

# Vendor Records within CCC ONE®

## Overview

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**Introduction** The job aids within this packet review topics associated with vendors within CCC ONE®.

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**Contents** This publication contains the following topics:

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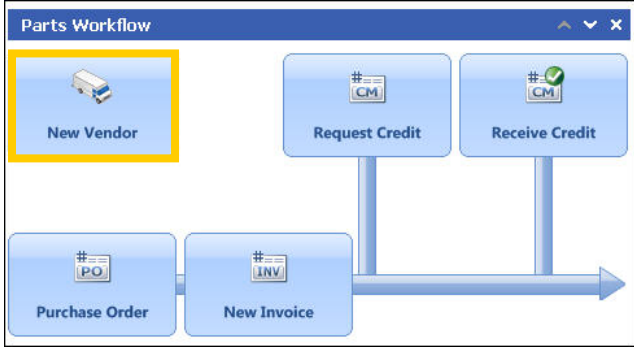
# The Vendor Search Screen in CCC ONE®

## Introduction

This document reviews the steps necessary to access the Vendor Search screen within CCC ONE®, as well as an overview of the New Vendor window.

## Accessing the Vendor Search Screen

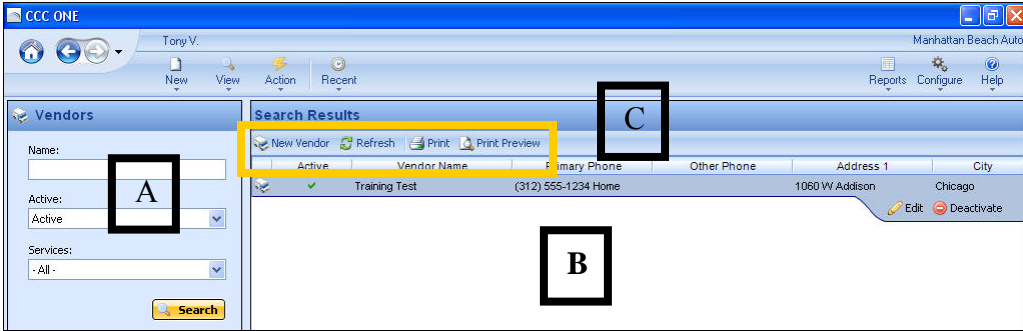

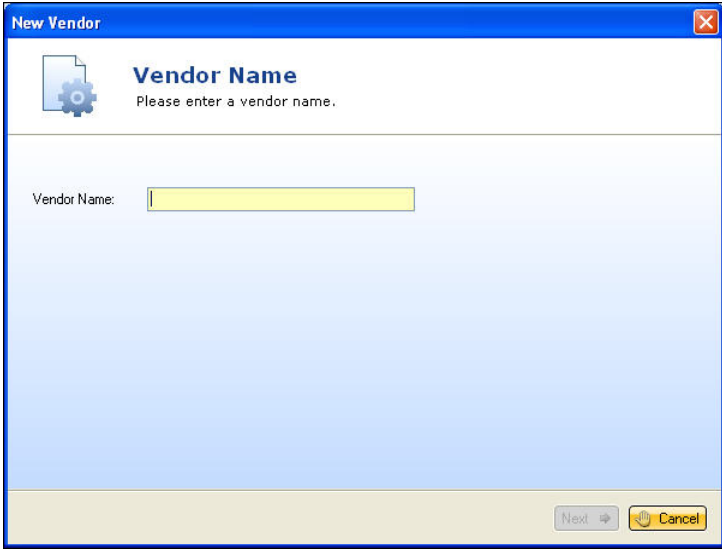
The following table outlines the steps necessary to access the Vendor Search screen:

Step	Action
1	<p>From the Configure Menu (which is located in the upper right hand of the screen), select Vendor from the drop down menu.</p> 
2	<p>Or, from CCC ONE® home page, click the New Vendor button that is part of the Parts Workflow widget.</p>  <p>If you select this, the New Vendor window opens in front of the CCC ONE® home page. Skip ahead to step 5 in this process.</p>

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# The Vendor Search Screen in CCC ONE®, Continued

## Accessing the Vendor Search Screen (continued)

Step	Action
3	<p>The Vendor Search Screen opens:</p>  <p>A. Vendor Search panel. B. The Search Results pane. C. The Vendor Search Screen toolbar – New Vendor, Refresh, Print, Print Preview buttons.</p>
4	<p>To create a New Vendor, click the New Vendor button  on the toolbar.</p>
5	<p>The New Vendor wizard opens. Enter a Vendor Name in the text box.</p> 


