



South African Weather Service

**Vendor Management
Training Manual**

Document Review and Distribution

Revision history

Version	Author	Date	Revision	Email address
1.0	Kgothatso Miya	11/07/2019	Draft	Kgothatso.Lehobye@eoh.com
1.1	Kgothatso Miya	15/10/2019	Draft	Kgothatso.Lehobye@eoh.com
1.2				
1.3				

Document distribution

This training manual will distributed course attendance

Table of Contents

1	INTRODUCTION	4
2	VENDOR MANAGEMENT	4
2.1	HOW TO ENTER A NEW VENDOR	5
2.2	MAKE CHANGES TO VENDOR	15

1 INTRODUCTION

Welcome to the world of NetSuite.

In this course, you will learn how to manage vendors within the SAWS environment. You will become familiar with the layouts and menu paths of NetSuite. The NetSuite application runs within a browser window i.e. Internet Explorer e.c.t. When you log into NetSuite, you will see a set of tabbed pages. NetSuite calls these tabbed pages a “center”. The role that will be assigned to you will determine which “center” you will be able to see.

Upon completion of this module, you will be able to:

- Log-in and navigate NetSuite successfully
- Enter New Vendors
- Make changes to existing Vendors

2 VENDOR MANAGEMENT

A vendor is a company or person from whom you purchase goods and services. Vendor records track information about your vendors and enable you to view past transactions and communications with them.

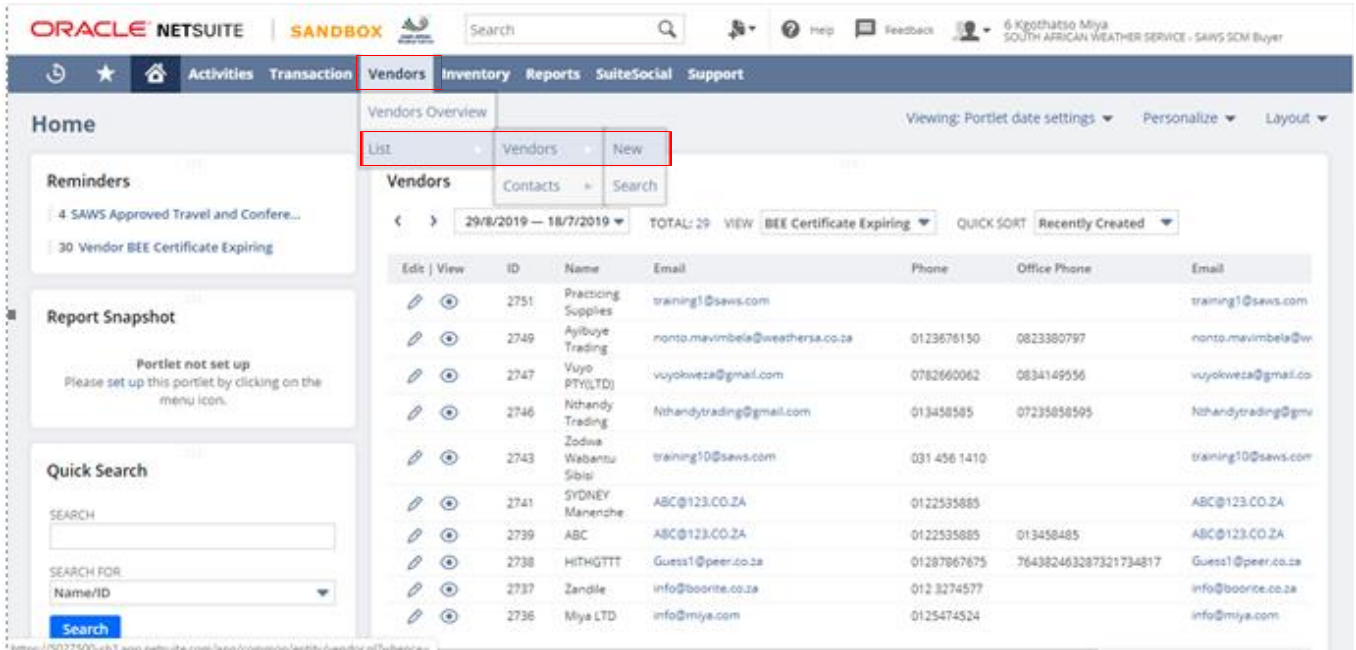
Two forms have been created for SAWS vendor forms

