

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

Browse Applications

Accounting

Contracts

Planning

Projects

Materials

People

Time & Expense

Opportunities

Contracts

Resources

Contract Man

Competitor Information

Customer/Vendor/Employee Information

Manage Contract Management Customer Info

Approve Prospective Customers

Manage Contract Management Vendor 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



FILE LINE OPTIONS PROCESS HELP

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 Customer Info

Identification

Prospective Customer ID Future Customer Account Prospective Customer

Customer Record Status

Name *

General Notes

Customer Type *

Customer Web S

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



FILE LINE OPTIONS PROCESS HELP

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 Customer Info

Identification

Prospective Customer ID Future Customer Account **Customer Record Status**
Prospective Customer

Name * Long Name *

General

Customer Status Pending

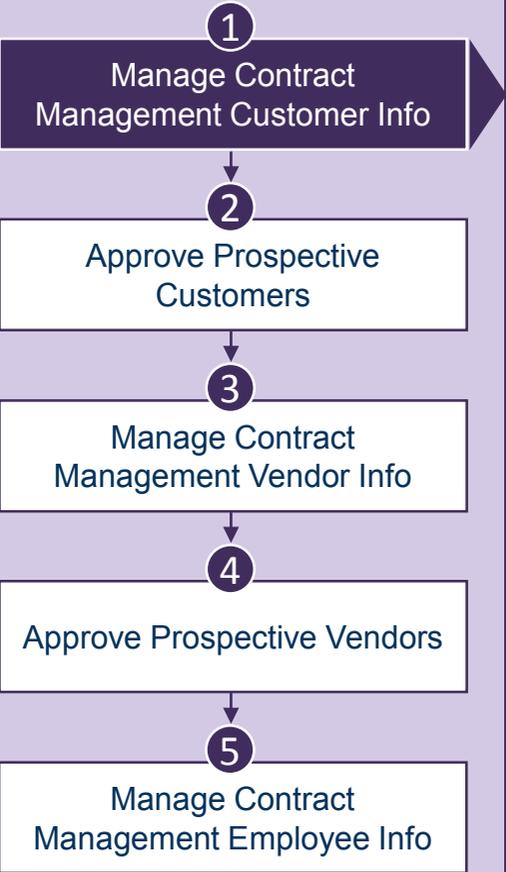
A Enter a unique prospective customer ID, or leave this field blank to have Costpoint automatically assign an ID if the **Auto-Assign Customer Prospect IDs** check box is selected on the Configure Contract Management Settings screen.

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



FILE LINE OPTIONS PROCESS HELP

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 Customer Info

Identification

New Copy Delete 1 of 1 New Table Query

Prospective Customer ID Future Customer Account

Name *

Customer Record Status
Prospective Customer

C

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

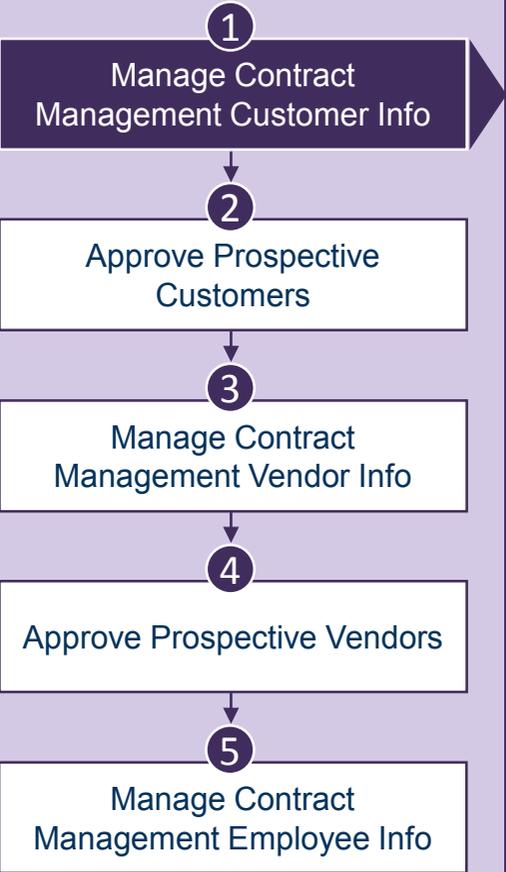
General Notes

Customer Type *

Customer Web Site

[Address/Contact Info](#) [User-Defined Info](#)

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Customer Info

Identification

New Copy Delete 1 of 1 New Table Query

Prospective Customer ID Future Customer Account **Prospective Customer** *Customer Record Status*

Name * Long Name *

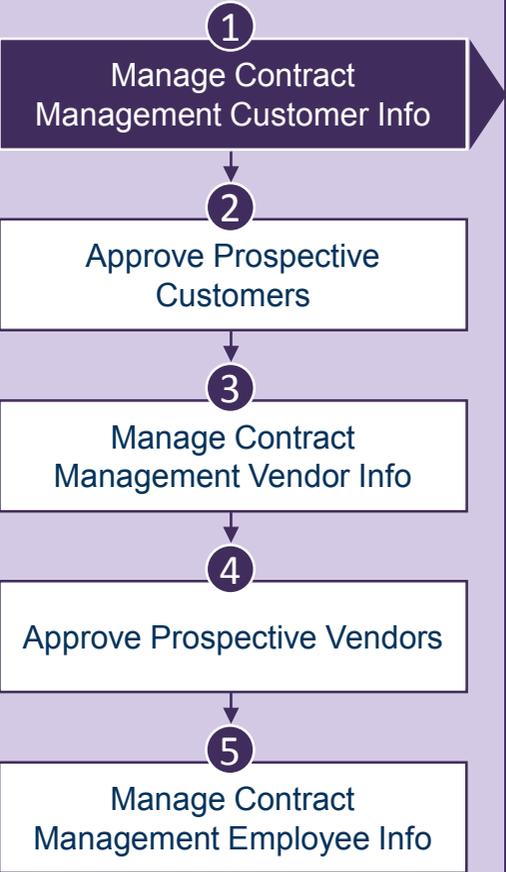
D Enter the prospective customer name in the **Name** field. The **Long Name** defaults from the **Name** you entered, but you can edit it.

