# ADD A NEW SUPPLIER TO FRED OFFICE

## This document details how to add a supplier to Fred Office.

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# ADD A NEW SUPPLIER TO FRED OFFICE

# Step 1: Create a New Supplier & Match to AppCAT

- 1. Go to Contacts > Suppliers > New
- 2. Go to the AppCAT Tab
  - Find/Match supplier
  - Click Select All > Apply changes

**NOTE:** If your supplier is *not on AppCAT*, skip this AppCAT Tab step.

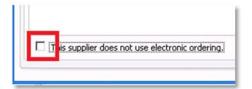
#### 3. Go to the Types Tab

 Select the supplier type (as applicable) – e.g. Direct supplier

Supplier - API le <u>E</u> dit <u>V</u> iew <u>H</u> elp	
🛃 Save and Close 🛛 S <u>a</u> ve 💧 🗍	>
General Types Accounts AppCA	AT
Supplier Types	
Direct Supplier	
Manufacturer	
Buying Group	

**NOTE:** A Supplier Type <u>must</u> be selected in order for the supplier to function correctly for ordering.

- 4. If this is an Electronic Supplier, click Accounts Tab
  - Click Add and enter the account details provided by your supplier.
  - Remember to clear "This supplier does not use electronic ordering".



#### 5. Click [Save & Close]

### Step 2A: For AppCAT Suppliers

Perform an AppCAT Download via "Download Now":

#### 6. Go to Assistants > AppCAT > Download Now

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New - 10 Find 🥥 λ	
Assistants 4	1
Folder	
Assistants Dashboard Group C Task Management	AppCAT Database Differences Last Download: 12002013 9:00:10 AM
Dy Tax Management	
	E: Wait for the download to complete

Add New Supplier Items in Bulk from AppCAT

1. Go to Assistants > AppCAT > New Supplier Items.

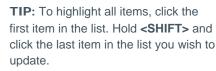
Items - 4935 Differences Found	
1302 Item Description Differences	126 Item Reorder Number Difference
32 Item Packsize Differences	343 Item Tax Differences
S 327 New Supplier Items	S 2190 Discontinued Supplier Items
1 824 New Item Aliases	1 Discontinued Item Aliases

2. Click **Collapse all** at the top, then expand which supplier you're looking for by clicking the **plus** next to its name.





#### 3. Highlight all items.



**WARNING!** If you have selected over 500 items to update, this may decrease the speed of Fred Office while the changes are processed e.g. it will delay scripts going to the till. It is recommended to update smaller groups OR at a quiet time/ outside normal hours to prevent delays.

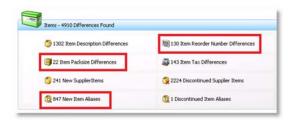
#### 4. Click Update value.

**Note:** The "Action" column will display the action to be performed once **[OK]** is clicked.

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🔍 Expand	All 🔍 Collapse All	Select All	Update Value	Do Nothing	I Igno
-	v SupplierIten				
Difference	s (330)				_
Difference	s (330)				
Item	r: ALPHAPHARM P1	IY. LTD.			
Item	r: ALPHAPHARM PT	IY. LTD.			
Item ⊕ Supplie ⊖ Supplie	r: ALPHAPHARM PT	ry. LTD.			
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#### 5. Click [OK].

**NOTE:** If required, the above procedure can be used to update the Item Pack Size, New Item Alias and Reorder Number Differences quickly also. Be sure to review all changes before applying them to ensure accuracy. Feedback can be sent to <u>products@appcat.com.au</u> should you notice any incorrect details in the AppCAT Database.



### Step 2B: For Non-AppCAT Suppliers

**NOTE:** Although this can be done in bulk using the Quick Action Wizard, the Quick Action process enters randomly generated PDE Codes for all items. This prevents any PDE searching for these items e.g. when adding items to an order or invoice. It is recommended you add each item's supplier information required as outlined below.



