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2. Vendor List and Vendor Search

2.1 Menus

The menus presented on the Vendor List window provide mouse and keyboard functionality to functions within the Vendor Management application. The Menu includes the following menu items:

- File
- Vendor List
- Help

2.1.1 File Menu

The Menu contains menu items for invoking various global features of the vendor application. It is enabled when the window is active. It has a mnemonic of "F" and does not have a short cut key. It includes the following menu items:

- File
 - Send Group Letters
 - Vendor Reports
 - Action Dates
 - Peer Group Management
 - UPC MAR Management
 - Food Instrument Types
 - System Tools
 - Open Vendor Folder
 - Exit Vendor Application

2.1.1.1 Send Group Letters Menu Item

The menu item allows the user to invoke the Send Group Letters function in order to identify and print various letters and mailing labels to send to vendors as needed. It is enabled when the menu is active. It has a mnemonic of "S" and does not have a short cut key.

2.1.1.2 Vendor Reports Menu Item

The menu item allows the user to invoke the Vendor Reports function in order to generate various vendor related reports. It is enabled when the menu is active. It has a mnemonic of "R" and does not have a short cut key.

2.1.1.3 Action Dates Menu Item

The menu item allows the user to invoke action dates. It is enabled when the menu is active. It has a mnemonic of "A" and does not have a short cut key.

2.1.1.4 Peer Group Management Menu Item

The menu item allows the user to invoke peer group management functions. It is enabled when the menu is active. It has a mnemonic of "P" and does not have a short cut key.

2.1.1.5 UPC MAR Management Menu Item

The menu item allows the user to invoke UPC MAR management functions. It is enabled when the menu is active. It has a mnemonic of "N" and does not have a short cut key.

2.1.1.6 Food Instrument Types Menu Item

The menu item allows the user to Food Instrument Types list to set the Low Variance value for the Low Variance Vendor Summary and High Risk reports. It is enabled when the menu is active. It has a mnemonic of "I" and does not have a short cut key.

2.1.1.7 System Tools Menu Item

The menu item allows the user to invoke the System Tools function in order to change printers or passwords. It is enabled when the menu is active. It has a mnemonic of "T" and does not have a short cut key.

2.1.1.8 Open Vendor Folder Menu Item

The menu item allows the user to invoke the Open Vendor Folder function in order to view and maintain information about a specific vendor. It is enabled when a row in the Vendor List table is selected. It has a mnemonic of "O" and does not have a short cut key.

2.1.1.9 Exit Vendor Application Menu Item

The menu item allows the user to exit the vendor application. It is enabled when the menu is active. It has a mnemonic of "X" and does not have a shortcut key.

2.1.2 Processes

Upon selection of the Send Group Letters menu item, the system invokes the Send Group Letters dialog described in [Chapter 20 – Vendor Form Letters](#).

Upon selection of the Vendor Reports menu item, the system invokes the Generate Reports dialog described in [Chapter 19 – Vendor Reports](#).

Upon selection of the Action Dates menu item, the system invokes the Action Date dialog as defined in [Chapter 07 – Action Date](#).

Upon selection of the Peer Group Management menu item, the system invokes the Peer Group Pricing dialog as defined in [Chapter 08 – Manage Peer Group](#).

Upon selection of the UPC MAR Management menu item, the system invokes the UPC Maximum Allowable Reimbursement (MAR) Price Management dialog as defined in [Chapter 27 - UPC](#).

Upon selection of the System Tools menu item, the system displays the sub-menu. The sub-menu includes the following menu items:

- System Tools
 - Change Password
 - Set Default Printers

Upon selection of the Change Password menu item, the system invokes the Change Password dialog as described in Application Administration [Chapter 02 -Security](#).

Upon selection of the Set Default Printers menu item, the system invokes the Select Printers for Workstation dialog as described in as described in Common Interface Panels [Chapter S - System Tools](#).