General Notes

Customer Type * Customer Web Site

[Address/Contact Info](#) [User-Defined Info](#)

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Customer Info

Identify New Copy Delete 1 of 1 New Table Query

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

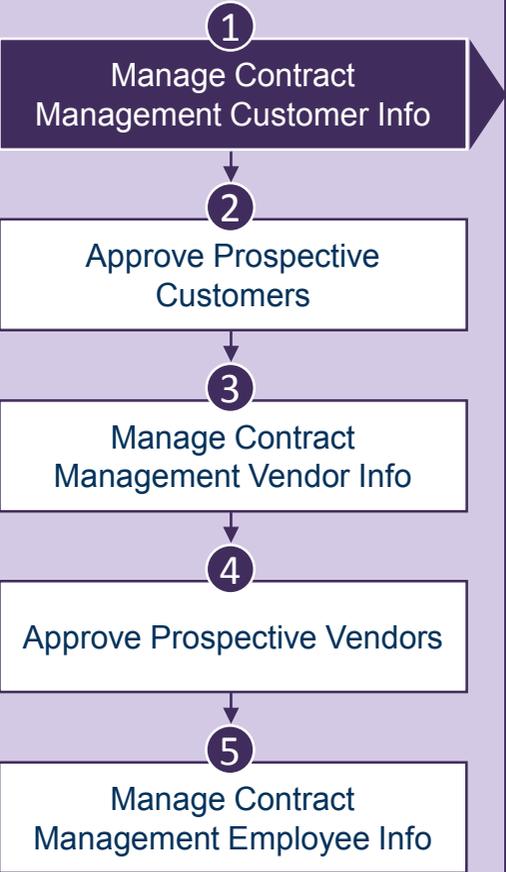
Customer Record Status
Prospective Customer

Customer Type * Customer Status Pending

Customer Web Site

Address/Contact Info User-Defined Info

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Customer Info

Identification

Prospective Customer ID Future
Name * Long

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**.

Customer Type * Customer Status

Customer Web Site

H Enter the customer or prospective customer website.

[Address/Contact Info](#) [User-Defined Info](#)

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Customer Info

Identification

New Copy Delete 1 of 1 New Table Query

Prospective Customer ID e Customer Account **Prospective Customer**

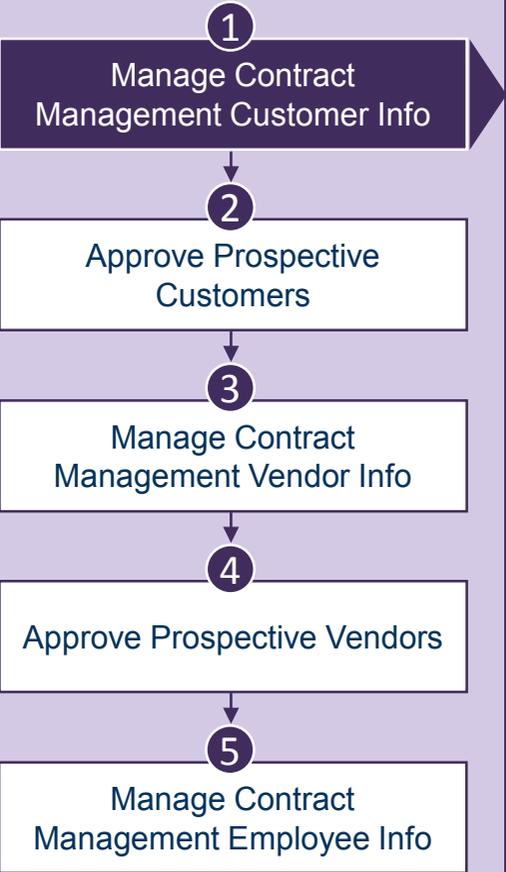
Name * Name *

General **Notes**

Use the Notes tab to enter relevant notes or comments about customers or prospective customers.

[Address/Contact Info](#) [User-Defined Info](#)

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Customer Info

Identification

New Copy Delete 1 of 1 New Table Query

Prospective Customer ID Future Customer Account **Customer Record Status**
Prospective Customer

Name * Long Name *

General **Notes**

If not yet open, click this link to access the Address/Contact Info subtask.

[Address/Contact Info](#) [User-Defined Info](#)

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Customer Info

Identification

New Copy Delete 1 of 1 New Table Query

Prospective Customer ID Future Customer Account **Customer Record Status**
Prospective Customer

Name * Long Name *

General Notes

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

Address/Contact Info User-Defined Info

Identification > Address/Contact Info

Address Code *	Address Line 1	Address Line 2	Address Line 3	City

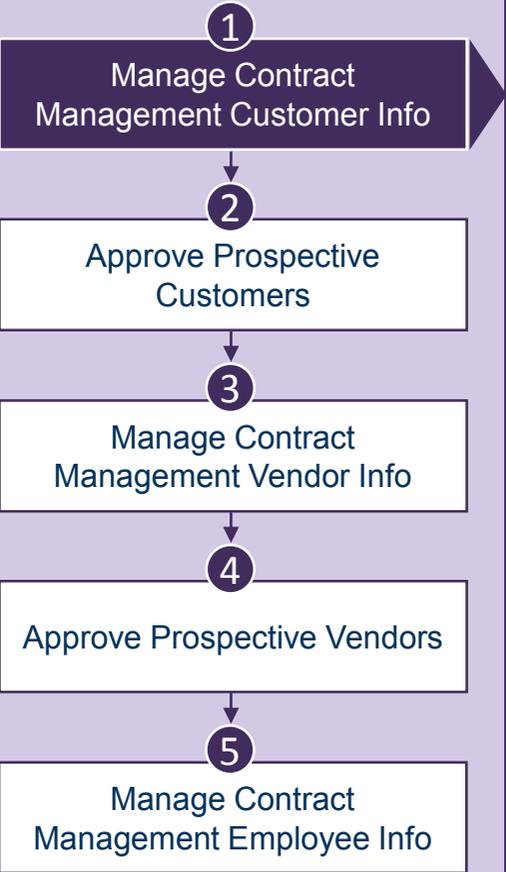
Contacts Close

K

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



FILE LINE OPTIONS PROCESS HELP

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 Customer Info

Identification

New Copy Delete 1 of 1 New Table Query

Prospective Customer ID Future Customer Account **Customer Record Status**
Prospective Customer

