BYU Dining Services

Standard Operating Procedures

Managing Suppliers

Business Process ID:	**SOP Owner:** Purchasing
SOP Collection: Eatec	**Accountable Group: Purchasing Business Process**
Last Updated: August 27th, 2024	
URL: /policy/eatec/suppliers	

Purpose

BYU uses Suppliers as vendors that provide inventory. To order inventory from an outside vendor, they must first be setup as a supplier in Eatec. This SOP will outline how to setup Suppliers in Eatec. Generally, BYU is not adding new suppliers very frequently.

Prior to creating a supplier in Eatec, BYU Dining must clear the supplier through the WorkDay supplier onboarding team to ensure that the vendor has been properly vetted. Once WorkDay approves the supplier, then a supplier can be created in Eatec.

Responsibilities

Area Responsibilities	Centralized Responsibilities
Purchasing & Dining Accounting Responsibilities include: • Contacting BYU Workday Supplier Onboarding team to receive vendor authorization • Creating and maintaining Supplier Contact Information	**Dining Accounting** Responsibilities include: • Creating Item bids for areas without bid access • Maintaining item bids

SOP User Guide

Contents

Training Videos and Other Resources

Definitions

Supplier Name: The Supplier name that is registered in Workday. For suppliers originally setup for PeopleSoft, the PeopleSoft Number will follow the Workday name.

Number: Workday Supplier number. One exception for this will be Nicholas because Nicholas will have two suppliers, please see the EDI documentation for Nicholas setup.

Other Name: Workday Supplier Connection ID.

Description: A free text field.

Contact 1: Primary Contact with the Vendor. This will be the Primary contact's name.

Contact 2: Secondary Contact with the Vendor. This will be the Secondary contact's name.

Type: This is where the supplier type will be specified (Required field); Refer to the "supplier types" section below for more information. The types will be EDI, Non-EDI, PCard, and Church.

Class: The specified class for the supplier. BYU will use Dining services for all supplier classes.

Street Address 1: This field specifies the Address of the supplier (#, Street, etc).

Street Address 2: Further descriptor of the address if necessary (Ex: Second floor, Delivery Address, Etc)

City: City in which the street address is located

State: State in which the street address is located

Zip: The zip code where the street address is located

Miscellaneous: A free field to input more information about the supplier location or main contact (Ex: additional email addresses, Another phone number, name, etc.)

Phone 1 & 2: The primary and secondary phone numbers of the supplier's main contact.

Fax: Ignore this field. Unless you would actually fax something to them.

Email Address: The primary supplier email address used for sending Purchase Orders. When PO's are created, Eatec can automatically send the PO via email to this address. This email will be in the 'To' line of the automated email.

Email CC: The secondary supplier email address that will be cc'd on all Purchase orders. When PO's are created, Eatec can automatically send the PO via email to this address. This email will be in the 'CC' line of the automated email.

Min. Order: The minimum dollar amount required by the vendor on each order. BYU currently will not use this.

Lead Time: The lead time needed by the vendor to receive their product. BYU currently will not use this.

Terms: These are the payment terms that were agreed upon by the vendor when they went through the onboarding process (Net 30, Pay immediate, etc...). BYU currently will not use this as this is determined by Workday.

Fed Tax ID: The vendors federal ID number. BYU currently will not use this.

State ID Number: BYU currently will not use this.

Send PO Via: This option enables emails to be sent after a PO is created.

PO Format: The desired format/file type for PO's. This should be set to PDF.

ERS(Y/M): Stands for Evaluated Receipt Settlement, a procurement and payment method that automatically settles goods receipts and eliminates the need for invoices. BYU currently will not use this.

Require Bids: Determine whether or not bids are required in order to place an order. Currently, this does not function. BYU currently will not use this.

Receiving Tolerance %: This is where a specific receiving tolerance can be set up. Currently, this does not function. BYU currently will not use this.

Remarks: Open Field to make additional notes for the specific vendor.

Supplier Currency: This will be set to US Dollars

Title, First Name, Middle Name, Last Name, Address, Phone, and Remarks: All of these fields are open and are there to help list contacts with each specific vendor.

Debit Account (Misc Invoice): BYU will not use this account.

Debit Dept (Misc Invoice): BYU will not use this account.

Credit Override Account: BYU will not use this account.

Max Order: The max order limit per vendor. BYU will not use this account.

Delivery Rules: The order dates and delivery dates set for each vendor

Alternate Email: Additional email where the PO's will be sent once processed. This email will be in the 'To' line of the automated email.

Allow RNI: Allow RNI enables PO to be received and invoiced or just received. If the supplier is set to 'Yes', then PO's will only be received into Eatec, but no payment will be initiated. EDI, PCard, and Church Vendors should be set to 'Yes'. Other vendors that delivery to BYU should be set to 'No', meaning when goods are received into Eatec, payment is also initiated.

