

Adding a Vendor Type Customer

To add a new customer, navigate to Contract Core -> Customer Maintenance -> Add.
The Customer Header will open.

Vendor Type Customer Header

Customer Header - TEST VENDOR CHILD 001

1. Header 2. Alias 3. Relationship

Customer Type: * VENDOR

COT: * DIST Effective Start Date: [calendar icon]

340B Entity:

Territory: * UNKNOWN

Reference ID: * 001VC

Name: * TEST VENDOR CHILD 001

Address 1: 123 Main Street

Address 2: [empty]

Address 3: [empty]

City: * BROWNS MILLS State: NEW JERSEY

Zip Code: * 08015 Country: United States

Contact:

Email: [empty]

Phone: [empty]

Fax: [empty]

Level: * Parent Child

Save

On the customer type drop-down, select VENDOR.

Fill in the required customer details, then hit SAVE to add a new customer.

For Vendor Type customers, a level must be selected (Parent/Child).

Refer to the table below when filling out the customer header for VENDOR type customers:

Field	Description
Class of Trade (Required)	Select the WHOLESALER, DISTRIBUTOR or desired COT. For Government Pricing, the COT category determines if sales for the customer should be considered wholesaler sales.
340B Entity	Check the box to exclude sales in Government Pricing.
Territory (Required)	Select a territory from the territory drop-down menu; defaults to UNKNOWN.
Reference ID (Required)	Enter the Main Reference ID. This ID will be displayed in most screens throughout the application. In Reporting/Analytics the Main Reference ID = Customer_Ref_ID field.
Name (Required)	Enter the name of the customer.
Address	Enter the customer's address.
City (Required)	Enter the customer's city.
State (Required)	Enter the customer's state.

Zip Code (Required)	Enter the customer's Zip code. This field is optional if the country is outside of the USA.
Country	Choose the customer's country from the drop-down menu; defaults to USA.
E-mail	Enter the customer's email address.
Phone	Enter the customer's phone number.
Fax	Enter the customer's fax number.
Level (Required)	Select Parent (Bill To) or Child (Ship To). Default is Parent.
845 EDI	Check the box to send EDI845. Available on Vendor Parent only.
849 EDI	Check the box to send EDI849. Available on Vendor Parent only.

After filling in all required fields, press the SAVE button.

Quick Tip on Vendor Customer Relationships:

A Vendor Type customer requires a level to be selected Parent/Child. There can only be one Vendor Parent, but multiple Vendor Children can have attached to a single parent.

A Vendor Parent should have at least one Vendor Child relationship.

If there are no errors, Tab 2. Alias will automatically open.

Alias - TEST VENDOR CHILD 001

1. Header 2. Alias 3. Relationship

Back Next

Add New Alias

Export To Excel

Change Delete

Message Main Ind First Assigned Last Assigned

Y

Save Cancel

Message Main Indicator Reference ID Reference Type First Assigned Last Assigned

EXTERNAL

Change Delete

Message Main Indicator Reference ID Reference Type

Y O1VC INTERNAL

To add a new alias, click the ADD NEW ALIAS button.

Fill in the desired Reference ID, select a Reference Type from the drop-down, then hit save.

To change or update an existing alias, click the CHANGE button next to the desired alias. Update Reference ID/Reference Type and Main Indicator status as desired.

Assigning Vendor Aliases

Vendor Parent Alias Tips

An internal alias is required for a Vendor Parent.

The system will automatically populate the Reference ID input on the Customer Header as the MAIN INDICATOR with a reference type INTERNAL.

Additional aliases can be added, if needed, by selecting the ADD NEW ALIAS button.

- The internal alias of the Vendor Parent is sent in field 3 of the ACCOUNTS RECEIVABLE interface CREDIT.txt
- The internal alias of the Vendor Parent is sent in field 1 of the EDI 849 interface RECON.txt

Vendor Child Alias Tips

An internal alias and a DEA alias are required for a Vendor Child.