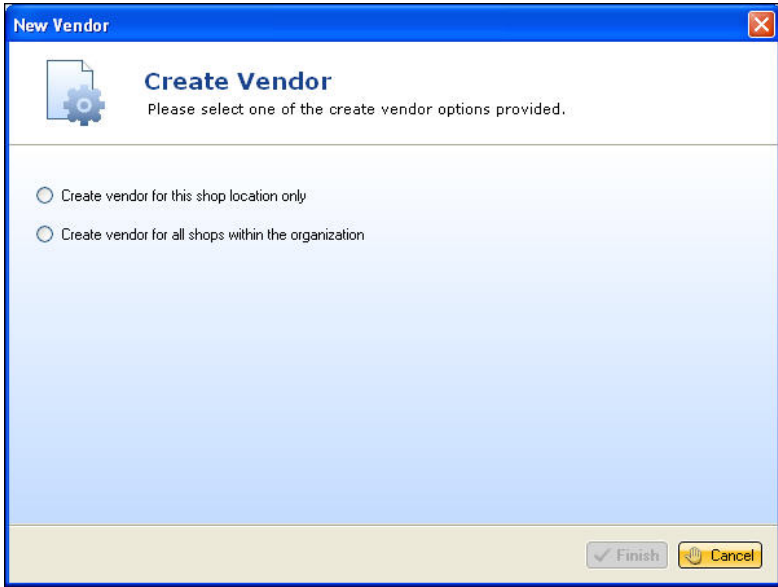

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## The Vendor Search Screen in CCC ONE®, Continued

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### Accessing the Vendor Search Screen

(continued)

Step	Action
6	Click the Next button 
7	<p>Use the radio buttons to select:</p> <ul style="list-style-type: none"><li>• Create vendor for this shop location only</li><li>• Create vendor for all shops within the organization</li></ul>  <p><b>Note:</b> The instructions for creating a vendor do not change based on the selection you make above.</p>
8	Click the Finish button 
9	The New Vendor window opens and it defaults to the General information tab. This tab is outlined in the next section of this job aid.

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# How to Create a New Vendor – General Tab

## Introduction

This document reviews the steps necessary to fill out the General tab of the New Vendor form within CCC ONE®. Information can be entered in the following sections:

- Vendor
- Internet
- Phone and fax numbers
- Contacts

**Note:** There are system required fields, as well as required fields determined by the administrator of this product and are customizable. To review required fields, go to *Configure > Global Settings > Vendor, Create / Edit*. For additional information on customizing Vendor fields, please refer to the job aid on Global Settings.

## General tab

To create a New Vendor, information can be entered on two tabs. Below is a picture of the General tab. The table that follows reviews the information needed to complete this tab.

The screenshot shows a software window titled "Untitled - Vendor" with a menu bar (File, Actions, Help) and buttons for "Save and Close" and "Save and New". The "General" tab is active, showing the following sections:

- Vendor:** Name (Training Test), Address 1, Address 2, City/State/Zip (with a dropdown menu).
- Internet:** Web, Email.
- Phone and fax numbers:** A table with columns: Phone Type, Phone Number, Order. It includes add, up/down arrow, and delete buttons.
- Contacts:** A table with columns: Name, Title, Primary Phone, Secondary Phone, Email. It includes "Add" and "Delete" buttons.

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# How to Create a New Vendor – General Tab, Continued



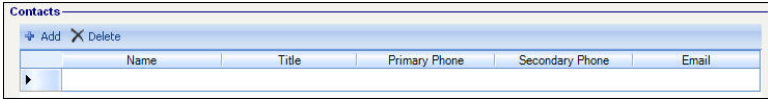
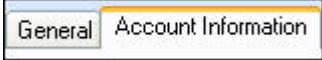
**General tab**  
(continued)