Upon selection of the Open Vendor Folder menu item, the system invokes the Vendor Folder described in [Chapter 04 – Vendor Folder](#) for the selected vendor.

Upon selection of the Exit Vendor Application menu item, the system will exit the vendor application and return the user to the operating system.

Upon selection of the Food Instrument Types menu item, the system invokes the Food Instrument Types dialog as described in [Chapter 21 – Food Instrument Type](#).

2.1.3 Vendor List Menu

This Menu contains menu items that allow the user to create a new vendor and manage vendor training. It is enabled when the window is active. It has a mnemonic of "V" and does not have a short cut key. It includes the following menu items:

- Vendor List
 - Create New Applicant
 - Training
 - Send Online Price Survey
 - Send Online Vendor Application

2.1.3.1 Create New Applicant Menu Item

The menu item allows the user to enter vendor information for vendors that have requested to participate in the WIC Program. It is enabled when the menu is active. It has a mnemonic of "C" and does not have a short cut key.

2.1.3.2 Training Menu Item

The menu item allows the user to invoke the Training function to set up training sessions and record attendance for specific vendors. It is enabled when the menu is active. It has a mnemonic of "T" and does not have a short cut key. Upon selection of this item, the Training Menu is displayed.

2.1.3.3 Send Online Price Survey Menu Item

The menu item allows the user to send an Online Price Survey. It is enabled when the menu is active. It has a mnemonic of "P" and does not have a short cut key.

2.1.3.4 Send Online Vendor Application Menu Item

The menu item allows the user to send an Online Vendor Application. It is enabled when the menu is active. It has a mnemonic of "A" and does not have a short cut key.

2.1.4 Processes

Upon selection of the Create New Applicant menu item, the system invokes the Applicant Information dialog described in [Chapter 03 – Entry of New Applicant](#).

Upon selection of the Training menu item, the system displays the sub-menu. The sub-menu includes the following menu items:

- Training
 - Schedule Training
 - Training Attended

Upon selection of the Selection of the Schedule Training menu item, the system invokes the Schedule Training dialog as described in [Chapter 18 – Vendor Training](#).

Upon Selection of the Training Attended menu item, the system invokes the Training Attended dialog, described in [Chapter 18 – Vendor Training](#).

Upon Selection of the Send On-line Price Survey menu item, the system invokes the Send On-line Price Survey dialog described in [Chapter 24 – Manage Vendor Questionnaire](#).

Upon Selection of the Send On-line Vendor Application menu item, the system invokes the Send On-line Price Survey dialog described in [Chapter 24 – Manage Vendor Questionnaire](#).

2.1.5 Help Menu

This Menu contains menu items that can assist the user in using the vendor application. It is enabled when the window is active. It has a mnemonic of "H" and does not have a shortcut key. It includes the following menu items:

- Help
 - Help on Screen

- Vendor Help Topics
- About Vendor

2.1.5.1 Help on Screen Menu Item

The menu item allows the user to view panel level help for the currently displayed screen. It is enabled when the system menu bar is active. It has a mnemonic of "S" and a shortcut key of F1.

2.1.5.2 Vendor Help Topics Menu Item

The menu item allows the user to view a list of help topics for the vendor application. It is enabled when the Help Menu is active. It has a mnemonic of "V" and does not have a shortcut key.

2.1.5.3 About Vendor Menu Item

The menu item allows the user to view the current version number of the vendor application software. It is enabled when the Help Menu is active. It has a mnemonic of "A" and does not have a shortcut key.

2.1.6 Processes

Upon selection of the Help on Screen menu item (or by pressing F1), the system invokes the panel level help for the currently selected window.

Upon selection of the Vendor Help Topics menu item, the system invokes the Help Topics: Vendor Help System at the Index tab of the help function.

Upon selection of the About Vendor Menu Item, the system invokes the About Vendor Management application information dialog.