Creating a Supplier

Prior to creating a supplier in Eatec, BYU Dining must clear the supplier through the WorkDay supplier onboarding team to ensure that the vendor has been properly vetted. Once WorkDay approves the supplier, then a supplier can be created in Eatec.

1. **Navigate to Suppliers**
   - Click Masters -> Supplier Management -> Suppliers
2. **Create a new supplier**
   - Click 'Create New' at the top left
3. **Enter Supplier Information**
   - The supplier's name will be the name as it is setup in WorkDay
   - The number will be the WorkDay Supplier Number
   - The Other Name(s) field will be the Supplier Connection Id
   - The Contact 1 should be the name of the primary contact, Contact 2 should be the secondary contact
   - Type should be EDI, Non-EDI, Church, or PCard depending on the supplier
   - Class will be Dining Services
   - Description is optional
   - Do not check 'Is Punchout Supplier' or 'Is Punchthrough Supplier'. BYU currently does not have punchout setup with any suppliers
4. **Enter Address & Comms Information**
   - Enter the supplier address in the appropriate fields
   - Phone 1 and Phone 2 should be the primary and secondary phone contact numbers
   - Email Address & Email CC will be the email address that Eatec can send POs to.
     - Emails in the 'Email Address' and 'Alternate Email' field will be in the 'To' line of the automated email when PO's are posted.
     - Emails in the 'Email CC' field will be in the 'CC' line of the automated email when PO's are posted. The buyer's email (who posted the PO) will also be in the 'CC' line.
     - If a supplier replies to the automated email, their reply will be sent to the buyer.
5. **Enter Settings Information**
   - If BYU wants to send PO's automatically to the vendor via email, then set 'Send PO Via' to 'Email'
   - PO Format should be set to 'PDF'
   - Ensure Supplier Currency is set to USD- US Dollars
   - Leave all other fields to the default empty values
   - Remarks is an optional field if additional comments are necessary
6. **Save the Supplier**
   - Once the Address & Comms and Settings tabs are completed click the 'Save' button at the top right

- After you click the save button, Eatec will create the supplier. To finish creating the supplier, click 'Edit' on the supplier's page. This will open 4 new tabs--- Supplier Bids, Supplier Contacts, Other Fields, Communications, and Transactions

7. **Supplier Bids**
   - To see how to add bids, see Supplier Bid section below.
8. **Supplier Contacts**
   - Enter Supplier Contact Information by clicking 'Add New'
   - Enter Appropriate Contact Information
9. **Other Fields**
   - Leave Override Credit Account, Override Credit Department, and Max Order empty
   - For Alternate Email, if you need a third email to be sent when PO's are completed then enter another email here
   - Delivery Rules are unique per supplier. The delivery rules setting specifies how late a PO can be submitted for it to be delivered on time
     - To set delivery rules, click the arrow under 'Delivery Rules'. A popup will appear requiring a time and date as the latest time an order can be placed for delivery
     - If you are trying to Post a PO after the set delivery time, Eatec will provide a warning and automatically push the delivery date to the next available day for delivery based on delivery rules.
     - For example, if US Foods delivers on Tuesday and all orders must be in by 5:30pm Monday, if a PO with a delivery date of Tuesday is processed at 5:35PM, a warning will be displayed when attempting to post and the Post Date will be moved to the next available delivery date
     - This time should include a buffer of 1-3 hours.
   - If Allow RNI is set to yes, then that supplier can only process RNIs. If it is set to No, then every PO will be processed direct to invoice (receive and invoice). There will be no suppliers set to optional.
10. **Communications**
    - This tab is used exclusively for EDI vendors. See EDI integration documentation for how to set up communications for EDI vendors.

Editing a Supplier

1. **Navigate to Suppliers**
   - Click Masters -> Supplier Management -> Suppliers
2. **Select a Supplier and Edit**
   - Search for a supplier by name, number, or contact
   - Click the supplier, and select 'Edit' in the top right
3. **Edit the supplier**
   - Select any area within supplier, see 'Creating a Supplier' section above to for how to setup a supplier

Copying a Supplier

1. **Navigate to Suppliers**
   - Click Masters -> Supplier Management -> Suppliers
2. **Select a Supplier to copy**

   a. Search for a supplier by name, number, or contact
   b. Click the supplier, and select 'Copy' in the top right

3. **Copy the supplier and setup**
   - See 'Creating a Supplier' section above to for how to setup a supplier

Deactivating a Supplier

4. **Navigate to Suppliers**
   - Click Masters -> Supplier Management -> Suppliers
5. **Select a Supplier to deactivate**
   - Search for a supplier by name, number, or contact
   - Click the supplier, and select 'Deactivate' in the top right

Managing Supplier Bids

Bids are set prices or catalogues determined by the vendor for items that we purchase. Bids are used when purchasing to load a predetermined price for inventory we will order.

Not all areas of BYU dining have access to create bids for items, only Dining Distributions and Commissary have access to add bids currently. If you need to add a bid to a new or existing item, please email itembidcreation@byu.edu with the following information:

- Eatec Item Name
- Eatec Item Number
- Supplier Name
- Supplier Item Number specific to that item
- Price per Unit.

