Vendor Setup

Vendor Setup Tasks

- Setup Vendor Classification
- Setup Purchasing Schedule
- Setup Vendor Category
- Setup Vendor Category Type
- Lookup Vendor
- Add & Edit Vendors
- Add & Edit Vendor Contacts
- Setup Vendor Discounts/Interest
- Setup Debit GL Account
- Vendor Briefcase
- Setup Related Vendors
- I2 Preferences
- Assign Vendor Classifications
- Setup Vendor Branch
- Setup Vendor Website
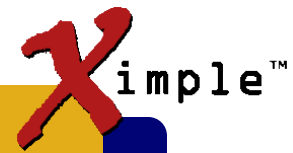- Setup Vendor Customer Number

Open Vendor Classification Type

Administration Module Menu

Vendor Classification Submenu

Vendor Classification Type Submenu Option

Vendor Classification Types Page

Popup Menu:

Edit: Edit Vendor Classification Type

Deactivate: Deactivate classification type

Activate: Re-activate classification type

Add Vendor Classification Type

Ximple Solutions	05/06/2010
Vendor Classification Type	16:09:07
	User Guide

New Vendor Classification Type (P1200)	
*Name	Reseller
*Maximum Level	3
Variable Level	● Yes ○ No
Multiple Selection	● Yes ○ No

Save   **Reset**   **Cancel**

Click
Save

Open Vendor Classification Page

Administration Module Menu

Vendor Classification Submenu

Vendor Classification Submenu Option

Vendor Classification Page

Click Add New

Popup Menu

Popup Menu:

View: View classification information

Edit: Edit Vendor Classification

Deactivate: Deactivate classification type

Activate: Re-activate classification type

Delete: Delete classification (any child levels must be deleted first)

Add Child: Add child level classification

Add Vendor Classification

Ximple Solutions
New Vendor Classification
05/06/2010
16:11:59
User Guide

New Vendor Classification(P0116)	
*Classification Type	Reseller
*Name	Computers
Is Last Level	○ Yes ⦿ No

Save   Reset   Cancel

Click
Save

Add Child Level

Ximple Solutions
Vendor Classification
06/20/2011
14:31:27
Jane Doe

Vendor Classification(P0114)

Wholesalers   Suppliers
                     Office Equipment
                     IT Equipment
                     Size

View
Edit
Deactivate
Delete
Add Child

Add New   Show All

Select **Add Child**

Ximple Solutions
New Vendor Classification
05/06/2010
16:11:59
User Guide

New Vendor Classification(P0116)

*Classification Type   Reseller
*Name   Computers
Is Last Level   ○ Yes   ⊙ No

Save   Reset   Cancel

Click **Save**

Purchasing Schedule

Purchasing Module Menu

Purchasing Schedule Submenu Option

Setup Submenu

Purchasing Schedule

Name	Cycle In Days
Daily	2
Weekly	7
Bi-Weekly	14
Monthly	28

Ximple Solutions
Purchase Schedule
12/17/2009
11:15:43
User Guide

View
Edit
Delete

Add New

Popup Menu

Click
Add New

Popup Menu:

View: View purchasing schedule information

Edit: Edit purchasing schedule

Delete: Delete purchasing schedule

Add Purchasing Schedule

	S	M	T	W	T	F	S
Week 1	☐	☐	☐	☐	☐	☐	☐
Week 2	☐	☑	☐	☐	☐	☐	☐
Week 3	☐	☐	☐	☐	☐	☐	☐
Week 4	☐	☑	☐	☐	☐	☐	☐

Ximple Solutions
New Purchase Schedule
12/17/2009
11:16:22
User Guide

New Purchase Schedule

*Name: Bi-Weekly

Save   Reset   Cancel

Click
Save

RPO Setting

Ximple Solutions
Purchase Schedule
06/20/2011
10:37:00
Jane Doe

Name	Cycle In Days
Daily	2
Weekly	7
Bi-Weekly	14
Monthly	28

View
Edit
Delete

Add New

Flexible and user friendly scheduling

Ximple Solutions
View Purchase Schedule
06/20/2011
10:37:09
Jane Doe

View Purchase Schedule

		S	M	T	W	T	F	S
Name	Daily							
Cycle In Days	2							
Week 1			X	X	X	X	X	
Week 2			X	X	X	X	X	
Week 3			X	X	X	X	X	
Week 4			X	X	X	X	X	

Back

Edit Vendor(P0145)