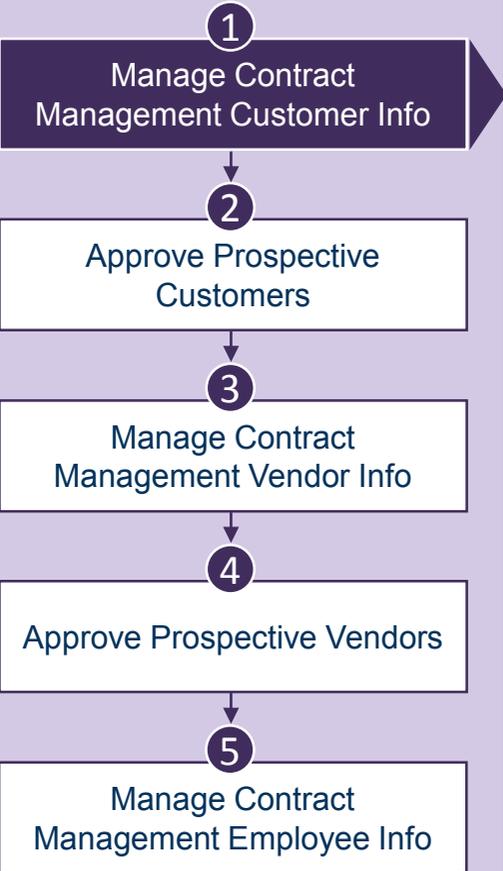
Name * Long Name *

General **Notes**

[Address/Contact Info](#) **User-Defined Info**

Click this link to open the User-Defined Info subtask.

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Customer Info

Identification

New Copy Delete 1 of 1 New Table Query

Prospective Customer ID Future Customer Account Prospective Customer

Name *

General Notes

Use the User-Defined Info subtask to view and manage user-defined customer information. User-defined fields are set up on the Manage Customer User-Defined Labels screen.

For prospective customers, some fields on this subtask are editable. For regular customers, all fields are read-only.

Address/Contact Info User-Defined Info

Identification > User-Defined Info

Data Type	Labels *	Text Value	Numeric Value	Date Value	Costpoint Validation Field	Validated Text	Required
<input checked="" type="checkbox"/>							

New Copy Delete Form Query

Autoload

Close

M

Click **New** to add a new line, or click **Autoload** to automatically populate the User-Defined Info subtask with data available on the Manage Customer User-Defined Labels screen.

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Customers

Approve All Disapprove All

Approval Code *
Pending

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



Approve Prospective Customers

Approve All Disapprove All

Approval Code *	Prospective Customer ID	Future Customer Account	Customer Name	Customer Type
Pending	CUSTPROSP-0000000000000001		Dept of Veterans Affairs	FEDERAL GOV'T
Pending	CUSTPROSP-0000000000000002		Department of Energy	FEDERAL GOV'T
Pending	CUSTPROSP-0000000000000004		JPM Consulting Services	COMMERCIAL
Pending	CUSTPROSP-0000000000000005		VS ProsCust-1	OTHER GOV'T
Pending	KAREN	KAREN		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



FILE LINE OPTIONS PROCESS HELP

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 Customers

Query [] [] [X]

Approve All Disapprove All

Approval Code *	Prospective Customer ID	Future Customer Account	Customer Name	Customer Type
Pending	CUSTPROSP-0000000000000001		Dept of Veterans Affairs	FEDERAL GOV'T
-Select-	CUSTPROSP-0000000000000002		Department of Energy	FEDERAL GOV'T
Pending	CUSTPROSP-0000000000000004		JPM Consulting Services	COMMERCIAL
Pending	CUSTPROSP-0000000000000005		VS ProsCust-1	OTHER GOV'T
Pending	KAREN	KAREN	1	COMMERCIAL
Pending		Karen with no customer id		FEDERAL GOV'T

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



FILE LINE OPTIONS PROCESS HELP

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 Customers

Query

Approve All Disapprove All

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

Account	Customer Name	Customer Type
	Dept of Veterans Affairs	FEDERAL GOV'T
	Department of Energy	FEDERAL GOV'T
	JPM Consulting Services	COMMERCIAL
	VS ProsCust-1	OTHER GOV'T
	1	COMMERCIAL
	Karen with no customer id	FEDERAL GOV'T

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

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 Customers

Approve All Disapprove All

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

	Approval Code *	Prospective Customer ID	Future Customer Account	Customer Name	Customer Type
✓	Approved	CUSTPROSP-0000000000000001		Dept of Veterans Affairs	FEDERAL GOV'T
✓	Approved	CUSTPROSP-0000000000000002		Department of Energy	FEDERAL GOV'T
✓	Approved	CUSTPROSP-0000000000000004		JPM Consulting Services	COMMERCIAL
✓	Approved	CUSTPROSP-0000000000000005		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



Identification [New] [Copy] [Delete] [Approval] [1 of 1 New] [Table] [Query]

Prospective Vendor ID Future Vendor ID **Vendor Record Status**
Prospective Vendor

Name *

General [Note]

Long Name *

Vendor Web Site

Vendor Approval

Business Classification

Size

- Large
- Woman-Owned
- Disadvantaged (Include Minority-Owned)
- Veteran-Owned
- Service-Disabled Veteran-Owned
- Alaska Native Corporations (ANC) and Indian Tribes
- HUBZone
- Historical Black Colleges and Universities/Minority Institutions

[employees](#) [NDA](#) [Teaming Agreement](#) [User-Defined 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



FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification New Copy Delete Approval 1 of 1 New Table Query

Prospective Vendor ID Future Vendor ID Vendor Record Status Prospective Vendor

General

Long Name Terms * UNS Number Certification Date

Business Size

Large Small Non-Profit Foreign/Other

Woman-Owned Alaskan Native Corporations (ANC) and Inc

Disadvantaged (Include Minority-Owned) HUBZone

Veteran-Owned Historical Black Colleges and Universities/M

Service-Disabled Veteran-Owned

Address/... -Defined Info

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

B View the vendor ID.

