including Word documents, Excel files, etc., are stored in the appropriate PO or RFQ folder within the BWB Data Store.
Company Documents	xxx.pdf	This Company Documents folder includes a variety of legal and informative documents that may be viewed and/or downloaded from the Supplier Portal web site. These are typically Adobe Acrobat (.pdf) files.

Printing a Spreadsheet

Below is a sample of the screen that will appear when you select the **Print** option. Be sure to click on the spreadsheet you wish to print before choosing the Print option.



Range - Selecting a Print Range: You may choose to print the entire spreadsheet (all), selected cells (those that you have highlighted on the current screen), the current page (only the rows that are currently visible on your screen), or a range of page numbers.

Orientation - Portrait or Landscape: You may print your report in portrait mode (normal) or landscape mode (sideways). Printing in landscape mode will allow you to fit more columns of information on your report.

Margins - Report Margins: You can make your report more attractive by setting the top, bottom, left, and right margins. Reduce the left and right margins if you need to fit more columns on the report.

Units - Inches or Centimeters? Are the margins you entered expressed in inches or centimeters?

Page Order: If your report is too wide, it may span multiple pages. When this occurs, do you want the report printed from top to bottom or left to right?

What Do You Want to Print? You can customize the appearance of your report by printing (or not printing) column headers, row headers, grid lines, borders, shadow, and color.

Headers and Footers: Your report may have up to three lines for the heading, and one line for the footer. The system initially displays a default heading, which you may modify if desired.

Tip: Use /p to designate a page number.

Which Columns Do You Want to Print? The columns that are available for printing are listed. Select the columns you wish to include on your report.

Importing Data from Excel

This screen below is displayed when you choose the option to Import data from a Microsoft Excel spreadsheet, a tab-delimited text file, or a comma-separated text file. The data will be imported to the current active spreadsheet, so be sure to click on the desired spreadsheet before choosing this option.

	Field Name	Column Number	Column Letter
1	Award	1	A
2	Vendor Number	2	B
3	Vendor Name	3	C
4	Security Level	4	D
5	Q Rating	5	E
6	D Rating	6	F
7	Q+D Rating	7	G
8	Bid Amount	8	H
9	Weighted Cost	9	I
10	Schedule Met?	10	J
11	Bid Type	11	K
12	Bid Notes	12	L
13	Buyer's Notes	13	M
14	Open PO\$	14	N
15	RFQ View Date	15	O
16	RFQ View Time	16	P
17	Submit Date	17	Q
18	Submit Time	18	R

Import File Name: Enter the path for the file that you wish to import. You may browse the files by clicking on the button next to the text box.

Header Rows: Enter the number of rows at the beginning of the file that are not to be imported

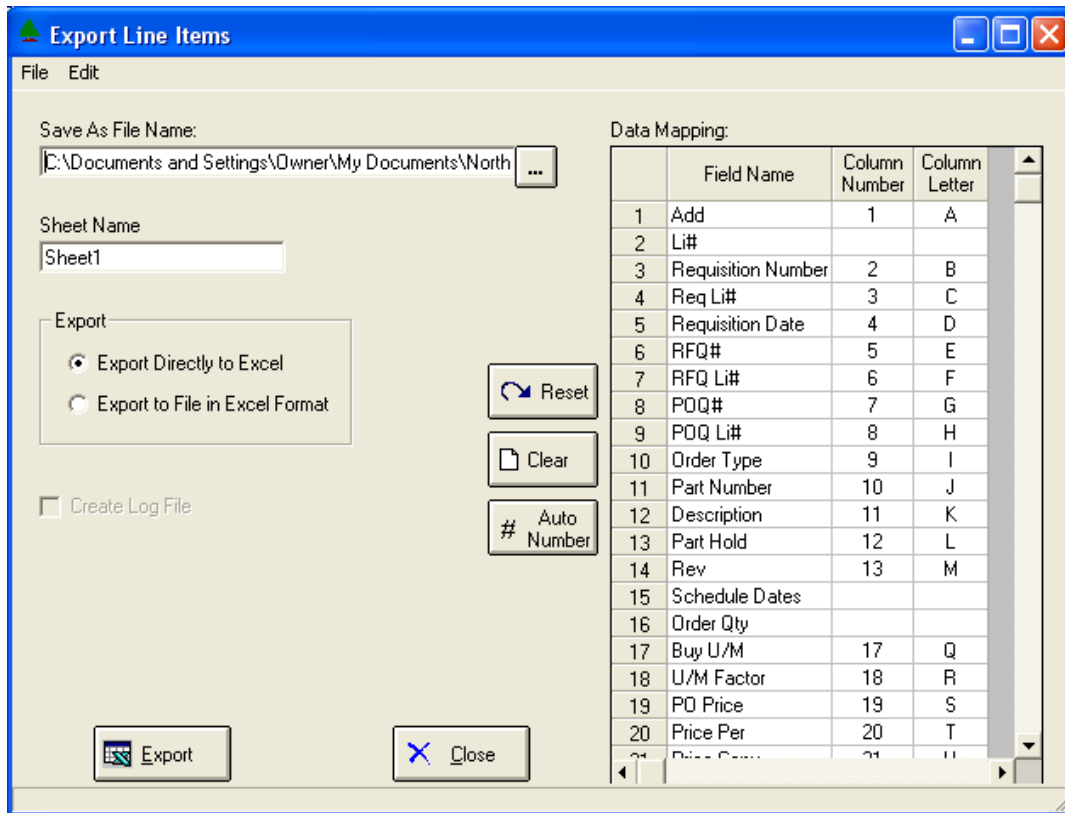
Import File Type: Select the type of file that you are importing