Step	Action												
1	<p>Enter information into the Vendor section of the screen.</p> <div data-bbox="586 449 1349 695" style="border: 1px solid black; padding: 5px;"> <p><b>Vendor</b></p> <p>Name: <input type="text" value="Training Test"/></p> <p>Address 1: <input style="background-color: yellow;" type="text"/></p> <p>Address 2: <input type="text"/></p> <p>City/State/Zip: <input style="background-color: yellow;" type="text"/> <input type="button" value="v"/> <input style="background-color: yellow;" type="text"/></p> </div> <p>The following fields can be completed by entering information in a text box or selecting information from a drop down list:</p> <p><b>Name:</b> This defaults to the Vendor Name entered at the beginning of the Vendor wizard.</p> <p><b>Address 1 &amp; 2</b></p> <p><b>City/State/Zip</b></p> <p><b>Note:</b> Required fields are indicated by a yellow background. Vendor Name, Address, City/State/Zip are system required fields for this section.</p>												
2	<p>Enter phone number information</p> <div data-bbox="586 1266 1349 1497" style="border: 1px solid black; padding: 5px;"> <p><b>Phone and fax numbers</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Phone Type</th> <th>Phone Number</th> <th>Order</th> </tr> </thead> <tbody> <tr> <td>Home <input type="button" value="v"/></td> <td>(312) 555-1234</td> <td>Primary</td> </tr> <tr> <td>Office <input type="button" value="v"/></td> <td>( ) - - x</td> <td>Secondary</td> </tr> <tr> <td><input type="button" value="v"/></td> <td></td> <td></td> </tr> </tbody> </table> <div style="border: 2px solid yellow; padding: 2px; float: right; margin-top: -20px;"> <input type="button" value="↑"/>  <input type="button" value="↓"/>  <input type="button" value="X"/> </div> </div> <ul style="list-style-type: none"> <li>Use the drop down list to select Phone Type.</li> <li>Enter the Phone Number.</li> </ul> <p><b>Note:</b> The first phone number entered is designated as the Primary number. Use the arrow keys to the right to change the order of the numbers listed. Use the red “X” to delete a phone number.</p>	Phone Type	Phone Number	Order	Home <input type="button" value="v"/>	(312) 555-1234	Primary	Office <input type="button" value="v"/>	( ) - - x	Secondary	<input type="button" value="v"/>		
Phone Type	Phone Number	Order											
Home <input type="button" value="v"/>	(312) 555-1234	Primary											
Office <input type="button" value="v"/>	( ) - - x	Secondary											
<input type="button" value="v"/>													

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## How to Create a New Vendor – General Tab, Continued

### General tab (continued)

Step	Action
3	<p>Enter Internet information:</p>  <p>Use the text boxes to enter a <b>Web</b> address and / or an <b>Email</b> address.</p>
4	<p>To add Contact information, click the Add button .</p>  <p>Use the text boxes to add the following contact information:</p> <ul style="list-style-type: none"> <li>• <b>Name</b></li> <li>• <b>Title</b></li> <li>• <b>Primary Phone</b></li> <li>• <b>Secondary Phone</b></li> <li>• <b>Email</b></li> </ul>
5	<p>Once you have completed entering information on the General tab, click the Account Information tab.</p>  <p>This tab is outlined in the next section of this job aid.</p>

# How to Create a New Vendor – Account Information Tab

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## Introduction

This document reviews the steps necessary to fill out the Account Information tab of the New Vendor form within CCC ONE®. Information can be entered in the following sections:

- Account
- Services
- Orders
- Returns
- Notifications

**Note:** There are system required fields, as well as required fields determined by the administrator of this product and are customizable. To review required fields, go to *Configure > Global Settings > Vendor, Create / Edit*. For additional information on customizing Vendor fields, please refer to the job aid on Global Settings.

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## Account Information tab

To create a New Vendor, information can be entered on two tabs. Below is a picture of the Account Information tab. The table that follows reviews the information needed to complete this tab.

The screenshot shows the 'Account Information' tab of a 'New Vendor' form. The form is titled 'Untitled - Vendor' and has a menu bar with 'File', 'Actions', and 'Help'. Below the menu bar are buttons for 'Save and Close' and 'Save and New'. The 'Account Information' tab is selected, and the form is divided into several sections:


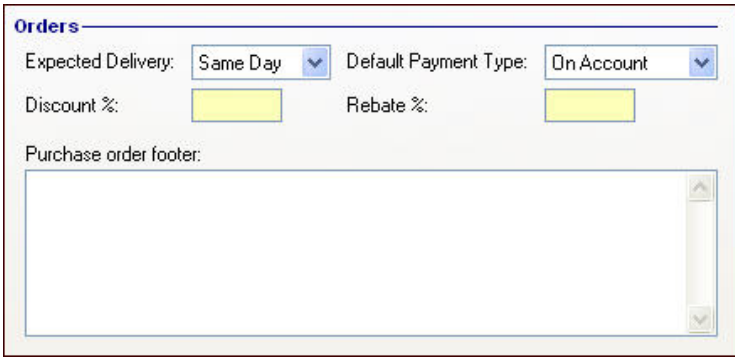
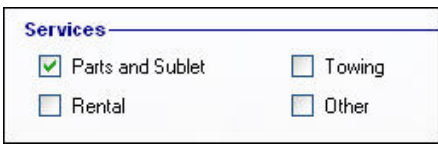
- Account:** Includes 'Account Number' and 'Terms' (set to 0).
- Services:** Includes checkboxes for 'Parts and Sublet' (checked), 'Towing', 'Rental', and 'Other'.
- Orders:** Includes 'Expected Delivery' (set to 'Same Day'), 'Default Payment Type' (set to 'On Account'), 'Discount %' (set to 0.0), and 'Rebate %' (set to 0). There is also a 'Purchase order footer' text area.
- Returns:** Includes 'Restock %' (set to 0) and 'Restock Flat Fee' (set to 0.00).
- Notifications:** Includes checkboxes for 'Fax' and 'Email', with corresponding input fields for phone numbers.

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# How to Create a New Vendor – Account Information Tab, Continued

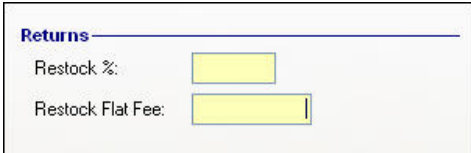
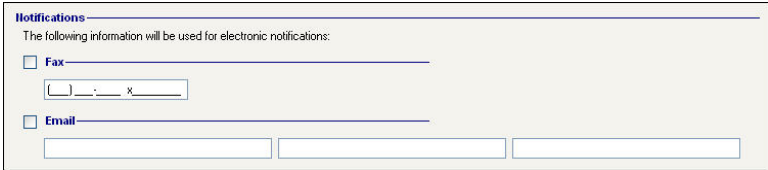
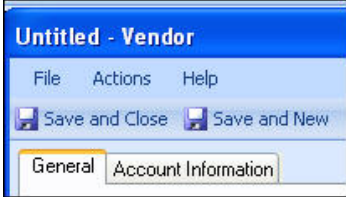
**Account Information tab** (continued)

Step	Action
1	<p>Enter an <b>Account Number</b> and <b>Terms</b> in the text boxes.</p>  <p><b>Note:</b> Terms is a system required field. This field automatically populates with a “0.”</p>
2	<p>Enter information into the <b>Orders</b> section:</p>  <p>Use the drop down arrows or text boxes to add information into the following fields:</p> <ul style="list-style-type: none"> <li>• <b>Expected Delivery</b></li> <li>• <b>Default Payment Type</b></li> <li>• <b>Discount %</b></li> <li>• <b>Rebate %</b></li> <li>• <b>Purchase order footer</b></li> </ul> <p><b>Note:</b> <u>Only</u> Purchase order footer is <i>not</i> a required field. The Discount and Rebate fields automatically populate with a 0.0 %.</p>
3	<p>Use the check boxes to select (or deselect) Services.</p>  <p><b>Note:</b> At least one of these Services must be selected.</p>

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# How to Create a New Vendor – Account Information Tab, Continued

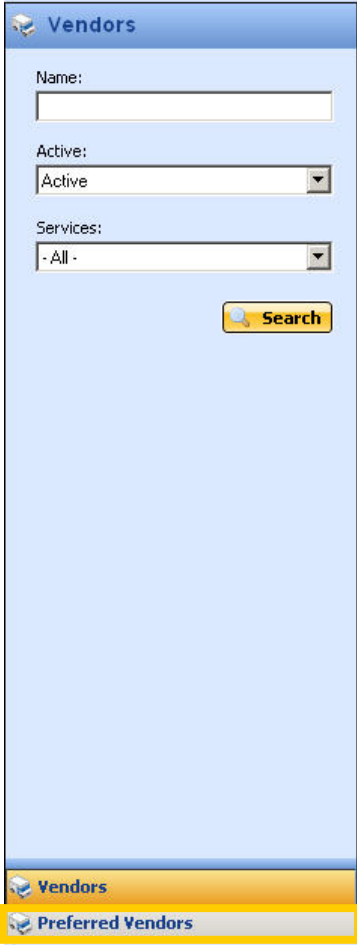
**Account  
Information tab  
(continued)**