- The internal alias of the Vendor Child is sent in field of the 13 of the ACCOUNTS RECEIVABLE interface CREDIT.txt
- The DEA is submitted in field 5 of the EDI 844 interface INDIRECT.txt
- The DEA is sent in field 5 of the EDI 849 interface RECON.txt
- **A DEA alias can only be assigned to one customer.**
- A vendor type customer may have a HIN instead of a DEA, if a DEA number is not available.

A may select any of the IDs as the main indicator by selecting the check box under the Main Indicator column; this can be done by clicking the CHANGE button on an existing alias and editing, or can be selected when adding a new alias.

- The Main Indicator ID is displayed in most screens throughout the application.

- In Reporting/Analytics the Main Indicator = Customer_Ref_ID field.

Once the appropriate aliases have been added, click on the NEXT button to continue to Tab 3. Relationship.

Relationships for Vendor Parents

The Customer Relationships header will open.

When reviewing the customer relationships header for a Vendor Parent, the application will display a list of Vendor Children that can be connected.

To view Vendor Child details, the user can click on the Reference ID. This will open up the Customer Header for the Vendor Child.

Note: Multiple vendor children can be connected to a single parent.

Contract Core Chargeback Payer Rebate Payer Utilization Payer Government Pricing Medicaid Payer Medicare Payer Gross To Net Forecasting Reporting/Analytics

Customer Relationships - TEST VENDOR PARENT 122925 Vendor Parent Name

1. Header 2. Alias 3. Relationship Save Back

To add a parent/child connection, click on the checkbox next to the desired vendor children, then hit SAVE.

Size: 50 Export To Excel

Reference	Member Name	Type	COT	City	State	Country	Zip	Status	Message
<input checked="" type="checkbox"/> MLR001VC	TEST VENDOR CHILD 001	VENDOR	DIST	BROWNS MILLS	NJ	USA	08015	A	
<input checked="" type="checkbox"/> MLR002VC	TEST VENDOR CHILD 002	VENDOR	DIST	MT HOLLY	NJ	USA	08060	A	

List of Vendor Children.
*Multiple vendor children can be connected to a single parent.

If no boxes are selected, there are no current vendor parent/child relationships.
 To add a relationship, click the checkbox next to the desired vendor child, then hit the SAVE button.
 To remove a vendor child relationship, uncheck the checkbox, then hit SAVE.

Relationships for Vendor Children

When reviewing the customer relationships header for a Vendor Child, the application will display a list of Vendor Parents that can be connected.

To view Vendor Parent details, the user can click on the Reference ID. This will open up the Customer Header for the Vendor Parent.

Note: A vendor child can only be connected to ONE vendor parent.

Contract Core Chargeback Payer Rebate Payer Utilization Payer Government Pricing Medicaid Payer Medicare Payer Gross To Net Forecasting Reporting/Analytics

Customer Relationships - TEST VENDOR CHILD 001 Vendor Child Name

1. Header 2. Alias 3. Relationship Save Back

Relationships

To add a parent/child connection, click on the checkbox next to the desired vendor parent, then hit SAVE.

Export To Excel

Reference	Member Name	Type	COT	City	State	Country	Zip	Status	Message
<input checked="" type="checkbox"/> MLR122925VP	TEST VENDOR PARENT 122925	VENDOR	WHL	PEMBERTON	NJ	USA	08068	A	
<input type="checkbox"/>		VENDOR	WHL	Shreveport	LA	USA	71115	A	
<input type="checkbox"/> T1946_TESTVP		VENDOR	WHL	Bloomfield	NJ	USA	07003	A	

List of Vendor Parents.
*Only one vendor parent can be selected.

If no boxes are selected, there are no current vendor child/parent relationship.

To add a relationship, click the checkbox next to the desired vendor parent, then hit the SAVE button.

To remove a vendor parent relationship, uncheck the checkbox, then hit SAVE.