Vendor Form	Detail
SAWS Vendor Form (Finance)	The bank payment detail subtab is visible
SAWS Vendor Form (SCM)	The bank payment detail subtab is not visible

2.1 How to Enter a New Vendor

2.1.1 Step 1 – Navigation

- On the menu bar, click on Vendors, a drop down menu will display.
- Click on Lists , Vendors and then New



The screenshot shows the Oracle Netsuite interface for Vendors. The 'Vendors' menu is open, and the 'New' option is selected. The main area displays a table of vendors with the following data:

ID	Name	Email	Phone	Office Phone	Email
2751	Practising Supplies	training1@saws.com			training1@saws.com
2749	Ayibuye Trading	nonto.mavimbela@weathersa.co.za	0123676150	0823380797	nonto.mavimbela@w
2747	Vuyo PTY(LTD)	vuyokweza@gmail.com	0782660062	0834149956	vuyokweza@gmail.co
2746	Nthandy Trading	Nthandytrading@gmail.com	013458585	07235858595	Nthandytrading@gmv
2743	Zodua Wabantu Sibisi	training10@saws.com	031 456 1410		training10@saws.com
2741	SYDNEY Manenzhe	ABC@123.CO.ZA	0122535885		ABC@123.CO.ZA
2739	ABC	ABC@123.CO.ZA	0122535885	013458485	ABC@123.CO.ZA
2738	HITHGTTT	Guest1@peer.co.za	01287867675	764382463287321734817	Guest1@peer.co.za
2737	Zandle	info@boornet.co.za	012 3274577		info@boornet.co.za
2736	Miya LTD	info@miya.com	0125474524		info@miya.com

2.1.2 Step 2 – Enter a New Vendor


Primary Information

- Next to **Type**, choose whether this vendor is a **company** or an **individual**.
- In the **Company Name** field, enter the legal name of this vendor. **(This Field is Mandatory *)**
- Please enter the **MA Number**, this is the CSD Vendor reference number. **(This Field is Mandatory *)**
- In the **Web Address** field, enter a URL for this vendor's web address. When you return to this record for viewing, this address is a link.
- Select the **category** for this vendor.
- **In the Comments field**, enter any additional notes.
- **In the BBBEE Status Level field**, enter the vendor current BBBEE level.
- Enter the **BBBEE Certificate expiry date**

Email, Phone and Address

- Enter the vendor Email Address. **(This Field is Mandatory *)**
- Enter the vendors Phone number in the phone field
- Enter the vendor Alternative number in the Alt. phone field.
- Enter the vendor Fax number
- Enter the vendor Province.

Primary Information		
CUSTOM FORM * SAWS Vendor Form (SCM)	COMPANY NAME * Sunshine Enterprise LTD	CATEGORY Goods - Air quality instruments
VENDOR ID To Be Generated	MA NUMBER * 98667778	COMMENTS
TYPE <input checked="" type="radio"/> COMPANY <input type="radio"/> INDIVIDUAL	WEB ADDRESS	

Email Phone Address		
EMAIL * training2@saws.com	FAX	ADDRESS
PHONE 0125474581	PROVINCE Gauteng	
ALT. PHONE 0125698547		

Vendor BBBEE Detail		
BBBEE STATUS LEVEL LEVEL 1	SUPPLIER CLASSIFICATION EME	BLACK WOMEN OWNED 30% OR MORE Yes
BBBEE CERTIFICATE EXPIRE DATE 1/12/2019	BLACK OWNED 51% OR MORE Yes	

Relationship subtab

- Under Contact, enter vendor contact person's name
- Enter the contact person Job title
- Enter the contact person email address
- Enter contact person main phone number
- Enter contact person role
- Click on Add once done

MA NUMBER *
78599574

Email | Phone | Address

EMAIL *
info@sunshine.com

PHONE
01145854751

ALT. PHONE

FAX
0114588474

PROVINCE
Free State

ADDRESS

Map

Relationships | Communication | Address | Financial | Preferences | System Information | Custom

Contacts

Remove all

CONTACT *	JOB TITLE	EMAIL	MAIN PHONE	ROLE
<input type="text"/>				

Communication Subtab

- In this subtab, Communication between vendor and client can be stored.
- Under phone calls record all the between the vendor and client
- Under Task record the task
- Record the Events
- Under File, store vendor documentation

