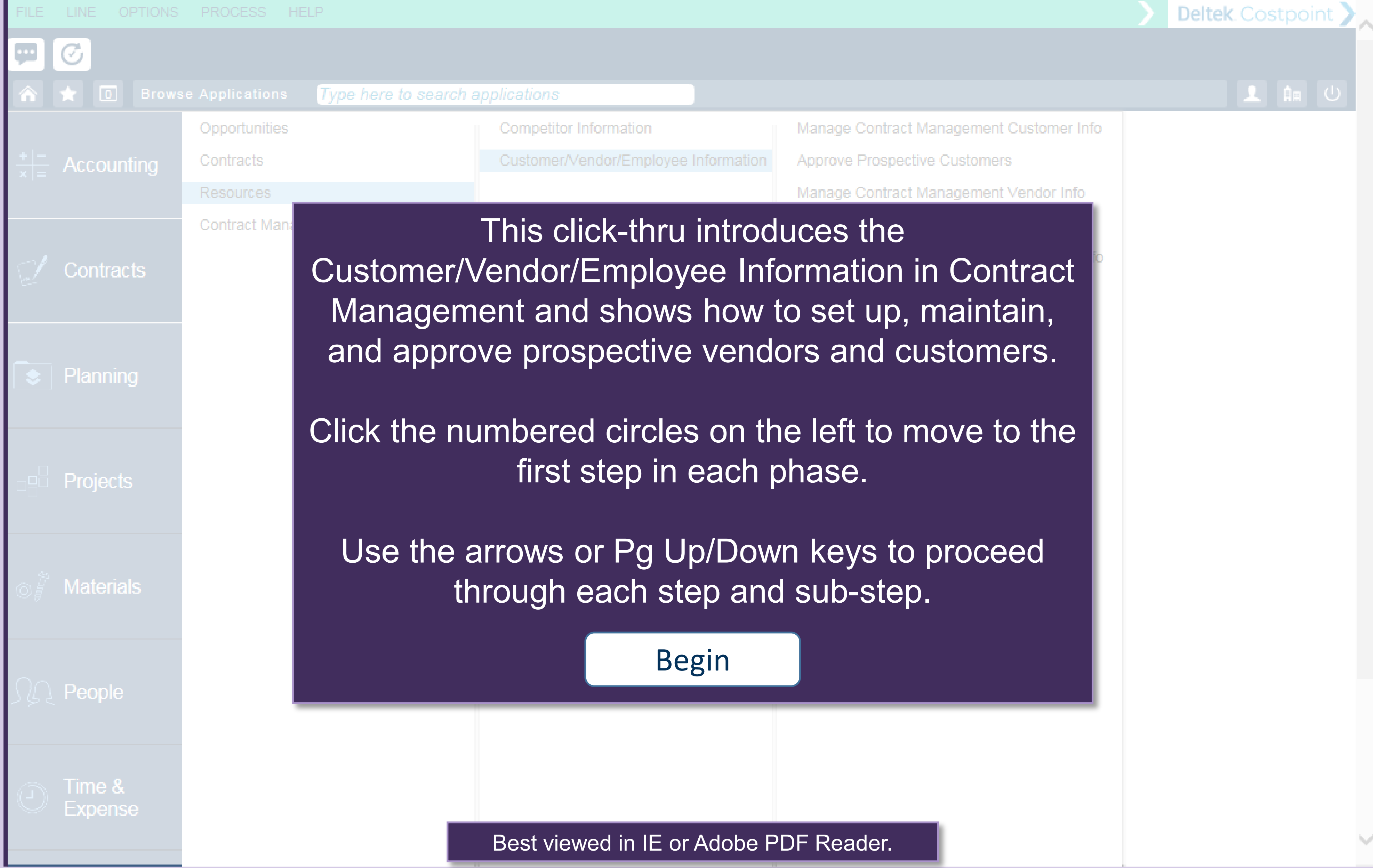
Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



This click-thru introduces the Customer/Vendor/Employee Information in Contract Management and shows how to set up, maintain, and approve prospective vendors and customers.

Click the numbered circles on the left to move to the first step in each phase.

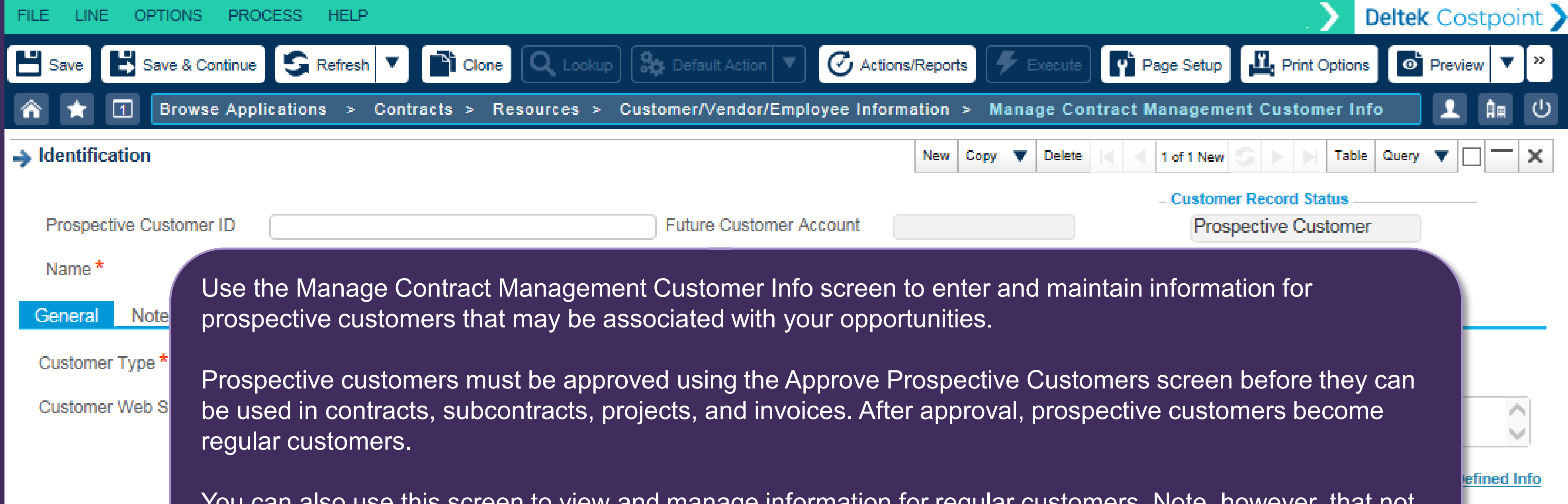
Use the arrows or Pg Up/Down keys to proceed through each step and sub-step.

Begin

Best viewed in IE or Adobe PDF Reader.

Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Use the Manage Contract Management Customer Info screen to enter and maintain information for prospective customers that may be associated with your opportunities.

Prospective customers must be approved using the Approve Prospective Customers screen before they can be used in contracts, subcontracts, projects, and invoices. After approval, prospective customers become regular customers.

You can also use this screen to view and manage information for regular customers. Note, however, that not all fields are editable for regular customers.

Follow the steps on the next slides to accomplish the Manage Contract Management Customer Info screen.

Customer/Vendor/ Employee Information

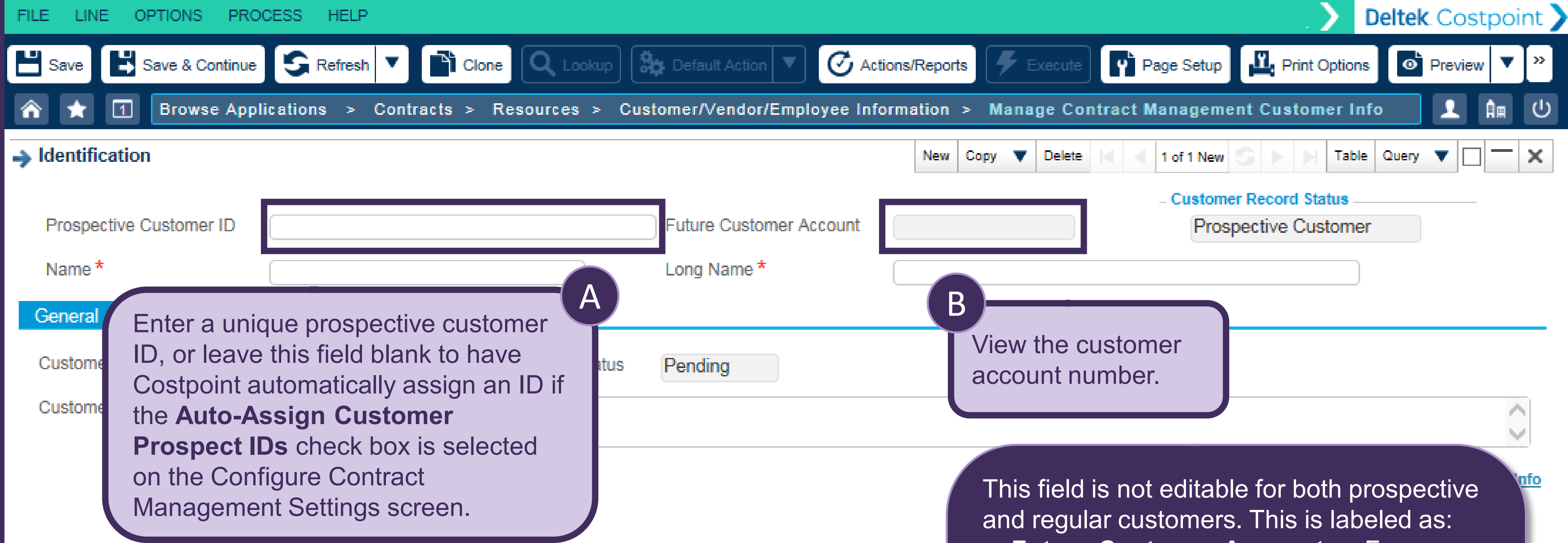
1 Manage Contract Management Customer Info

2 Approve Prospective Customers

3 Manage Contract Management Vendor Info

4 Approve Prospective Vendors

5 Manage Contract Management Employee Info



A Enter a unique prospective customer ID, or leave this field blank to have Costpoint automatically assign an ID if the **Auto-Assign Customer Prospect IDs** check box is selected on the Configure Contract Management Settings screen.

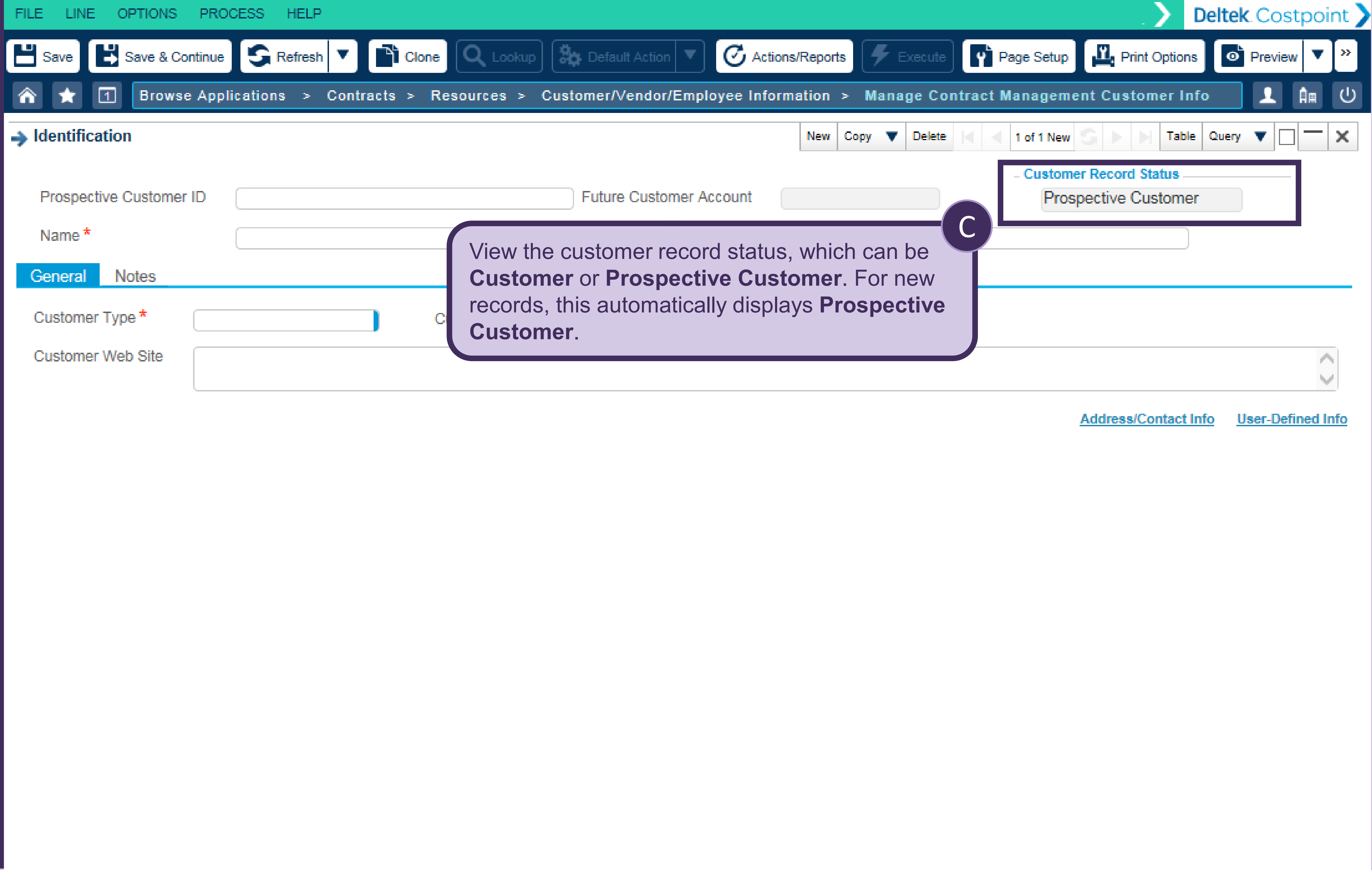
B View the customer account number.

This field is not editable for both prospective and regular customers. This is labeled as:

- **Future Customer Account** — For prospective customers. You set up future customer accounts on the Approve Prospective Customers screen.
- **Customer Account** — For approved or regular customers. The customer account displays as a hyperlink that you can click to open the Manage Customers screen and view additional information about the customer.

Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

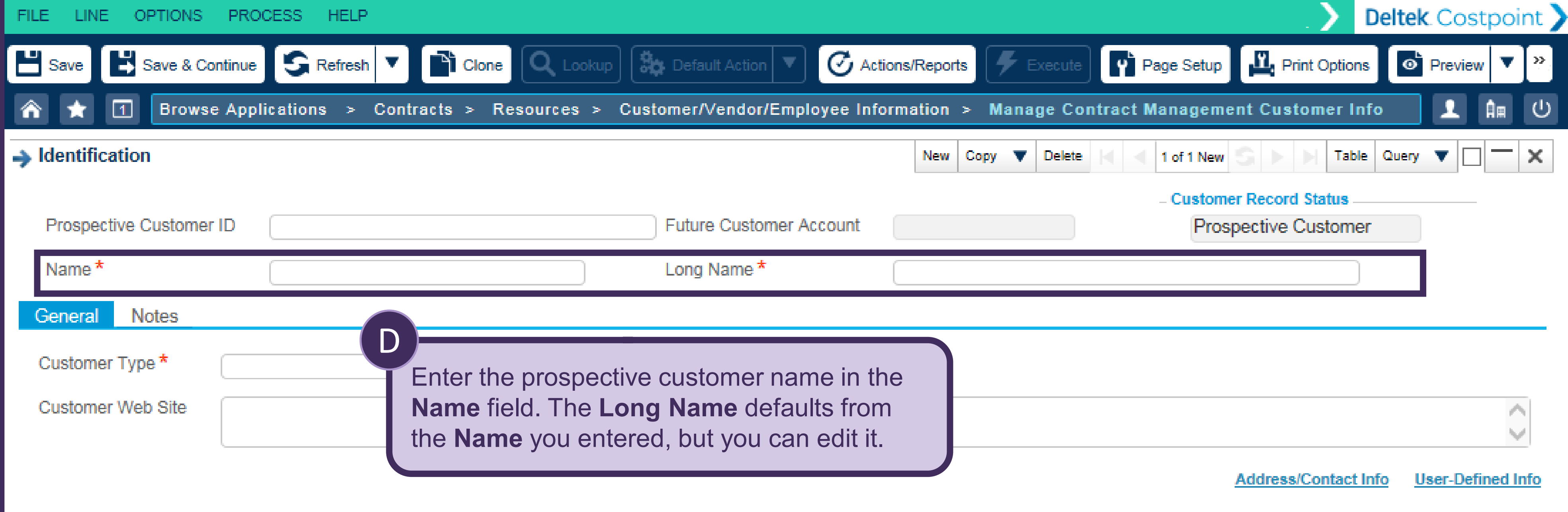
1 Manage Contract Management Customer Info

2 Approve Prospective Customers

3 Manage Contract Management Vendor Info

4 Approve Prospective Vendors

5 Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

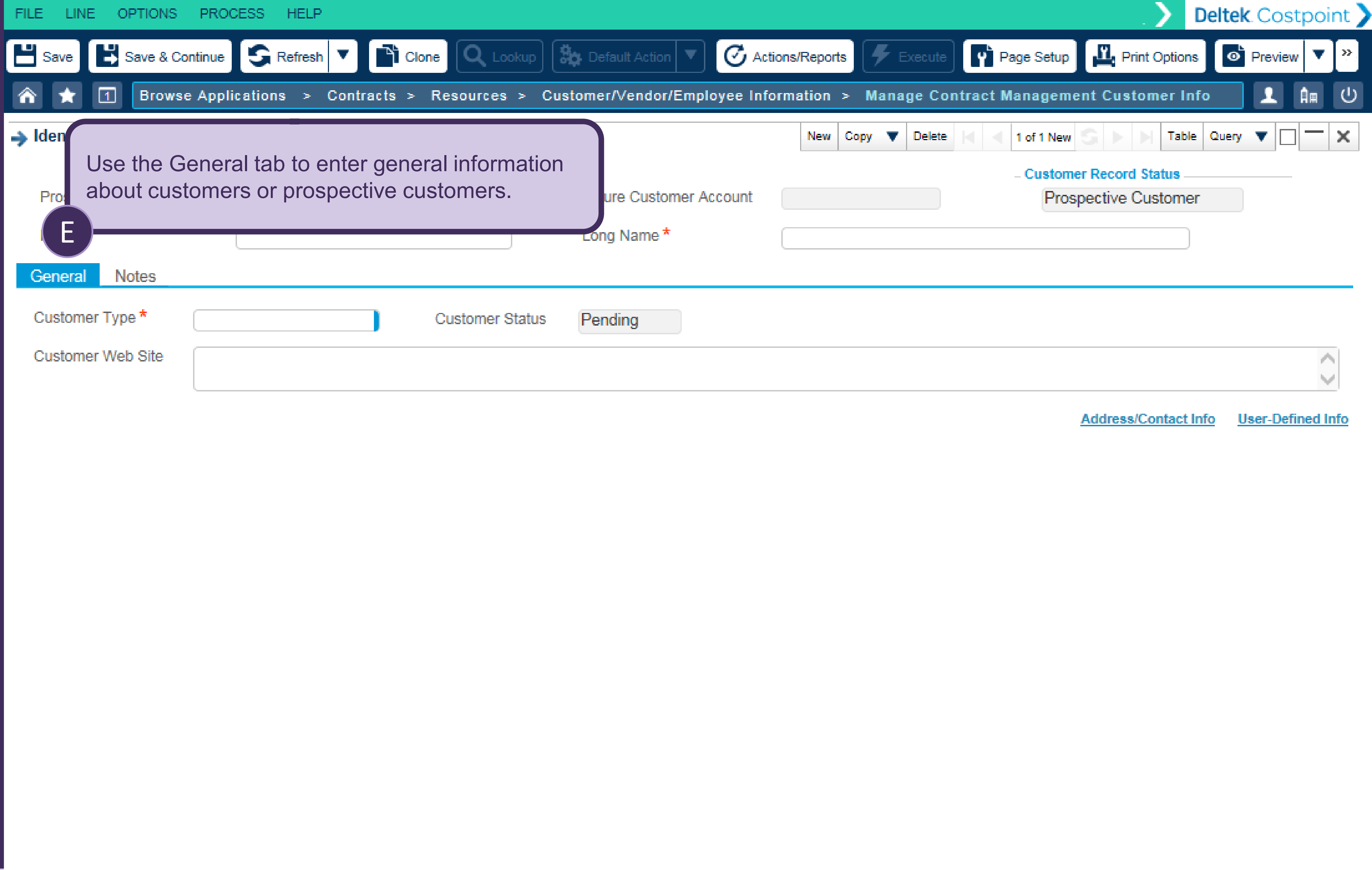
1 Manage Contract Management Customer Info

2 Approve Prospective Customers

3 Manage Contract Management Vendor Info

4 Approve Prospective Vendors

5 Manage Contract Management Employee Info



E

Use the General tab to enter general information about customers or prospective customers.