Step	Action
4	<p>Enter information into the <b>Returns</b> section:</p>  <p>Use the text boxes to enter a <b>Restock %</b> and <b>Restock Flat Fee</b>.</p> <p><b>Note:</b> Both of these are system required fields. The Restock % defaults to 0.0% and the Restock Flat Fee defaults to \$0.00.</p>
5	<p>Enter information into the <b>Notifications</b> section.</p>  <ul style="list-style-type: none"> <li>• Use the check boxes to select Fax, Email or both.</li> <li>• Enter information into the appropriate text boxes.</li> </ul> <p><b>Note:</b> This section pre-fills the Send Notification screen that opens when you save a Purchase Order or Credit Memo.</p>
6	<p>Once all the required information is entered, click the Save and Close button at the top of the screen:</p>  <p><b>Note:</b> If you are creating multiple vendors, you can click <b>Save and New</b> to open a <b>New Vendor</b> window.</p>

# How to Create a Preferred Vendor

This table outlines the steps necessary to designate a vendor as preferred.

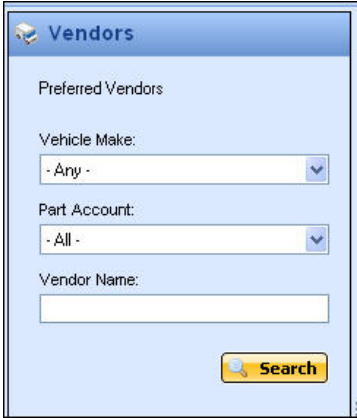
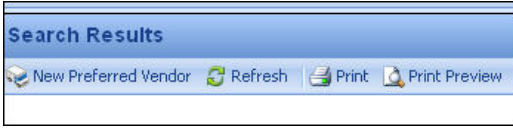

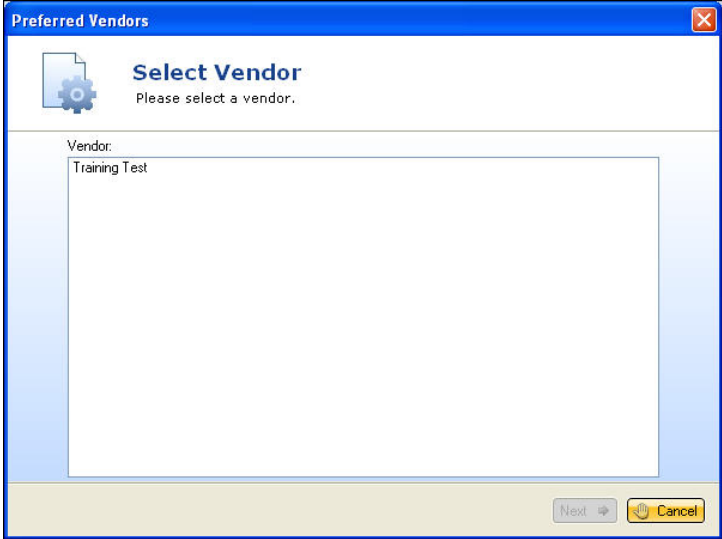
**Creating a Preferred Vendor**

Step	Action
1	Go to the Vendor Search Screen through the Configure Menu > Vendors.
2	<p>On the left hand side of the screen, is the Vendor Search pane. At the bottom of this pane, there are navigation buttons which link to the different vendor search screens.</p>  <p>To access the Preferred Vendors Search Screen, click the Preferred Vendor bar.</p>

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## How to Create a Preferred Vendor, Continued


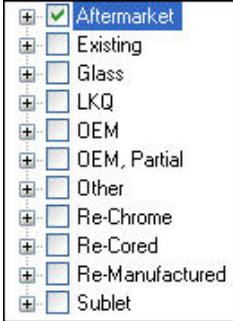

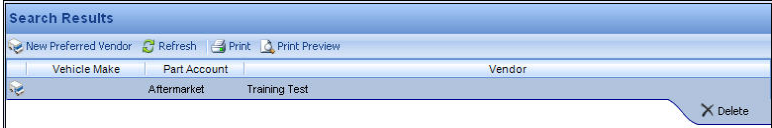
### Creating a Preferred Vendor (continued)