MA NUMBER *
78599574

Email | Phone | Address

EMAIL *
info@sunshine.com

PHONE
01145854751

ALT. PHONE

FAX
0114588474

PROVINCE
Free State

ADDRESS

Map

Relationships **Communication** Address Financial Preferences System Information Custom

Phone Calls **Tasks** Events Files

Remove all

TITLE *	PRIORITY *	START DATE *	DUE DATE *
	Medium	15/7/2019	15/7/2019

Address subtab

- Click on Edit

COMPANY
 INDIVIDUAL

Contractor
 COMMENTS
 Pending Approval

COMPANY NAME *
 Sunshine Enterprise LTD
 MA NUMBER *
 78599574


Email | Phone | Address

EMAIL * info@sunshine.com FAX 0114588474 ADDRESS
 PHONE 01145854751 PROVINCE Free State
 ALT. PHONE Map

Relationships Communication **Address** Financial Preferences System Information Custom

DEFAULT SHIPPING	DEFAULT BILLING	LABEL	ADDRESS *	EDIT
<input checked="" type="checkbox"/>	Yes			<input type="button" value="EDIT"/>

- Enter the vendor Address details
- Click on Ok to Save

OK 

COUNTRY * South Africa
 ATTENTION
 ADDRESSEE Sunshine Enterprise LTD
 PHONE
 ADDRESS 1 1 Osborne Lane
 ADDRESS 2
 CITY Bedfordview
 PROVINCE Free State POSTAL CODE 2007

ADDRESS Sunshine Enterprise LTD
 1 Osborne Lane
 Bedfordview Free State 2007
 South Africa
 OVERRIDE

Map

- Click on Add, to Add the address.

COMPANY NAME *
Sunshine Enterprise LTD

MA NUMBER *
78599574

Pending Approval

Email | Phone | Address

EMAIL *
info@sunshine.com

PHONE
01145854751

ALT. PHONE

FAX
0114588474

PROVINCE
Free State

ADDRESS

Map

Relationships | Communication | **Address** | Financial | Preferences | System Information | Custom

DEFAULT SHIPPING	DEFAULT BILLING	LABEL	ADDRESS*	EDIT
Yes	Yes	1 Osborne Lane	Sunshine Enterprise LTD 1 Osborne Lane Bedfordview Free State 2007 South Africa	

Financial Subtab

- Enter the vendor primary currency (This field is mandatory *)
- Enter the Vendor Terms
- Enter the Incoterms if applicable
- Enter Tax Reg number
- Enter Tax Code

Relationships | Communication | Address | **Financial** | Preferences | System Information | Custom

Account Information

LEGAL NAME
Sunshine Enterprise LTD

ACCOUNT

DEFAULT EXPENSE ACCOUNT

DEFAULT PAYABLES ACCOUNT

PRIMARY CURRENCY *
South African Rand

TERMS

CREDIT LIMIT

INCOTERM

CO. REG. NUMBER

Tax Information

TAX REG. NUMBER

TAX ROUNDING METHOD
Round Off

TAX CODE

TAX ROUNDING PRECISION
0.01 and Below

Balance Information

OPENING BALANCE

OPENING BALANCE DATE

OPENING BALANCE ACCOUNT
31000 Accounts Payable

Project Information

PROJECT RESOURCE

WORK CALENDAR *
Default Work Calendar

LABOR COST

Preference Subtab

- Enter the email preference
- tick if transaction will be send via email, print or fax

System Information Subtab

- Tick Inactive, when the vendor is inactive

Entity Bank Details

List Search Customise More

Save Cancel Reset

NAME * FNB TYPE * Primary

INACTIVE

PAYMENT FILE FORMAT * Standard Bank

ACCOUNT NUMBER * 6255201452

BRANCH NUMBER * 250655

Remove all

TITLE	MEMO *	DATE	TIME	TYPE	DIRECTION
		17/7/2019	1:35 pm		

Add Cancel Insert Remove

Save Cancel Reset

➤ The banking details have been saved

MA NUMBER
87572

Email | Phone | Address

EMAIL FAX ADDRESS
PHONE PROVINCE
ALT. PHONE Gauteng
601 Management House, 38 Melle Street Map

Relationships Communication Address Financial Preferences System Information **Bank Payment Details**

EFT BILL PAYMENT VENDOR BANK FEES

Entity Bank Details

VIEW
Default View

New Entity Bank Details

EDIT	NAME ▲	TYPE	PAYMENT FILE FORMAT	REMOVE
Edit	FNB	Primary	Standard Bank	Remove