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

- **Future Vendor ID** — For prospective vendors. You set up future vendor IDs on the Approve Prospective Vendors screen.
- **Vendor ID** — For approved or regular vendors. The vendor ID displays as a hyperlink that you can click to open the Manage Vendors screen and view additional information about the 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

FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification

Prospective Vendor ID Future Vendor ID

Name *

Vendor Record Status
Prospective Vendor

General Notes

Long Name *

Vendor Web Site

Vendor Approval Status DUNS Number CAGE Code

Business Classification

Size

Large Small Non-Profit Foreign/Other Certification Date Certification Number

Woman-Owned Alaskan Native Corporations (ANC) and Indian Tribes

Disadvantaged (Include Minority-Owned) HUBZone

Veteran-Owned Historical Black Colleges and Universities/Minority Institutions

Service-Disabled Veteran-Owned

[Address/Contact Info](#) [Vendor Employees](#) [NDA](#) [Teaming Agreement](#) [User-Defined 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

FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification

Prospective Vendor ID Future Vendor ID **Vendor Record Status**
Prospective Vendor

Name *

General Notes

Long Name * Term City

Vendor Web Site

Vendor Approval Status **Pending** DUNS Number CAGE Code

Business Classification

Size

Large Small Non-Profit Foreign/Other Certification Date Certification Number

Woman-Owned Alaskan Native Corporations (ANC) and Indian Tribes

Disadvantaged (Include Minority-Owned) HUBZone

Veteran-Owned Historical Black Colleges and Universities/Minority Institutions

Service-Disabled Veteran-Owned

[Address/Contact Info](#) [Vendor Employees](#) [NDA](#) [Teaming Agreement](#) [User-Defined Info](#)

D Enter the prospective vendor name.

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

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

Vendor ID: [] Vendor Record Status: Prospective Vendor

General Notes

Long Name * [] Terms * [] Specialty []

Vendor Web Site []

Vendor Approval Status: Pending DUNS Number [] CAGE Code []

Business Classification

Size

Large Small Non-Profit Foreign/Other Certification Date [] Certification Number []

Woman-Owned Alaskan Native Corporations (ANC) and Indian Tribes

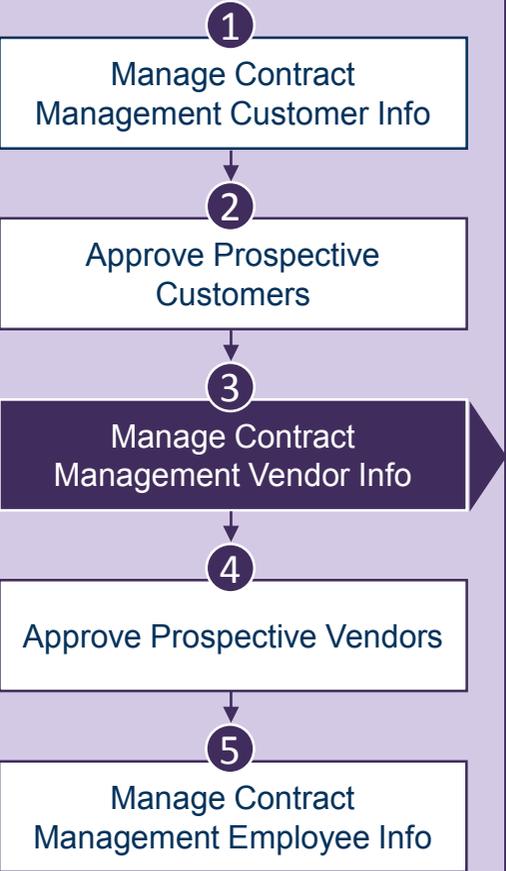
Disadvantaged (Include Minority-Owned) HUBZone

Veteran-Owned Historical Black Colleges and Universities/Minority Institutions

Service-Disabled Veteran-Owned

[Address/Contact Info](#) [Vendor Employees](#) [NDA](#) [Teaming Agreement](#) [User-Defined Info](#)