Step	Action
3	<p>This changes both the Search Criteria...</p>  <p>...and the Search Results</p> 
4	<p>Click the New Preferred Vendor button  from the Search Results toolbar.</p>
5	<p>The Preferred Vendors – Select Vendors window opens.</p> 

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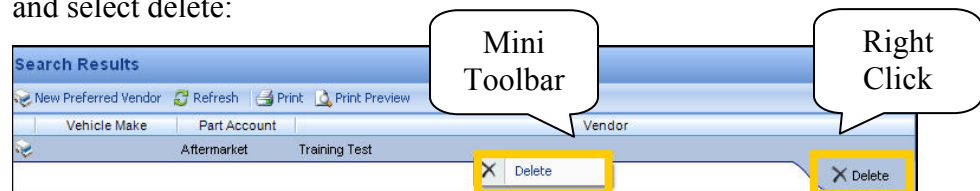
## How to Create a Preferred Vendor, Continued

### Creating a Preferred Vendor (continued)

Step	Action
6	Select the Vendor and click the Next button  at the bottom of the window.
7	Use the check boxes to select accounts for which the selected vendor is the primary vendor:   <p><b>Note:</b> You can expand each item by clicking the “+” sign. From there, you can select specific manufacturers for each part type. If you select the overall part type, all of the items listed under that part are selected.</p>
8	Click the Finish button  .
9	This vendor is now listed as a preferred vendor on the Search Results list.  

### Deleting a Preferred Vendor

To remove a vendor from the Preferred list, you can either click the Delete button on the mini toolbar or you can right click on the Vendor and select delete:

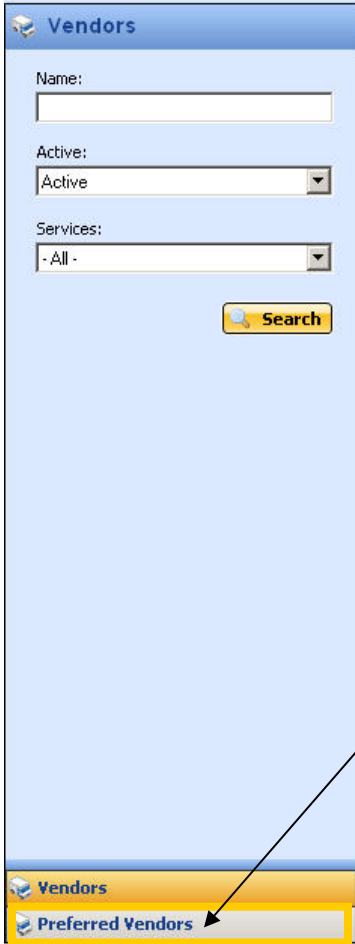


**Note:** This does not remove the vendor entirely. If you wish to deactivate a vendor, please refer to the job aid that reviews this topic.

# How to Search for a Preferred Vendor

## Searching for a Preferred Vendor

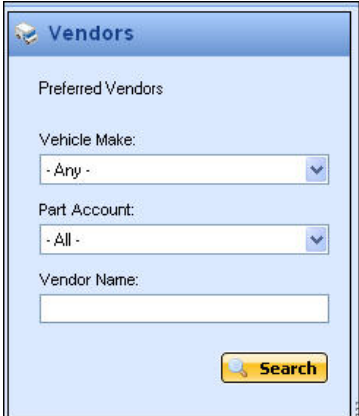
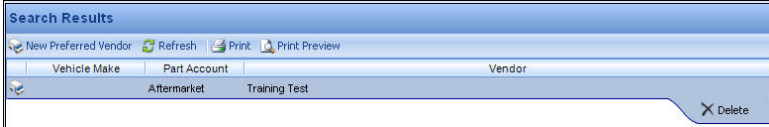
The following table outlines the steps necessary to Search for a Preferred Vendor:

Step	Action
1	Go to the Vendor Search Screen through the Configure Menu > Vendors.
2	<p>On the left hand side of the screen, is the Vendor Search pane. At the bottom of this pane, there are links to additional search criteria.</p>  <p>The screenshot shows a 'Vendors' search interface with the following elements:</p> <ul style="list-style-type: none"><li><b>Name:</b> A text input field.</li><li><b>Active:</b> A dropdown menu currently set to 'Active'.</li><li><b>Services:</b> A dropdown menu currently set to '- All -'.</li><li><b>Search:</b> A yellow button with a magnifying glass icon.</li><li><b>Navigation Bar:</b> A yellow bar at the bottom with two items: 'Vendors' and 'Preferred Vendors'. The 'Preferred Vendors' item is highlighted with a grey background and has an arrow pointing to it from a callout box.</li></ul> <p>To access the Preferred Vendors Search Screen, click the Preferred Vendor bar.</p>

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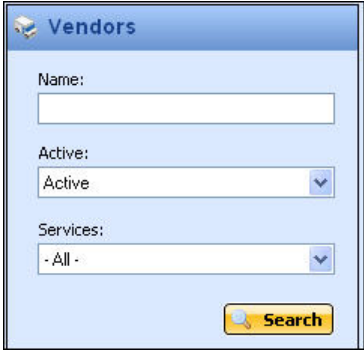

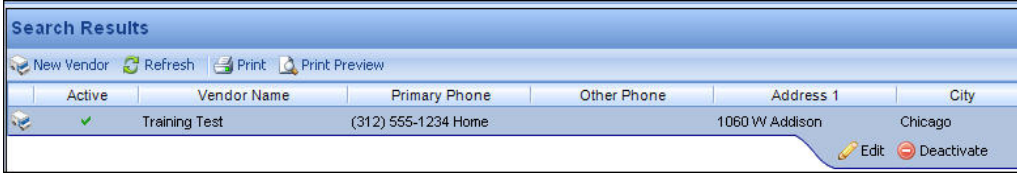
## How to Search for a Preferred Vendor, Continued

### Searching for a Preferred Vendor (continued)

Step	Action
3	<p>This changes the Search Criteria:</p> 
4	<p>To enter search criteria, use the drop down arrows to select:</p> <ul style="list-style-type: none"> <li>• Vehicle Make</li> <li>• Part Account</li> </ul> <p>Enter a Vendor Name in the text box.</p>
5	<p>Click the Search button.</p> <p><b>Note:</b> You can run the search without entering any search criteria as well.</p>
6	<p>The Search Results display:</p> 

# How to Search for a Vendor

**Searching for a Vendor** The following table outlines the steps necessary to Search for a vendor:

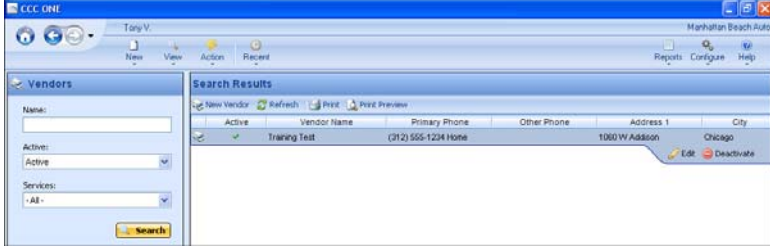


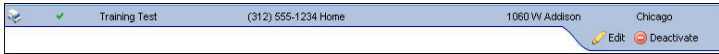
Step	Action
1	Go to the Vendor Search Screen through the Configure Menu > Vendors.
2	<p>On the left hand side is the Vendor Search criteria:</p>  <p>You can use any of the following criteria:</p> <ul style="list-style-type: none"> <li>• Enter a <b>Name</b> in the text box.</li> <li>• Select an <b>Active</b> status and / or <b>Services</b> from the drop down list.</li> </ul>
3	Click the Search button  .
4	<p>The Search Results display:</p> 