*Vendor Name	Apple Corportation
*Print Check As	Apple Corp.
Print Check to	[ ] V
Federal ID		DUNS ID	
Alpha Code		UCC	
Status	Active ⦿ Inactive ○
Class ID		Vendor Type	
Approved for PO	Yes	Begin Date	
Purchasing Group	East Coast	Purchasing Schedule	Daily
Distributor Account		Vendor Quote	
RMA Frequency		Last RMA Date	
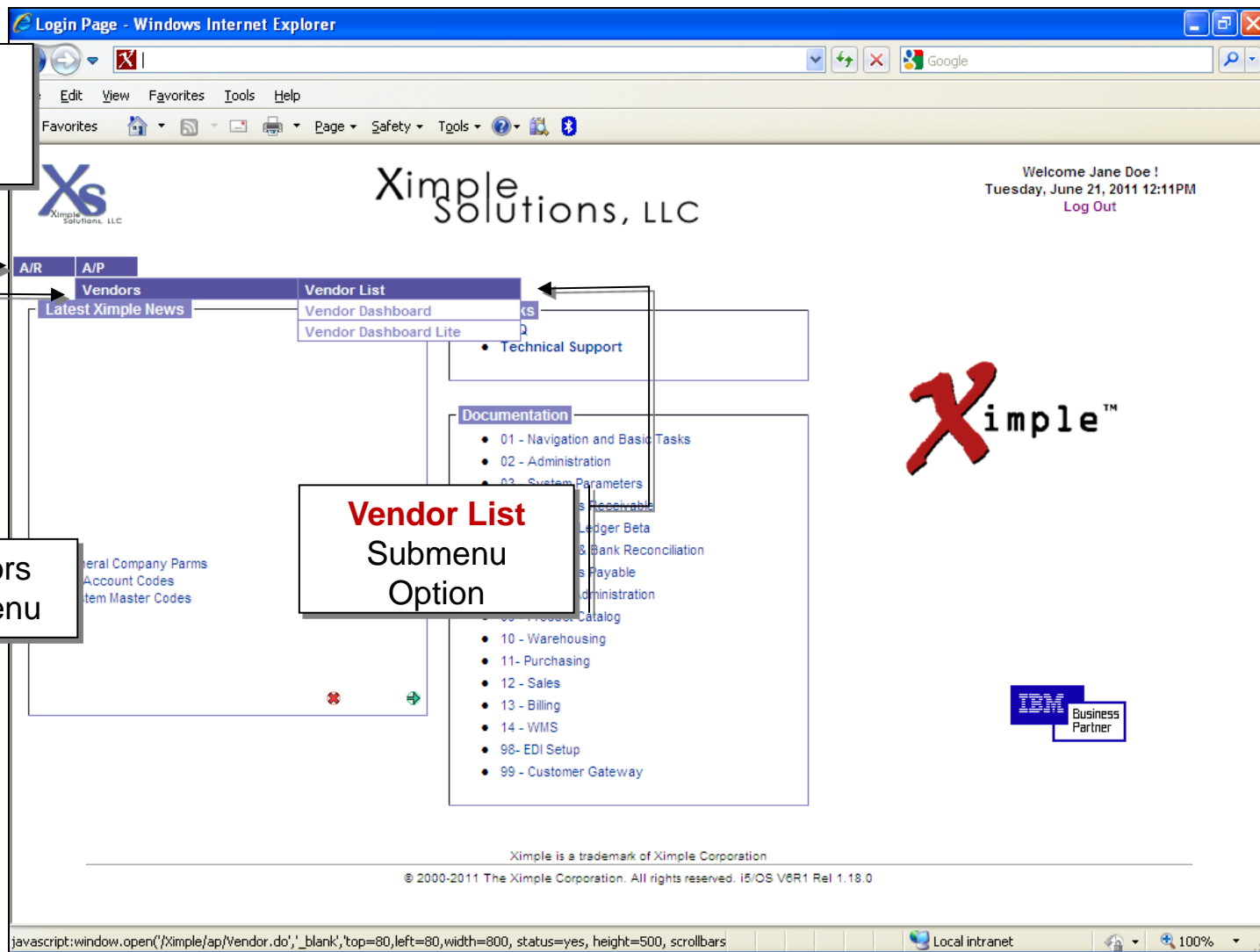
Open Vendor List Page

A/P Module Menu

Vendors Submenu

Vendor List
Submenu Option

Vendor Lookup

X imple ™

Enter Search Criteria
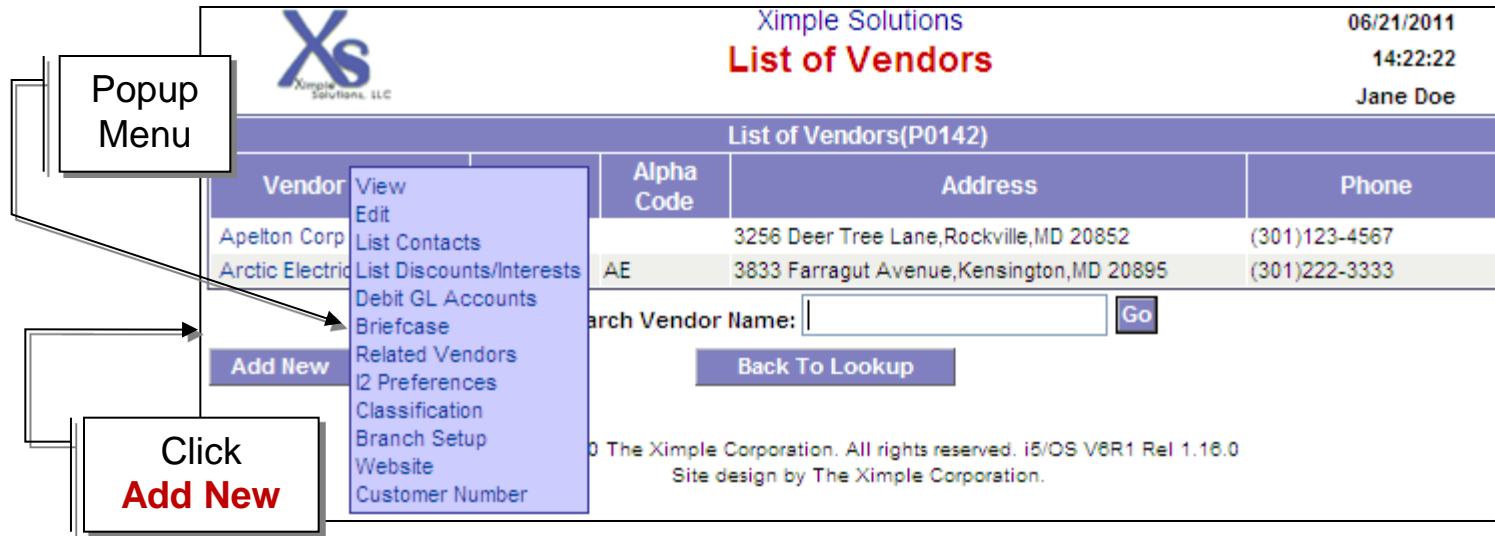
Ximple Solutions
Vendor Lookup