- 1. Go to Assistants > AppCAT > Download Now
- 2. Go to Inventory > items and search for item
- 3. Double -click to open the item stockcard
- 4. Click Inventory & Ordering tab > Suppliers
- 5. Click Add
- **6.** Select the new supplier using the drop down and enter all details.
- 7. Click [OK]
- 8. Click [Save & Close]
- 9. Repeat for all items as applicable.



## Step 3 (Optional) - Set New Supplier as the Primary Supplier

**WARNING!** This may slow down Fred Office while the changes are processed e.g. it will delay scripts going to the till. Therefore it is recommended to run this process at a quiet time/ outside normal hours to prevent delays.

#### 1. Tools->System Setup Wizard

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New - S Find 3	Order	٠
Assistants	Account	•
Folder	Item	
🔛 Assistants Dashboard	Reason Codes	
Group Task Management	AppCat	•
1 Item Manager	System	•
📝 Stocktake	Script	
Rate of Usage	Alerts	,
AppCAT	System Setup Wi	zard



**NOTE:** If prompted to run again, click "Yes:" to proceed.

**3.** Click **[Next]** three times until you are on the *Set Primary Suppliers* step.

- 4. Use the **Top**, **Up**, **Down** and **Bottom** buttons to set the desired primary supplier listing.
- 5. Ensure all the **Apply** checkboxes are ticked as applicable.

	Assemble the suppliers in order of priority you want for Primary supplier to be set.		
	Priority A Suppler Name	Apply	
	1 API		
PharmX Details	2 SIGMA	8	
Supplier Accounts			
Supplier Types			Top
Set Primary Suppliers			
and the second			Up
Set Item Codes			

- 6. Click Next
- 7. Optional From the Set Item Codes step, you can opt to set your item codes to match your supplier reorder numbers from this step. To do so check the Apply boxes as applicable.

**NOTE:** If you perform this change, you will also need to consider whether printing updated shelf tickets is also required.

- 8. Click [Next].
- 9. Click [Finish].



## Step 4 (Optional) - Reconfigure Ordering Templates

If you use Ordering templates to create your orders, these templates may need to be adjusted to take into account the new supplier recently configured.

**TIP!** When using the Draft Wizard, you must configure Ordering Templates.

The Draft Wizard has two sections.

- The first few options allow you to select "which items" you will consider for ordering (i.e. only items from a specific supplier, or in a particular department etc ...).
- The second section gives you options of "how many" to order (i.e. suggest quantities based on replenishment and restock levels, or quantity sold etc ... ).



To Edit an Existing Ordering Template:

- 1. Go to Ordering > Drafts > New.
- 2. Select Use Wizard to Add Items.
- 3. Click [OK].
- 4. Select Load Saved Template
- 5. Use the drop down to select the template to edit
- 6. Tick Allow me to edit this template



- 7. Click [Next]
- **8.** Move through each step of the wizard selecting the options required.

**TIP!** Pay particular attention to the "Supplier Details" Step options.

9. Click [Finish] to save your changes.

To Create a New Template:

- 1. Go to Ordering > Drafts > New.
- 2. Select Use Wizard to Add Items.
- 3. Click [OK].
- 4. Select Create New List and click [Next]
- 5. Move through each step of the wizard selecting the options required.
- On the final step click Check this box to allow saving of this template, enter a template name then click [Finish]

Preferences	Teinolete' check how and enters a Teinolete name.
	To close the wizard and view your added items, click Finish
Help (F1)	Gancel < Back Next > Enish





1300 731 888 (Local Call Cost) **Fred Help Centre:** http://help.fred.com.au **Email:** help@fred.com.au

8.30am - 9.00pm (EST) Mon – Fri 8.30am - 5.00pm (EST) Sat, Sun & Public Holidays

 Fred IT Group Pty Ltd

 20 Trenerry Crescent Abbotsford VIC 3067
 T 03 9418 1800
 F 1300 730 888

 www.fred.com.au
 F 1300 730 888
 F 1300 730 888



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