

ADD A NEW SUPPLIER TO FRED OFFICE

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

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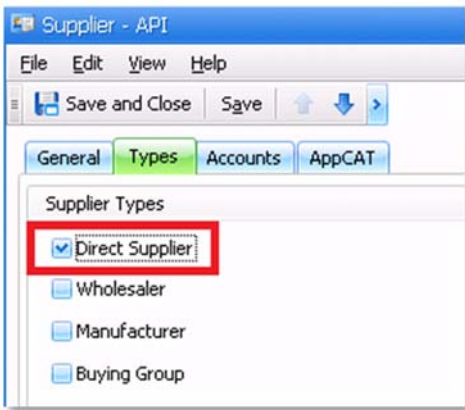
ADD A NEW SUPPLIER TO FRED OFFICE

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**

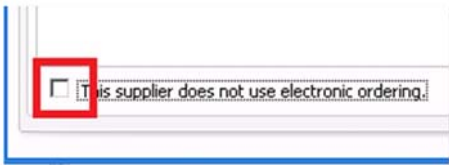
NOTE: If your supplier is *not on AppCAT*, skip this AppCAT Tab step.

3. Go to the **Types Tab**
 - Select the supplier type (as applicable) – e.g. Direct supplier



NOTE: A Supplier Type must 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”.

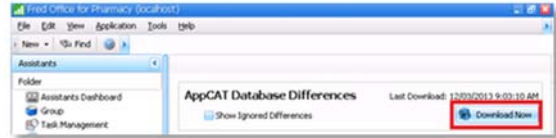


5. Click **[Save & Close]**

Step 2A: For AppCAT Suppliers

Perform an AppCAT Download via “Download Now”:

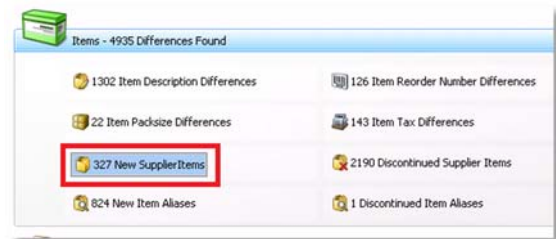
6. Go to **Assistants > AppCAT > Download Now**



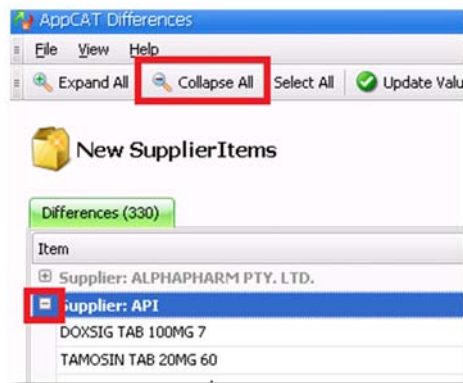
NOTE: Wait for the download to complete before continuing.

Add New Supplier Items in Bulk from AppCAT

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



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.



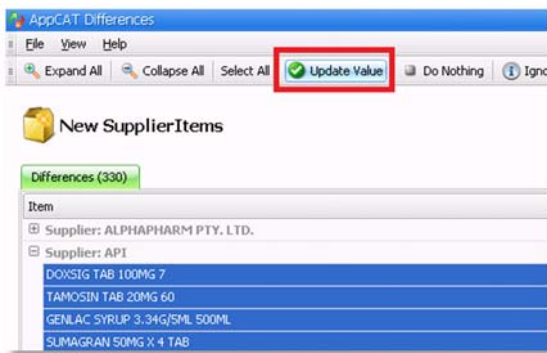
TIP: To highlight all items, click the first item in the list. Hold <SHIFT> and click the last item in the list you wish to update.



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**.

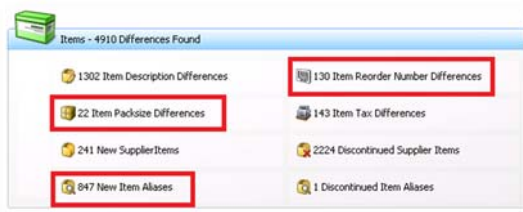
Note: The "Action" column will display the action to be performed once **[OK]** is clicked.