Customer/Vendor/ Employee Information

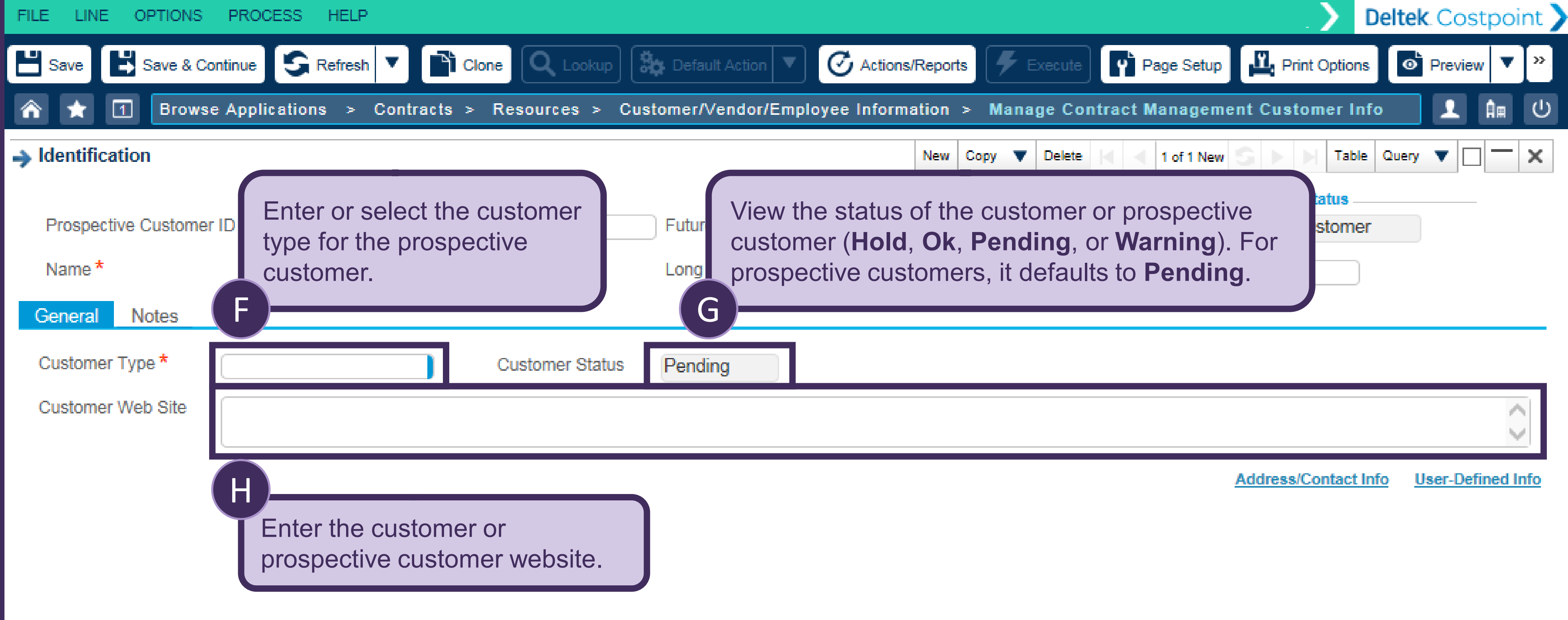
1 Manage Contract Management Customer Info

2 Approve Prospective Customers

3 Manage Contract Management Vendor Info

4 Approve Prospective Vendors

5 Manage Contract Management Employee Info



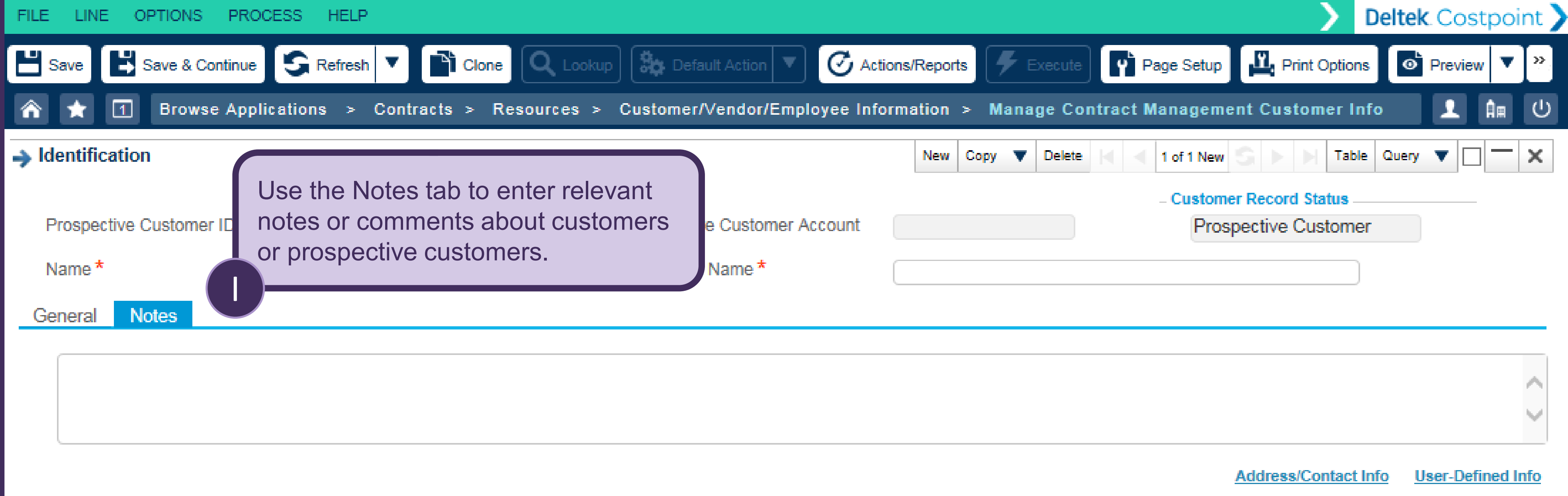
F Enter or select the customer type for the prospective customer.

G View the status of the customer or prospective customer (**Hold**, **Ok**, **Pending**, or **Warning**). For prospective customers, it defaults to **Pending**.

H Enter the customer or prospective customer website.

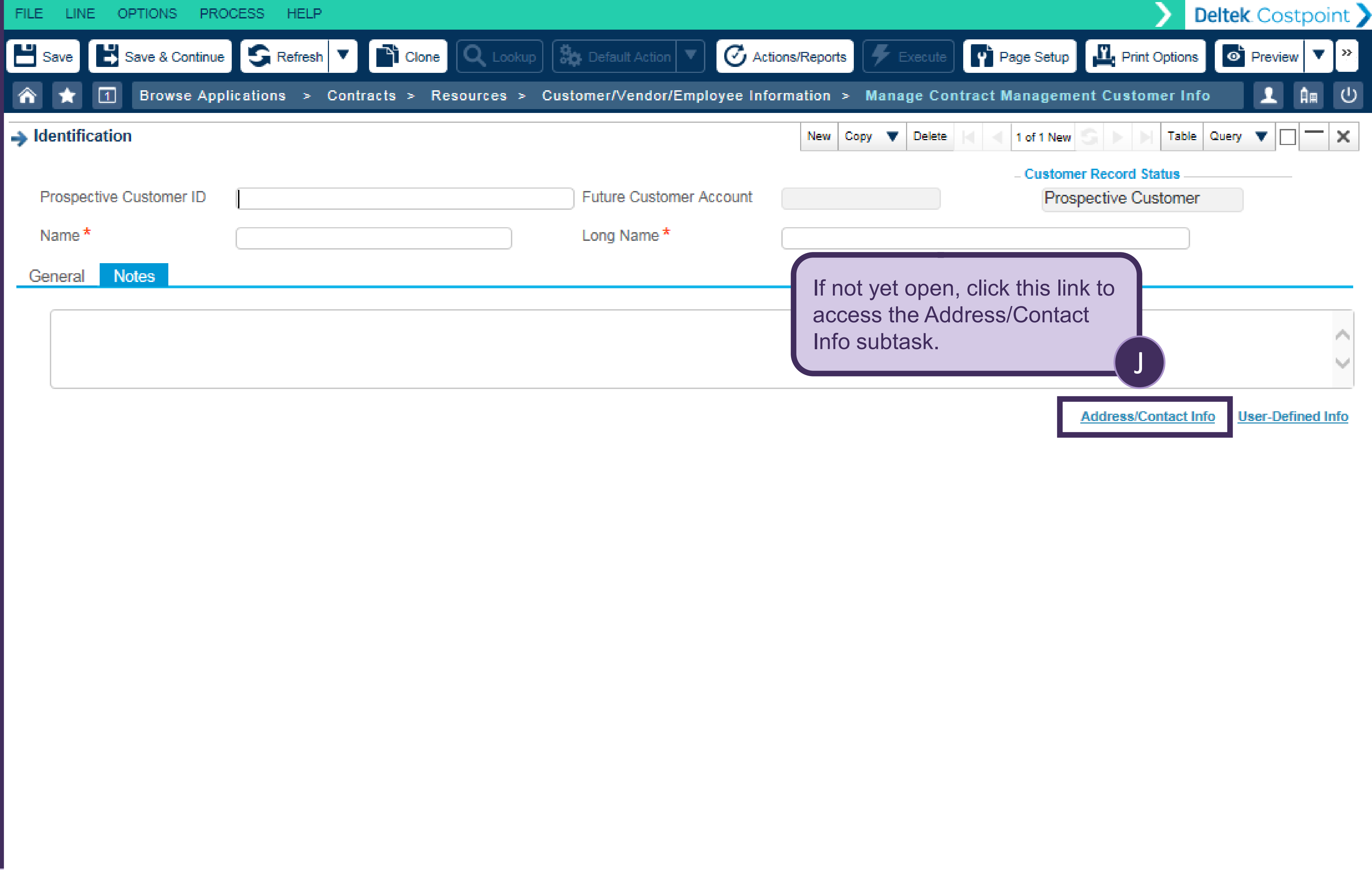
Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



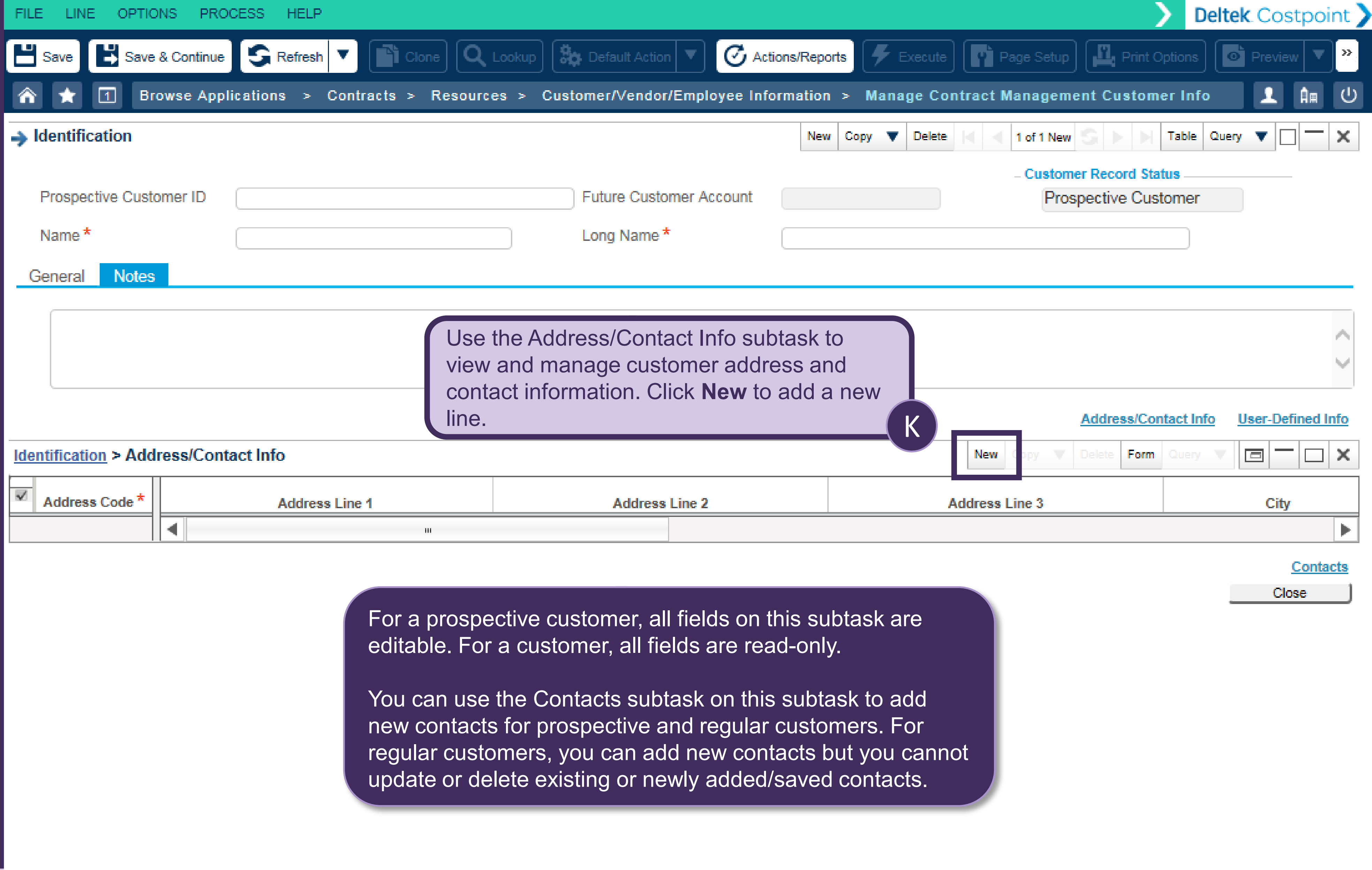
Customer/Vendor/ Employee Information

1. **Manage Contract Management Customer Info**
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



K: Use the Address/Contact Info subtask to view and manage customer address and contact information. Click **New** to add a new line.

For a prospective customer, all fields on this subtask are editable. For a customer, all fields are read-only.

You can use the Contacts subtask on this subtask to add new contacts for prospective and regular customers. For regular customers, you can add new contacts but you cannot update or delete existing or newly added/saved contacts.

Customer/Vendor/ Employee Information

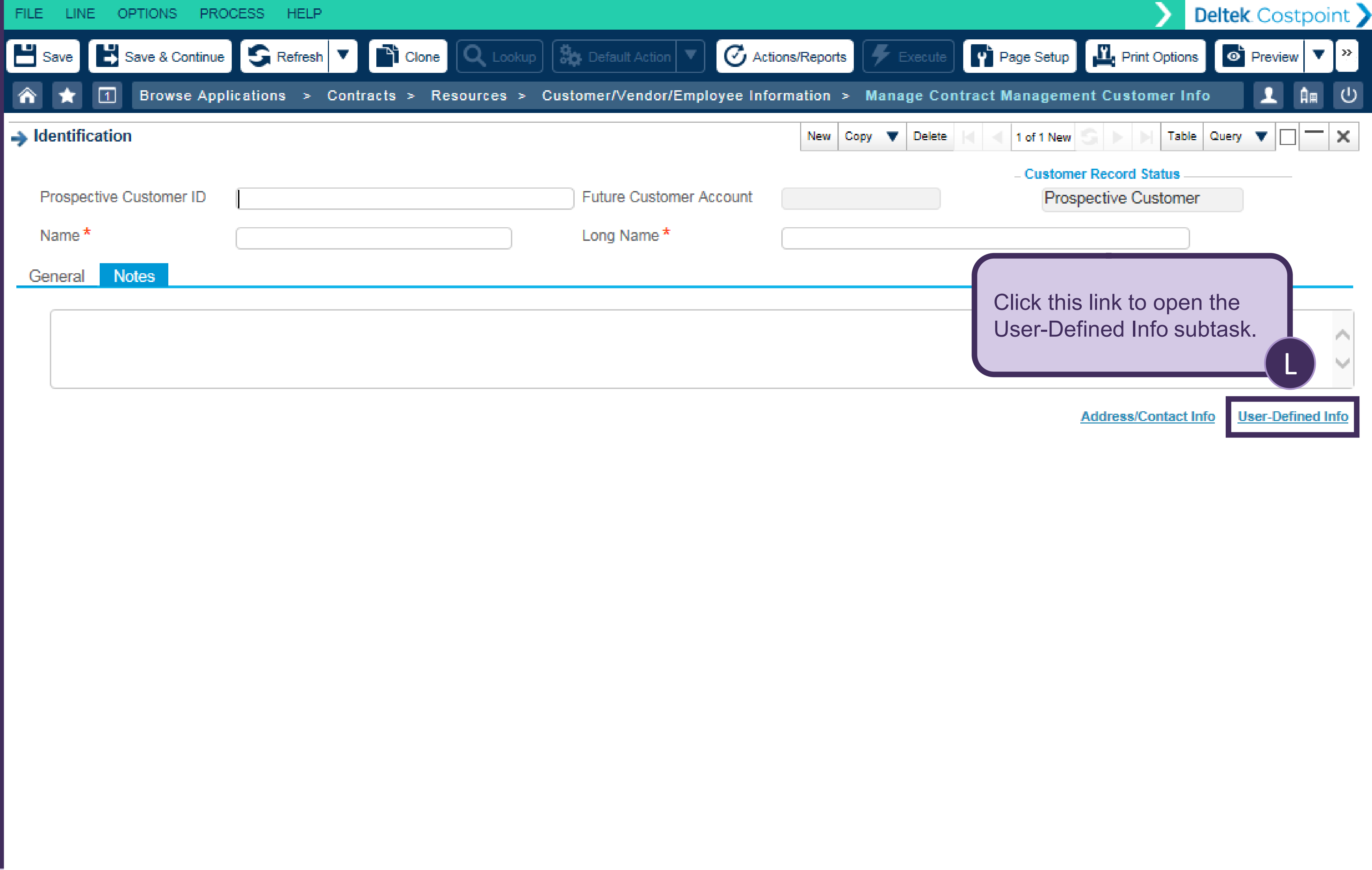
1
Manage Contract Management Customer Info

2
Approve Prospective Customers

3
Manage Contract Management Vendor Info

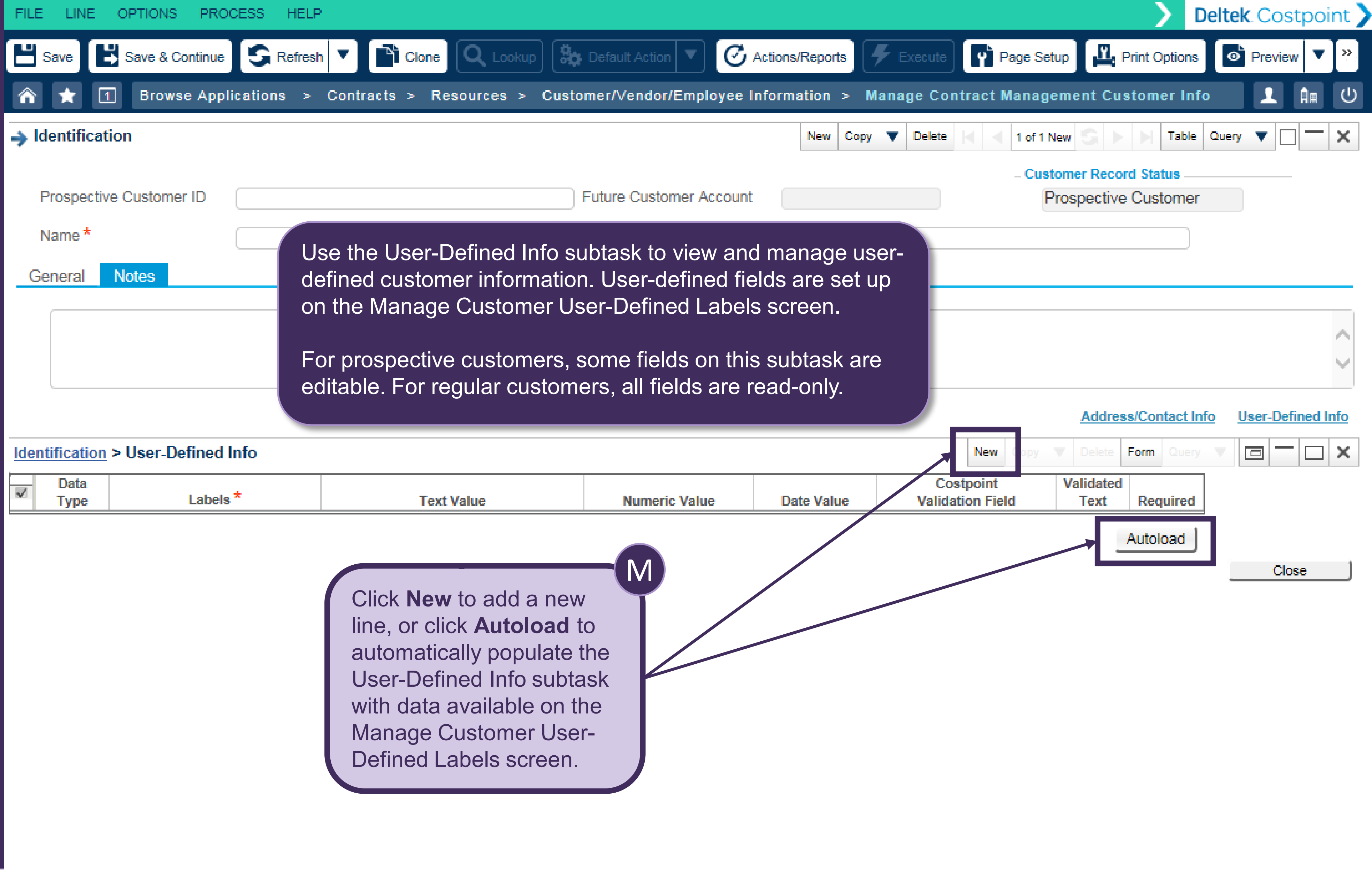
4
Approve Prospective Vendors

5
Manage Contract Management Employee Info



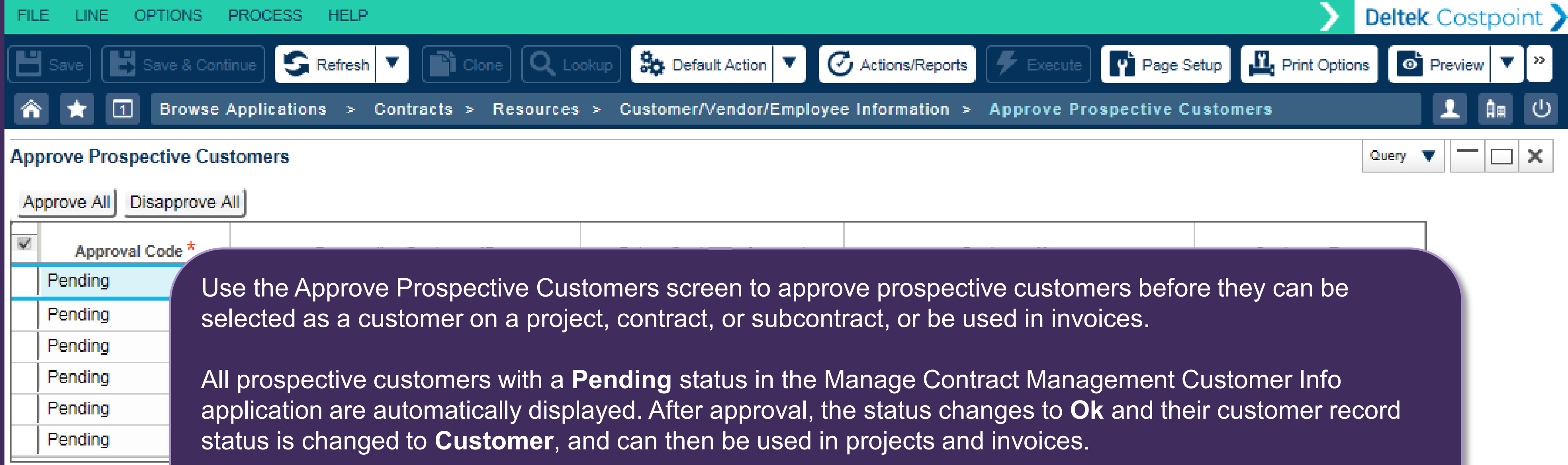
Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Use the Approve Prospective Customers screen to approve prospective customers before they can be selected as a customer on a project, contract, or subcontract, or be used in invoices.

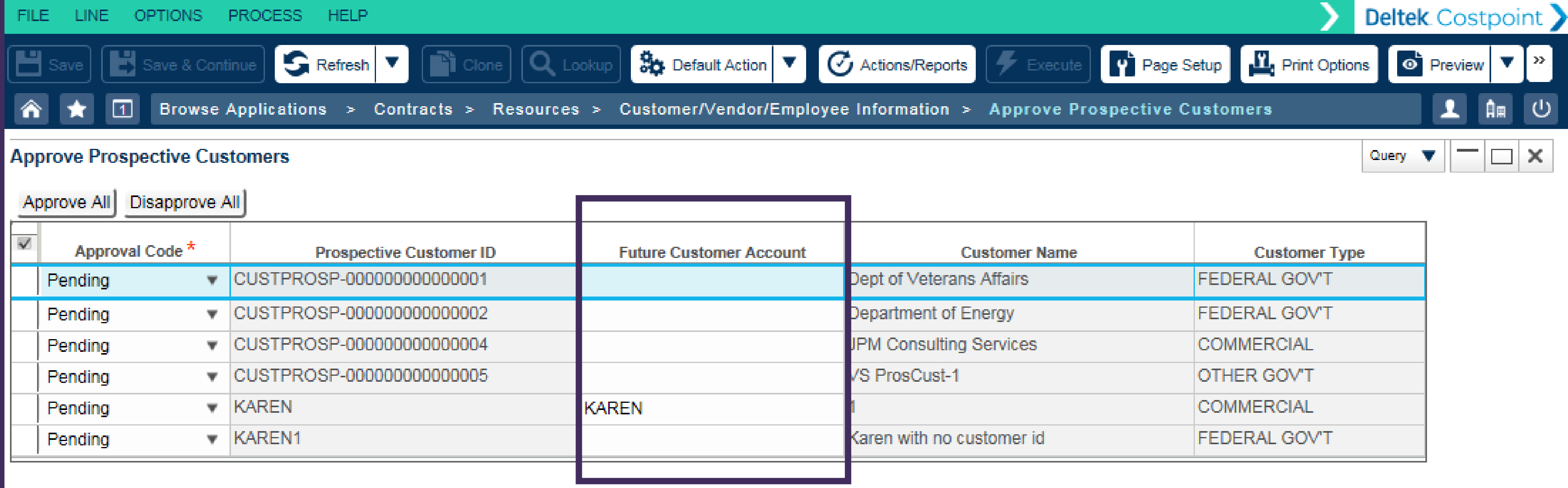
All prospective customers with a **Pending** status in the Manage Contract Management Customer Info application are automatically displayed. After approval, the status changes to **Ok** and their customer record status is changed to **Customer**, and can then be used in projects and invoices.