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification

Prospective Vendor ID Future Vendor ID Vendor Record Status
Prospective Vendor

Name *

General Notes

Long Name * Terms * Specialty

Vendor Web Site

Vendor Approval DUNS Number

Business Classification

Size

Large Small Non-Profit Foreign/Other

Woman-Owned Alaskan Native Corporation (AKA) and Indian Tribe

Disadvantaged (Include Minority-Owned) HUBZone

Veteran-Owned Historical Black Colleges and Universities/Minority Institutions

Service-Disabled Veteran-Owned

Certification Number

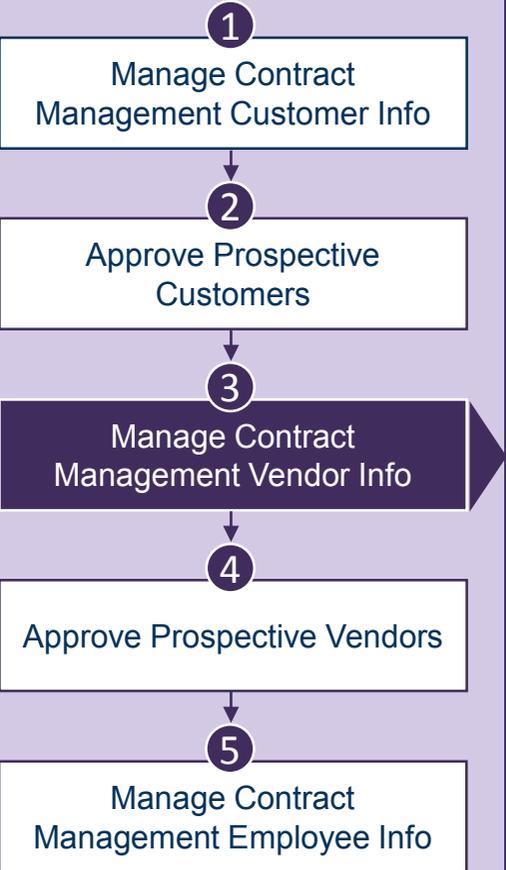
[Address/Contact Info](#) [Vendor Employees](#) [NDA](#) [Teaming Agreement](#) [User-Defined Info](#)

F Enter the prospective vendor long name.

G Enter the payment terms to be used as a default when entering vouchers for the prospective vendor.

H Enter the areas of specialty of the vendor or prospective vendor.

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification

Prospective Vendor ID Future Vendor ID Vendor Record Status: Prospective Vendor

Name *

General Notes

Long Name * Terms * Specialty

Vendor Web Site

Vendor Approval Status: Pending DUNS Number CAGE Code

Business Classification

Size

Large Woman-Owned Disadvantaged (Include Minority-Owned) Veteran-Owned Service-Disabled Veteran-Owned

Alaskan Native Corporations (ANC) and Indian Tribes HUBZone Historical Black Colleges and Universities/Minority Institutions

Certification Date Certification Number

[Address/Contact Info](#) [Vendor Employees](#) [NDA](#) [Teaming Agreement](#) [User-Defined Info](#)

1 Enter the vendor or prospective vendor website.

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification

Future Vendor ID

Vendor Approval Status: Pending

DUNS Number

CAGE Code

Business Classification

Size: Large Small Non-Profit

Woman-Owned

Disadvantaged (Include Minority-Owned)

Veteran-Owned

Service-Disabled Veteran-Owned

Address/Contact Info Vendor Employees NDA Teaming Agreement User-Defined Info

J View the prospective vendor approval status. This field displays either **Pending** or **Approved**.

K Enter the Data Universal Numbering System (DUNS) number for the prospective vendor.

L Enter the Government Entity (CAGE) code for the prospective vendor.

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification

Prospective Vendor ID Future Vendor ID Vendor Record Status: Prospective Vendor

Name *

General

Long Terms * Specialty

Vendor Approval Status: Pending DUNS Number CAGE Code

Business Classification

Size

Large Small Non-Profit Foreign/Other Certification Date Certification Number

Woman-Owned Alaskan Native Corporations (ANC) and Indian Tribes

Disadvantaged (Include Minority-Owned) HUBZone

Veteran-Owned Historical Black Colleges and Universities/Minority Institutions

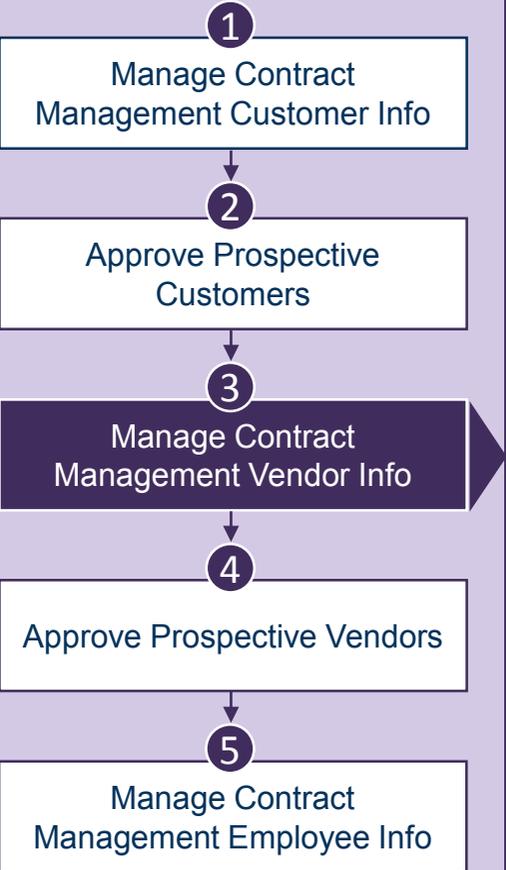
Service-Disabled Veteran-Owned

[Address/Contact Info](#) [Vendor Employees](#) [NDA](#) [Teaming Agreement](#) [User-Defined Info](#)

Use this group box to enter information about the business classifications of the prospective vendor.

M

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification

Prospective Vendor ID

Name *

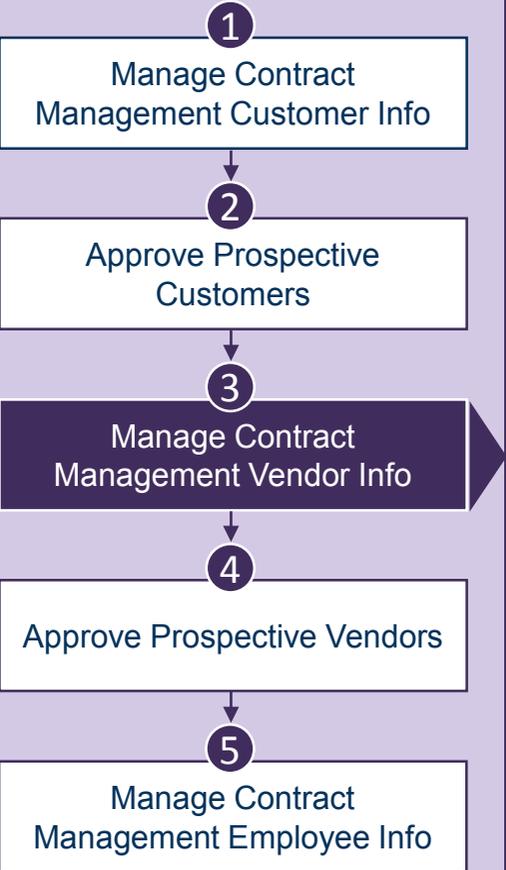
Notes

Use the Notes tab to enter relevant notes or comments about vendors or prospective vendors.