05/18/2011
10:27:22
User Guide

Xs — Ximple Solutions, LLC

Vendor Lookup			
UCC		OR	**Alpha Code**
OR			
Vendor Name			
Print Check As			
Phone #			
Classification			☐ No Class. Assigned
Status	All		
Include Related Vendor	☐		
Report Format	⦿ HTML ○ PDF ○ MS Excel	**Contact Type**	Accounts Payable **Clear All**

Add New   **Lookup**

Click **Lookup**

List of Vendors Page

Popup Menu:

View: View, edit and add contact information for vendor (address/email/phone)

Edit: Edit vendor information

List Contacts: View, edit and add vendor contacts

Debit GL Accounts: View and setup vndr GL Accts.

Briefcase: View and schedule events for vendor

Related Vendors: View, edit and setup related vendors

I2 Preferences: View and setup vendor I2 upload preferences

Classification: View and setup vendor classifications

Branch Setup: View, edit and setup classification

Website: View, edit and add vendor websites

Add New Vendor

Add New Vendor

Vendor's Phone and Email Information

	Country Code	Number	Extension	Phone Type
Phone1	USA-1 ▼	3011112222		Daytime ▼
Phone2	▼			▼
Phone3	▼			▼
Email	info@arcticelectric.com			General Company Email ▼

G/L

*G/L	Accounts Payable	v	*Discount GL	A/P Gained Cash Disco v
			*Interest GL	A/P Late Fees v

Freight & Ordering

Freight Paid	○ Yes ● No	EBO Only	○ Yes ● No
Shipping Method	Best Way ▼	Allow Multiple Shipments	● Yes ○ No
Freight Term	Vendor pays if total amount exceeds min. freight setup ▼		
FOB	FOB Destination ▼		
Min. Order Amt.	10	Min. For Free Freight	100

Payment & Terms

*Terms	Net 30th ▼	Payment Method	On Account ▼
Tax Exemption	No ▼	Tax Exemption ID	
Payment Retention	No ▼	Consolidate Payment	Yes ▼
Tax Form	▼	Use Credit Automatically	● Yes ○ No
Withhold Tax	No ▼	Withhold %	
*Discount Day	10 ▼		
*Net Due Day	23 ▼	*Billing Cycle Day	24 ▼

Add New Vendor

Form Split in 2. Continued From Previous Slide

Only open if: Pymt Method = Wire Transfer

ACH & Wire Transfer

Type Of Account	ACH
Disbursement Type	Checking Dollars
Receiving ABA / DFI	111111111
DFI Account	2222222222
Currency	US Dollar
Bank	Citi

Wire Transfer

Swift Code	
Bank Account	

International Wire Transfer

US Corresponding Bank Name	
International Bank City	
International Bank Country	

Communication

Price Service	Price Service
Communication Method	☑ Mail ☐ Email ☑ EDI ☐ Fax

Only open if: Communication Method = EDI

EDI Information

*Vendor Trading Partner ID	123456789
*Vendor EDI ID	987654
*Receive Vendor Trading Partner ID	123456
*Receive Vendor EDI ID	6543
*Network	MCI : TY : 1-1-1-2
*Branch Duns + 4	◯ Duns + Spaces ◯ Duns + Zeros ◉ Duns + Branch Alpha

Save   Reset   Cancel

Click **Save**

Edit Vendor: Address, Phone, Email

Ximple Solutions
List of Vendors

06/21/2011
14:22:22
Jane Doe

List of Vendors(P0142)

Vendor			Alpha Code	Address	Phone
View					
Edit					
Apelton Corp	List Contacts			3256 Deer Tree Lane,Rockville,MD 20852	(301)123-4567
Arctic Electric	List Discounts/Interests		AE	3833 Farragut Avenue,Kensington,MD 20895	(301)222-3333
	Debit GL Accounts				
	Briefcase				
Add New	Related Vendors		arch Vendor Name:		Go
	I2 Preferences				
	Classification		Back To Lookup		
	Branch Setup				
	Website		0 The Ximple Corporation. All rights reserved. i5/OS V6R1 Rel 1.16.0		
	Customer Number		Site design by The Ximple Corporation.		

Select
View

Edit Vendor: Address, Phone, Email

Ximple™

Ximple Solutions
View Vendor
09/03/2009
12:06:40
User Guide

View Vendor(P0143)

Vendor Name	Arctic Electric, Inc.		
Print Check As	Arctic Electric		
Print Check To			
Federal ID		**DUNS ID**	
Alpha Code	AE	**UCC**	100010
Status	Active		
Class ID	Trade	**Vendor Type**	D
Approved for PO	Yes	**Begin Date**	
Purchasing Group	East Coast	**Purchasing Schedule**	D
Distributor Account		**Vendor Quote**	
RMA Frequency		**Last RMA Date**	07/22/2009

Credit Information

Bank		**Currency**	US Dollar
DFI Account		**G/L**	Accounts Payable
Receiving ABA / DFI		**Credit Limit**	0.00
Terms	Net 15	**Discount GL**	941 OP from 3rd quarter
Category		**Interest GL**	941 OP from 3rd quarter
Tax Exemption	No	**Tax Exemption ID**	
Payment Retention	No	**Consolidate Payment**	Yes
Tax Form		**Withhold Tax**	No
Freight Term	Vendor pays if total qty exceeds min. freight setup	**W/H %**	0.00
Min. Order Amt.	0.00	**Price Service**	I2 eDataFlex
Min. Freight Amt.	100.00	**Payment Method**	On Account
Freight Paid	No	**Use Credit Automatically**	Yes
Communication Method	☑ Mail ☐ Email ☑ EDI ☐ Fax		
Default Fax	3012223333		
Default Email			
Discount Day	10		
Net Due Day	15	**Billing Cycle Day**	16
Vendor Trading Partner ID	001181858IDX		
Vendor EDI ID	001181858IDX		
Receive Vendor Trading Partner ID	001181858IDX		
Receive Vendor EDI ID	001181858IDX		
Network	Verizon : FTP :21		