Data Mapping: Enter the Column Number or Letter where data resides on the Excel file.

Import Data: Click OK to begin the import procedure.

Exporting a Spreadsheet to Excel

Below is a sample of the screen that will appear when you select the **Export to Excel** option. This will export the current active spreadsheet, so be sure to click on the spreadsheet you wish to print before choosing the Export option.



Save As File Name: Enter the pathname of the file you wish to create. You may browse the files by clicking the button to locate the drive and folder where the file will be stored.

Sheet Name: Enter the Excel sheet name to create. This will automatically default to Sheet1.

Export to Excel or to a File? You may export the contents of the display directly to Excel, or you may choose to create a file in Excel format.

Create a Log File? Select this option to create a log file. The log file contains error messages and other information about how your Excel file was created. The name of the log file is "CreateExcelFile.log", and it will be stored in the same folder as your spreadsheet.

Data Mapping: You may move data to alternate columns by changing the column number or letter. You may also remove a column by removing the row that contains the column information you do not wish to export.

Export Button: After all required information has been entered, click this button to export your data to Microsoft Excel.

Editing Features

Copy, Cut, Paste and Fill

You may use the standard Windows Copy, Cut, and Paste features to copy data to the Windows clipboard, or to paste data from the clipboard into a cell.

To copy data, hold down the left mouse button and highlight one or more cells, then choose **Copy**. There are multiple ways to enter this command:

1. From the **Edit** menu choose **Copy**.
2. Click the **Right Mouse** button, then choose **Copy** from the pop-up menu.
3. Click the corresponding icon on the toolbar.
4. Hold down the **Ctrl** key and type the letter **C (Ctrl-C)**.

You can use the Cut command (Ctrl-X) and the Paste command (Ctrl-V) in similar fashion.

To copy the contents of an entire row, click once on the row header (the number displayed on the left side of the first cell), and then choose **Copy**. Now click on the row header that you want to copy the data to and choose **Paste**.

If you want to update several cells with the same value, highlight all of the cells you wish to update then choose **Fill Cells**. This command will update each cell with the current information from the clipboard.

Zoom

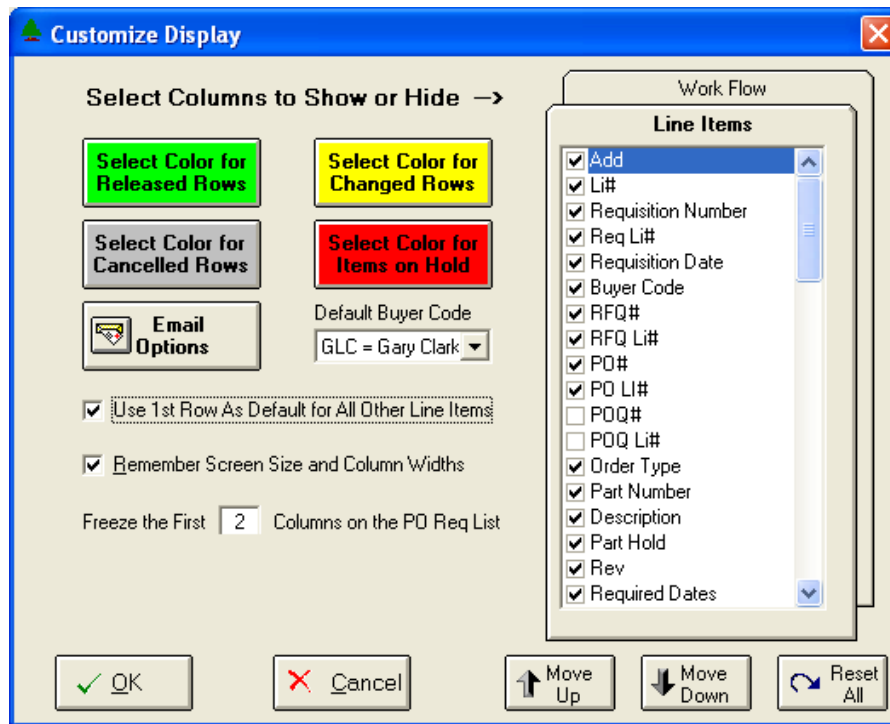
This feature allows you to view, print and/or edit the expanded contents of a field. It is especially useful for multi-line information such as notes and long descriptions.