The item bid creation team will create your bid within 1 business day. The item bid creation team will enter the given information, setting the effective date to that day's date and the expiration to open non-EDI items.

Inventory Item: The name of the inventory item.

Supp #: The supplier's internal number for each specific item.

Unit: The purchase unit for each item (Case, Pound, Each, etc...).

Pack Size: Quantity of items within each Unit purchased.

Site Price: The site is currently Dining Services. This will not change.

Bid Price: The vendor price for that item.

Effective Date: The "start" date of that specific inventory item bid.

Expire Date: The date the bid expires and is no longer valid.

Shipping/Unit: This will be the cost of shipping per unit. BYU will not use this.

Currency: The currency of the bid. Will always be USD.

Exchange Rate: Contracted exchange rate for the bid. BYU will not use this.

Normalized: Auto-calculated field that is the Bid Price/Pack Size. This shows the per unit cost.

Minimum Order Quantity: The minimum quantity that must be purchased for specific items. This is only for reference and is not enforced in other modules.

Priority: Inventory items may be attached to multiple different vendors. This is where we specify which vendor we would to prioritize purchasing from. We have the ability to select between "Priority", "Secondary", or "Last Resort". Those listed as "Priority", will automatically be selected when creating a Purchase Order.

Bid Regions: For areas with multiple supply locations, regions specify where items are coming from geographically. BYU will not use this.

Catch Weight: This flag will automatically change a Purchase Order from a volume unit to a non-convertible unit. This currently does not function in Eatec. BYU will not use this.

Remarks: Open field to make additional notes on an inventory item.

Contracted: Whether this is a contracted item with that specific vendor. This is only for reference and is not enforced in other modules.

Lead Time: The wait time until you can anticipate receiving the product. This is only for reference and is not enforced in other modules.

Delivery Schedule: The schedule for deliveries to be mad. This is only for reference and is not enforced in other modules.

Creating Bids through the Supplier

1. **Navigate to Suppliers**
    - Click Masters -> Supplier Management -> Suppliers
2. **Select a Supplier and Edit**
    - Search for a supplier by name, number, or contact
    - Click the supplier, and select 'Edit' in the top right
3. **Add bids to the supplier**
    - Click the 'Supplier Bids' tab
    - In the search bar that appears next to 'Inventory -Items', you can search for inventory items for which you would like to create a bid for
        - By clicking 'Inventory - Items', you can modify the search to search by items, packages, class, or type
    - After searching for the item, select the item and click 'Select' at the bottom of the search results. This should add the item to the supplier bids item list
    - To edit the bid for the item, select the item. A pop-up called 'Edit Supplier Bids' will appear
    - In the pop-up, enter the Supply Item Number, the Purchase Unit, Bid Price, Pack Size, Effective Date, Expire Date, and Priority. These are key fields for correct item bids
    - Do not edit Bid Region, Bid Currency (should be USD), Shipping/Unit, or Catch Weight

- For reference, you can add a minimum order quantity and lead time, but this will not be enforced by Eatec when creating a PO.
- If the item has a contracted yearly price, set Contracted to 'Contracted'. This will be for reference only.
- Click 'Save'
- Repeat for each item bid

4. **Save the Supplier**
   - When all bids are added and all edits have been completed, click 'Save' at the top right.

Creating Bids through the Inventory Items

1. **Navigate to Inventory Items**
   - Click Masters -> Inventory List
2. **Select an Item and Edit**
   - Search for an item
   - Click the item, and select 'Edit' in the top right
3. **Add bids to the supplier**
   - Click the 'Supplier Bids' tab
   - In the search bar that appears next to 'Supplier-Supplier', you can search for suppliers for which you would like to create a bid for
     - By clicking 'Supplier-Supplier', you can modify the search to search by items, packages, class, or type
   - After searching for the supplier, select the item and click 'Select' at the bottom of the search results. This should add the item to the supplier bids item list
   - To edit the bid for the item, select the item. A pop-up called 'Edit Supplier Bids' will appear
   - In the pop-up, enter the Supply Item Number, the Purchase Unit, Bid Price, Pack Size, Effective Date, Expire Date, and Priority. These are key fields for correct item bids
   - Do not edit Bid Region, Bid Currency (should be USD), Shipping/Unit, or Catch Weight
   - For reference, you can add a minimum order quantity and lead time, but this will not be enforced by Eatec when creating a PO.
   - If the item has a contracted yearly price, set Contracted to 'Contracted'. This will be for reference only.
   - Click 'Save'
   - Repeat for each supplier
4. **Save the Item**
   - When all bids are added and all edits have been completed, click 'Save' at the top right.

Creating Bids via EDI

For information on creating bids through the EDI process, please see the EDI SOP.

Editing Bids

Bids can be edited through either the supplier module or the inventory item itself. To edit bids, the process will be the same as setting up the bid originally, but do not add another item or supplier to the list, merely find the existing bid and select it to edit.