Close Window

Address and Contact Information

[Address | Phone | Email]

List Address (P0405)

Address	Type	Eff. Date	Exp. Date
1562 Arctic Lane,Kensington, Montgomery,MD 20895	Ship to	09/01/2009	
*3833 Farragut Avenue,Kensington, Montgomery,MD 20	Mail to	01/29/2009	

View
Edit
Set as Primary

Position To: [   ] Go

Add New   Show All

Show Both Active & Inactive:
Addresses, Phones, Emails

Tabs: Select to View

Add New: Address, Phone, Email

Edit Vendor Information

Ximple Solutions

List of Vendors

06/21/2011
14:22:22
Jane Doe

List of Vendors(P0142)				
Vendor	View	**Alpha Code**	**Address**	**Phone**
Apelton Corp	Edit		3256 Deer Tree Lane,Rockville,MD 20852	(301)123-4567
Arctic Electric	List Contacts	AE	3833 Farragut Avenue,Kensington,MD 20895	(301)222-3333
	List Discounts/Interests			
	Debit GL Accounts			
	Briefcase			

View
Edit
List Contacts
List Discounts/Interests
Debit GL Accounts
Briefcase
Related Vendors
I2 Preferences
Classification
Branch Setup
Website
Customer Number

Add New

arch Vendor Name: [   ] Go

Back To Lookup

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Select
Edit

Edit Vendor Information

Ximple Solutions
Edit Vendor

04/14/2011
15:21:01
User Guide

Edit Vendor(P0145)

Field	Value	Field	Value
*Vendor Name	Arctic Electric, Inc.		
*Print Check As	Arctic Electric		
Print Check to			
Federal ID		DUNS ID	
Alpha Code	AE	UCC	100010
Vendor Class	Trade	Vendor Type	Distributor & Manufacturer
Approved for PO	Yes	Begin Date	
Purchasing Group	East Coast	Purchasing Schedule	Bi-Weekly
Distributor Account	1000101-M	Vendor Quote	
RMA Frequency		Last RMA Date	12/02/2010
Category		Credit Limit	0.00
Status	Active ● Inactive ○	*Currency	US Dollar

G/L

*G/L	Accounts Payable	*Discount GL	Accounts Payable
		*Interest GL	Interest Expense

Form Split Continued on Next Slide

Edit Vendor Information

Freight & Ordering

Freight Paid	○ Yes ● No	EBO Only	○ Yes ● No
Shipping Method	[▼]	Allow Multiple Shipments	○ Yes ● No
Freight Term	Vendor pays if total amount exceeds min. freight setup [▼]		
FOB	[▼]		
Min. Order Amt.	10.00	Min. For Free Freight	100.00

Payment & Terms

*Terms	Net 60 [▼]	Payment Method	On Account [▼]
Tax Exemption	No [▼]	Tax Exemption ID	[ ]
Payment Retention	No [▼]	Consolidate Payment	Yes [▼]
Tax Form	1099 [▼]	Use Credit Automatically	● Yes ○ No
Withhold Tax	Yes [▼]	Withhold %	5.00
*Discount Day	10 [▼]		
*Net Due Day	24 [▼]	*Billing Cycle Day	25 [▼]

Edit Vendor Information

Continued From Previous Slide

ACH & Wire Transfer
Type Of Account	
Disbursement Type	
Receiving ABA / DFI	
DFI Account	
Currency	
Bank	

Wire Transfer
Swift Code	
Bank Account	

International Wire Transfer
US Corresponding Bank Name	
International Bank City	
International Bank Country	

Communications
Price Service   I2 eDataFlex

Communication Method   ☑ Mail   ☐ Email   ☑ EDI   ☐ Fax

PO's
Fax	3012223333
Email	info@arcticelectric.com

Critical Stock
Fax	3014445555
Email	ywang@cap400.com

EDI Information
*Vendor Trading Partner ID	001181858IDX
*Vendor EDI ID	001181858IDX
*Receive Vendor Trading Partner ID	001181858IDX
*Receive Vendor EDI ID	001181858IDX
*Network	Verizon : FTP : 21
*Branch Duns + 4	◯ Duns + Spaces ◯ Duns + Zeros ◉ Duns + Branch Alpha

Save   Reset   Cancel

Click **Save**

Open Vendor Contact List Page

Ximple Solutions
List of Vendors
06/21/2011
14:22:22
Jane Doe

List of Vendors(P0142)

Vendor		Alpha Code	Address	Phone
Apelton Corp	View		3256 Deer Tree Lane,Rockville,MD 20852	(301)123-4567
Arctic Electric	Edit	AE	3833 Farragut Avenue,Kensington,MD 20895	(301)222-3333

View
Edit
List Contacts
List Discounts/Interests
Debit GL Accounts
Briefcase
Related Vendors
I2 Preferences
Classification
Branch Setup
Website
Customer Number

Add New

arch Vendor Name: [   ] Go

Back To Lookup

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Select
List Contacts

Vendor Contact List Page

Popup Menu

Click Add New

Contact Name	Job Title	Contact Type	Phone	Fax	Status
Jessica Strauss	er	Account Receivable	(301) 777-8888	(301) 555-6666	Active

Popup menu items (shown over the table): View, Edit, Briefcase, Deactivate

Show All   **Close Window**

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Ximple Solutions
Vendor Contact List
09/03/2009
15:59:40
User Guide

Vendor Contact List(P0146)
Arctic Electric, Inc.