Vendor Record Status: Prospective Vendor

Address/Contact Info Vendor Employees NDA Teaming Agreement User-Defined Info

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification

Prospective Vendor ID Future Vendor ID [Vendor Record Status](#)
Prospective Vendor

Name *

General **Notes**

If not yet open, click this link to access the Address/Contact Info subtask.

[Address/Contact Info](#) [Vendor Employees](#) [NDA](#) [Teaming Agreement](#) [User-Defined 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

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 Vendor Info

Identification New Copy Delete Approval 1 of 1 New Table Query

Prospective Vendor ID Future Vendor ID Vendor Record Status
 Name * Prospective Vendor

General **Notes**

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 [Your Employees](#) [NDA](#) [Teaming Agreement](#) [User-Defined Info](#)

Identification > Address/Contact Info New Copy Delete Form Query

Address Code *	Address Line 1	Address Line 2	Address Line 3	City

[Contacts](#)
Close

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification New Copy Delete Approval 1 of 1 New Table Query

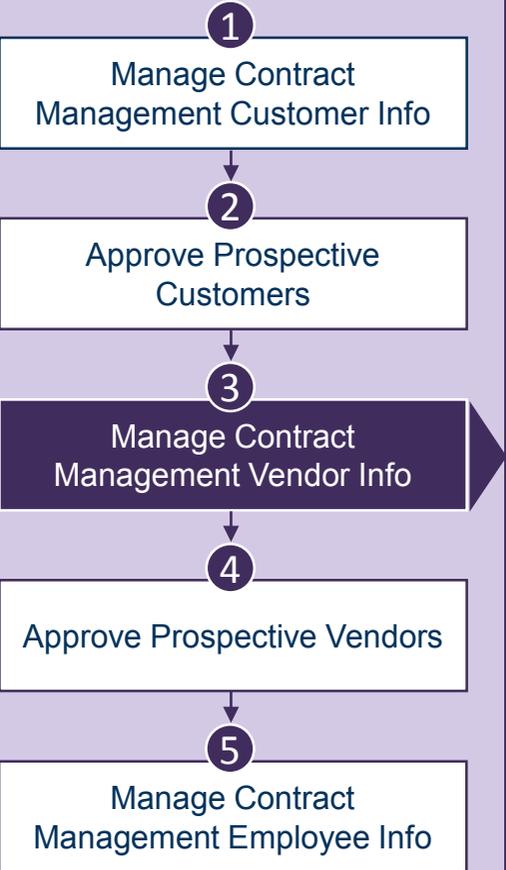
Prospective Vendor ID Future Vendor ID - Vendor Record Status
Name * Prospective Vendor

General Notes

Click this link to open the Vendor Employees subtask.

[Address/Contact Info](#) **[Vendor Employees](#)** [NDA](#) [Teaming Agreement](#) [User-Defined Info](#)

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification New Copy Delete Approval 1 of 1 New Table Query

Prospective Vendor ID Future Vendor ID

Name * Vendor Record Status
Prospective Vendor

General Notes

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.

Vendor Employees NDA Teaming Agreement User-Defined Info

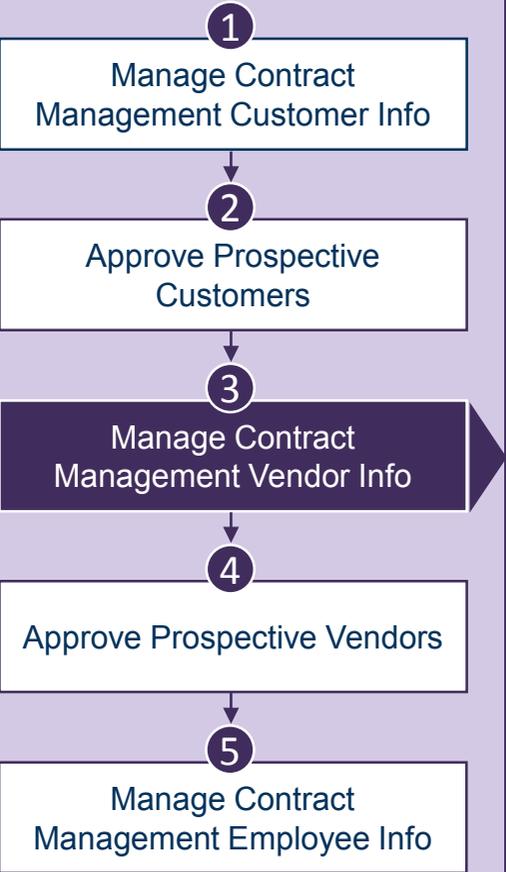
New Copy Delete Form Query

Vendor Employee ID *	Name *	Title	Cell Phone	Office Phone

Certification Details Skills Trainings Security Close

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

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification New Copy Delete Approval 1 of 1 New Table Query

Prospective Vendor ID Future Vendor ID

Name *

- Vendor Record Status -
Prospective Vendor

General Notes

Click this link to open the NDA subtask.