You can also use this screen to view and manage information for regular customers. Note, however, that not all fields are editable for regular customers.

Follow the steps on the next slides to accomplish the Approve Prospective Customers screen.

Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Approval Code *	Prospective Customer ID	Future Customer Account	Customer Name	Customer Type
Pending	CUSTPROSP-000000000000001		Dept of Veterans Affairs	FEDERAL GOV'T
Pending	CUSTPROSP-000000000000002		Department of Energy	FEDERAL GOV'T
Pending	CUSTPROSP-000000000000004		JPM Consulting Services	COMMERCIAL
Pending	CUSTPROSP-000000000000005		VS ProsCust-1	OTHER GOV'T
Pending	KAREN	KAREN	1	COMMERCIAL
Pending	KAREN1		Karen with no customer id	FEDERAL GOV'T

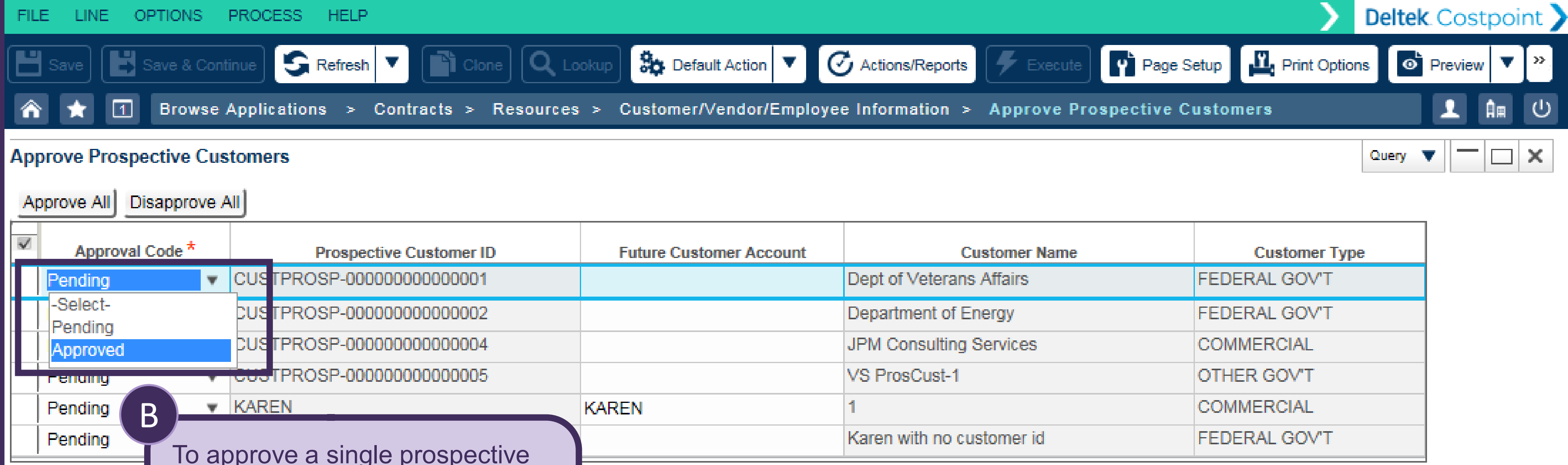
A

Enter a unique customer account for the prospective customer.

You must enter a value in this field before you can approve a prospective customer. You can leave this field blank and save the prospective customer record, but you will not be able to approve it.

Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. **Approve Prospective Customers**
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



B

To approve a single prospective customer, click the corresponding **Approval Code** drop-down list of the prospective customer and select **Approved**.

Customer/Vendor/ Employee Information

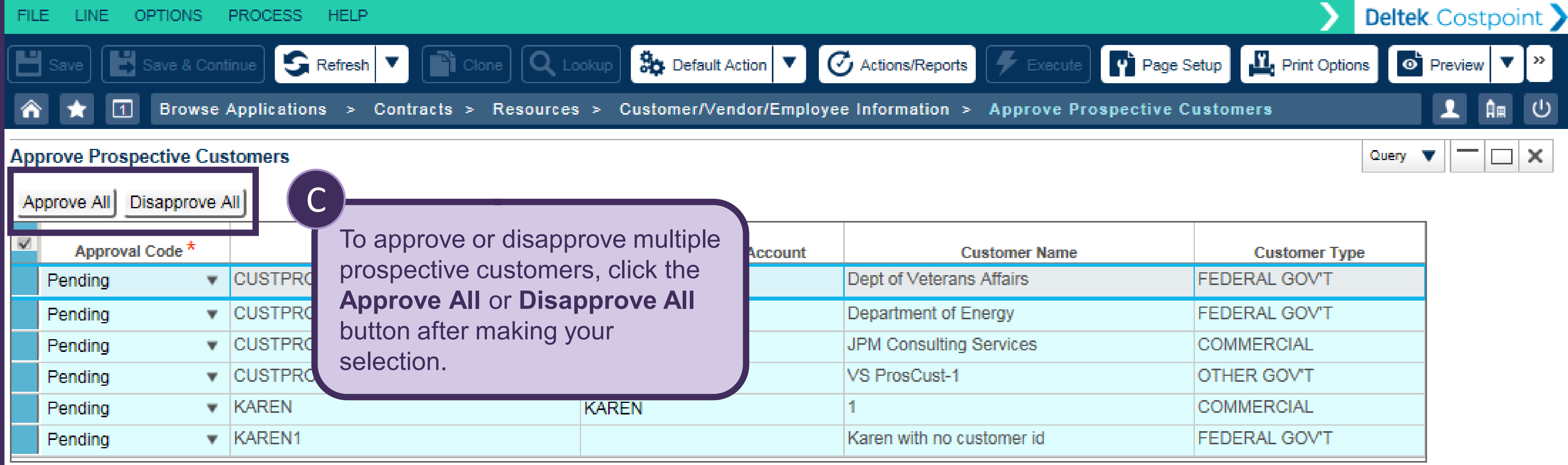
1 Manage Contract Management Customer Info

2 **Approve Prospective Customers**

3 Manage Contract Management Vendor Info

4 Approve Prospective Vendors

5 Manage Contract Management Employee Info



C

To approve or disapprove multiple prospective customers, click the **Approve All** or **Disapprove All** button after making your selection.

Here are some guidelines when selecting records:

- To select all records, click the **Select All Rows** ☑ check box.
- To select multiple contiguous customers, hold the SHIFT key on your keyboard and highlight those rows with your cursor.
- To select multiple non-contiguous customers, hold the CTRL key on your keyboard and highlight those rows with your cursor.

Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. **Approve Prospective Customers**
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info

FILE LINE OPTIONS PROCESS HELP

Deltek Costpoint

Save | Save & Continue | Refresh | Clone | Lookup | Default Action | Actions/Reports | Execute | Page Setup | Print Options | Preview

Browse Applications > Contracts > Resources > Customer/Vendor/Employee Information > Approve Prospective Customers

Approve Prospective Cu

Query

D Click **Save** or **Save & Continue** to save the record.

Approve All | Disapprove A

Approval Code *	Prospective Customer ID	Future Customer Account	Customer Name	Customer Type
Approved	CUSTPROSP-000000000000001		Dept of Veterans Affairs	FEDERAL GOV'T
Approved	CUSTPROSP-000000000000002		Department of Energy	FEDERAL GOV'T
Approved	CUSTPROSP-000000000000004		JPM Consulting Services	COMMERCIAL
Approved	CUSTPROSP-000000000000005		VS ProsCust-1	OTHER GOV'T
Approved	KAREN	KAREN	1	COMMERCIAL
Approved	KAREN1		Karen with no customer id	FEDERAL GOV'T

Customer/Vendor/ Employee Information

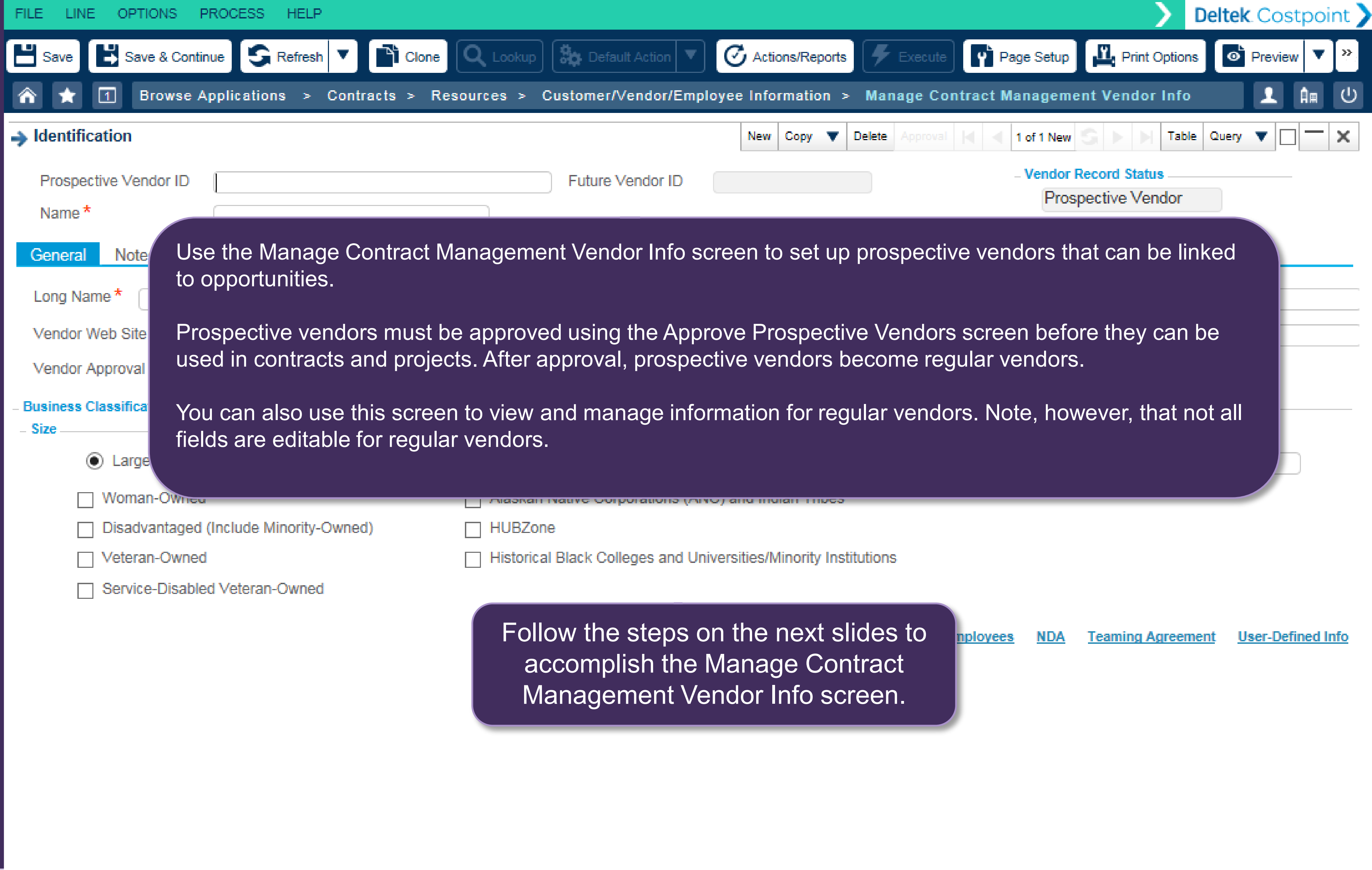
1 Manage Contract Management Customer Info

2 Approve Prospective Customers

3 Manage Contract Management Vendor Info

4 Approve Prospective Vendors

5 Manage Contract Management Employee Info



Use the Manage Contract Management Vendor Info screen to set up prospective vendors that can be linked to opportunities.

Prospective vendors must be approved using the Approve Prospective Vendors screen before they can be used in contracts and projects. After approval, prospective vendors become regular vendors.

You can also use this screen to view and manage information for regular vendors. Note, however, that not all fields are editable for regular vendors.

Follow the steps on the next slides to accomplish the Manage Contract Management Vendor Info screen.

Customer/Vendor/ Employee Information

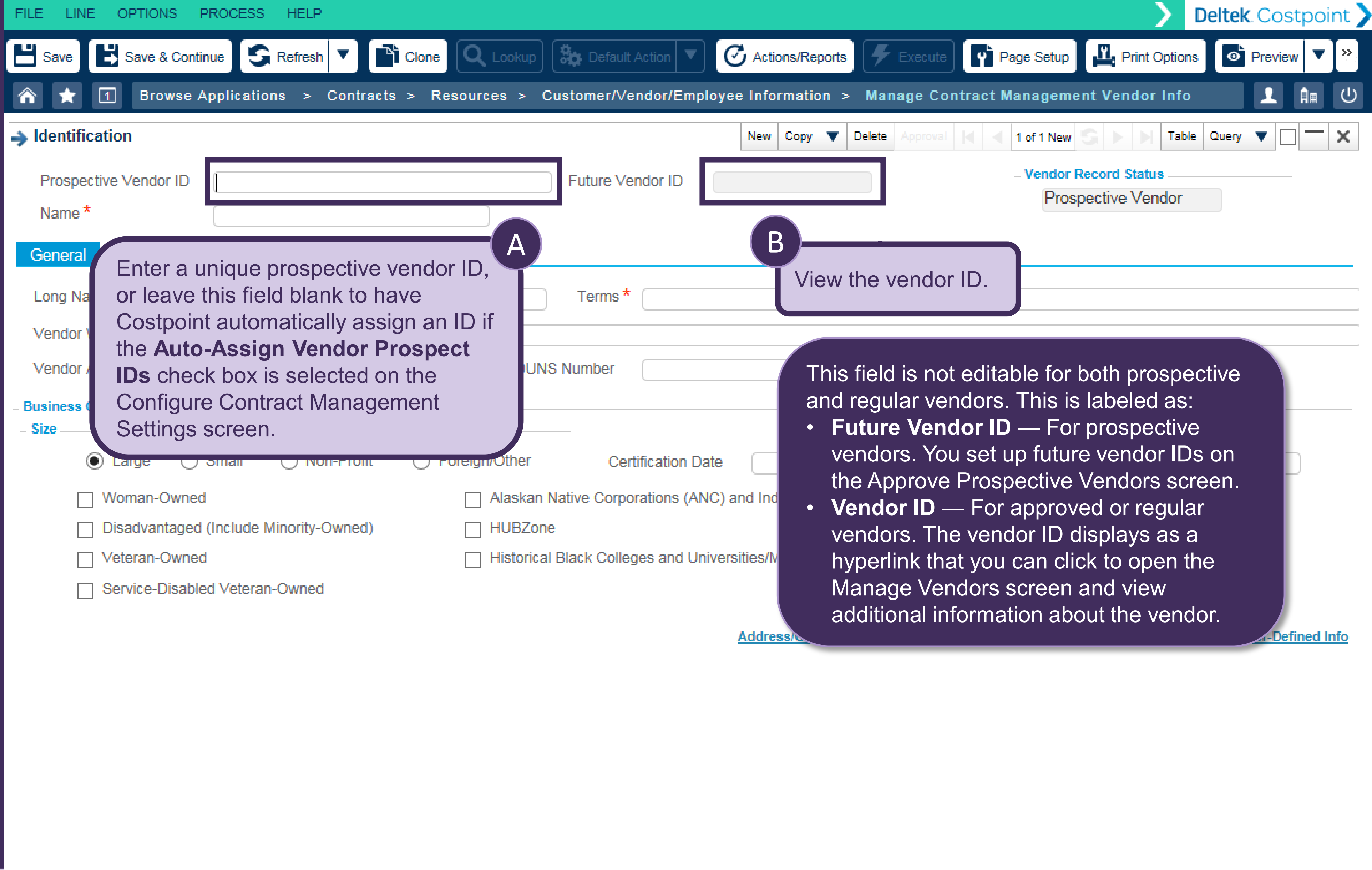
1 Manage Contract Management Customer Info

2 Approve Prospective Customers

3 **Manage Contract Management Vendor Info**

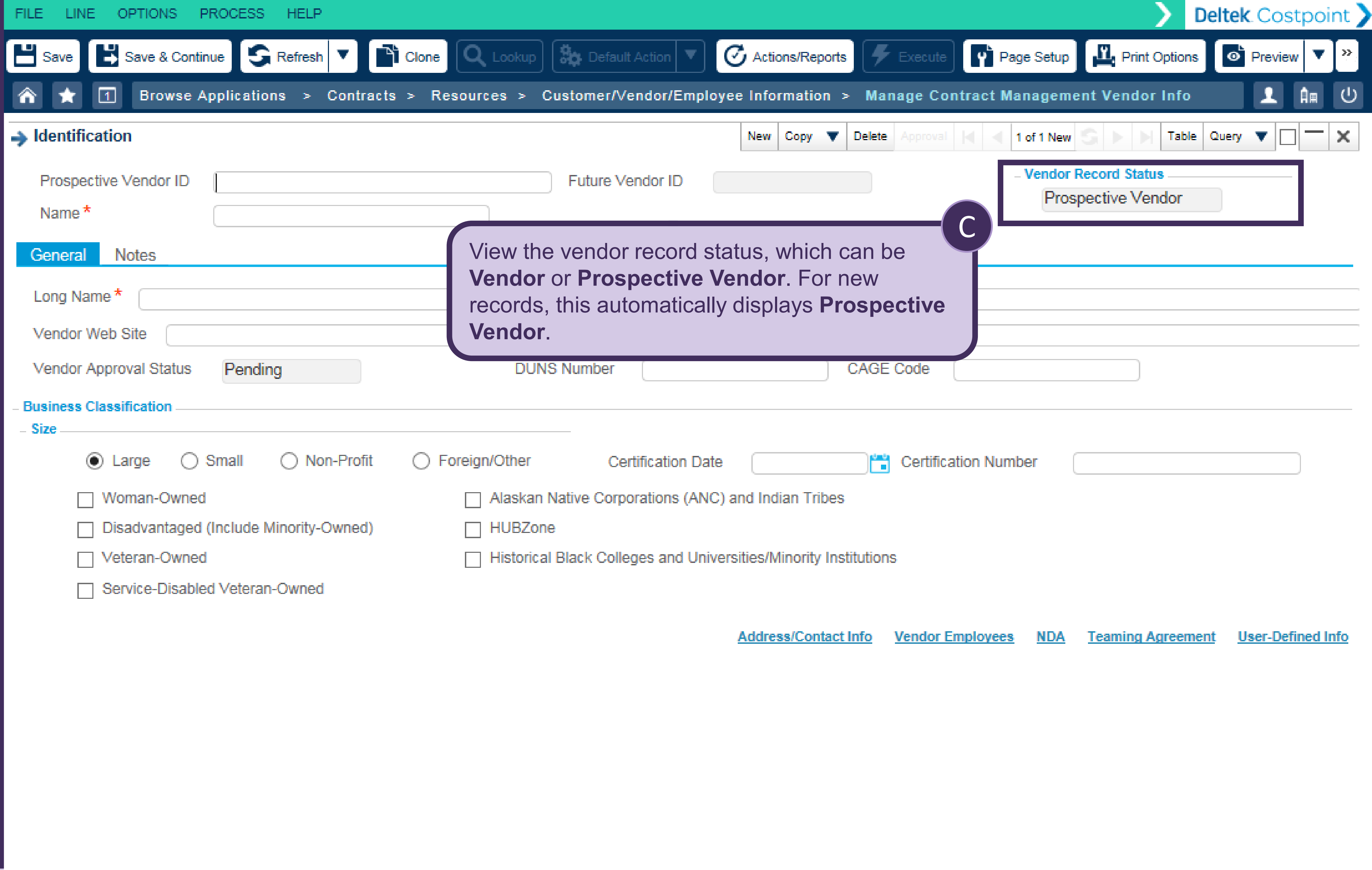
4 Approve Prospective Vendors

5 Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. **Manage Contract Management Vendor Info**
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info

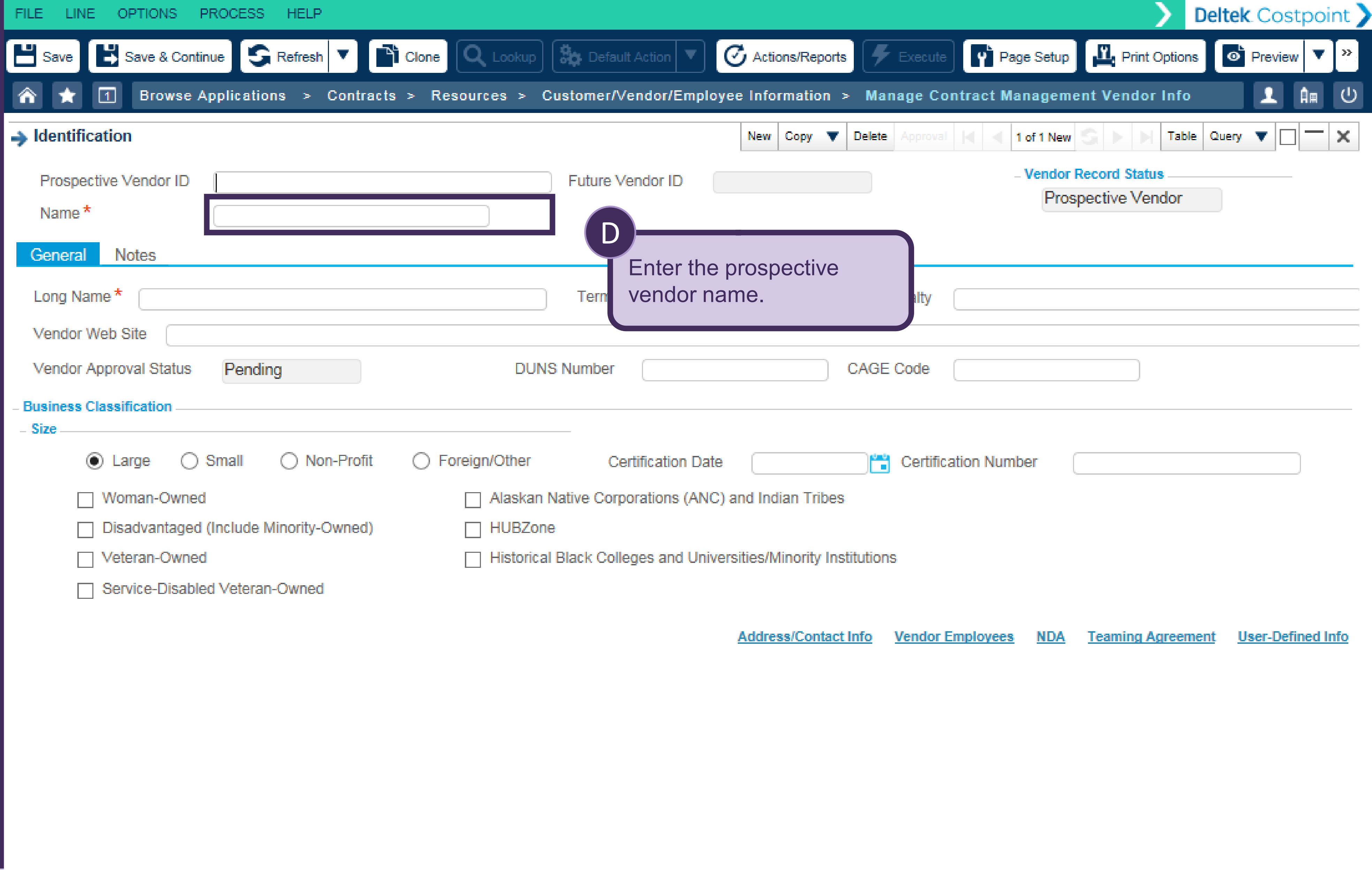


C

View the vendor record status, which can be **Vendor** or **Prospective Vendor**. For new records, this automatically displays **Prospective Vendor**.

Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

1 Manage Contract Management Customer Info

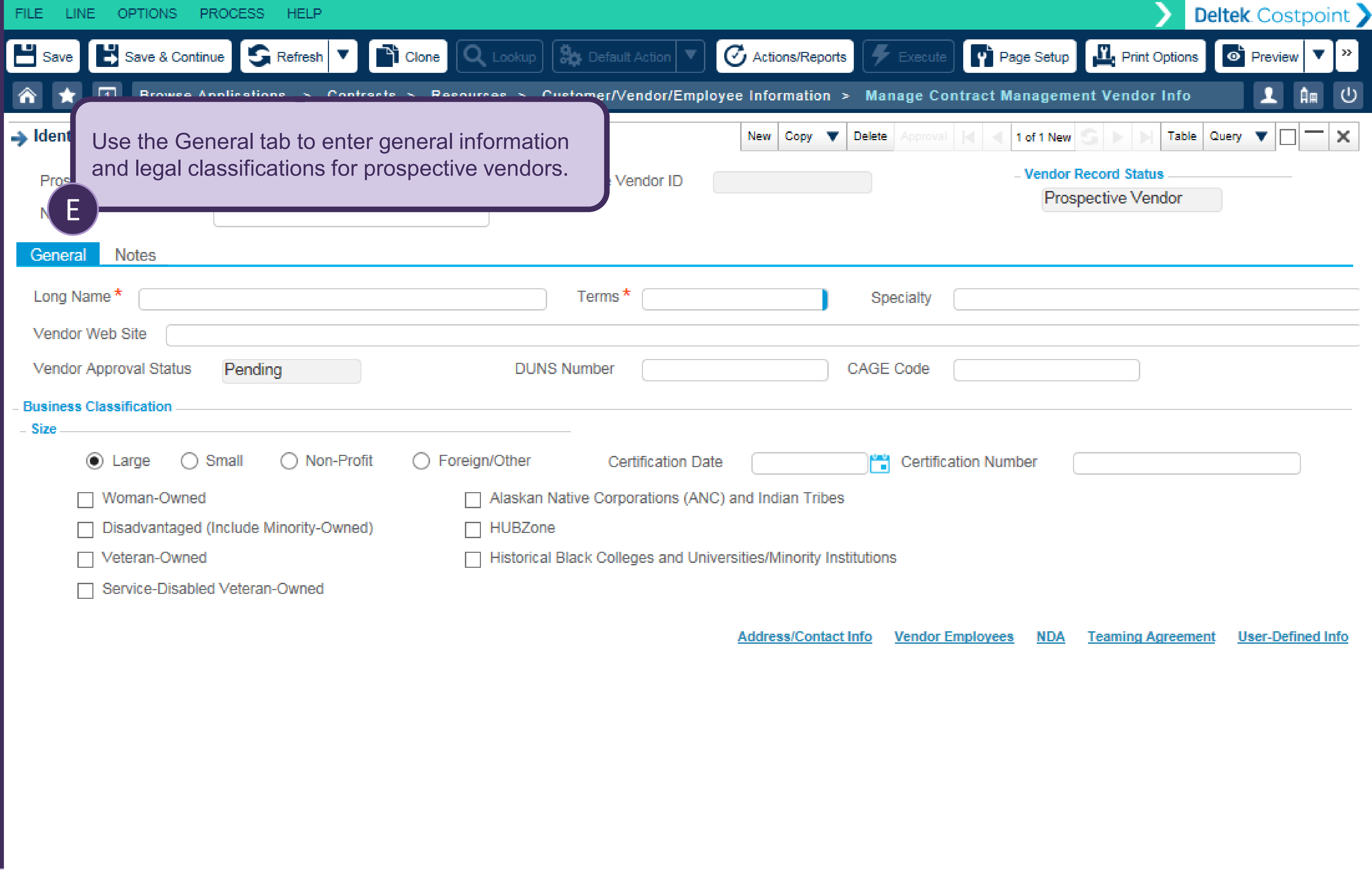
2 Approve Prospective Customers

3 Manage Contract Management Vendor Info

4 Approve Prospective Vendors

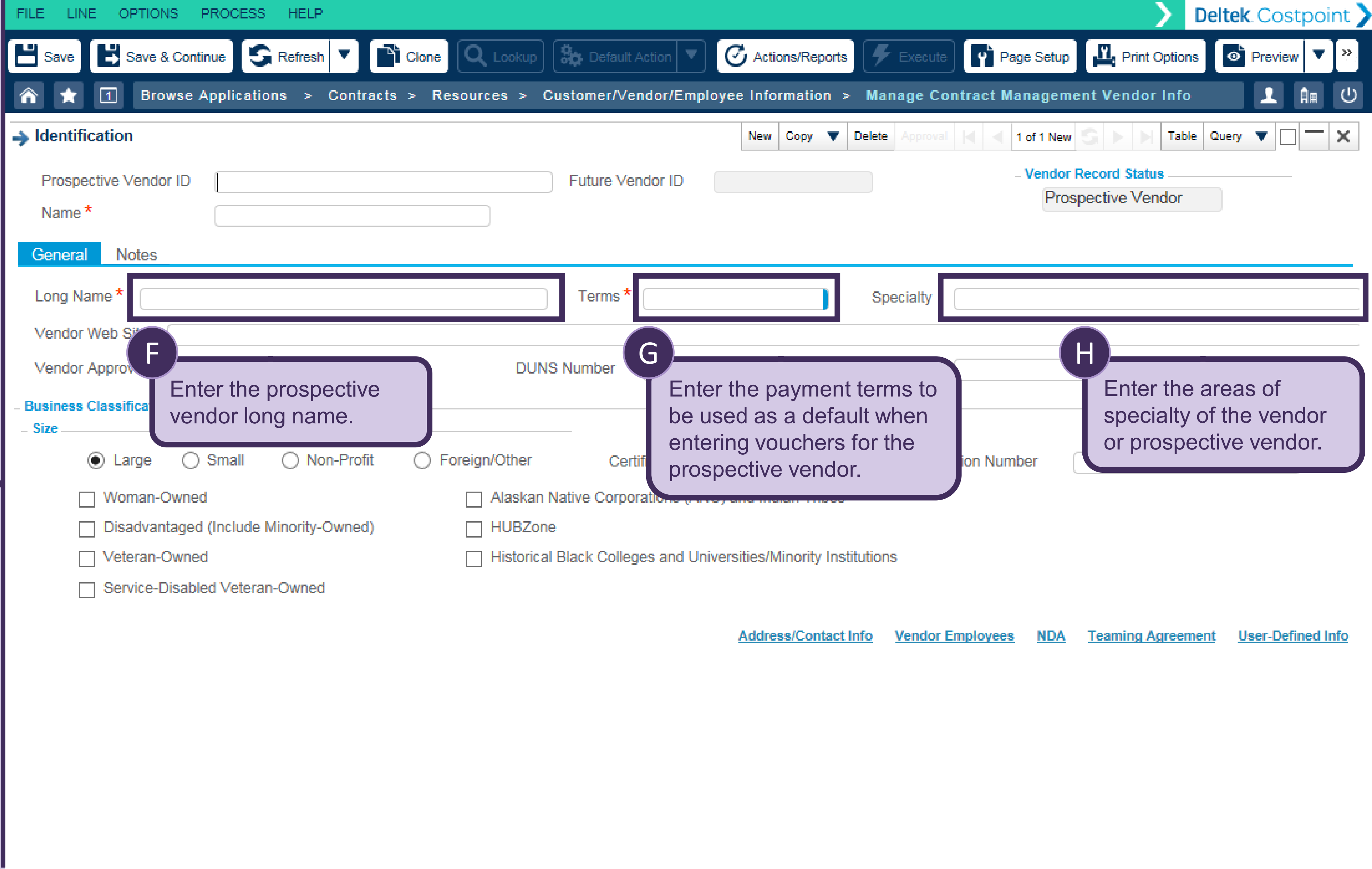
5 Manage Contract Management Employee Info

E Use the General tab to enter general information and legal classifications for prospective vendors.



Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

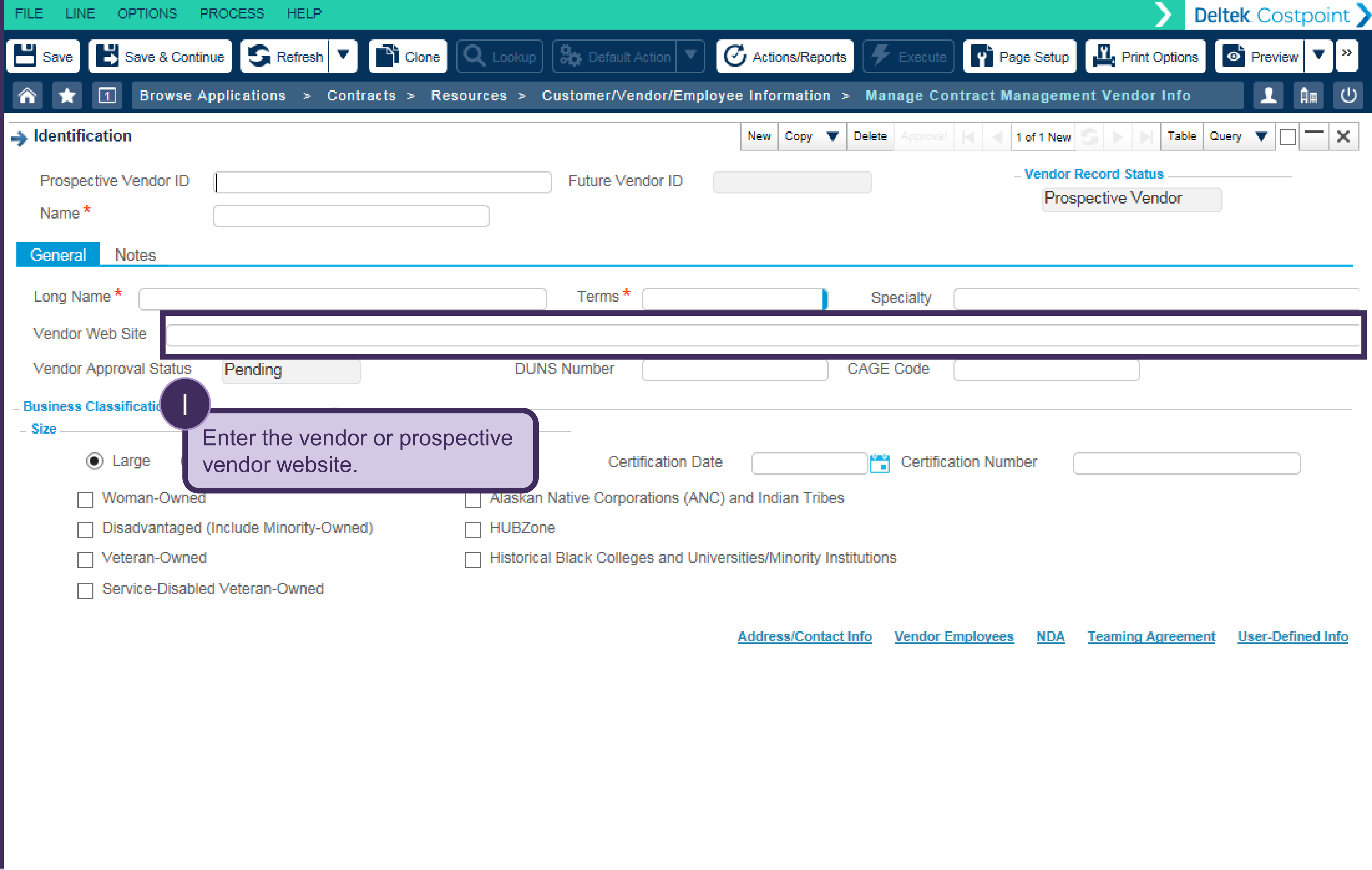
1 Manage Contract Management Customer Info

2 Approve Prospective Customers

3 Manage Contract Management Vendor Info

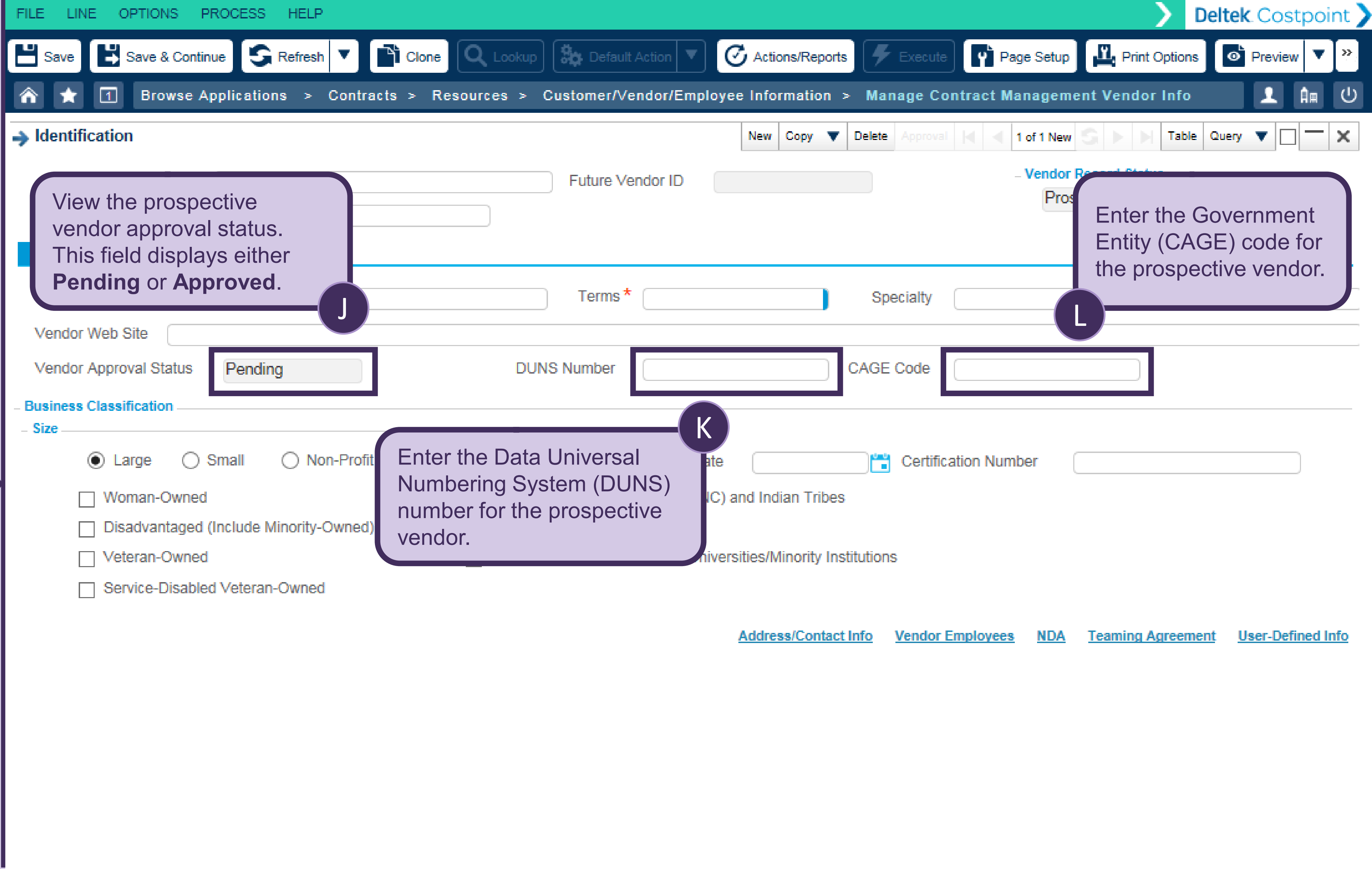
4 Approve Prospective Vendors

5 Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. **Manage Contract Management Vendor Info**
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

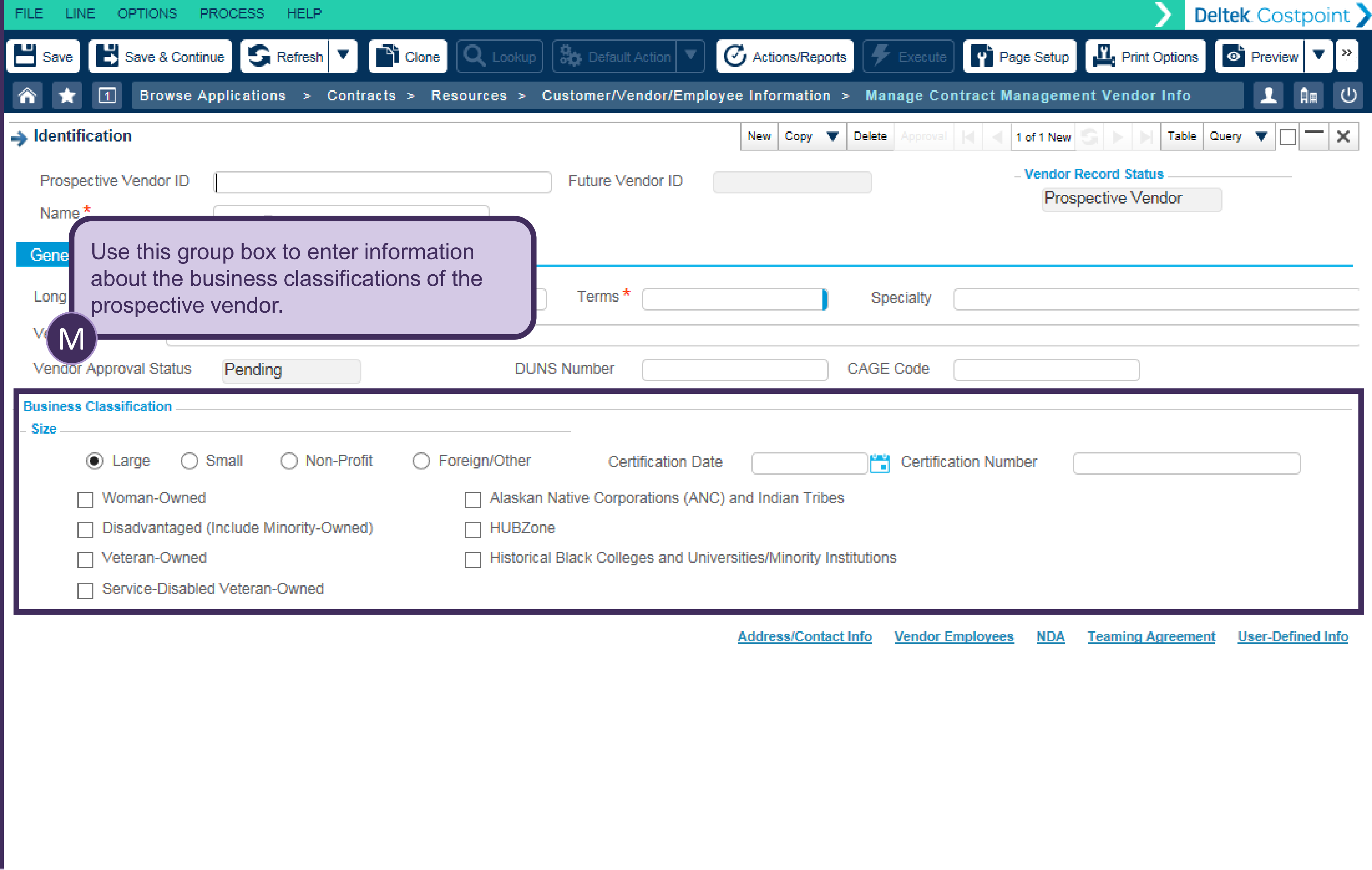
1 Manage Contract Management Customer Info