Edit Back Submit for Approval Actions

- Click on Save , once all vendor information have been captured

Vendor List Search More

Save

Primary Information

VENDOR ID To Be Generated	WEB ADDRESS	BBBEE STATUS LEVEL LEVEL 1
TYPE <input checked="" type="radio"/> COMPANY <input type="radio"/> INDIVIDUAL	CATEGORY Contractor	BBBEE CERTIFICATE EXPIRE DATE 31/7/2019
COMPANY NAME * Sunshine Enterprise LTD	COMMENTS	VENDOR APPROVAL STATUS Pending Approval
MA NUMBER * 78599574		

Email | Phone | Address

EMAIL * info@sunshine.com	FAX 0114588474	ADDRESS Sunshine Enterprise LTD 1 Osborne Lane Bedfordview Free State 2007 South Africa
PHONE 01145854751	PROVINCE Free State	<input type="button" value="Map"/>
ALT. PHONE		

Relationships Communication Address Financial Preferences **System Information** Custom

- The vendor successfully saved , to make changes to the vendor click on edit

Confirmation
Vendor successfully Saved

Vendor List View Dashboard Search

2753 Sunshine and Rainbow Enterprise LTD

Edit

Primary Information

VENDOR ID 2753 Sunshine and Rainbow Enterprise LTD	MA NUMBER 98667758	COMMENTS
TYPE Company	WEB ADDRESS	
COMPANY NAME Sunshine and Rainbow Enterprise LTD	CATEGORY Goods - Air quality instruments	

Email | Phone | Address

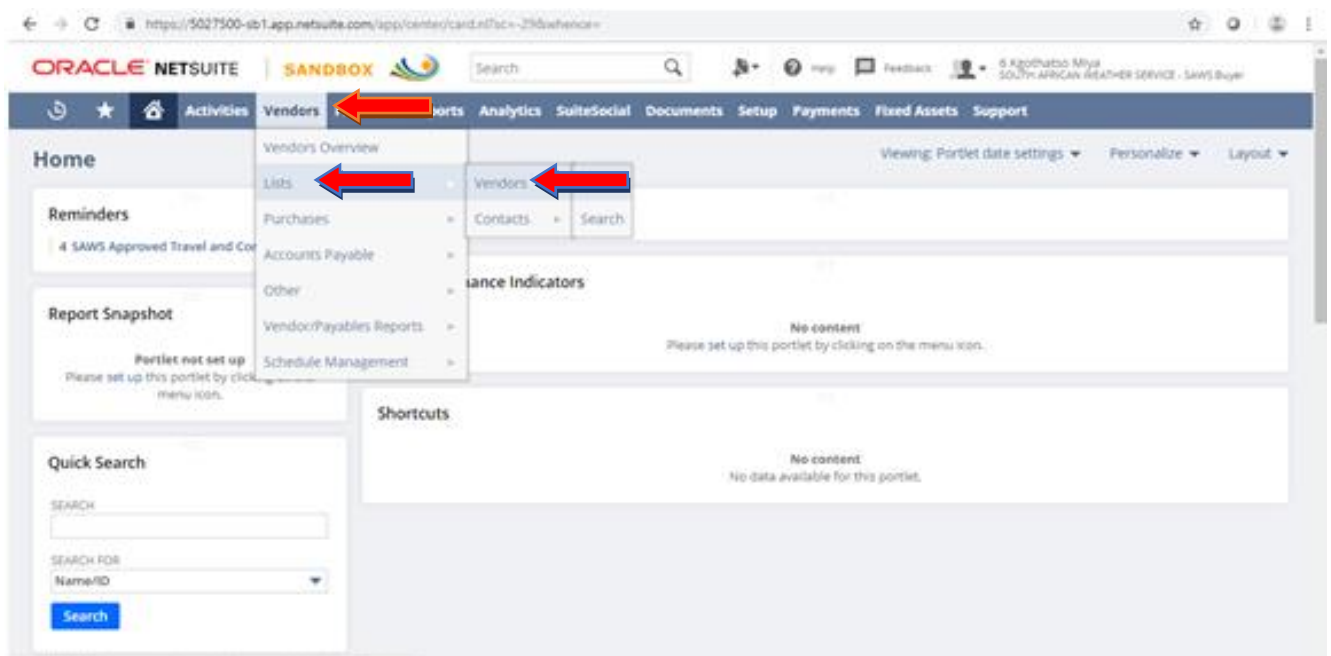
EMAIL training2@saws.com	FAX	ADDRESS
PHONE 0125474581	PROVINCE Gauteng	
ALT. PHONE 0125698547		