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 products@appcat.com.au 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.

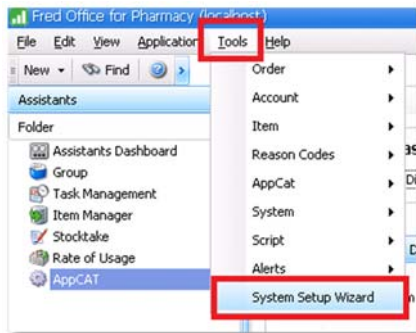
1. Go to **Assistants > AppCAT > Download Now**
2. Go to **Inventory > items** and search for item
3. **Double-click** to open the item stockcard
4. Click **Inventory & Ordering tab > Suppliers**
5. Click **Add**
6. Select the new supplier using the drop down and enter all details.
7. Click **[OK]**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



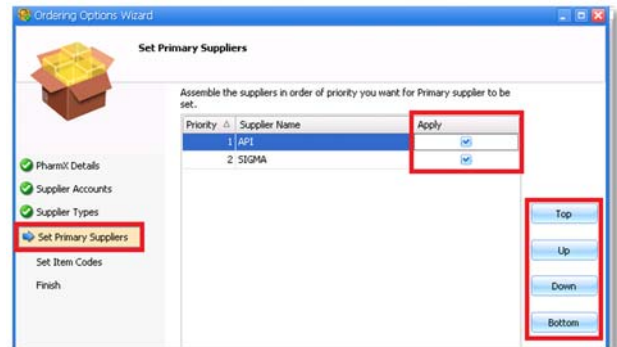
2. Click **Ordering Settings**



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.



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.

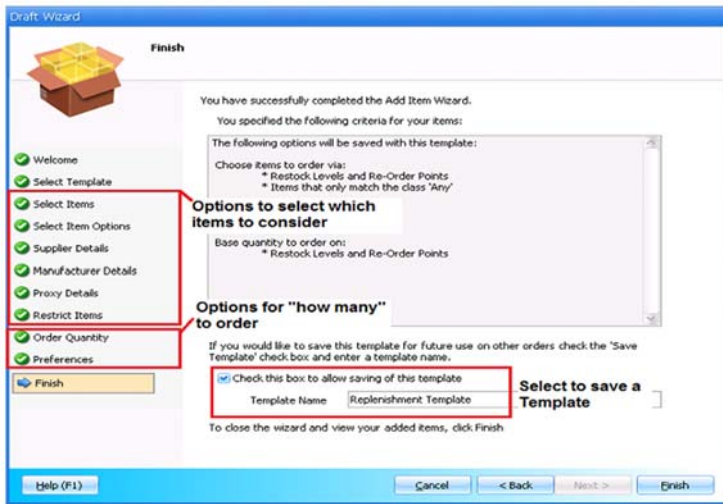
8. Click **[Next]**.
9. Click **[Finish]**.

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.

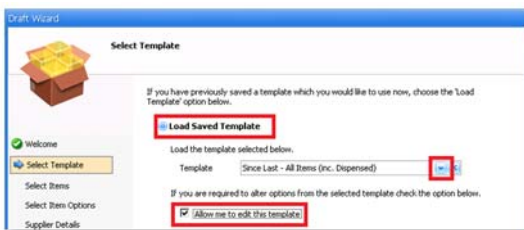
TIP! When using the Draft Wizard, you must configure Ordering Templates. The Draft Wizard has two sections.

- 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.

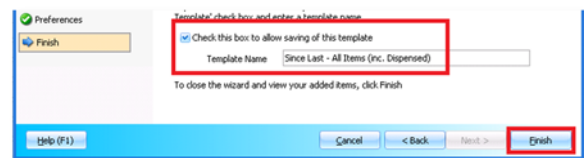
TIP! Pay particular attention to the “Supplier Details” Step options.



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.
6. On the final step click **Check this box to allow saving of this template**, enter a template name then click **[Finish]**





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The word "FRED" in a large, bold, dark blue, sans-serif font.