

Hot Sheet



| Topic | Master Vendor as a Distributor on the Vendor > Distributor Sub-Tab |
|------------------------------------|--|
| Document Types Involved | Bid <input type="checkbox"/> Master Blanket <input checked="" type="checkbox"/> Requisition <input type="checkbox"/> PO <input checked="" type="checkbox"/> Receipt <input type="checkbox"/> Invoice <input type="checkbox"/> Credit Memo <input type="checkbox"/> Report <input type="checkbox"/> Vendor <input type="checkbox"/> User Profile <input type="checkbox"/> Agency Setup <input type="checkbox"/> Other <input type="checkbox"/> |
| Reason for Publication | <p>The Vendor > Distributors sub-tab on Master Blanket Purchase Orders displays the list of vendors that are authorized to deliver the goods and services outlined in the contract. The vendor selected on the Vendor > General tab will be automatically added as a Distributor. However, if more vendors are added as distributors, the Basic Purchasing user creating the Master Blanket must check the “Include Primary Vendor in the Vendor Distributor List” check box in the Vendor Distributor List to allow Releases off the Master Blanket to be sent to the Master Vendor for purchasing.</p> |
| Steps Resulting in Scenario | <ol style="list-style-type: none"> 1. The Basic Purchaser creates a new Master Blanket from scratch, from a Bid, or by cloning another document. 2. The Basic Purchaser adds vendors to the Vendor > Distributor sub-tab. <ol style="list-style-type: none"> a. The Basic Purchaser did not check the “Include Primary Vendor in the Vendor Distributor List” check box in the Vendor Distributor List. 3. Releases off the Master Blanket Purchase Order default to the Master Vendor, not one of the Distributors 4. The Requisition will process through approvals without an error <div style="margin-left: 20px;">  <p>The resulting Release Purchase Order will not be able to be sent due to this error: PO Overall Validation Errors PO vendor "9000003757 - HEWLETT PACKARD COMPANY" is not an active vendor distributor of master blanket/contract # ADSPO12-024657.</p> </div> |
| Recommended Strategy | <p>If the Master Vendor is also a Supplier of the Goods on the Master Blanket Purchase Order:</p> <p><i>NOTE: You do not use a change order to complete this process</i></p> <ol style="list-style-type: none"> 1. Go to the Vendor > Distributors sub-tab on the Master Blanket Purchase Order 2. Click the “Include Primary Vendor in the Vendor Distributor List” checkbox 3. Click the Save & Continue button <p>Once the Release Purchase Order is refreshed the error will disappear and the Release may be sent to the vendor</p> <ul style="list-style-type: none"> • If the requisitioner did not leave the Release Purchase Order while the correction was being made, using the Browser’s refresh button will remove the error message • If the requisitioner went on to other work in ProcureAZ or logged out while the correction was being made, the error will be gone when they return to the Release Purchase Order |

If the Master Vendor is NOT a Supplier of the Goods on the Master Blanket Purchase Order:

1. The Release Purchase Order must be canceled – vendors on Purchase Orders in Ready to Send or Sent status cannot be changed with a change order
 - a. Department Access users with rights to the document may cancel it using a change order
 - b. Basic Purchasing users may cancel the document using the **Cancel PO** button
2. Clone the original Requisition
3. On the new Requisition, go to the Vendor > Distributor sub-tab and select the correct Distributor for the order
4. Finish processing the document as usual

Screenshots

1) Add the Master Vendor as a Distributor on the Vendor > Distributor sub-tab on the Master Blanket Purchase Order:

1. Click the “Include Primary Vendor in the Vendor Distributor List” checkbox
2. Click the Save & Continue button

Master Blanket Purchase Order ADSP012-024657 Status: 3PS - Sent

General | Items | **Vendor** | Routing | Control | Attachments(7) | Notes | Change Orders(4) | Reminders | Summary

General | Subcontractors | **Distributors**

Vendor Distributor List

| Vendor ID | Alternative ID | Vendor Name | Preferred Delivery Method | Vendor Distributor Status | Delete All |
|----------------------------|----------------|----------------|---------------------------|---------------------------|--------------------------|
| | | | | | <input type="checkbox"/> |
| 000042524 | | Wombat Supply | Email | Active | <input type="checkbox"/> |
| 9000007659 | PZ9000007659 | A & A Cottages | Email | Active | <input type="checkbox"/> |

Include Primary Vendor in the Vendor Distributor List

Save & Continue | Reset | Lookup & Add Vendor Distributors