Popup Menu:

View: View, edit and add contact information for vendor contact (address/email/phone)

Edit: Edit vendor contact information

Briefcase: View and schedule events for vendor contact

Add Vendor Contact

Edit Contact: Address, Phone, Email

Select **View**

Ximple Solutions
Vendor Contact List

09/03/2009
15:59:40
User Guide

Vendor Contact List(P0146)					
Arctic Electric, Inc.					
Contact Name	**Job Title**	**Contact Type**	**Phone**	**Fax**	**Status**
Jessica Strauss	er	Account Receivable	(301) 777-8888	(301) 555-6666	Active

View
Edit
Briefcase
Deactivate

Show All   Close Window

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Ximple Solutions
View Vendor Contact

09/03/2009
16:11:22
User Guide

View Vendor Contact(P0147)				
Vendor Name: Arctic Electric, Inc.				
Prefix	**First Name**	**Middle Name**	**Last Name**	**Suffix**
	Jessica		Strauss	
SSN/ID	**Citizenship**	**Job Title**	**Contact Type**	**Status**
		Manager	Account Receivable	Active

Back

Address and Phone/Email Information

Tabs: Select to View

[Address | Phone | Email]

List Address (P0405)			
Address	**Type**	**Eff. Date**	**Exp. Date**
*3833 Farragut Avenue,Kensington, Montgomery,MD 20895	Mail to	03/06/2009	
69875 Goober Road,Kensington, Montgomery,MD 2089	Ship to	09/03/2009	

View
Edit
Set as Primary

Position To: Go

Add New Entry

Add New   Show All

Edit Vendor Contact Information

Select **Edit**

Click **Save**

Open Vendor Contact Briefcase

Select **Briefcase**

- Briefcase for the selected vendor contact.

- Information (events/tasks/multimedia files) for the contact will be setup and maintained from here.

- Events assigned to the contact will also appear in the **Briefcase to Do** of the employee being assigned the event.

- Pending events should be closed from the assigned employee's **Briefcase to Do**.

Vendor Contact Briefcase

Ximple Solutions
Scheduled Events

09/04/2009
16:52:21
User Guide

Vendor Information (P1122)

Arctic Electric, Inc.
3833 Farragut Avenue
Kensington, MD 20895
(301) 222-3333 (Work)

Jessica Strauss
3833 Farragut Avenue
Kensington, MD 20895
(301) 777-8888 (Home)

Owner of Briefcase

Pending Events | All Events | Multimedia | Alert

Tabs: Select to View

Scheduled Events (P1123)

Date	Time	Type	Note	Status
09/04/2009	16:45	Phone Call	Call regarding new contract that needs signing.	Pending

Position to Date: 09/04/2009 [Go]

Add New   **Close Window**

Click
Add New

Vendor Contact Briefcase Tasks

- Schedule an Event
- Close an Event
- Vendor Contact Multimedia
- Add Vendor Contact Multimedia

Schedule an Event

Ximple Solutions
Scheduling a New Event

09/04/2009
16:45:23
User Guide

Vendor Information (P1122)

Arctic Electric, Inc.
3833 Farragut Avenue
Kensington, MD 20895
(301) 222-3333 (Work)

Jessica Strauss
3833 Farragut Avenue
Kensington, MD 20895
(301) 777-8888 (Home)

Scheduling a New Event (P1124)

*Event Type	Phone Call
*Date / Time	09/04/2009 16:45
*Assign To	Jane Doe v
*Event Status	Pending
Note	Call regarding new contract that needs signing.

453 characters remaining on your input limit

[Save]   [Save & Add Multimedia]   [Reset]   [Cancel]

- •Employee assigned to the event

- •Event will appear in the employee's **Briefcase to Do**

Click **Save**

Schedule the Event & Attach a Multimedia File

Close an Event

- This Event is being closed from the Contact's own Briefcase.

Select Active Link to Close the Event

Close an Event

Schedule follow-up to event

Click Close Event

Append note with any information regarding the completion of the event.

Vendor Contact Multimedia

Ximple™

Xs *Ximple Solutions .LLC*

Ximple Solutions
Scheduled Events

09/08/2009
16:51:42
User Guide

Vendor Information (P1122)

Arctic Electric, Inc.
3833 Farragut Avenue
Kensington, MD 20895
(301) 222-3333 (Work)

Jessica Strauss
3833 Farragut Avenue
Kensington, MD 20895
(301) 777-8888 (Home)

Tabs: Select **'Multimedia'**

Pending Events   All Events   Multimedia   Alert

N	View Edit Edit Description Delete	Catalog Type	MIME Type	Size	View
Contract 100-0125		Word Document	text/plain	0 kb	Link to image

Add New

Close Window

Click
Add New

Popup Menu:

View: Open multimedia file.

Edit: Edit file (upload new file).

Edit Description: Edit description of file.

Delete: Delete file from system.

Add Vendor Contact Multimedia File

Ximple™

Ximple Solutions	09/08/2009
Scheduled Events	16:51:42
	User Guide

Vendor Information (P1122)

Arctic Electric, Inc.	Jessica Strauss
3833 Farragut Avenue	3833 Farragut Avenue
Kensington, MD 20895	Kensington, MD 20895
(301) 222-3333 (Work)	(301) 777-8888 (Home)

Pending Events   All Events   **Multimedia**   Alert

New Multimedia Entry

*Multimedia Catalog Type	Word Document ▼
*Description	Contract 10-5698
*Upload Files	C:/Contracts/AE/105698.pdf Browse...