# How to Edit a Vendor Record

## Editing a Vendor

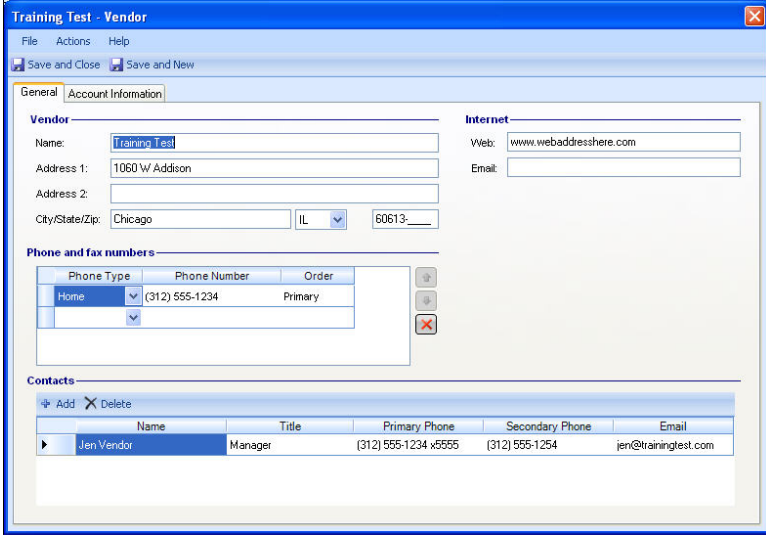

The table below outlines the steps for editing a vendor.

Step	Action
1	Go to the Vendor Search Screen through the Configure Menu > Vendors.
2	Conduct a Search for the specific Vendor you wish to edit.  <b>Note:</b> For information on searching for vendors, see the job aid for that topic.
3	From the Search Results, locate and click on the vendor you wish to edit.  
4	You can access the edit mode for the Vendor record three different ways: <ul style="list-style-type: none"> <li>• Click the Edit button on the mini toolbar               <div style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div> </li> <li>• Right click on the record and select Edit from the pop up list               <div style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div> </li> <li>• Double click on the vendor record               <div style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div> </li> </ul>

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## How to Edit a Vendor Record, Continued

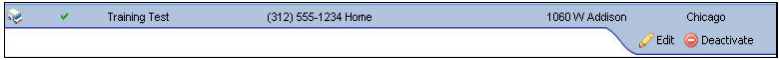

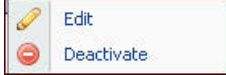
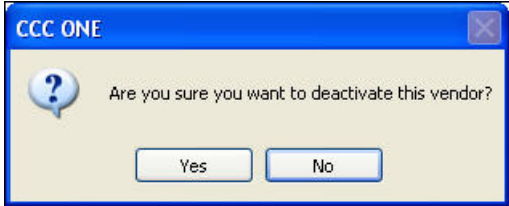
### Editing a Vendor (continued)

Step	Action
5	<p>The vendor record opens:</p> 
6	<p>Edit information within the General and Account Information tabs as needed.</p> <p><b>Note:</b> For information on entering information in these tabs, refer to the Create Vendor job aids.</p>
7	<p>Once the edits are complete, click either the Save and Close button or the Save and New button.</p>  <p><b>Note:</b> The changes will not be saved to the Vendor record without this step.</p>

# How to Deactivate (and Reactivate) a Vendor

## Deactivating a Vendor

The table below outlines the steps necessary to deactivate a vendor.

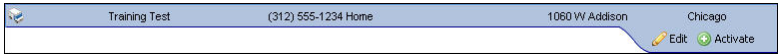


Step	Action
1	Go to the Vendor Search Screen through the Configure Menu > Vendors.
2	Conduct a Search for the specific Vendor you wish to deactivate.  <b>Note:</b> For information on searching for vendors, see the job aid for that topic.
3	From the Search Results, locate and click on the vendor you wish to deactivate.  
4	You can Deactivate a Vendor record two different ways: <ul style="list-style-type: none"> <li>Click the Deactivate button on the mini toolbar</li> </ul>  <ul style="list-style-type: none"> <li>Right click on the record and select Deactivate from the pop up list</li> </ul> 
5	A confirmation message appears:   Click "Yes" to confirm the deactivation request.
6	The Vendor Record is deactivated.  <b>Note:</b> If you search for Active vendors, this vendor will not appear within the Search Results.

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## How to Deactivate (and Reactivate) a Vendor, Continued

### Activating a Vendor

The table below outlines the steps necessary to activate a vendor.

Step	Action
1	Go to the Vendor Search Screen through the Configure Menu > Vendors.
2	Conduct a Search for the specific Vendor you wish to activate.  <b>Note:</b> You will need to make sure that the Search Criteria is set to search for “Inactive” vendors.
3	From the Search Results, locate and click on the vendor you wish to activate.  
4	You can Activate a Vendor record two different ways: <ul style="list-style-type: none"> <li>Click the Activate button on the mini toolbar  </li> <li>Right click on the record and select Activate from the pop up list  </li> </ul>
5	The Vendor record is Activated.  <b>Note:</b> If you search for Inactive vendors, this vendor will not appear within the Search Results.