2.2 System Toolbar

The system toolbar gives the user a quick way of accessing the global functions of the vendor application. This section describes the behavior of the buttons on the system toolbar.



Figure 1 - System Toolbar

2.2.1 Toolbar Buttons

2.2.1.1 Vendor Reports Toolbar Button

The Vendor Reports toolbar button invokes the Vendor Reports dialog and allows the user to generate various vendor related reports. This toolbar button is enabled when the Vendor List window is active. The toolbar button has a tool tip text of "Vendor Reports".

2.2.1.2 System Tools Toolbar Button

The System Tools toolbar button invokes the System Tools dialog and allows the user to make changes to printers and/or passwords. This toolbar button is enabled when the Vendor List window is active. The toolbar button has a tool tip of "System Tools."

2.2.1.3 Exit Vendor Application Toolbar Button

The Exit Vendor Application toolbar button allows the user to exit the vendor application. This toolbar button is enabled when the Vendor List window is active. The toolbar button has a tool tip text of "Exit Vendor Application".

2.2.1.4 Create New Applicant Toolbar Button

The Create New Applicant toolbar button invokes the Applicant Information dialog and allows the user to begin processing vendors that have requested applications to participate in the WIC Program. This toolbar button is enabled when the Vendor List window is active. The toolbar button has a tool tip text of "Create New Applicant".

2.2.1.5 Open Vendor Folder Toolbar Button

The Open Vendor Folder toolbar button invokes the Vendor Folder dialog and allows the user to view and maintain information about a specific vendor. This toolbar button is enabled when the Vendor List window is active and a vendor is selected. The toolbar button has a tool tip text of "Open Vendor Folder".

2.2.2 Processes

Upon selection of the Vendor Reports toolbar button, the system invokes the Generate Reports dialog described in [Chapter 19 – Vendor Reports](#).

Upon selection of the System Tools toolbar button, selecting the System Tools menu item, the system displays the sub-menu. The sub-menu includes the following menu items:

- Change Password
- Set Default Printers

Upon selection of the Change Password menu item, the system invokes the Change Password dialog as described in *Security*.

Upon selection of the Set Default Printers menu item, the system invokes the Select Printers for Workstation dialog as described in as described in *System Tools*

Upon selection of the Exit Vendor Application toolbar button, the system will exit the vendor application and return the user to the operating system

Upon selection of the Create New Applicant toolbar button, the system invokes the Applicant Information dialog described in [Chapter 03 – Entry of New Applicant](#).

Upon selection of the Open Vendor Folder toolbar button, the system invokes the Vendor Folder described in [Chapter 04 – Vendor Folder](#) for the selected vendor.

2.3 Vendor List

The main window of the vendor application allows the user access to all the vendor related functions. When a Vendor Search is performed, the results from the search are displayed in a grid.

The screenshot shows the 'Vendor List' application window. It features a menu bar with 'File', 'Vendor List', and 'Help'. Below the menu bar are several icons, including a printer, a person, an 'EXIT' button, a house, and a map. The main area contains search criteria fields: 'Vendor ID', 'Stamp Number', 'Food Stamp Number', 'Peer Group' (dropdown), 'Name', 'County' (dropdown), 'City' (dropdown), and 'Zip'. A 'Status' section includes checkboxes for 'Terminated', 'Applicant', 'Denied', 'Disqualified', 'Enrolled', 'Probation', and 'Waiting List'. There are 'Search' and 'Clear' buttons. Below these is an 'Owner Information' section with fields for 'Last Name', 'First Name', 'Middle Name', 'Phone', and 'SSN'. A 'Corporate Parent' section has a dropdown menu. At the bottom is a data grid with columns: Status, Vendor ID, Name, City, ZIP, County, and Address. The grid is currently empty.

Figure 2 - Vendor List Window

2.3.1 Controls

This section describes the behavior of the controls on this window.