Address/Contact Info Vendor Employees **NDA** Teaming Agreement User-Defined Info

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Customers

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Management Vendor Info

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Approve Prospective Vendors

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Manage Contract
Management Employee Info

FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification New Copy Delete Approval 1 of 1 New Table Query

Prospective Vendor ID Future Vendor ID - Vendor Record Status
Name * Prospective Vendor

General Notes

Use the NDA subtask to browse for, add, or launch non-disclosure agreement (NDA) documents from a network location, and associate them to vendors.
Click **New** to add a new line.

Identification > NDA

Date Received	Details	Expiration Date	File Location	File Name

View NDA
Close

Use the NDA subtask to browse for, add, or launch non-disclosure agreement (NDA) documents from a network location, and associate them to vendors.
Click **New** to add a new line.

The fields are enabled and editable for both vendors and prospective vendors.

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification New Copy Delete Approval 1 of 1 New Table Query

Prospective Vendor ID Future Vendor ID - Vendor Record Status
Name * Prospective Vendor

General Notes

Click this link to open the Teaming Agreement subtask. U

[Address/Contact Info](#) [Vendor Employees](#) [NDA](#) [Teaming Agreement](#) [User-Defined Info](#)

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification New Copy Delete Approval 1 of 1 New Table Query

Prospective Vendor ID Future Vendor ID Vendor Record Status
Prospective Vendor

Name*

General **Notes**

Use the Teaming Agreement subtask to browse for, add, or launch teaming agreement documents from a network location, and associate them to vendors.

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

Identification > Teaming Agreement

Date Received	Details	Expiration Date	File Location	File Name
<input checked="" type="checkbox"/>				

New Copy Delete Form Query View Teaming Agreement Close

The fields are enabled and editable for both vendors and prospective vendors.

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification

Prospective Vendor ID Future Vendor ID

Name *

Vendor Record Status: Prospective Vendor

General Notes

Click this link to open the User-Defined Info subtask.

[Address/Contact Info](#) [Vendor Employees](#) [NDA](#) [Teaming Agreement](#) [User-Defined Info](#)

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Vendor Info

Identification New Copy Delete Approval 1 of 1 New Table Query

Prospective Vendor ID Future Vendor ID - Vendor Record Status
Prospective Vendor

Name*

General **Notes**

Use the User-Defined Info subtask to enter, edit, and view values for user-defined fields for a vendor. User-defined fields are set up on the Manage Vendor User-Defined Labels screen.

For prospective vendors, some fields on this subtask are editable. For regular vendors, all fields are read-only.

Click **New** to add a new line, or click **Autoload** to automatically populate the User-Defined Info subtask with data available on the Manage Vendor User-Defined Labels screen.

Address/Contact Info Vendor Employees NDA Teaming Agreement User-Defined Info

Identification > User-Defined Info New Copy Delete Form Query

<input checked="" type="checkbox"/>	Data Type	Labels *	Text Value	Numeric Value	Date Value	Costpoint Validation Field	Validated Text	Required

Autoload Close

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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 Vendors

Identification

Default Values needed for Vendor Approval

AP Account Description * OPERATING ACCOUNT

Cash Account Description * OPERATING CASH

Approve All Disap

Approval C	Pending
✓	Pending
	Pending
	Pending

VENDPROSP-0000000000000002 Digital Mgmt Consulting

Close

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



FILE LINE OPTIONS PROCESS HELP

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 Vendors

Identification

Default Values needed for Vendor Approval

AP Account Description * OPERATING ACCOUNT

Cash Account Description * OPERATING CASH

[Approve Prospective Vendors](#)

Approval Query

Approve All Disapprove All

Approval Code *	Future Vendor ID	Prospective Vendor ID	Vendor Name
Pending		123456789123456789123456789123SA	prospective vend pchua 12
-Select-		KARENPROSPECT	karen prospect vendor
Pending			
Not Approved			
Approved		VENDPROSP-0000000000000002	Digital Mgmt Consulting

Close

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



FILE LINE OPTIONS PROCESS HELP

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 Vendors

Identification

Default Values needed for Vendor Approval

AP Account Description * OPERATING ACCOUNT

Cash Account Description * OPERATING CASH

[Approve Prospective Vendors](#)

Approval Query

Approve All **Disapprove All**

Approval Code *	Vendor Name
Pending	prospective vend pchua 12
Pending	karen prospect vendor
Pending	Digital Mgmt Consulting

Close

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

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Manage Contract
Management Customer Info

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Approve Prospective
Customers

3
Manage Contract
Management Vendor Info

4
Approve Prospective Vendors

5
Manage Contract
Management Employee Info

FILE LINE OPTIONS PROCESS HELP

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 Vendors

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

Identification

- Default Values needed

AP Account Description

Cash Account Description * OPERATING CASH

[Approve Prospective Vendors](#)

Approval Query

Approve All Disapprove All

<input checked="" type="checkbox"/>	Approval Code *	Future Vendor ID	Prospective Vendor ID	Vendor Name
<input checked="" type="checkbox"/>	Approved		123456789123456789123456789123SA	prospective vend pchua 12
<input checked="" type="checkbox"/>	Approved		KARENPROSPECT	karen prospect vendor
<input checked="" type="checkbox"/>	Approved		VENDPROSP-0000000000000002	Digital Mgmt Consulting

Close

Customer/Vendor/ Employee Information

1
Manage Contract
Management Customer Info

2
Approve Prospective
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Approve Prospective Vendors

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Manage Contract
Management Employee Info