Vendor BBBEE Detail

2.2 Make changes to Vendor

Navigation

- On the menu bar, click on Vendors, a drop down menu will display.
- Click on Lists and Vendors



- Click on View ,next to the vendor you want to make changes



Vendors

VIEW SAWS General Edit View New Vendor Submit

FILTERS

NAME/ID MA NUMBER

VENDOR APPROVAL STATUS

- All -
- None -
- Approved
- Rejected

STYLE Normal

SHOW INACTIVES EDIT

QUICK SORT Recently Modified 17/7/2019 - 19/6/2019 TOTAL: 2729

INACTIVE	EDIT VIEW	ID	NAME	MA NUMBER	CATEGORY	BBBEE STATUS LEVEL	BBBEE CERTIFICATE EXPIRE DATE	VENDOR APPROVAL STATUS	PROVINCE	PRIMARY CONTACT
<input type="checkbox"/>	Edit View		CCM Events & Training PTY LTD	87572	Consultant	LEVEL 1		Approved	Gauteng	
<input type="checkbox"/>	Edit View	1266	Singapore Airline	85808		LEVEL 1			Gauteng	
<input type="checkbox"/>	Edit View	1173	ABB South Africa (Pty) Ltd	81826					Gauteng	
<input type="checkbox"/>	Edit View	299	21st Century Pay Solutions	77855						
<input type="checkbox"/>	Edit View	2683	Mamela Leano	864585				Pending Approval	Gauteng	

➤ Click on Edit

Activities Transaction **Vendors** Inventory Reports SuiteSocial Support

Vendor 1512 ABSA FUEL

Edit Actions

Primary Information

VENDOR ID	MA NUMBER	COMMENTS
1512 ABSA FUEL	10390	
TYPE	WEB ADDRESS	
Company		
COMPANY NAME	CATEGORY	
ABSA FUEL		

Email | Phone | Address

EMAIL	FAX	ADDRESS
PHONE		ABSA FUEL
		Pretoria Gauteng
ALT. PHONE	PROVINCE	South Africa Map
	Gauteng	

Vendor BBBEE Detail

BBBEE STATUS LEVEL	SUPPLIER CLASSIFICATION	BLACK WOMEN OWNED 30% OR MORE
BBBEE CERTIFICATE EXPIRE DATE	BLACK OWNED 51% OR MORE	

- Makes the required changes to the vendor form
- Then Click on Save




Vendor  

[←](#) [→](#) [List](#) [View Dashboard](#) [Search](#) [More](#)

1512 ABSA FUEL

[Save](#)  [Reset](#) |  [Actions](#) 

Primary Information

CUSTOM FORM * <input type="text" value="SAWS Vendor Form (SCM)"/>	COMPANY NAME * <input type="text" value="ABSA FUEL"/>	CATEGORY <input type="text"/>
VENDOR ID 1512 ABSA FUEL	MA NUMBER *  <input type="text" value="10390"/>	COMMENTS <input type="text"/>
TYPE <input checked="" type="radio"/> COMPANY <input type="radio"/> INDIVIDUAL	WEB ADDRESS <input type="text"/>	


Email | Phone | Address

EMAIL * <input type="text"/>	FAX <input type="text"/>	ADDRESS ABSA FUEL Pretoria Gauteng South Africa
PHONE <input type="text"/>	PROVINCE <input type="text" value="Gauteng"/>	
ALT. PHONE <input type="text"/>		

Vendor BBBEE Detail

➤ The vendor successfully saved , to make changes to the vendor click on edit

 **Confirmation**
Vendor successfully Saved

Vendor  

[←](#) [→](#) [List](#) [View Dashboard](#) [Search](#)


1512 ABSA FUEL

[Edit](#) [Back](#) |   [Actions](#) 

Primary Information

VENDOR ID 1512 ABSA FUEL	MA NUMBER 10390	COMMENTS
TYPE Company	WEB ADDRESS	
COMPANY NAME ABSA FUEL	CATEGORY	

Email | Phone | Address

EMAIL Training3@saws.com	FAX	ADDRESS ABSA FUEL Pretoria Gauteng South Africa 
PHONE	PROVINCE Gauteng	
ALT. PHONE		