2.3.1.1 Vendor ID Masked Edit Box

This control allows the user to enter the Vendor ID as part of the search criteria. The masked edit box is enabled when the Vendor List window is active. If the value for the [VENDORID_NUMERIC](#) business rule is set to 'Y', the Vendor ID field will allow only numeric digits. Otherwise, alphanumeric characters are allowed. The length is determined by the value set for the [VENDORIDLENGTH](#) business rule. Alpha characters are forced to uppercase. Special characters are not accepted in this field.

2.3.1.2 Stamp Number Text Box

This control allows the user to enter a WIC vendor stamp number as part of the search criteria. The entered stamp number can be an active or inactive stamp number. The text box is enabled when the Vendor List window is active. If the value for the [STAMPNUMBERNUMERIC](#) business rule is set to 'Y', the Stamp Number field will allow only numeric digits. Otherwise, alphanumeric characters are allowed. The length is determined by the value set for the [STAMPNUMBERLENGTH](#) business rule. Alpha characters are forced to uppercase. Special characters are not accepted in this field.

2.3.1.3 Vendor Name Text Box (Name)

This control allows the user to enter the name of the vendor as part of the search criteria. The text box is enabled when the Vendor List window is active. This control accepts a minimum of one (1) and maximum of fifty-(50) alphanumeric characters. Partial entry will allow a search for vendors whose name begins with the characters entered. All alphabetic characters are forced to uppercase. Special characters are accepted in this field.

2.3.1.4 County Dropdown

This control allows the user to select the county for the vendor location as part of the search criteria. The dropdown is enabled when the Vendor List window is active. It displays a list of counties from the County table. This list is read only and listed in alphabetical order. Upon selecting a county, the City dropdown becomes enabled.

2.3.1.5 City Dropdown

This control allows the user to select the city location of the vendor as part of the search criteria. The dropdown will become enabled when a value is selected in the County dropdown. It displays a sub-set list of cities associated with the selected county from the LocalMunicipality entity. The list is read only and is listed in alphabetical order. If enabled, it will be initially blank. If a change is made to the County dropdown, the City value is emptied.

2.3.1.6 Vendor ZIP Masked Edit Box (ZIP)

This control allows the user to enter the ZIP code of the vendor as part of the search criteria. The masked edit box is enabled when the Vendor List window is active. The masked edit box will only allow the entry of numeric digits. The mask for the box will be "99999-9999" to allow entry of the five digit zip code and a four digit ZIP extension, if known. Special characters are not accepted in this field.

If an entry is made in this control, a complete five digit ZIP code is required. If any part of the four-digit extension is entered, the entire extension is required.

2.3.1.7 Food Stamp Number Text Box

This control allows the user to enter the food stamp number of the vendor as part of the search criteria. The text box is enabled when the Vendor List window is active. The text box will only allow the entry of numeric digits. The maximum allowed will be fifteen (15) digits. Special characters are not accepted in this field.

2.3.1.8 Peer Group Dropdown

This control allows the user to select the peer group of the vendor as part of the search criteria. The dropdown is enabled when the Vendor List window is active. It displays a list of peer groups, in alphabetical order, from the PeerGroup entity.

2.3.1.9 Status Group

This Status group allows the user to include the vendor status as part of the search criteria. The control is enabled when the Vendor List window is active. The Status group will include the following check boxes:

- Terminated
- Applicant
- Denied
- Disqualified
- Enrolled (If the ChangeVendorEnrolledToAuthorized business rule is set to 'Y' then this check box will be labeled "Authorized".)
- Waiting List
- Probation

The user may make single or multiple selections.

2.3.1.10 Owner Information Radio Button

This control allows the user to include Owner (or Partnership) Information as part of the search criteria for the vendor or vendors. It is enabled when the Vendor List window is active.