Save   Reset   Cancel

Close Window

Click
Save

Browse
Computer for
Multimedia File

Vendor Contact Alerts

Ximple™

	Ximple Solutions	09/08/2009
Xs	**Entity Alerts**	17:34:17
		User Guide

Vendor Information (P1122)

Arctic Electric, Inc.	Jessica Strauss
3833 Farragut Avenue	3833 Farragut Avenue
Kensington, MD 20895	Kensington, MD 20895
(301) 222-3333 (Work)	(301) 777-8888 (Home)

Pending Events   All Events   Multimedia   **Alert**

Alert Tab

Entity Alerts

Type	Message		Eff. Date	Exp. Date
Purchase Order	Please make sure to send all PO to Jessica.	Edit / Delete		

Add New   **Close Window**

Click **Add New**

Vendor Contact Alerts

Open Vendor Discounts/Interests List

Ximple Solutions
List of Vendors

06/21/2011
14:22:22
Jane Doe

List of Vendors(P0142)

Vendor	View	Alpha Code	Address	Phone
	Edit			
Apelton Corp	List Contacts		3256 Deer Tree Lane,Rockville,MD 20852	(301)123-4567
Arctic Electric	List Discounts/Interests	AE	3833 Farragut Avenue,Kensington,MD 20895	(301)222-3333
	Debit GL Accounts			
	Briefcase		arch Vendor Name:	Go
Add New	Related Vendors			
	I2 Preferences		Back To Lookup	
	Classification			
	Branch Setup		0 The Ximple Corporation. All rights reserved. i5/OS V6R1 Rel 1.16.0	
	Website		Site design by The Ximple Corporation.	
	Customer Number			

Select
List Discounts/Interests

Vendor Discounts/Interests List Page

X̶imple™

Popup Menu

Ximple Solutions
Vendor Discounts/Interests List

09/08/2009
17:50:19
User Guide

Vendor Discounts/Interests List(P0150)			
Arctic Electric, Inc.			
Type	**Rate %**	**Effective Date**	**Expiration Date**
Discount	5.00	05/01/2009	11/30/2009

Edit
Delete

Add New   **Show Inactive**   **Close Window**

Click **Add New**

Popup Menu:

Edit: Edit discount information (Rate, Effective-Expiration Dates)

Delete: Delete discount

Ximple Solutions
Add Vendor Discount/Interest

09/08/2009
18:11:24
User Guide

Add Vendor Discount/Interest(P0151)	
Arctic Electric, Inc.	
'Type	Interest ▾
'Rate %	1.00
'Effective Date	01/01/2009
'Expiration Date	

Save   **Reset**   **Cancel**

Click **Save**

Open Vendor Debit GL Account List

Ximple Solutions
List of Vendors

06/21/2011
14:22:22
Jane Doe

List of Vendors(P0142)

Vendor		Alpha Code	Address	Phone
Apelton Corp	View		3256 Deer Tree Lane,Rockville,MD 20852	(301)123-4567
Arctic Electric	Edit	AE	3833 Farragut Avenue,Kensington,MD 20895	(301)222-3333

View
Edit
List Contacts
List Discounts/Interests
Debit GL Accounts
Briefcase
Related Vendors
I2 Preferences
Classification
Branch Setup
Website
Customer Number

arch Vendor Name: _____ Go

Add New

Back To Lookup

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Select
Debit GL Accounts

Vendor Debit GL Account List Page

Popup Menu

Ximple Solutions
Vendor Debit GL Account List
09/08/2009
18:15:28
User Guide

Vendor Debit GL Account List(P0153)	
Arctic Electric, Inc.	
GL Account	**Cost Center**
Cost of Products Sold ▲ Delete	

Add New   **Close Window**

Click **Add New**

Popup Menu:

Delete: Delete debit GL account from vendor's list

Ximple Solutions
Add Vendor Debit GL Account
09/08/2009
18:15:09
User Guide

Add Vendor Debit GL Account(P0154)		
Arctic Electric, Inc.		
'General Ledger	Cost of Products Sold [v]	Cost Center [v] [ ] [v]

Save   **Reset**   **Cancel**

Click **Save**

Open Vendor Briefcase

Ximple Solutions
List of Vendors
06/21/2011
14:22:22
Jane Doe

List of Vendors(P0142)

Vendor	Alpha Code	Address	Phone
Apelton Corp		3256 Deer Tree Lane,Rockville,MD 20852	(301)123-4567
Arctic Electric	AE	3833 Farragut Avenue,Kensington,MD 20895	(301)222-3333

Menu:
- View
- Edit
- List Contacts
- List Discounts/Interests
- Debit GL Accounts
- Briefcase
- Related Vendors
- I2 Preferences
- Classification
- Branch Setup
- Website
- Customer Number

Search Vendor Name: [_____] Go

Back To Lookup

Add New

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Select
Briefcase

Vendor Briefcase

Ximple Solutions
Scheduled Events

09/08/2009
18:29:20
User Guide

Vendor Information (P1122)

Arctic Electric, Inc.
3833 Farragut Avenue
Kensington, MD 20895
(301) 222-3333 (Work)

Arctic Electric, Inc.
3833 Farragut Avenue
Kensington, MD 20895
(301) 222-3333 (Work)

Pending Events | All Events | Multimedia | Alert

Scheduled Events (P1123)

Date	Time	Type	Note	Status
09/01/2009	16:54	SYSTEM NOTIFICATION	*Purchase Order # 133 is not approved., SO # 460	Pending

Position to Date: [   ] Go

Add New   Close Window

Owner of Briefcase

Tabs: Select to View

Click
Add New

Vendor Briefcase Tasks

• Schedule an Event

• Close an Event

• Vendor Multimedia

• Add Vendor Multimedia

Schedule an Event

• Employee assigned to the event

• Event will appear in the employee's **Briefcase to Do**

Ximple Solutions
Scheduling a New Event

09/08/2009
18:30:15
User Guide

Vendor Information (P1122)

Arctic Electric, Inc.	Arctic Electric, Inc.
3833 Farragut Avenue	3833 Farragut Avenue
Kensington, MD 20895	Kensington, MD 20895
(301) 222-3333 (Work)	(301) 222-3333 (Work)

Scheduling a New Event (P1124)

*Event Type   Phone Call

*Date / Time   09/08/2009   18:30

*Assign To   Jane Doe   v

*Event Status   Pending

Note   Call to find out status of order 6582.