2 Approve Prospective Customers

3 Manage Contract Management Vendor Info

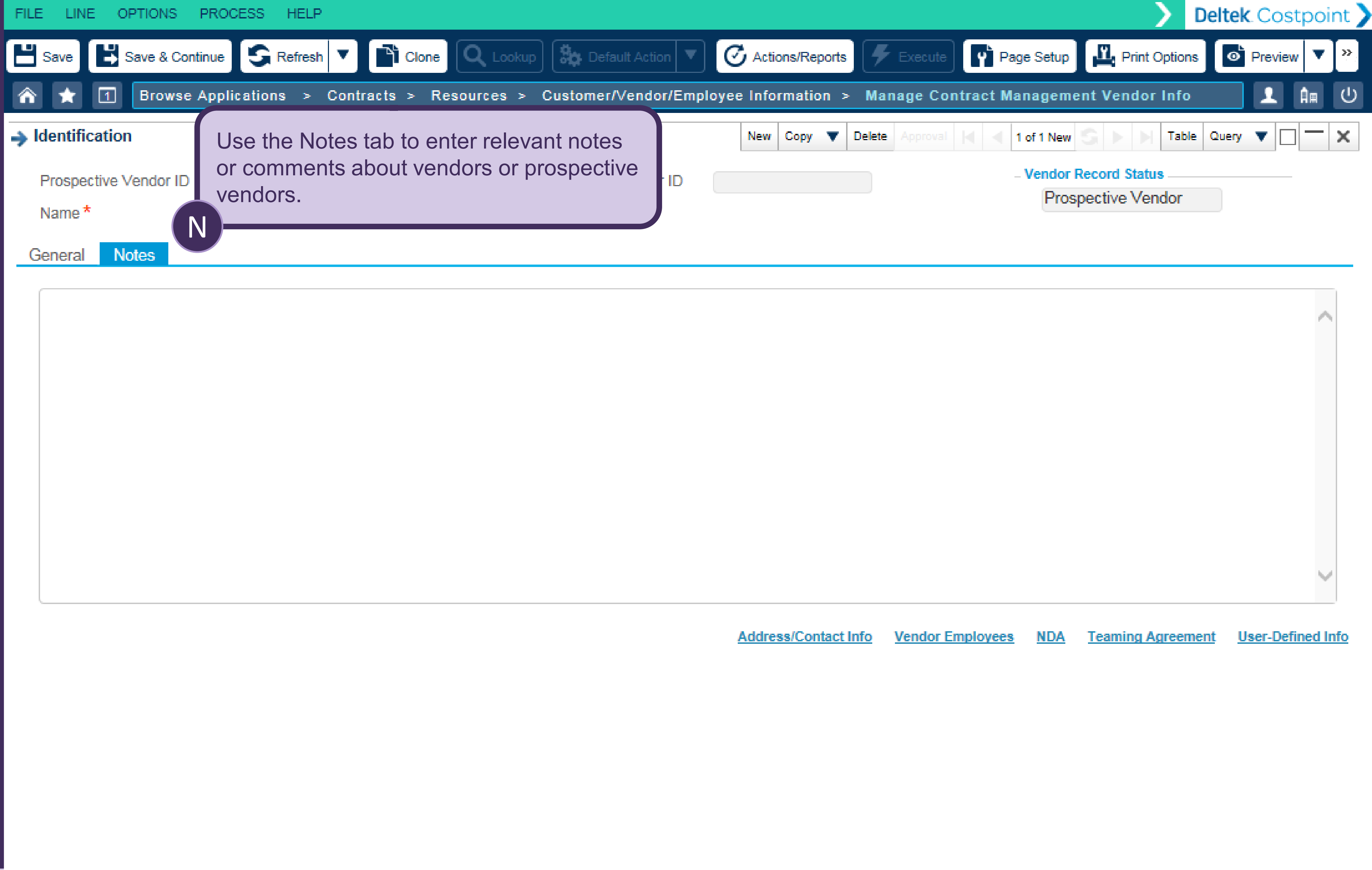
4 Approve Prospective Vendors

5 Manage Contract Management Employee Info



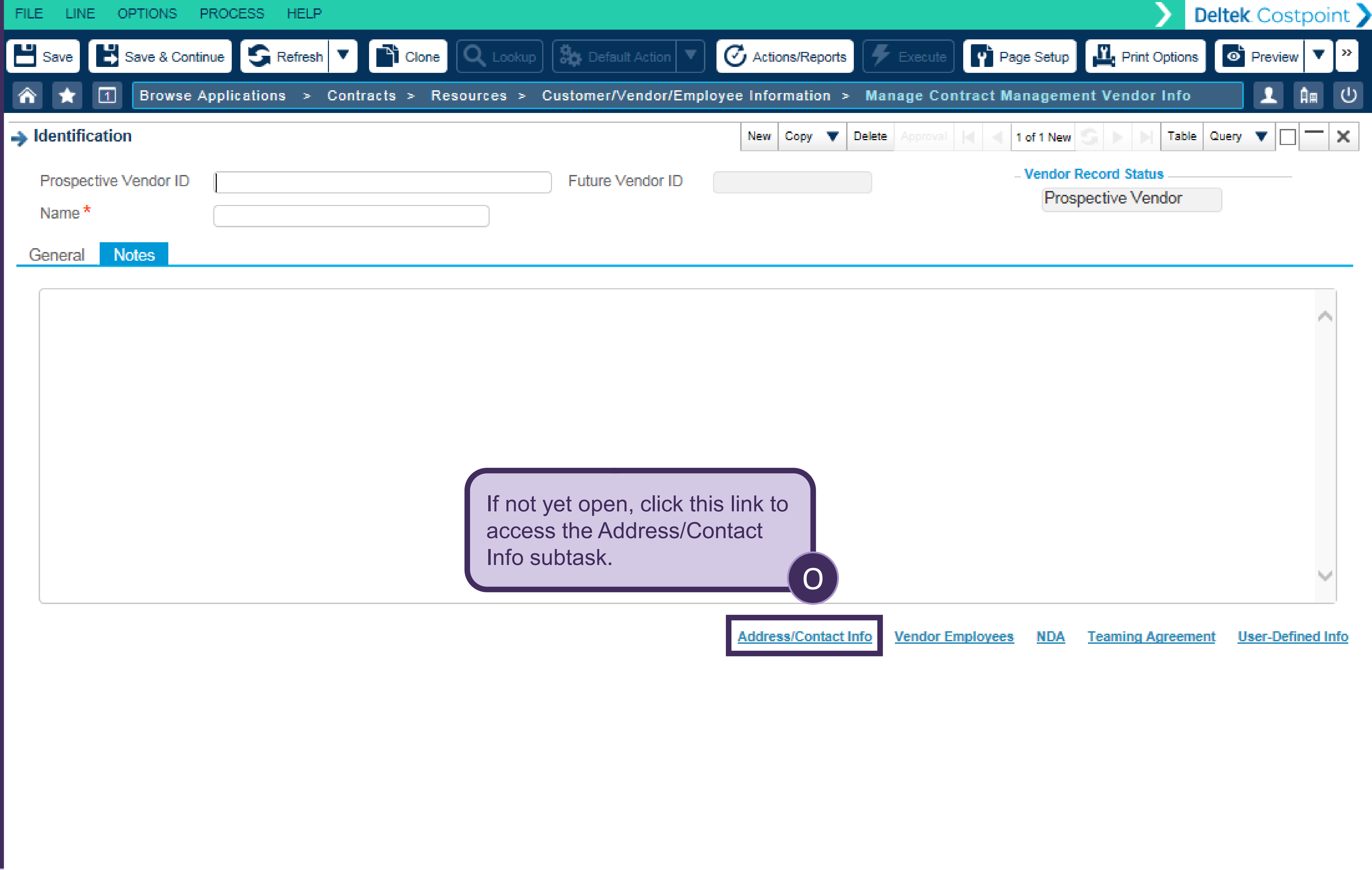
Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. **Manage Contract Management Vendor Info**
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



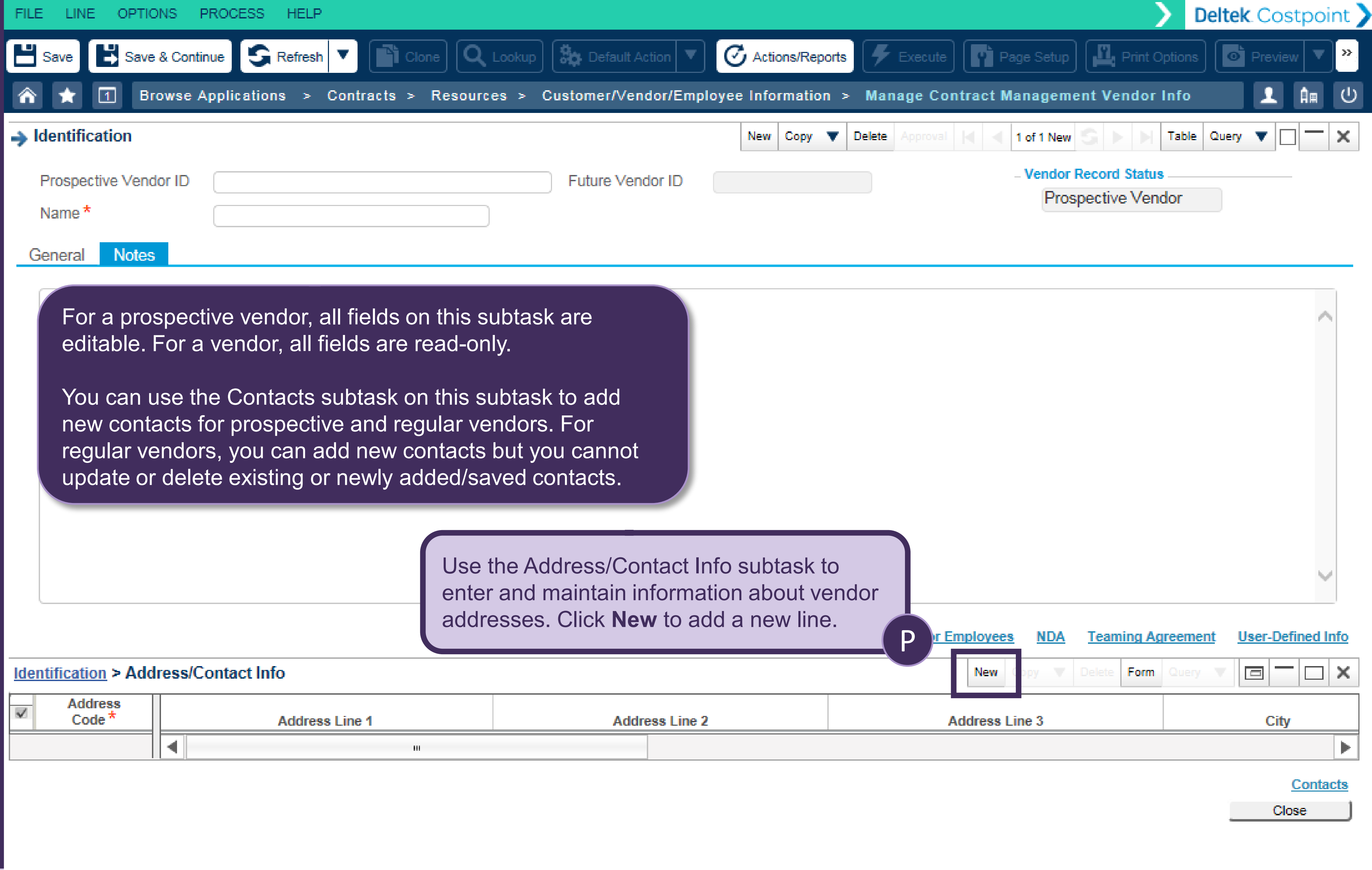
Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



For a prospective vendor, all fields on this subtask are editable. For a vendor, all fields are read-only.

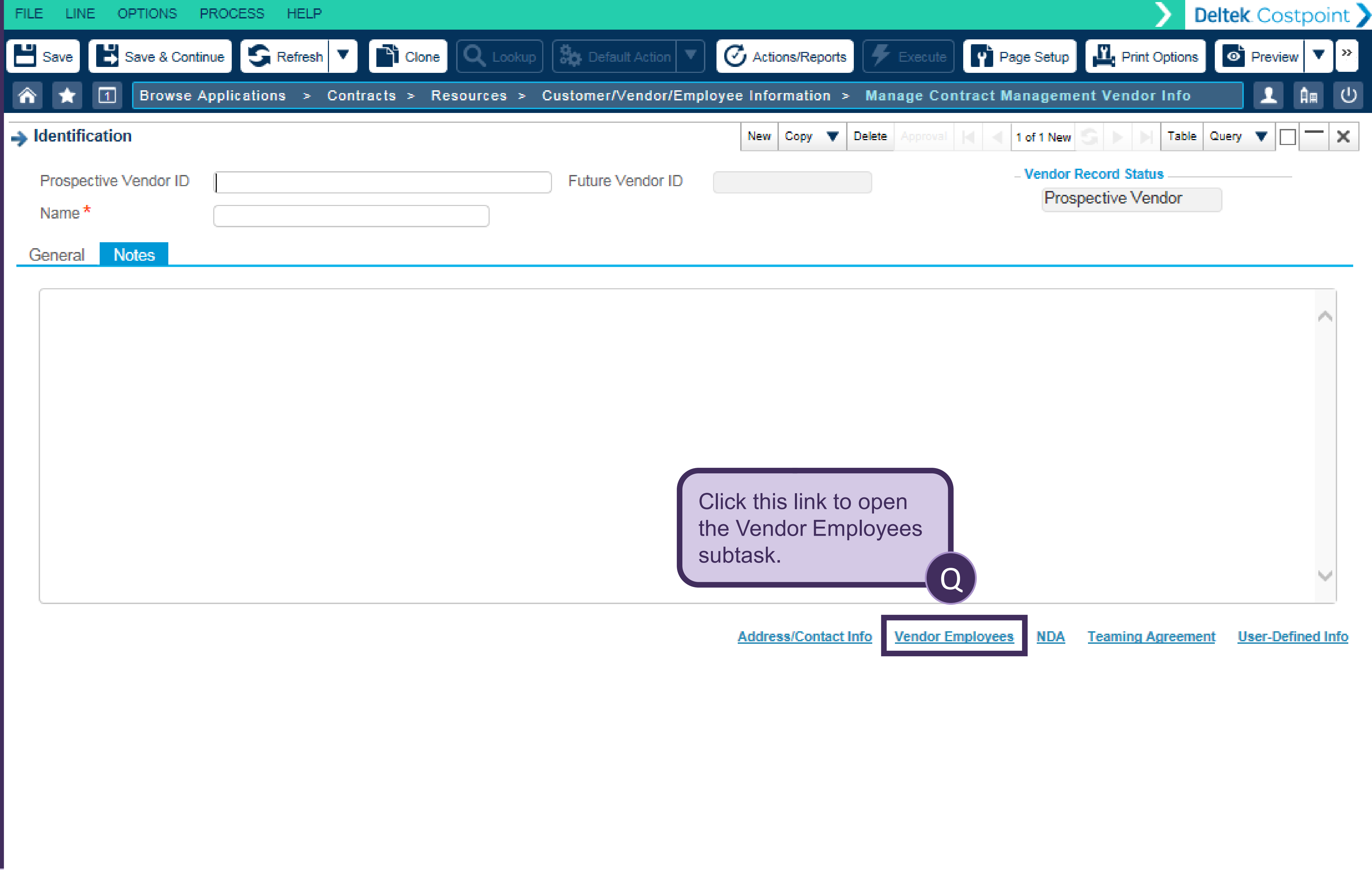
You can use the Contacts subtask on this subtask to add new contacts for prospective and regular vendors. For regular vendors, you can add new contacts but you cannot update or delete existing or newly added/saved contacts.

Use the Address/Contact Info subtask to enter and maintain information about vendor addresses. Click **New** to add a new line.

P

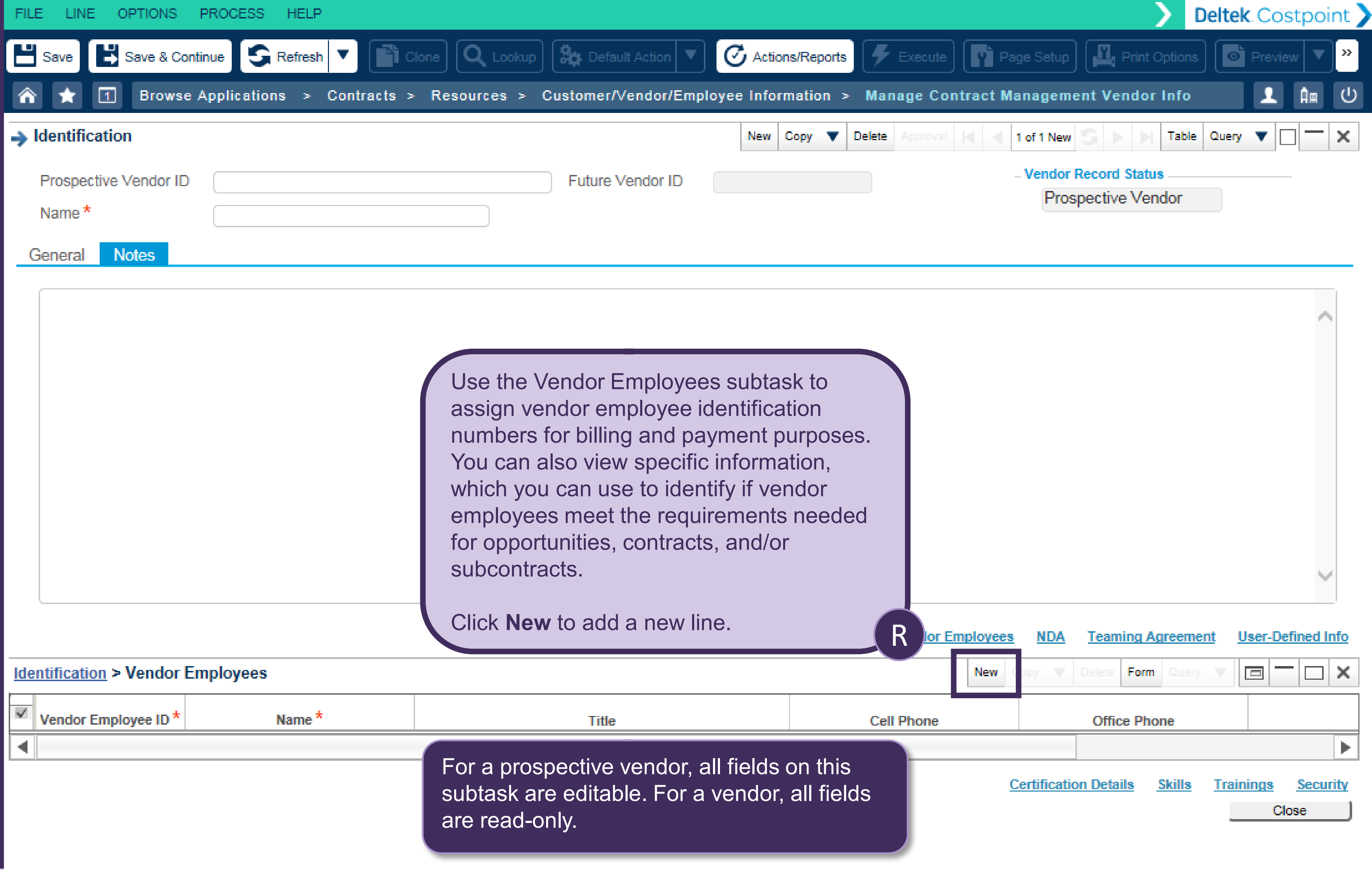
Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. **Manage Contract Management Vendor Info**
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Use the Vendor Employees subtask to assign vendor employee identification numbers for billing and payment purposes. You can also view specific information, which you can use to identify if vendor employees meet the requirements needed for opportunities, contracts, and/or subcontracts.

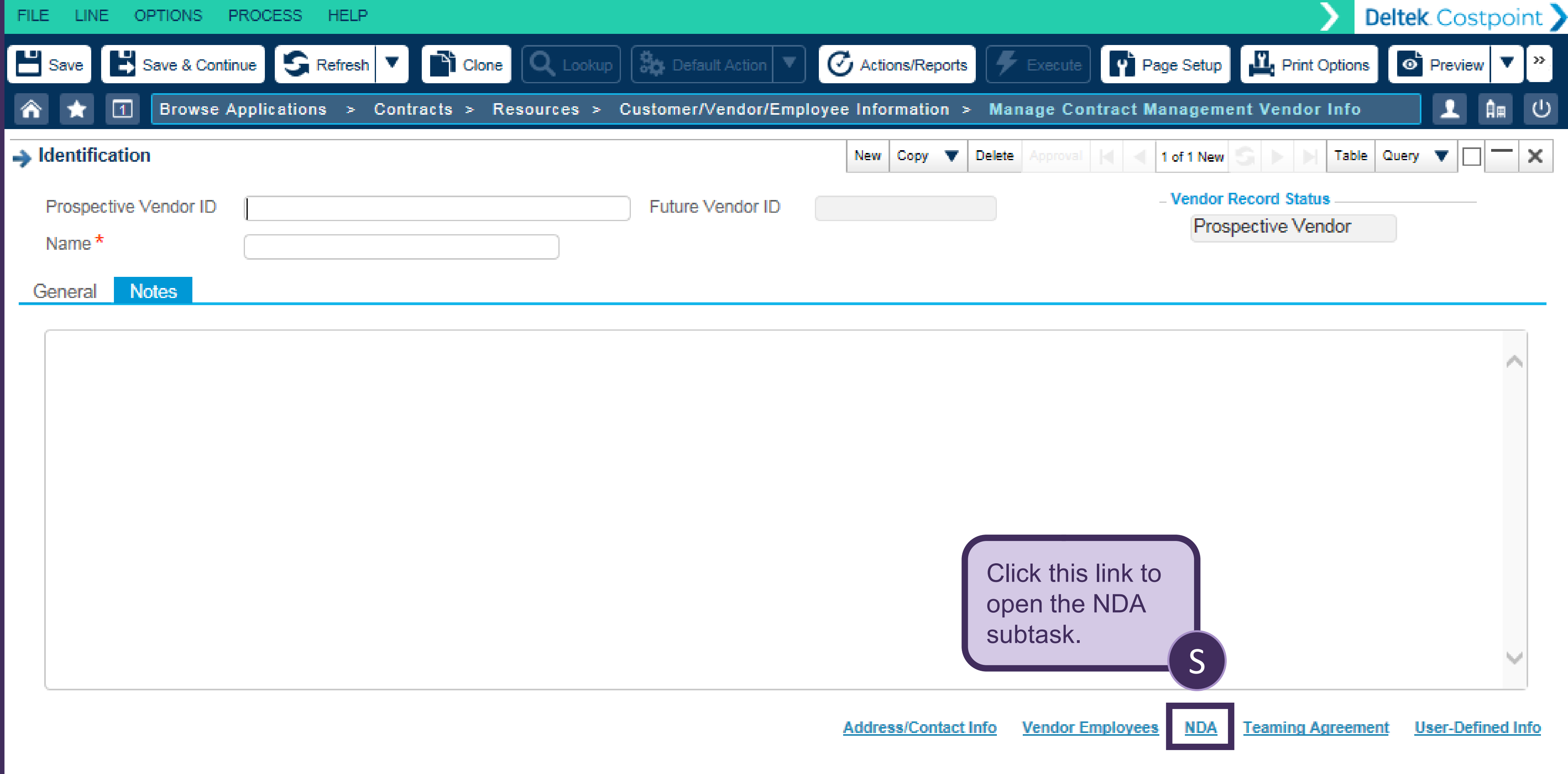
Click **New** to add a new line.

R

For a prospective vendor, all fields on this subtask are editable. For a vendor, all fields are read-only.

Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

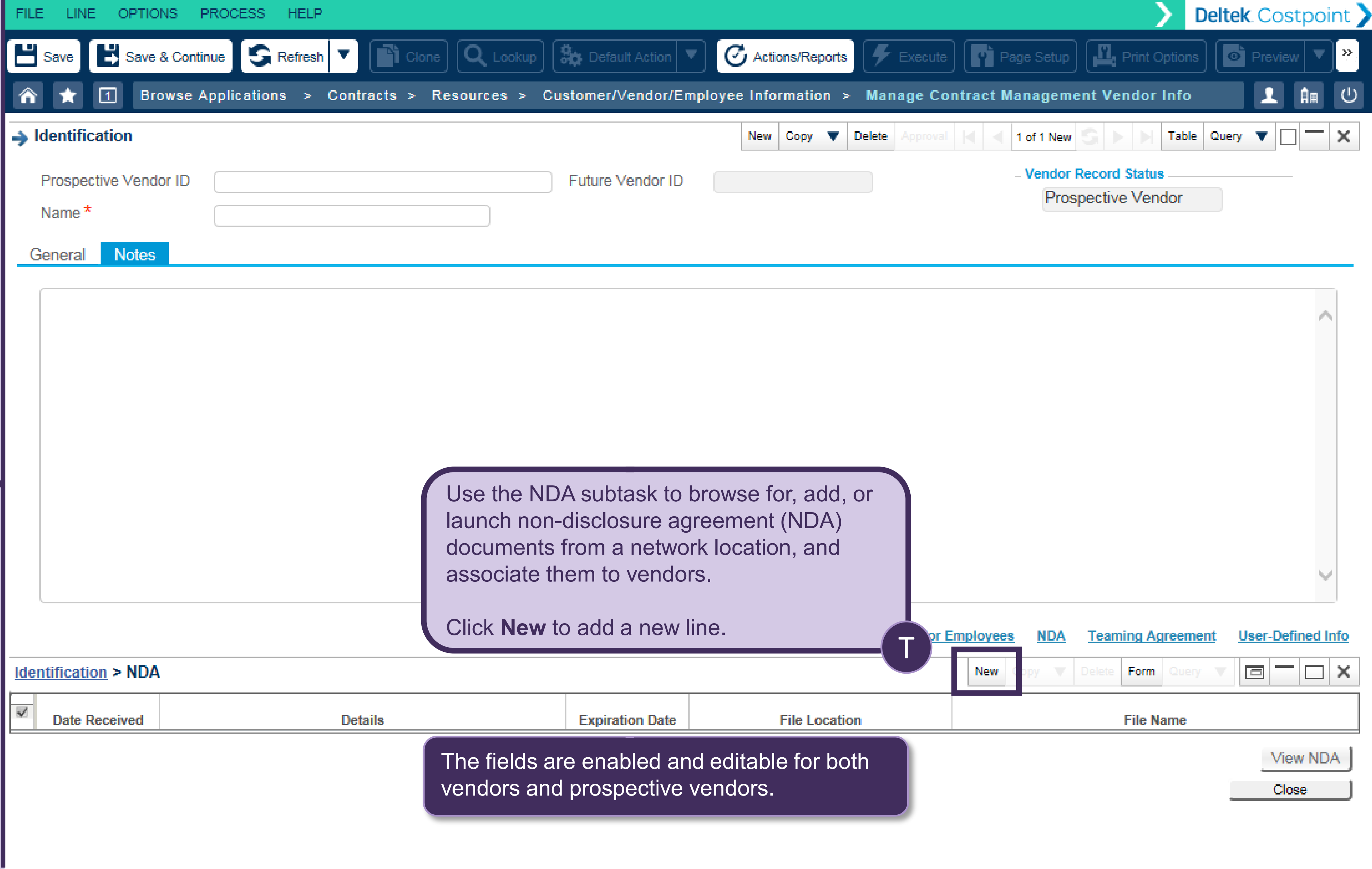
1 Manage Contract Management Customer Info

2 Approve Prospective Customers

3 Manage Contract Management Vendor Info

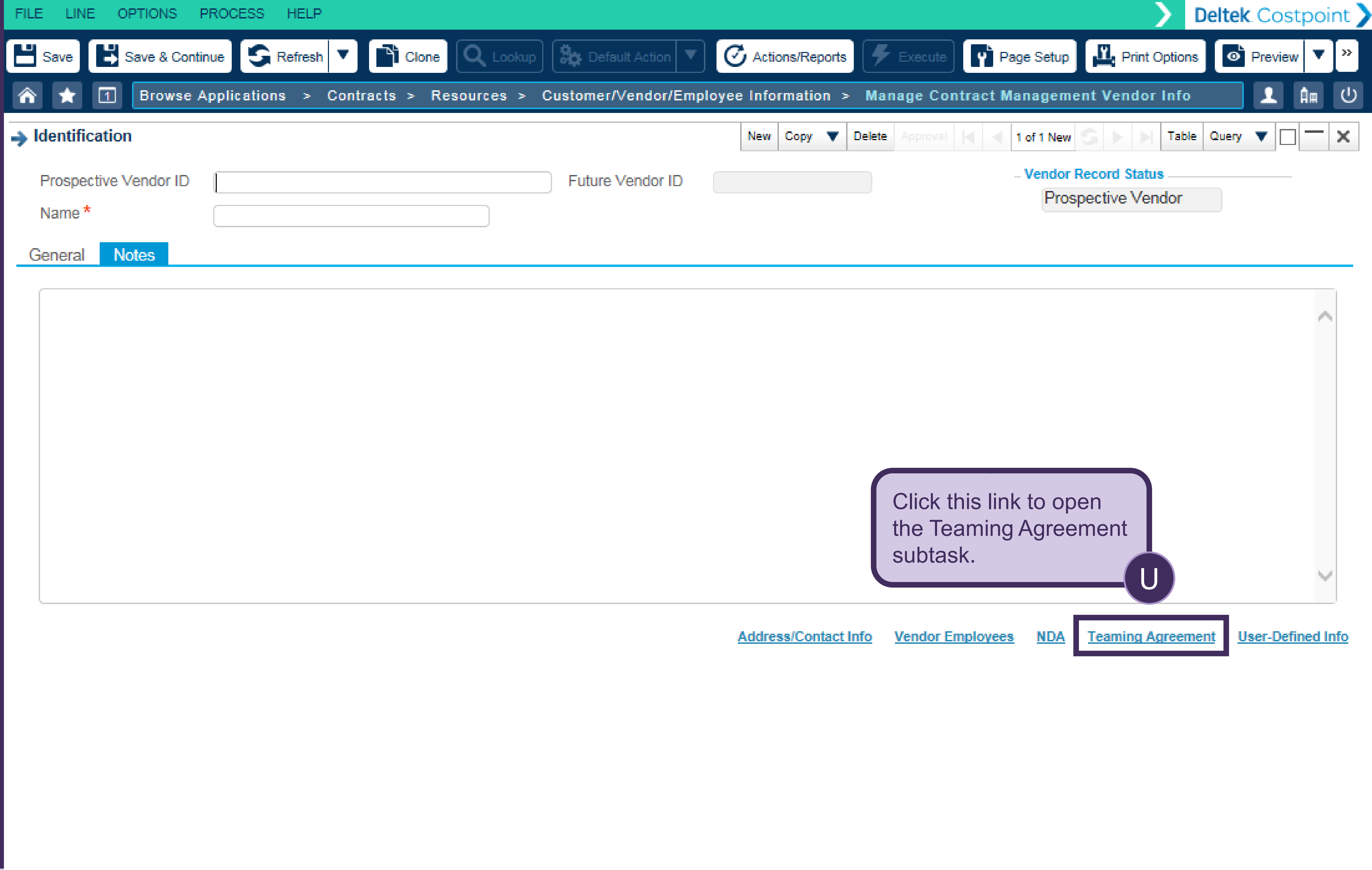
4 Approve Prospective Vendors

5 Manage Contract Management Employee Info



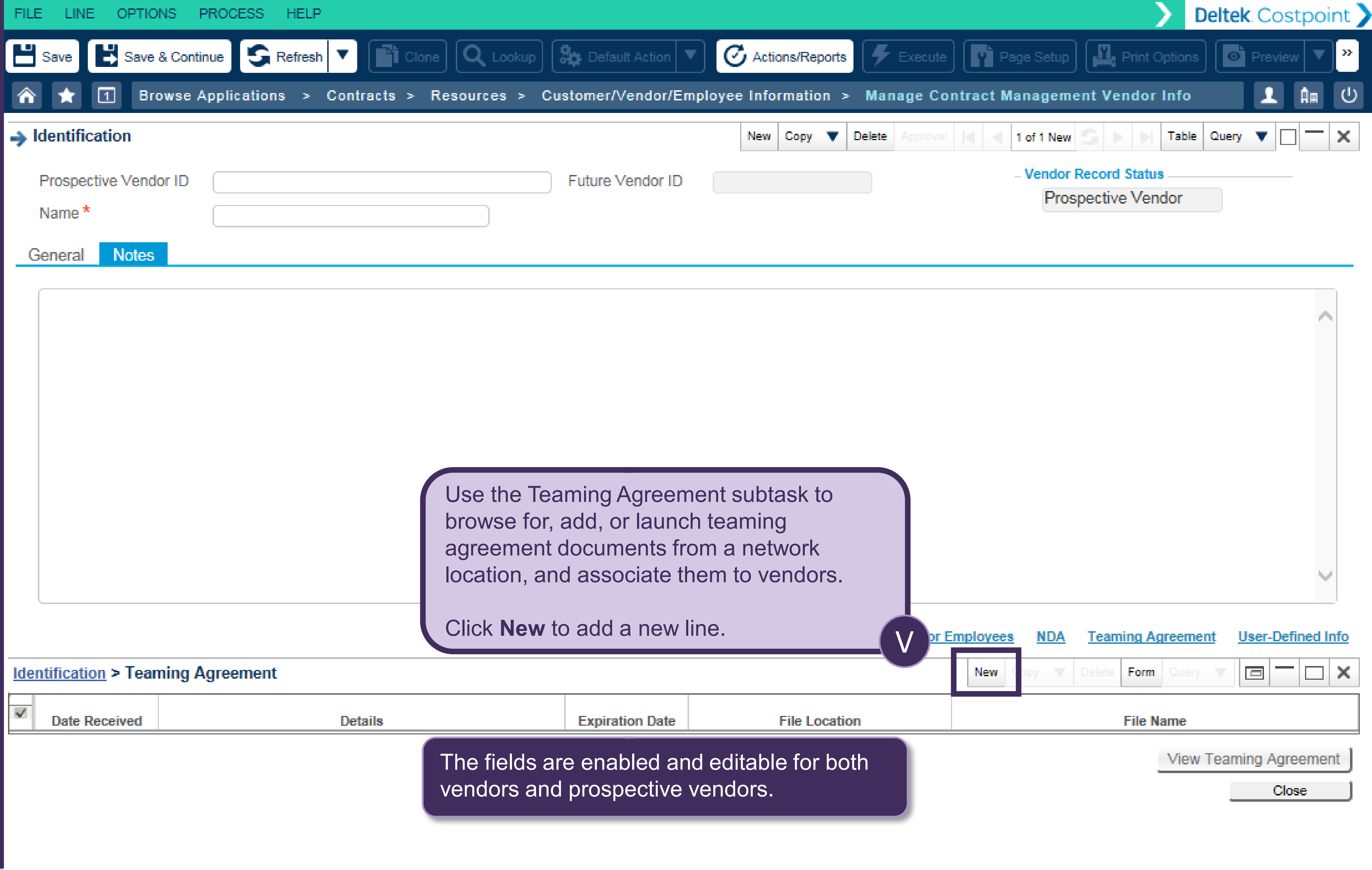
Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. **Manage Contract Management Vendor Info**
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

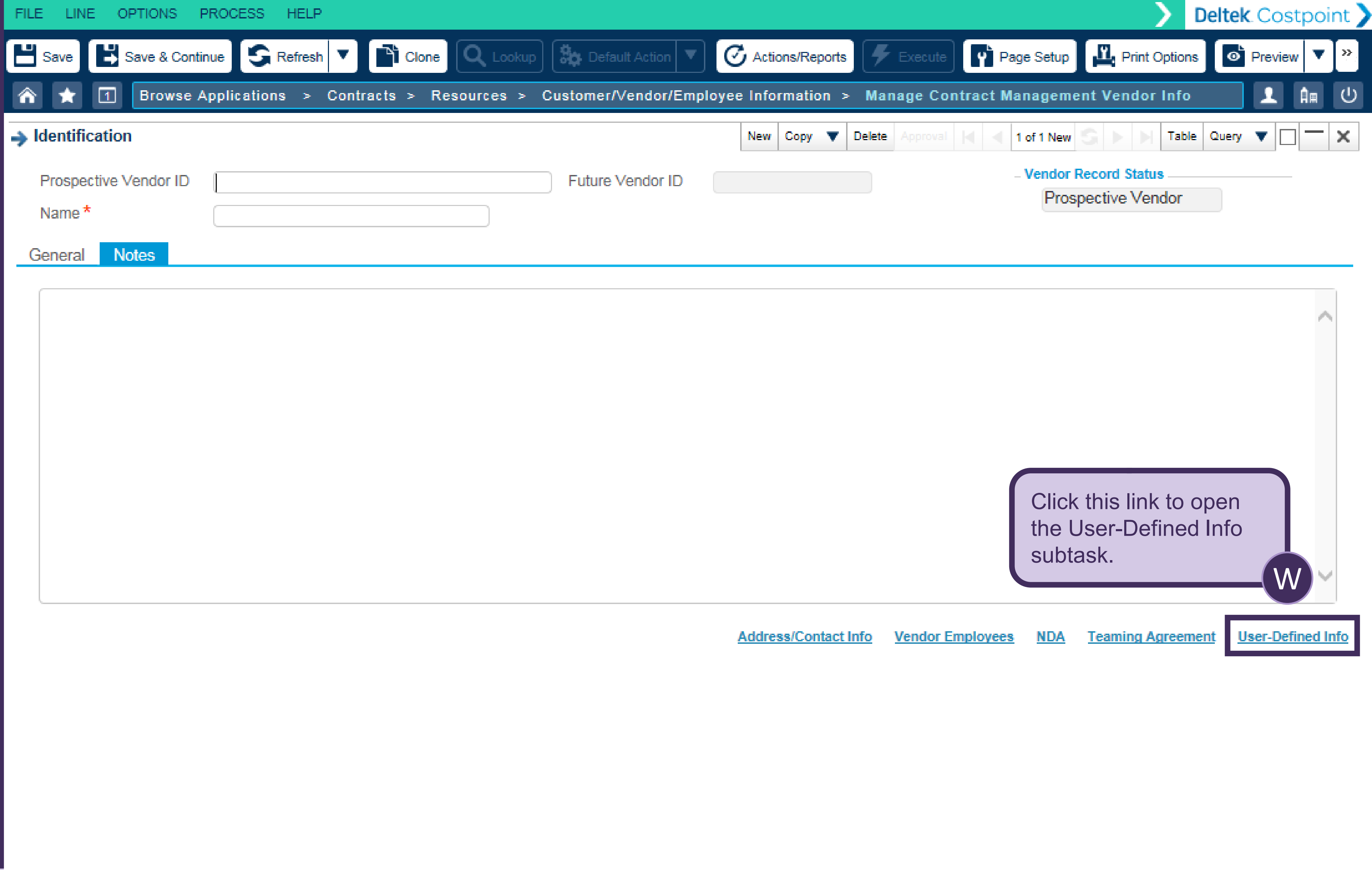
1 Manage Contract Management Customer Info

2 Approve Prospective Customers

3 Manage Contract Management Vendor Info

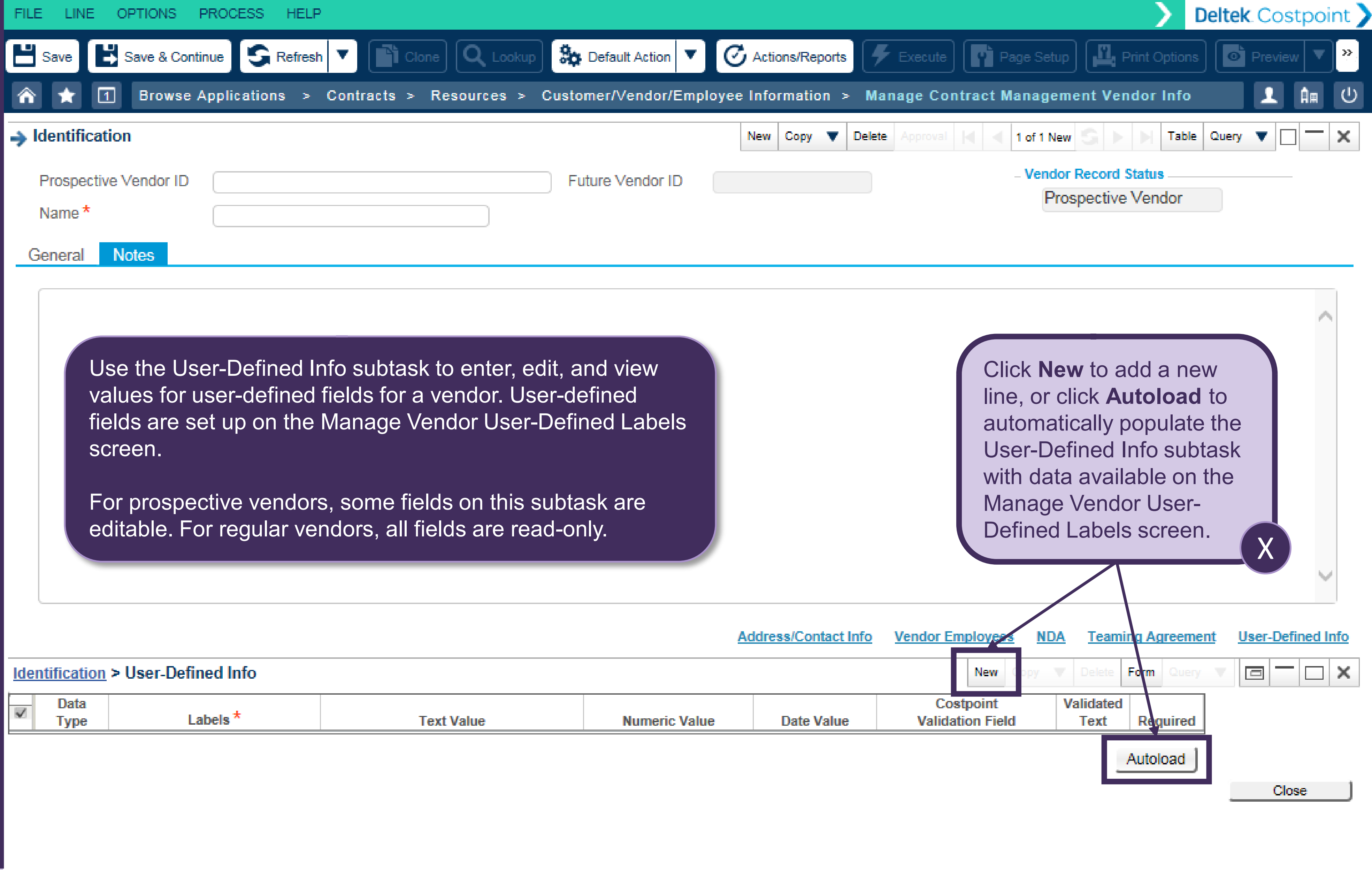
4 Approve Prospective Vendors

5 Manage Contract Management Employee Info



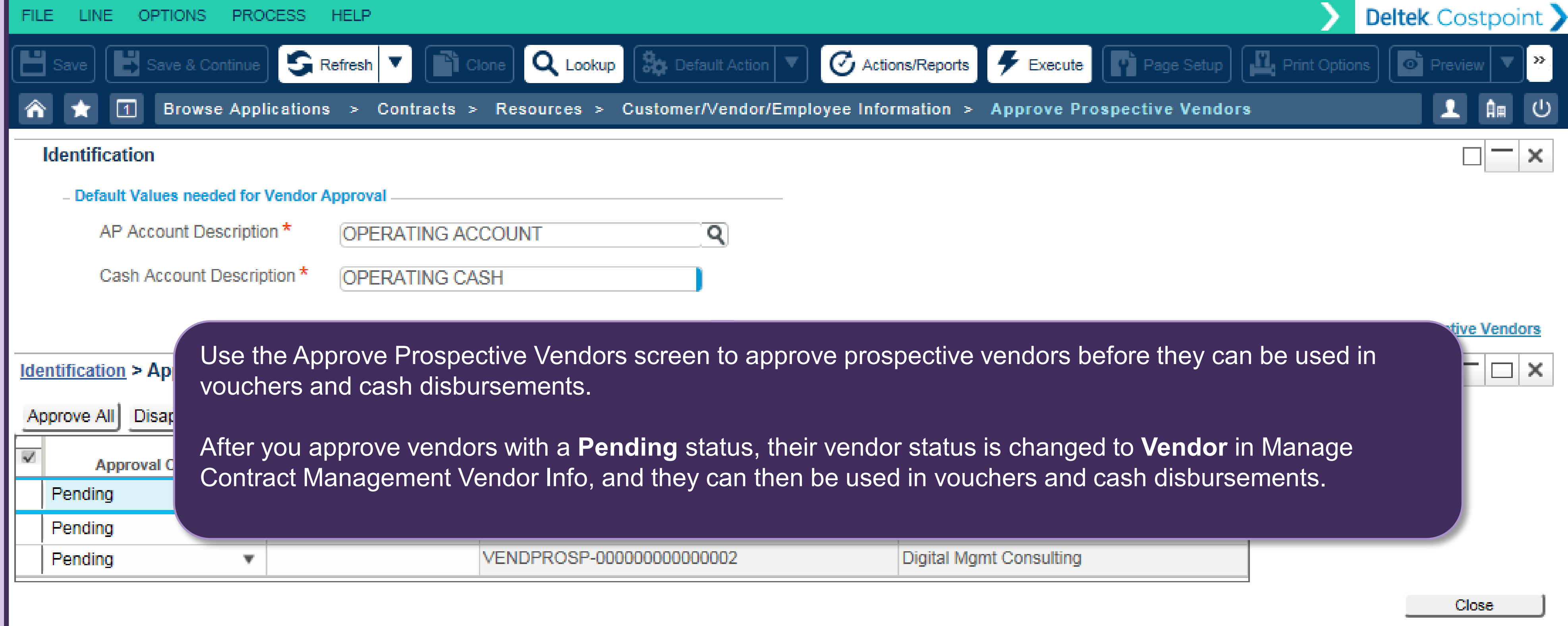
Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. **Manage Contract Management Vendor Info**
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. **Approve Prospective Vendors**
5. Manage Contract Management Employee Info



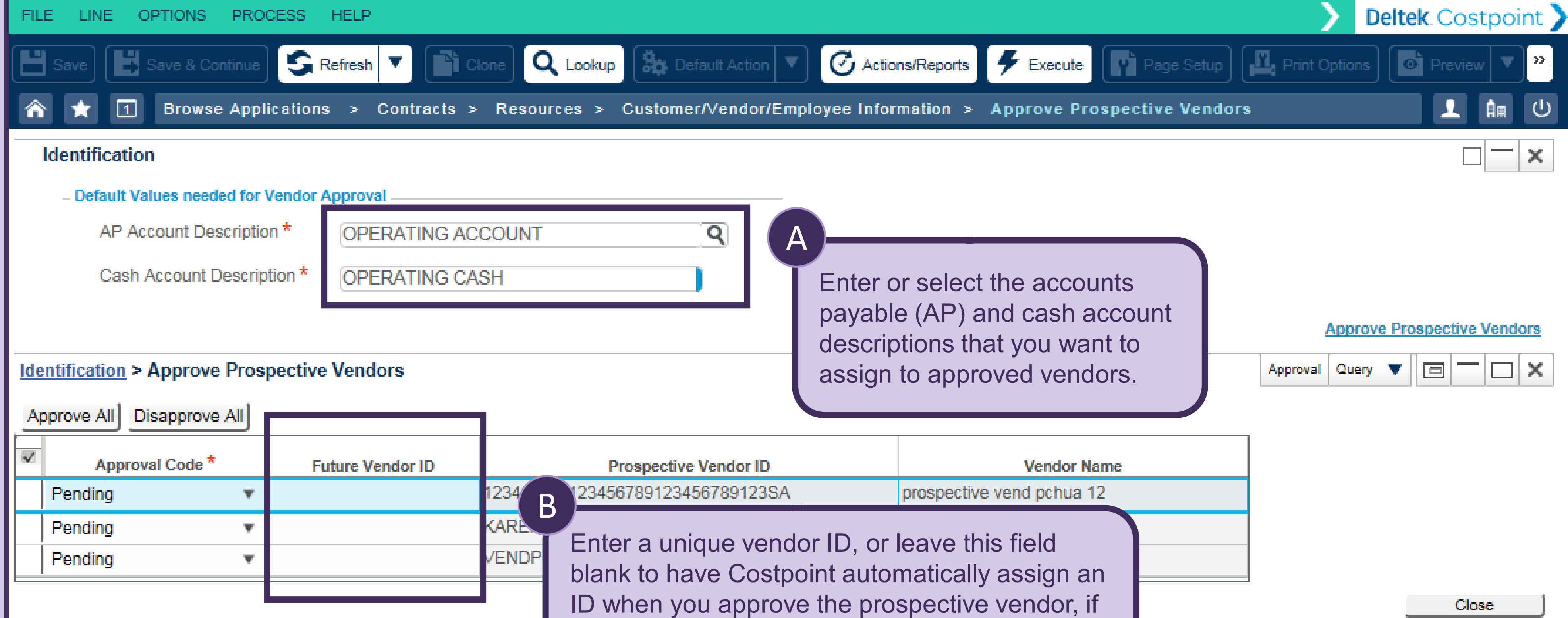
Use the Approve Prospective Vendors screen to approve prospective vendors before they can be used in vouchers and cash disbursements.

After you approve vendors with a **Pending** status, their vendor status is changed to **Vendor** in Manage Contract Management Vendor Info, and they can then be used in vouchers and cash disbursements.