- ❑ You may "Zoom in" on any selected item by selecting Zoom from the Edit Menu, clicking the magnifying glass on the toolbar, or selecting Zoom from the right click menu.
- ❑ The Column Name will appear in the Title Bar with "Edit" or "View". You may edit the field when it is allowed. Click **OK** when finished, or **Cancel** to revert to the original data.
- ❑ To print the selected item, click on the printer icon and the information will be sent to your local printer.

Locked fields may be viewed but not modified using the Zoom Feature. If the field is locked, **View** will appear in the Title Bar, and there will only be a single command button labeled **Done**.

Customizing Your Display / Arranging Columns

Use this view to customize your display. This information is stored in the Windows Registry, and is unique to each user.



Each tab contains a list of fields that corresponds to a screen used in this application. Use the checkboxes to show or hide each field.

Use the **Move Up** and **Move Down** Buttons to re-arrange the order in which the fields appear on the specific screen Display. Click **Reset All** to return to the system's default settings.

Select the color to use for highlighting Rows that have been modified, during data entry. This is done by clicking on the box **Select Color for Released Rows**. By clicking on this box, the system will display several colors to choose from. Click on the color you would like to use for highlighting, and then click OK and you will see that the **Select** box on the main screen has been changed to your selected color. Repeat this procedure to **Select Color for Changed Rows**, **Select Color for Cancelled Rows** and **Select Color for Items on Hold**.

Click the **Email Options** button to enter parameters for sending email messages (please refer to the Email Options topic for more information).

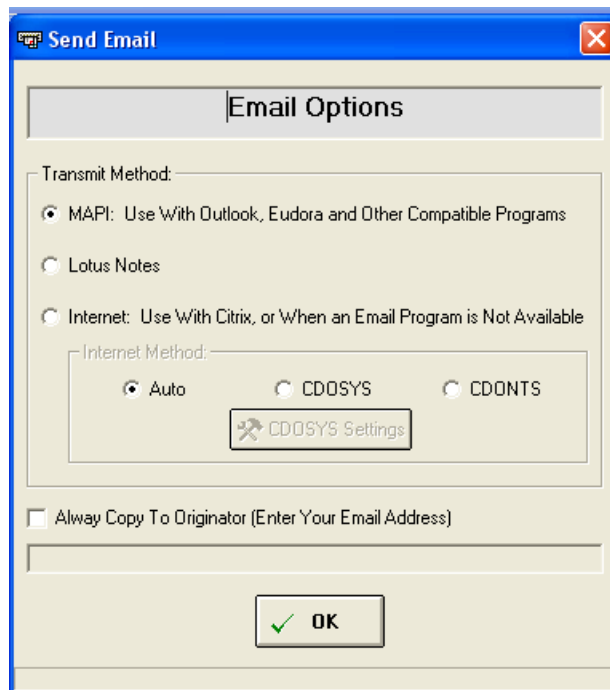
Select the Buyer Code to be used as the default during Purchase Order and RFQ entry.

You may opt to have the system use the 1st row's information as a default for all other line items.

You may opt for the system to “Remember Screen Size and Column Widths”. Any changes you make to the screen's appearance will be saved and applied the next time you launch this application.

Choose the number of columns (from left to right) you wish to *freeze* on the spreadsheet. A frozen column will remain in place as you scroll to the right.

Email Options



Please contact your System Administrator if you are not sure which **Transmit Method** is appropriate for your system.

MAPI: Choose this option if you are running an email program on your desktop such as Outlook or Eudora. Your messages will be placed in your email program's "out box" and sent in the same manner as your regular email messages.

LOTUS NOTES: Select this option if you have Lotus Notes running on your desktop

INTERNET: Use this option if an SMTP server has been setup for sending email via the Internet. If you are running this application via Citrix or Terminal Services, you will want to use the Internet method.

If you wish to send a copy of the email to your email address, click on the “Always Copy To Originator” field and enter your email address. This is recommended when using the Internet method to transmit email.

Wildcarding

Wildcarding is a powerful feature that allows you to search using a portion of the field. You tell the system you want to use a wildcard by typing three periods “...” or an asterisk “*” at the beginning or end of your search entry. Here are some examples of wildcard commands and their expected results:

Part Number:	XTR... (or XTR*)	Returns part numbers that begin with “XTR”
Description:	...VALVE... (or *VALVE*)	Returns parts with the word “VALVE” anywhere in the description.
Category:	...A (or *A)	Returns parts with a category ending with the letter “A”.