462 characters remaining on your input limit

Save   **Save & Add Multimedia**   Reset   Cancel

Click
Save

Schedule the Event & Attach a Multimedia File

Close an Event

- **This Event is being closed from the Vendor's own Briefcase.**

Click **Event Date**

Click **Close Event**

Vendor Multimedia

Ximple Solutions
Scheduled Events

09/08/2009
18:35:18
User Guide

Vendor Information (P1122)

Arctic Electric, Inc.
3833 Farragut Avenue
Kensington, MD 20895
(301) 222-3333 (Work)

Arctic Electric, Inc.
3833 Farragut Avenue
Kensington, MD 20895
(301) 222-3333 (Work)

Tabs: Select **'Multimedia'**

Pending Events   All Events   Multimedia   Alert

View		cription	Catalog Type	MIME Type	Size	View
Edit						
PO 6582	Edit Description		Word Document	text/plain	0 kb	Link to image
Add New	Delete					

Close Window

Click
Add New

Popup Menu:

View: Open multimedia file.

Edit: Edit file (upload new file).

Edit Description: Edit description of file.

Delete: Delete file from system.

Add Vendor Multimedia File

Ximple Solutions
Scheduled Events
09/08/2009
18:35:18
User Guide

Vendor Information (P1122)

Arctic Electric, Inc.
3833 Farragut Avenue
Kensington, MD 20895
(301) 222-3333 (Work)

Arctic Electric, Inc.
3833 Farragut Avenue
Kensington, MD 20895
(301) 222-3333 (Work)

Pending Events   All Events   Multimedia   Alert

New Multimedia Entry

*Multimedia Catalog Type   Word Document
*Description   PO 8569
*Upload Files   C:/PO/8569.pdf   Browse...

Save   Reset   Cancel

Close Window

Click
Save

Browse
Computer for
Multimedia File

Vendor Alerts

Ximple Solutions
Entity Alerts
09/08/2009
18:38:03
User Guide

Vendor Information (P1122)

Arctic Electric, Inc.
3833 Farragut Avenue
Kensington, MD 20895
(301) 222-3333 (Work)

Arctic Electric, Inc.
3833 Farragut Avenue
Kensington, MD 20895
(301) 222-3333 (Work)

Alert Tab

Pending Events   All Events   Multimedia   Alert

Entity Alerts

Type	Messa	Edit	Eff. Date	Exp. Date
Purchase Order	Need to send all PO to Jessica.	Delete		

Add New   Close Window

Click **Add New**

Vendor Contact Alerts

Open Related Vendors Page

Ximple Solutions
List of Vendors
06/21/2011
14:22:22
Jane Doe

List of Vendors(P0142)				
Vendor	View Edit	Alpha Code	Address	Phone
Apelton Corp	List Contacts		3256 Deer Tree Lane,Rockville,MD 20852	(301)123-4567
Arctic Electric	List Discounts/Interests	AE	3833 Farragut Avenue,Kensington,MD 20895	(301)222-3333

View
Edit
List Contacts
List Discounts/Interests
Debit GL Accounts
Briefcase
Related Vendors
I2 Preferences
Classification
Branch Setup
Website
Customer Number

Search Vendor Name: [   ] Go

Add New

Back To Lookup

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Select
**Related
Vendors**

Ximple™

Popup Menu

Ximple Solutions
Related Vendors
09/09/2009
17:20:32
User Guide

Related Vendors List (P0143)					
Arctic Electric, Inc.					
Vendor Name	View	UCC	Alpha Code	Phone	Status
Septimus Industries	Delete	0		(301) 999-8888	Active

Add New   **Close Window**

Click **Add New**

Popup Menu:

View: View related vendor's address book.

Delete: Delete related vendor from vendor's list

Ximple Solutions
New Related Vendor
09/09/2009
17:21:38
User Guide

New Related Vendor (P0143)	
Vendor	Arctic Electric, Inc.
'Related Vendor	Quince Solutions [V]

Save   **Reset**   **Cancel**

Click **Save**

I2 Preferences

Ximple Solutions
List of Vendors
06/21/2011
14:22:22
Jane Doe

List of Vendors(P0142)				
Vendor	View	**Alpha Code**	**Address**	**Phone**
Apelton Corp	Edit		3256 Deer Tree Lane,Rockville,MD 20852	(301)123-4567
Arctic Electric	List Contacts	AE	3833 Farragut Avenue,Kensington,MD 20895	(301)222-3333
	List Discounts/Interests			
	Debit GL Accounts			
	Briefcase			
Add New	Related Vendors			
	I2 Preferences			
	Classification			
	Branch Setup			
	Website			
	Customer Number			

arch Vendor Name: [   ] Go

Back To Lookup

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Select
I2 Preferences

I2 Preferences

Open Assign Vendor Classification Page

Ximple Solutions
List of Vendors

06/21/2011
14:22:22
Jane Doe

List of Vendors(P0142)

Vendor			Alpha Code	Address	Phone
Apelton Corp	View			3256 Deer Tree Lane,Rockville,MD 20852	(301)123-4567
Arctic Electric	Edit		AE	3833 Farragut Avenue,Kensington,MD 20895	(301)222-3333
	List Contacts				
	List Discounts/Interests				
	Debit GL Accounts				
	Briefcase				
Add New	Related Vendors		arch Vendor Name:		Go
	I2 Preferences				
	Classification		**Back To Lookup**		
	Branch Setup				
	Website		0 The Ximple Corporation. All rights reserved. i5/OS V6R1 Rel 1.16.0		
	Customer Number		Site design by The Ximple Corporation.		