Follow the steps on the next slides to accomplish the Approve Prospective Vendors screen.

Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. **Approve Prospective Vendors**
5. Manage Contract Management Employee Info



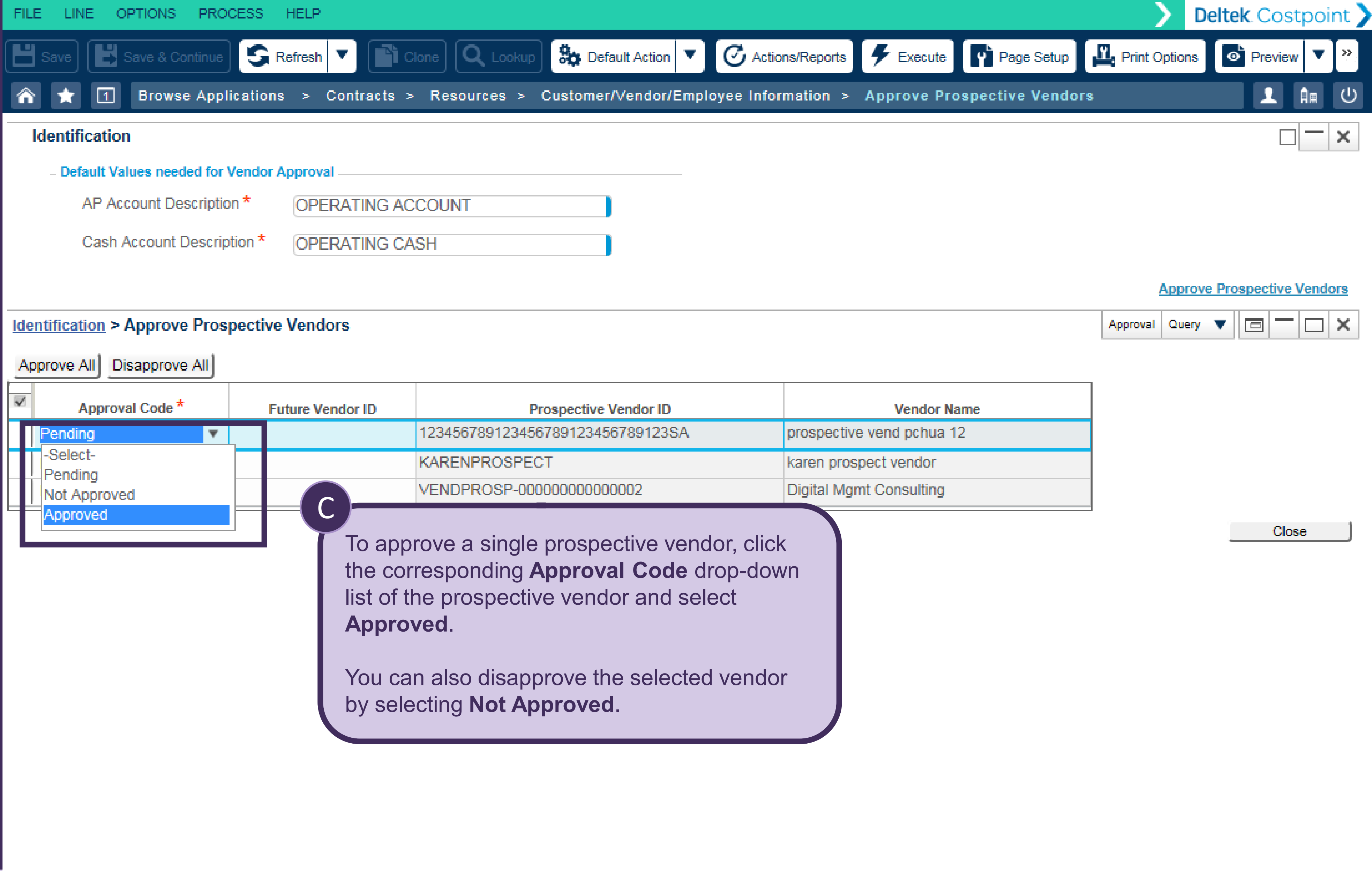
A Enter or select the accounts payable (AP) and cash account descriptions that you want to assign to approved vendors.

B Enter a unique vendor ID, or leave this field blank to have Costpoint automatically assign an ID when you approve the prospective vendor, if auto-assignment of vendor IDs is enabled on the Configure Vendor Settings screen.

If the auto-assignment of vendor IDs is not enabled, you must enter a value in this field before you can approve a prospective vendor. You can leave this field blank and save the prospective vendor record, but you will not be able to approve it.

Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. **Approve Prospective Vendors**
5. Manage Contract Management Employee Info



C

To approve a single prospective vendor, click the corresponding **Approval Code** drop-down list of the prospective vendor and select **Approved**.

You can also disapprove the selected vendor by selecting **Not Approved**.

Customer/Vendor/ Employee Information

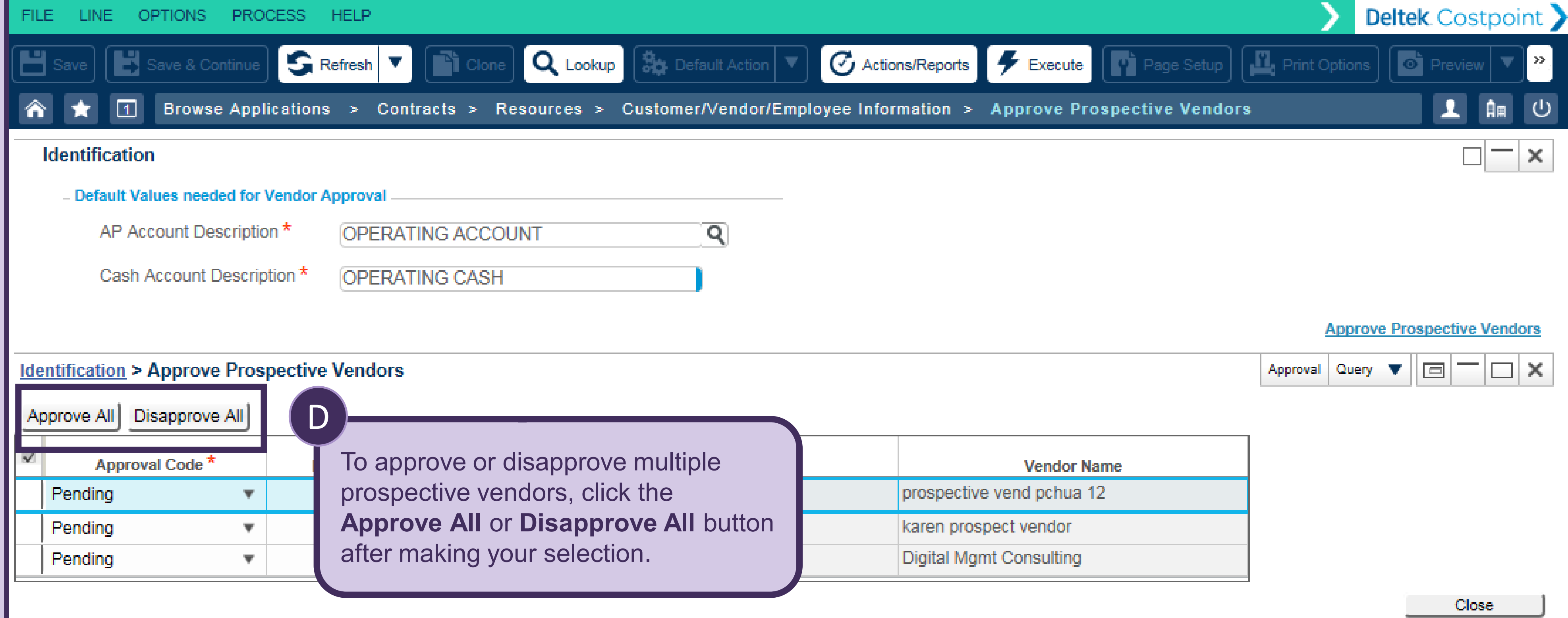
1 Manage Contract Management Customer Info

2 Approve Prospective Customers

3 Manage Contract Management Vendor Info

4 **Approve Prospective Vendors**

5 Manage Contract Management Employee Info



D

To approve or disapprove multiple prospective vendors, click the **Approve All** or **Disapprove All** button after making your selection.

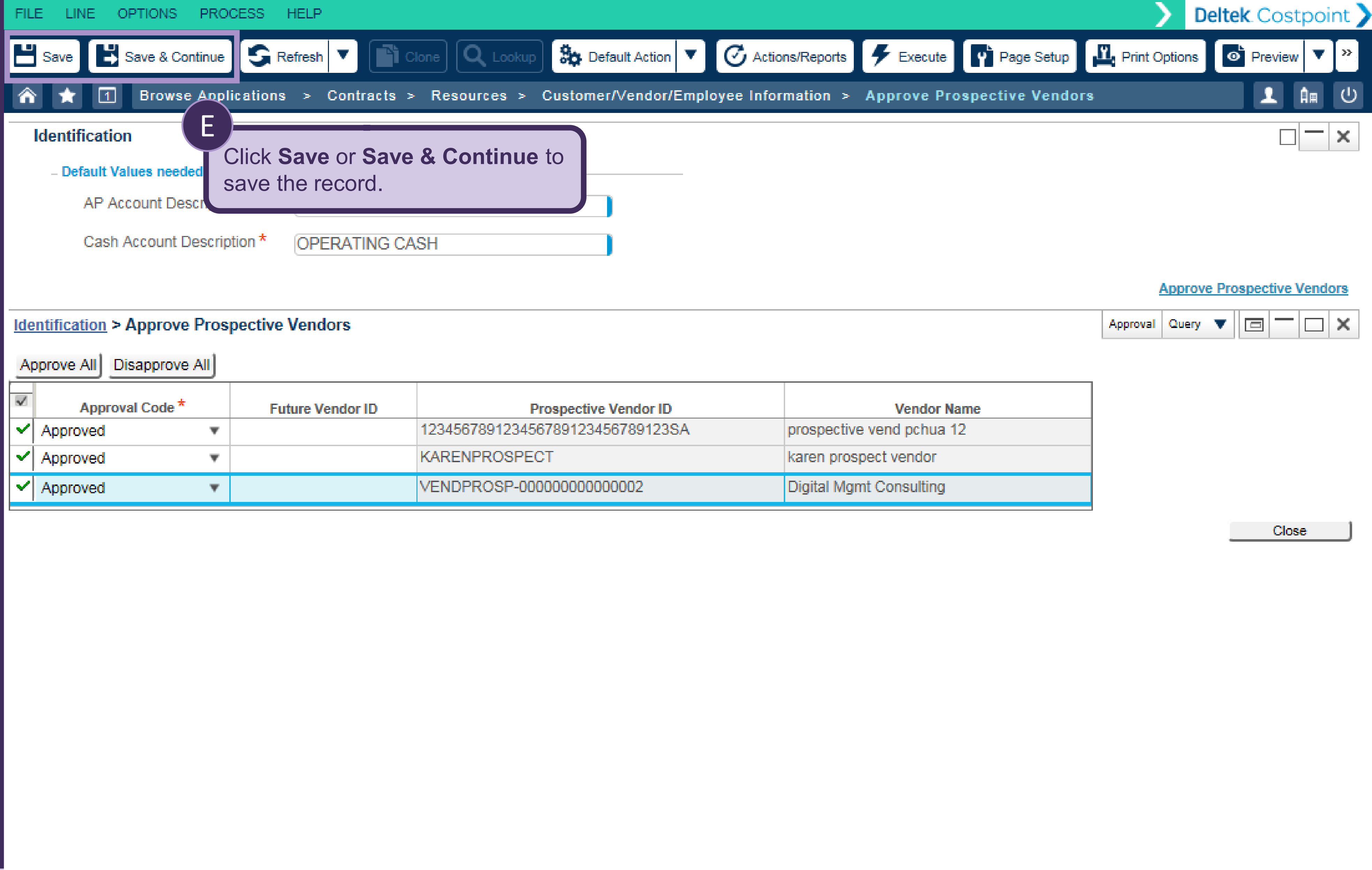
Here are some guidelines when selecting records:

- To select all records, click the **Select All Rows** check box.
- To select multiple contiguous vendors, hold the SHIFT key on your keyboard and highlight those rows with your cursor.
- To select multiple non-contiguous vendors, hold the CTRL key on your keyboard and highlight those rows with your cursor.

Customer/Vendor/ Employee Information

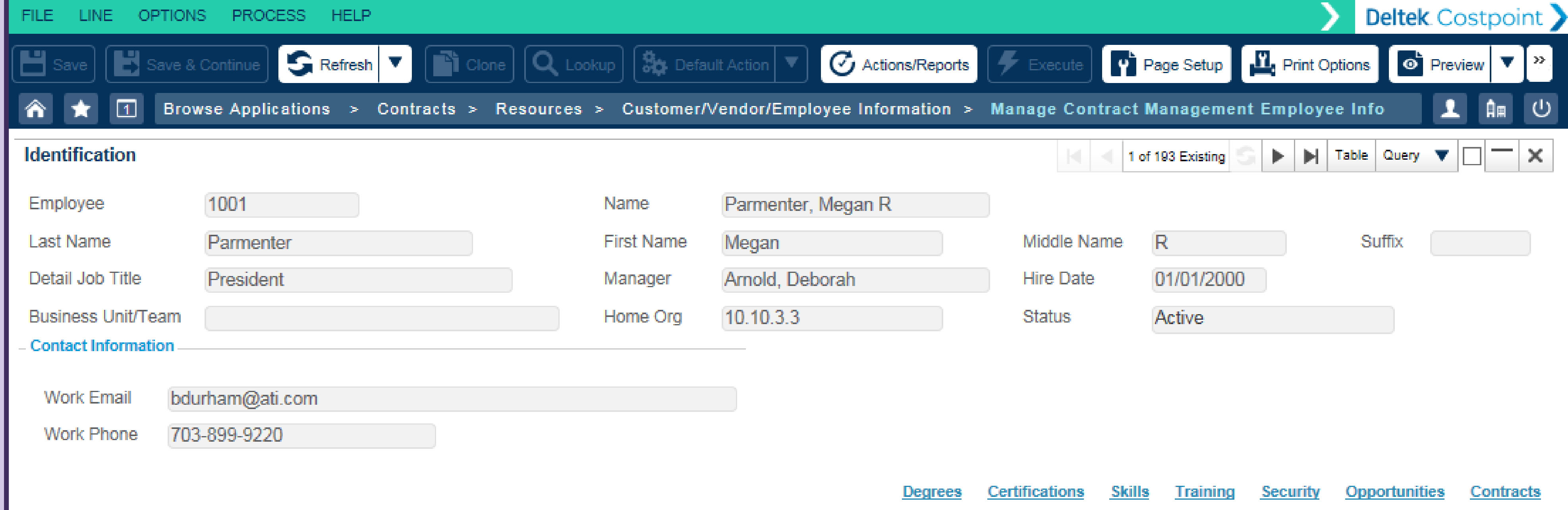
1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. **Approve Prospective Vendors**
5. Manage Contract Management Employee Info

E Click **Save** or **Save & Continue** to save the record.



Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



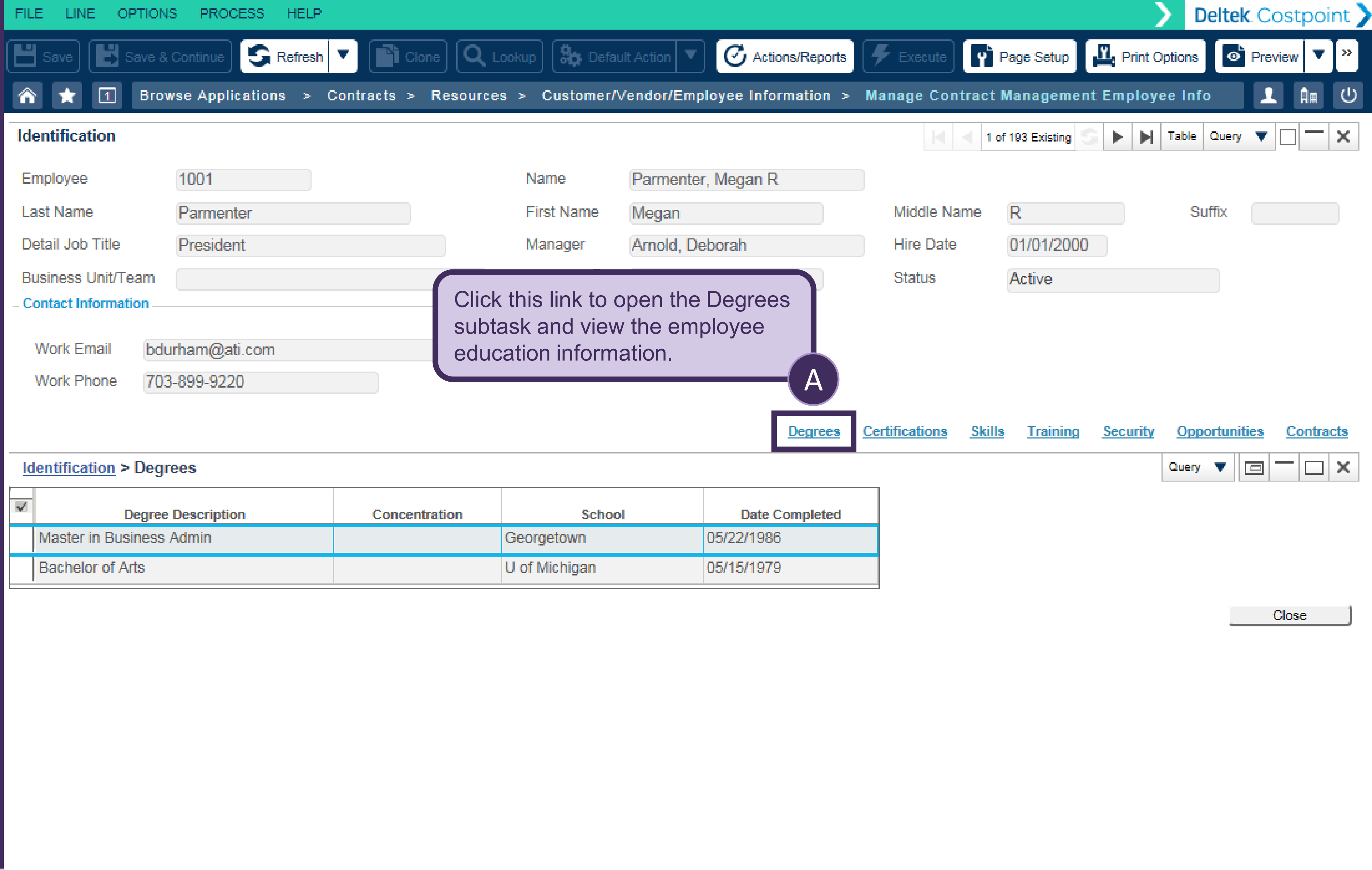
Use the Manage Contract Management Employee Info screen to view information about your employees, so you can determine the employees that have the training, skills, and security details necessary to work on potential contracts and opportunities.

All fields on this screen and its subtasks are read-only. Employee information needs to be modified on the Manage Employee Information screen under the People domain.

Follow the steps on the next slides to use the Manage Contract Management Employee Info screen.

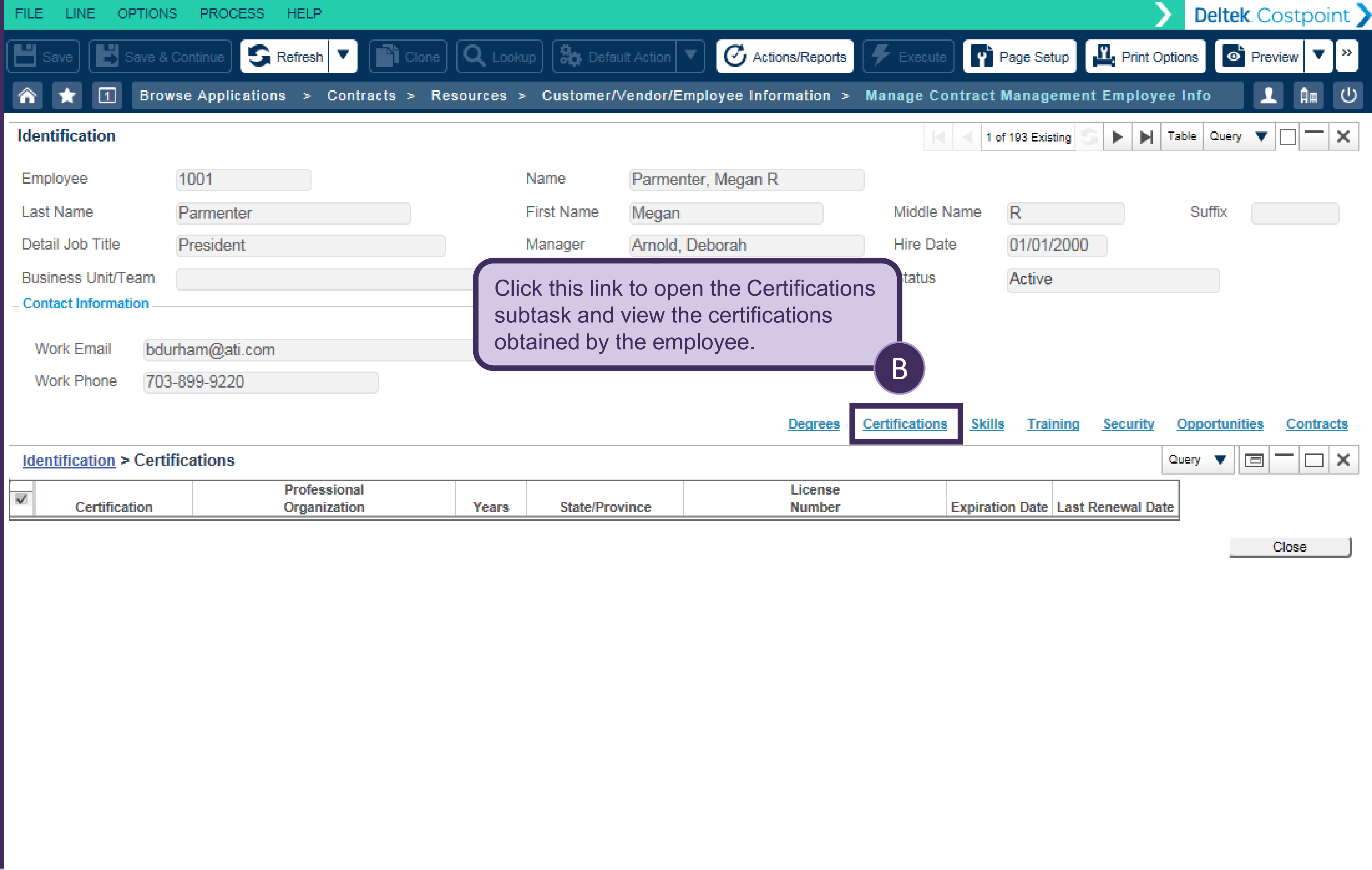
Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. **Manage Contract Management Employee Info**