FILE LINE OPTIONS PROCESS HELP

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	10.10.3.3			Status	Active

Contact Information

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

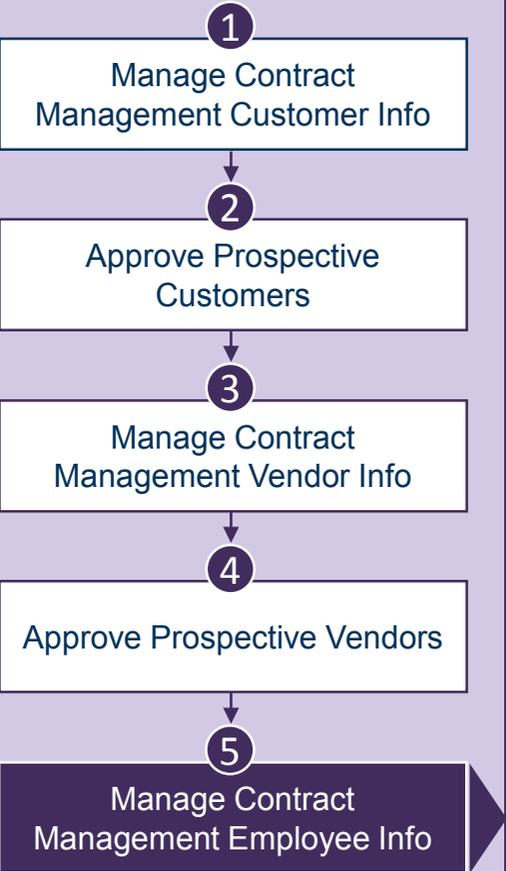
[Degrees](#) [Certifications](#) [Skills](#) [Training](#) [Security](#) [Opportunities](#) [Contracts](#)

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



FILE LINE OPTIONS PROCESS HELP

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: Status: Active

Contact Information

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

Click this link to open the Degrees subtask and view the employee education information.

Degrees Certifications Skills Training Security Opportunities Contracts

Identification > Degrees Query

	Degree Description	Concentration	School	Date Completed
<input checked="" type="checkbox"/>	Master in Business Admin		Georgetown	05/22/1986
	Bachelor of Arts		U of Michigan	05/15/1979

Close

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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: status: Active

Contact Information

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

[Degrees](#) **[Certifications](#)** [Skills](#) [Training](#) [Security](#) [Opportunities](#) [Contracts](#)

[Identification](#) > Certifications Query

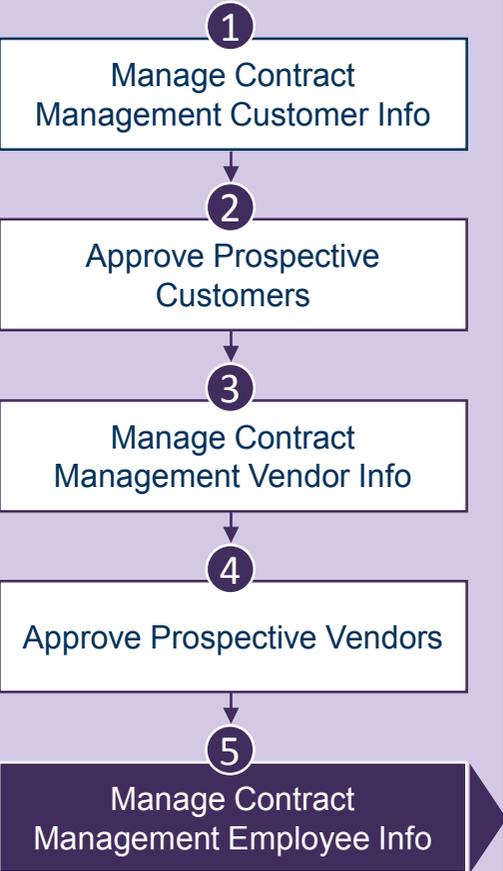
<input checked="" type="checkbox"/>	Certification	Professional Organization	Years	State/Province	License Number	Expiration Date	Last Renewal Date
-------------------------------------	---------------	---------------------------	-------	----------------	----------------	-----------------	-------------------

Close

Click this link to open the Certifications subtask and view the certifications obtained by the employee.

B

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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

Click this link to open the Skills subtask and view the employee's skills. C

Degrees Certifications **Skills** Training Security Opportunities Contracts

Identification > Skills Query

Description	Skill Level	Date Acquired	Years of Experience
Certified Public Accountant	Master	04/30/2001	12
Microsoft Office Suite	Master	12/15/2000	12
Corporate Law	Master	10/15/1992	20

Close

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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

Identification

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	10.10.3.3				

Contact Information

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

Click this link to open the Security subtask and view the employee's security details.

E

[Degrees](#) [Certifications](#) [Skills](#) [Training](#) **[Security](#)** [Opportunities](#) [Contracts](#)

Identification > Security

U.S. Person Status	
--------------------	--

Green Card Information

Surname		Category/Visa		Document Number	
Given Name		Resident Date		Verified By	
USCIS Number		Expiration Date		Date Verified	

ITAR

ITAR Status

- U.S. Person Authorized for ITAR
- Foreign Person with U.S. Dept of State Authorization/Special Exemption
- Not Authorized Denied Person
- Not Applicable

ITAR Start Date		Verified By	
ITAR End Date		Date Verified	

Notes

[Security Clearances](#)

Close

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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
Detail Job Title	President	Manager	Arnold, Deborah	Hire Date	01/01/2000
Business Unit/Team		Home Org	10.10.3.3	Suffix	

Contact Information

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

Degrees Certifications Skills Training Security **Opportunities** Contracts

Identification > Opportunities Query

Opportunity ID	Opportunity Name	Stage	Role
...			

Close

Click this link to open the Opportunities subtask and view information on opportunities associated with the employee.

F

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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: 10.10.3.3

Contact Information

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

Degrees Certifications Skills Training Security Opportunities **Contracts**

Identification > Contracts Query

Contract Name	Role	Contract Start Date	Contract End Date	Contract Status
...				

Close

Click this link to open the Contracts subtask and view information on contracts associated with the employee.

G

Customer/Vendor/ Employee Information



FILE LINE OPTIONS PROCESS HELP

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
Business Unit/Team:
Contact Information:
Work Email: bdurham@ati.com
Work Phone: 703-899-9220

Security Opportunities Contracts

Identification > Contracts Query

Contract Name	Role	Contract Start Date	Contract End Date	Contract Status
[Empty table body]				

Close

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