Select
Classification

Assign Vendor Classification Page

Assigned Vendor Classification

Ximple Solutions
Assign Vendor Classifications

09/09/2009
18:28:55
User Guide

Assign Vendor Classifications(P0118)
Arctic Electric, Inc.
IT Equipment
Assign Vendor Classification

'Classification   Wholesalers ∨   Office Equipment   ∨

Save   Reset   Cancel

Assign Classification

Classification Type

Click **Save**

Assigned Classification

Open Branch Setup Page

Select
Branch Setup

Branch Setup Page

X imple™

Assigned Branches

Ximple Solutions
Assign Vendor Branch
09/09/2009
18:32:03
User Guide

		Assign Vendor Branch			
		Arctic Electric, Inc.			
Branch	**Distributor Acct #**	**Contact**	**Phone**	**Fax**	**Address**
Rockville	10000101110				3833 Farragut Avenue, Kensington, Montgomery, MD, 20895

Assign Vendor Branch	
*Branch	Baltimore
*Distributor Acct #	10000101111
Vendor Purchasing Contact	Jessica Strauss
Vendor Purchasing Address	1562 Arctic Lane, Kensington, Montgomery, MD, 20895
Vendor Purchasing Phone	(301)222-3333
Vendor Purchasing Fax	(301)444-5555

Save **Reset** **Cancel**

Assign Branch Form

Click **Save**

Open Vendor Website Page

Ximple Solutions

List of Vendors

06/21/2011
14:22:22
Jane Doe

List of Vendors(P0142)

Vendor	Alpha Code	Address	Phone
Apelton Corp		3256 Deer Tree Lane,Rockville,MD 20852	(301)123-4567
Arctic Electric	AE	3833 Farragut Avenue,Kensington,MD 20895	(301)222-3333

Menu:
- View
- Edit
- List Contacts
- List Discounts/Interests
- Debit GL Accounts
- Briefcase
- Related Vendors
- I2 Preferences
- Classification
- Branch Setup
- Website
- Customer Number

Search Vendor Name: [   ] Go

Add New

Back To Lookup

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Select
Website

Entity Website List Page

Popup
Menu

Ximple Solutions
Entity Website List

09/09/2009
18:55:50
User Guide

Arctic Electric, Inc.

Websi...	Website URL	User Name	User Password
Edit			
Delete			
Assign Employee			
Arctic Electric	/www.arcticelectricinc.net	XimpleS	XimpleSolutions001

Add New   **Close Window**

Click **Add New**

Popup Menu:

Edit: Edit website info (Website Name, URL, User Name, Password)

Delete: Delete website from vendor's list.

Assign Employee: Assign employee to website (website info will appear in Employee's **Briefcase To Do** under the **Websites** tab).

Ximple Solutions
Add Entity Website

09/09/2009
18:55:05
User Guide

Arctic Electric, Inc.

*Website Name	Arctic Electric
*Website URL	http://www.arcticelectricinc.net
User Name	XimpleS
Password	XimpleSolutions001

Click **Save**

Save   **Reset**   **Cancel**

Assign Employee

Ximple Solutions
Entity Website List
09/09/2009
18:55:50
User Guide

Arctic Electric, Inc.

Websi	Edit	Website URL	User Name	User Password
Arctic Electric	Delete Assign Employee	www.arcticelectricinc.net	XimpleS	XimpleSolutions001

Add New   Close Window

Select **Assign Employee**

Click **Save**

Select Employee to Assign

Assigned Employees

Ximple Solutions
Assign Employee To Website
09/09/2009
18:57:27
User Guide

Assign Employee

Entity	Arctic Electric, Inc.
Website	Arctic Electric
Employee	John C. Smith [v] Save

Employee

Jane Doe

Back

Return to Previous Page

Open Customer Number

Ximple Solutions
List of Vendors
06/21/2011
14:22:22
Jane Doe

	List of Vendors(P0142)			
Vendor	View	**Alpha Code**	**Address**	**Phone**
	Edit			
Apelton Corp	List Contacts		3256 Deer Tree Lane,Rockville,MD 20852	(301)123-4567
Arctic Electric	List Discounts/Interests	AE	3833 Farragut Avenue,Kensington,MD 20895	(301)222-3333
	Debit GL Accounts			
	Briefcase		arch Vendor Name: [____]	Go
Add New	Related Vendors			
	I2 Preferences		**Back To Lookup**	
	Classification			
	Branch Setup		0 The Ximple Corporation. All rights reserved. i5/OS V6R1 Rel 1.16.0	
	Website		Site design by The Ximple Corporation.	
	Customer Number			

Select **Customer Number**

Customer Number List

Ximple Solutions
Vendor Customer Number

User Guide

Click **Save**

Customer Number

Vendor	Arctic Electric, Inc.
Customer	Custar Electrics [V] ☐ Related Customer
OR	
Customer Classification	[▼] [V]
Customer Number	5639-12 [Save]

Assign Customer Number

Customers Number

Customer	Customer Classification	Customer Number	Related Customers	Edit	Delete
Johans # Electrics		5639-10		Edit	Delete

Assigned Numbers

Close Window

END Vendor Setup