Customer/Vendor/ Employee Information

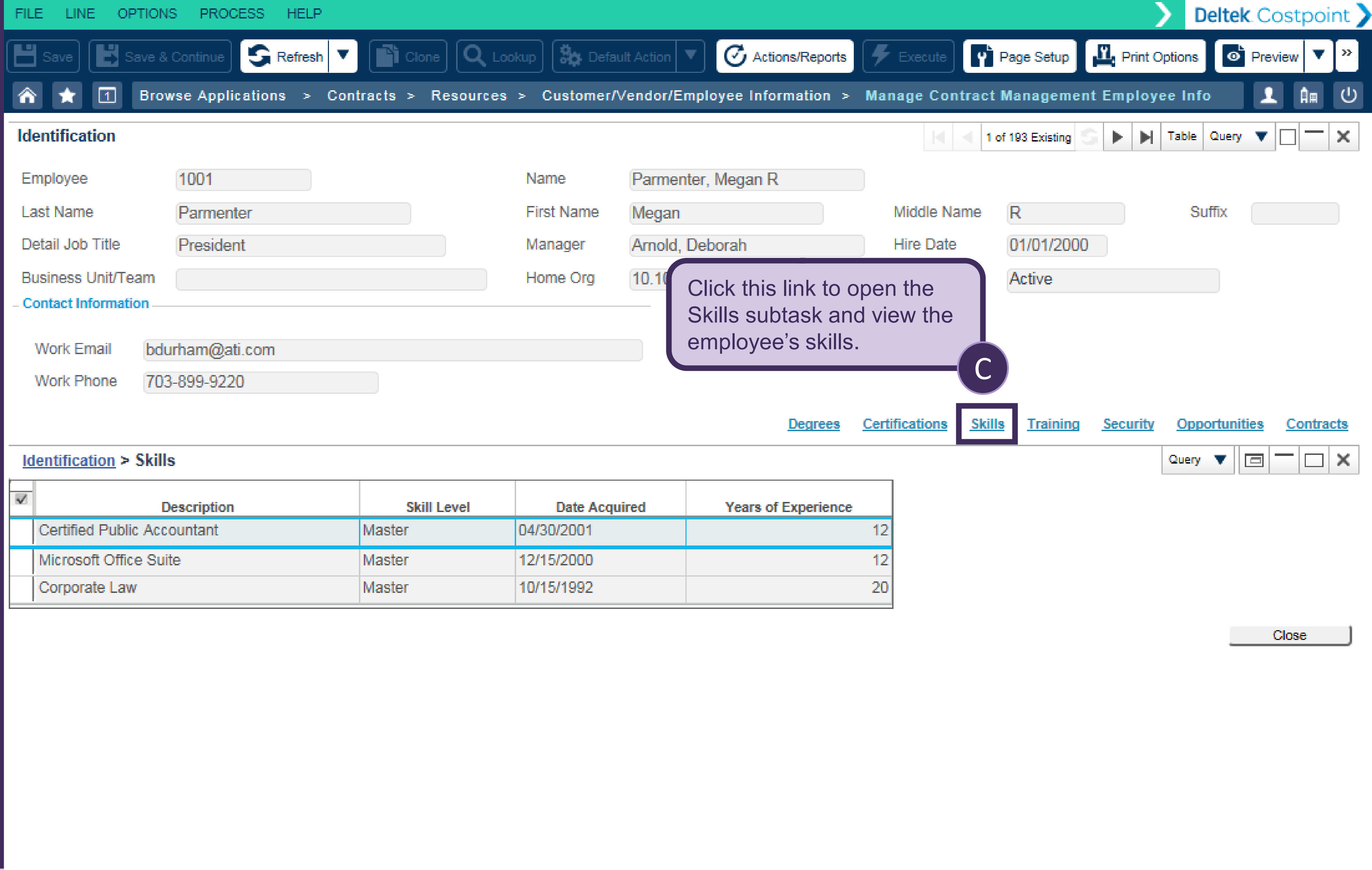
1 Manage Contract Management Customer Info

2 Approve Prospective Customers

3 Manage Contract Management Vendor Info

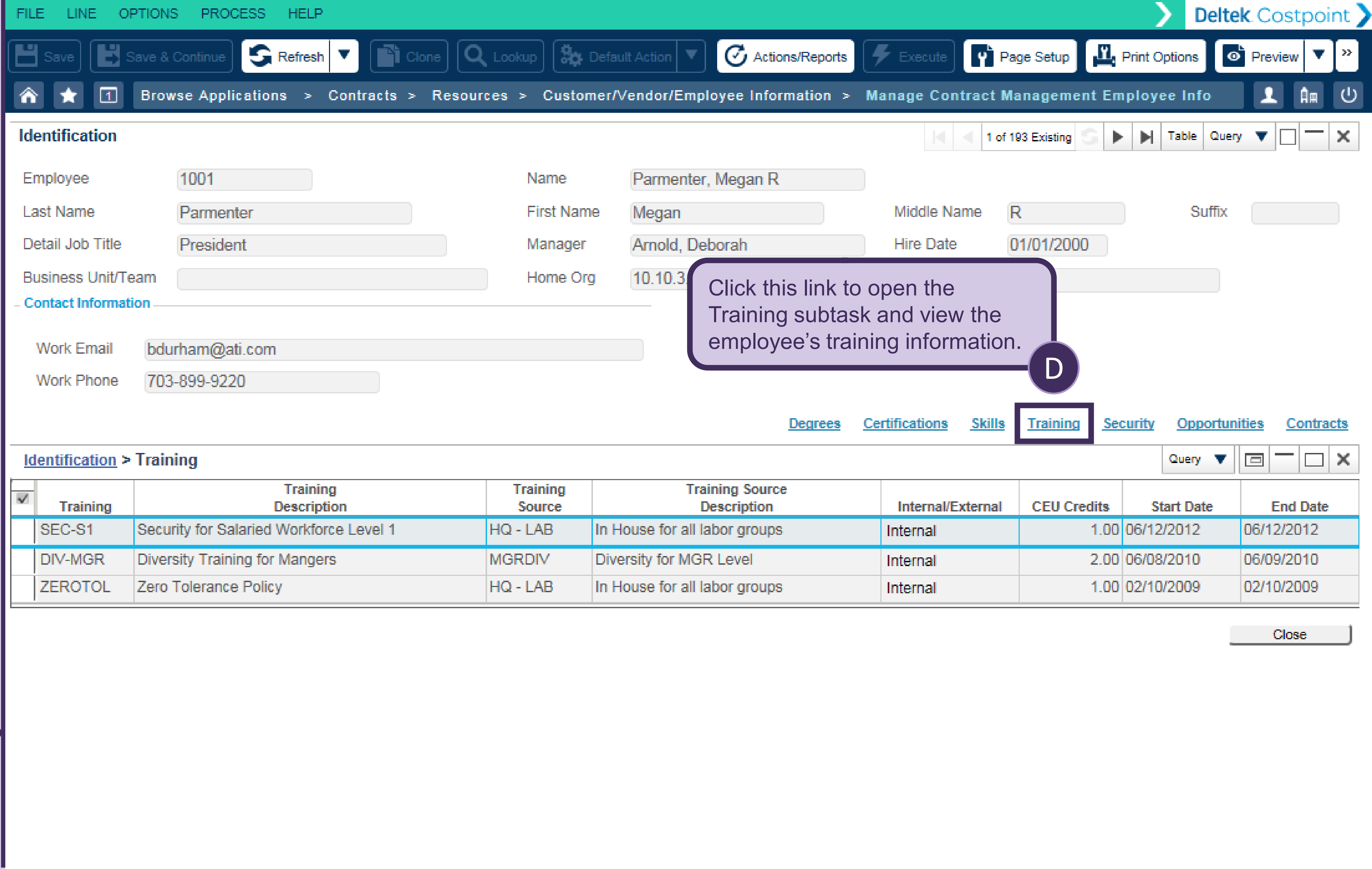
4 Approve Prospective Vendors

5 Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. **Manage Contract Management Employee Info**



FILE LINE OPTIONS PROCESS HELP

Deltek Costpoint

Save | Save & Continue | Refresh | Clone | Lookup | Default Action | Actions/Reports | Execute | Page Setup | Print Options | Preview

Browse Applications > Contracts > Resources > Customer/Vendor/Employee Information > Manage Contract Management Employee Info

Identification

1 of 193 Existing | Table | Query

Employee: 1001
Name: Parmenter, Megan R
Last Name: Parmenter
First Name: Megan
Middle Name: R
Suffix:
Detail Job Title: President
Manager: Arnold, Deborah
Hire Date: 01/01/2000
Business Unit/Team:
Home Org: 10.10.3

Contact Information

Work Email: bdurham@ati.com
Work Phone: 703-899-9220

Click this link to open the Training subtask and view the employee's training information.

D

Degrees | Certifications | Skills | Training | Security | Opportunities | Contracts

Identification > Training

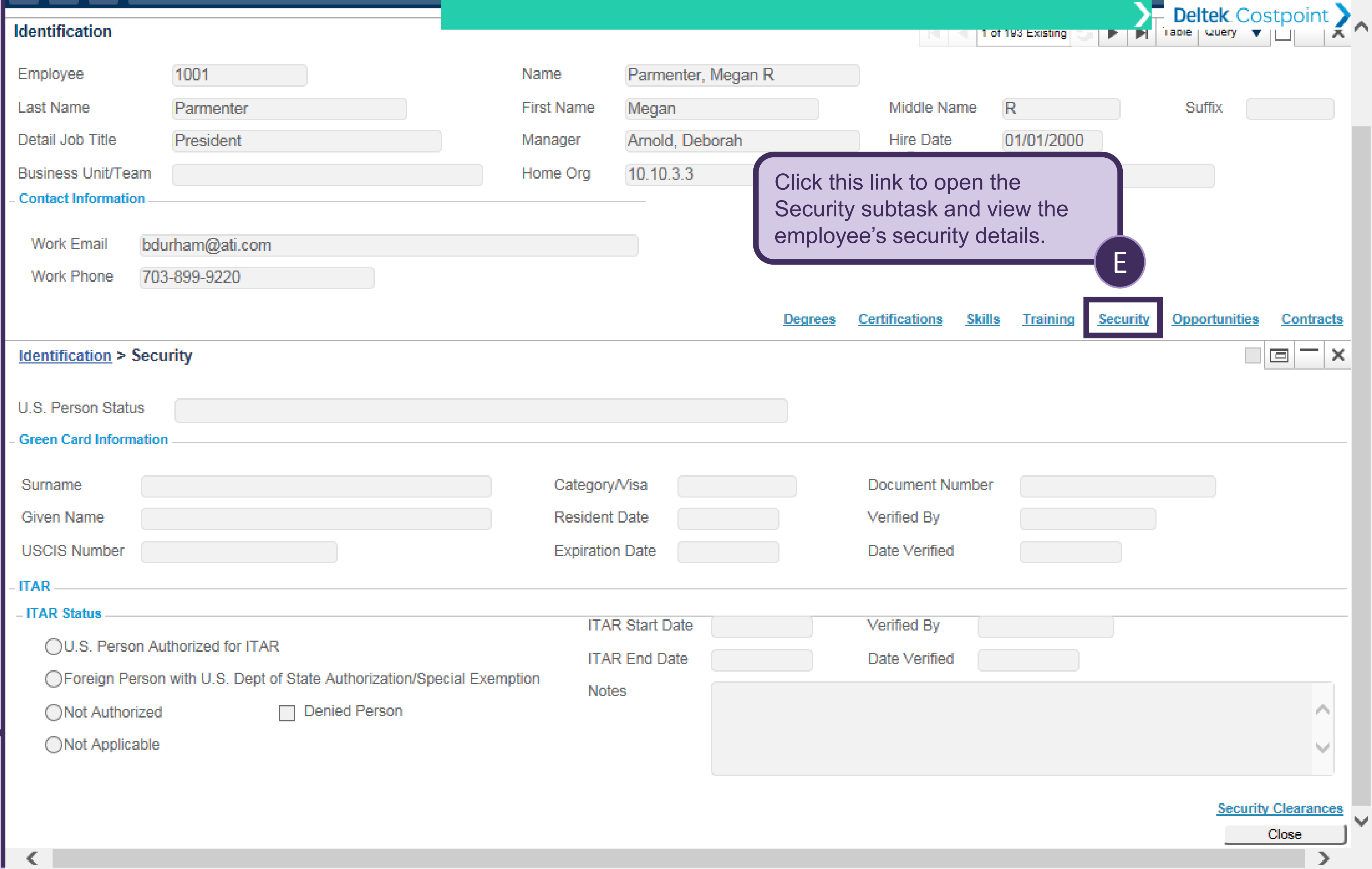
Query

Training	Training Description	Training Source	Training Source Description	Internal/External	CEU Credits	Start Date	End Date
SEC-S1	Security for Salaried Workforce Level 1	HQ - LAB	In House for all labor groups	Internal	1.00	06/12/2012	06/12/2012
DIV-MGR	Diversity Training for Mangers	MGRDIV	Diversity for MGR Level	Internal	2.00	06/08/2010	06/09/2010
ZEROTOL	Zero Tolerance Policy	HQ - LAB	In House for all labor groups	Internal	1.00	02/10/2009	02/10/2009

Close

Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. **Manage Contract Management Employee Info**



Customer/Vendor/ Employee Information

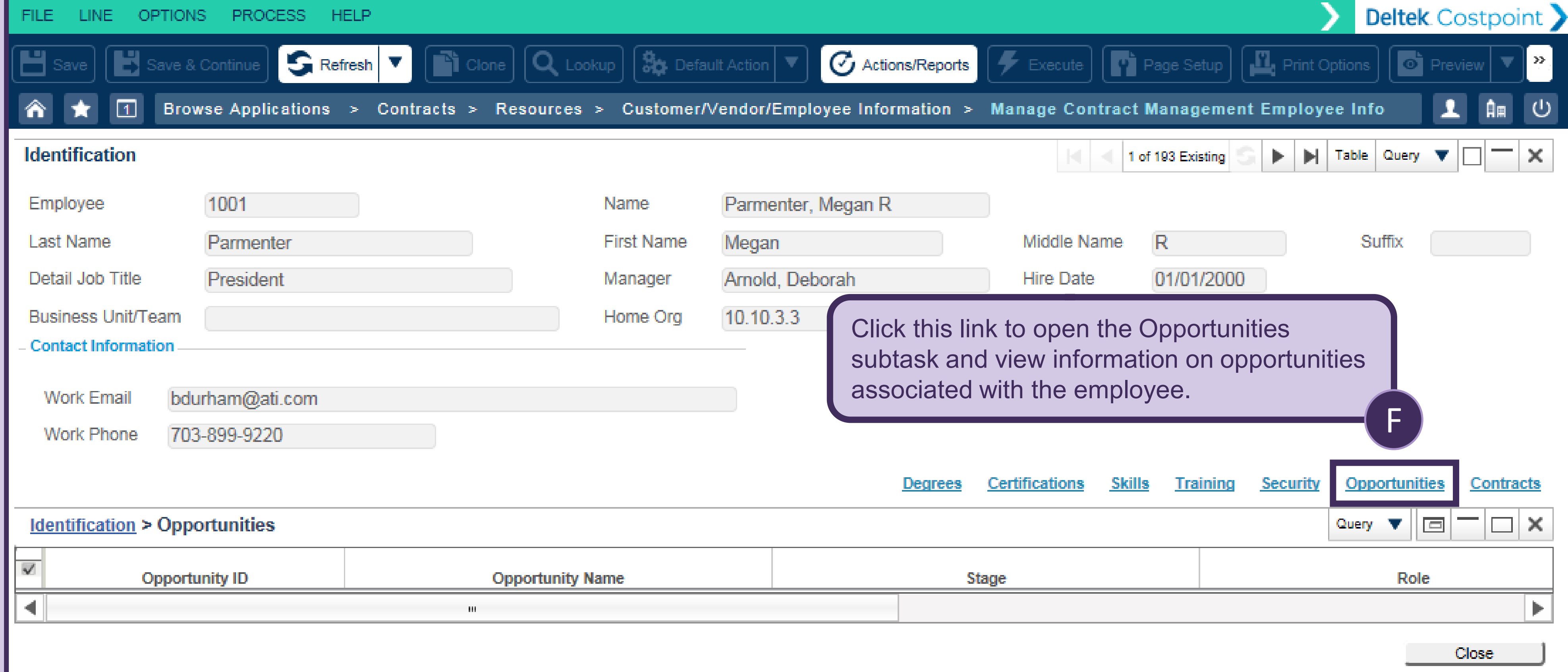
1 Manage Contract Management Customer Info

2 Approve Prospective Customers

3 Manage Contract Management Vendor Info

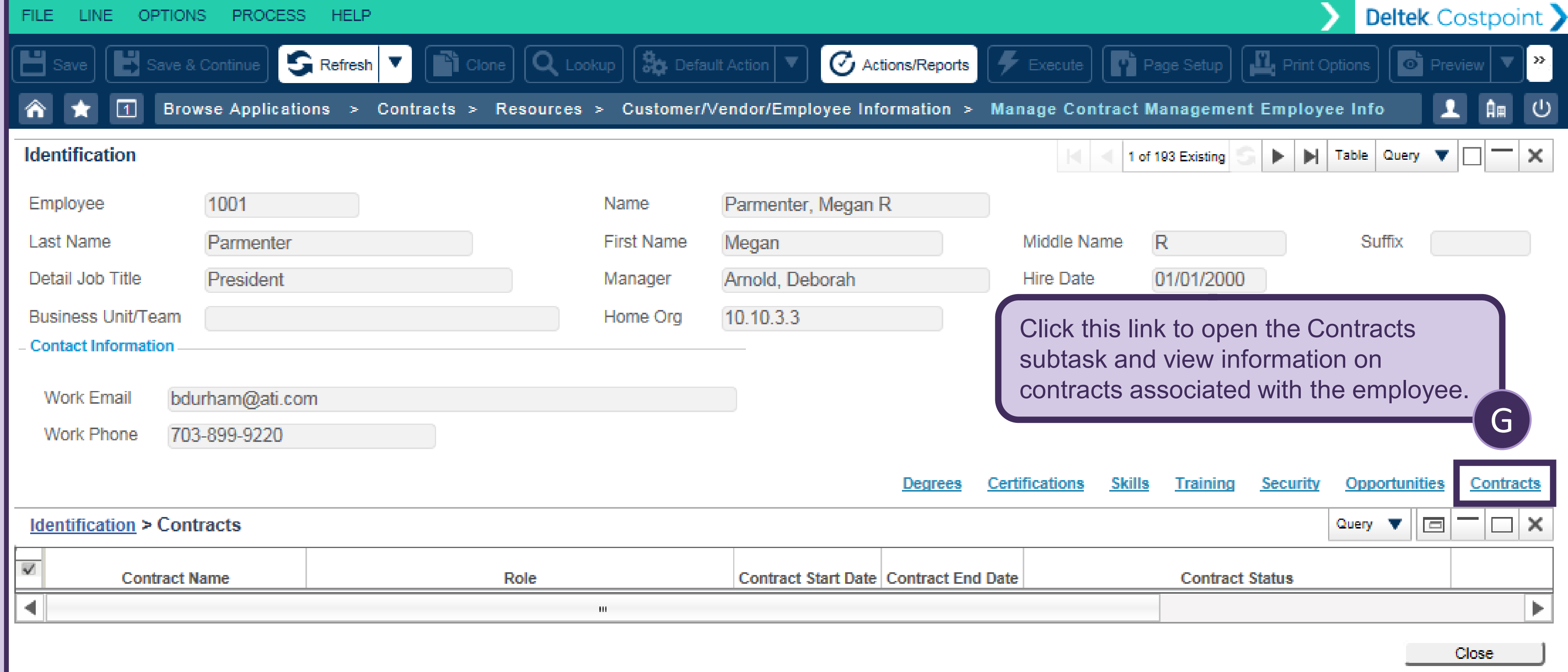
4 Approve Prospective Vendors

5 **Manage Contract Management Employee Info**



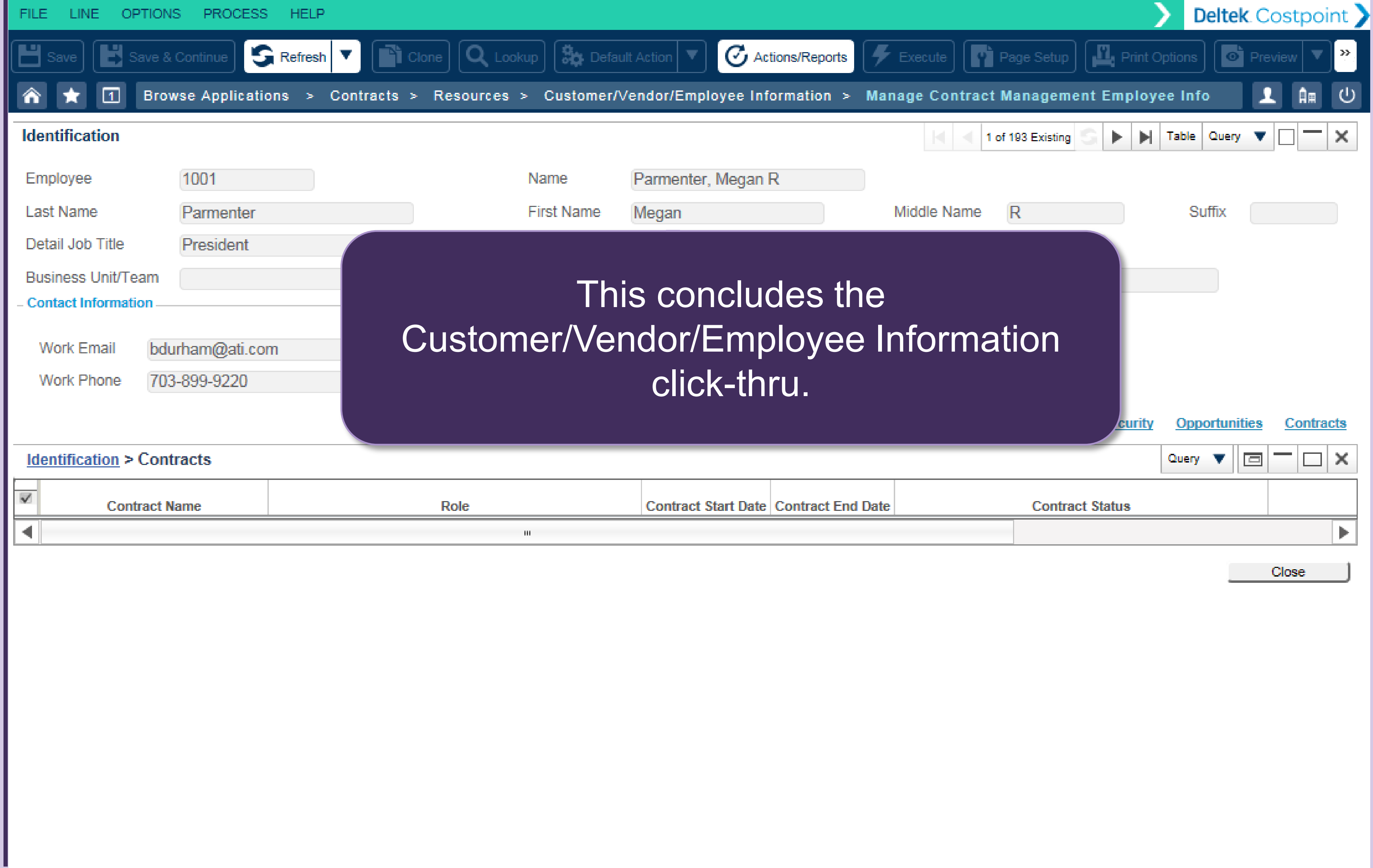
Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



Customer/Vendor/ Employee Information

1. Manage Contract Management Customer Info
2. Approve Prospective Customers
3. Manage Contract Management Vendor Info
4. Approve Prospective Vendors
5. Manage Contract Management Employee Info



This concludes the Customer/Vendor/Employee Information click-thru.