2.3.1.11 Owner Last Name Text Box (Last Name)

This control allows the user to enter the last name of the owner as part of the search criteria for a vendor. The text box is enabled when the Owner radio button is selected. The control will only accept entry of alphanumeric characters. The maximum size of this control is twenty-five (25) characters. All alphabetic characters are forced to uppercase. Partial entry of the last name will initiate a search for Vendors whose owner last name begins with the characters entered. Special characters are not accepted in this control.

2.3.1.12 Owner First Name Text Box (First Name)

This control allows the user to enter the owner's first name as part of the search criteria for a vendor. The text box is enabled when the Owner radio button is selected. The control will only accept entry of alphanumeric characters. The maximum size of this control is twenty (20) characters. All alphabetic characters are forced to uppercase. Partial entry of the owner's first name will initiate a search for vendors whose owner first name begins with the characters entered. Special characters are not accepted in this control.

2.3.1.13 Owner Middle Name Text Box (Middle Name)

This control allows the user to enter the middle name of the owner as part of the search criteria for a vendor. The text box is enabled when the Owner radio button is selected. The control will only accept entry of alphanumeric characters. The maximum size of this control is twenty (20) characters. All alphabetic characters are forced to uppercase. Partial entry of the middle name will allow a search for vendors whose owner middle name begins with the characters entered. Special characters are not accepted in this control.

2.3.1.14 Owner Telephone Masked Edit Box (Telephone Number)

This control allows the user to enter the telephone number of the owner as part of the search criteria for a vendor. The text box is enabled when the Owner radio button is selected. The masked edit box will only accept the entry of numeric digits. The mask for the box will be "999-999-9999" which accepts the entry of an area code and seven digit telephone number. Special characters are not accepted in this control.

2.3.1.15 Owner Social Security Number Masked Edit Box (SSN)

This control allows the user to enter the Social Security number of the owner as part of the search criteria for a vendor. The text box is enabled when the Owner radio button is selected. The masked edit box will only accept the entry of numeric digits. The mask for the box will be "999-99-9999" and will allow partial. Special characters are not accepted in this control.

2.3.1.16 Corporate Parent Radio button

This control allows the user to include Corporate Parent Information as part of the search criteria for the vendor or vendors. The option button is enabled when the Vendor List window is active.

2.3.1.17 Corporate Parent Dropdown

This control allows the user to select a Corporate Parent to include as part of the search criteria for the vendor or vendors. The drop down list is enabled when the Corporate Parent radio button is selected. It displays all the corporations listed in the CORPORATEPARENT entity. It is displayed in alphabetical order by Corporate Parent name. It is a read-only control.

2.3.1.18 Search Button

The Search button allows the user to initiate the search. The Search button will be enabled when the Vendor List window is active. It will have a mnemonic of 'S' and will be the default button for the window.

2.3.1.19 Clear Button

The Clear button allows the user to clear all entered search criteria. The Clear button will be enabled when the Vendor List window is active. It will have a mnemonic of 'C'.

2.3.1.20 Vendor List Display Grid

The Vendor List display grid allows the user to view a list of vendors displayed from the results of the Vendor Search process. The user may then select a vendor to perform vendor management functions.

The Vendor List display grid displays vendor(s) that match the search criteria. Vendors are displayed in alphabetical order by vendor name. The grid displays the following columns:

- Status
- Peer Group ID
- Vendor ID
- Name
- City
- ZIP
- County
- Address

Selecting the column headers allows the user to sort the display grid in alphabetical or numeric order, depending on the column selected. When the Address column is selected, the display grid is sorted numerically by street number, then alphabetically by street name.

Double clicking on a record in the grid will open the vendor folder.

2.3.2 Processes

This section describes the processes (navigation) that take place on the Vendor List window.

2.3.2.1 Initializing the Interface

Upon initial display of the window:

- The title bar text will be set to "Vendor List".
- All controls default to blank.
- The City dropdown is initially disabled.
- The Owner radio button is initially selected.
- The Vendor List grid is initially blank.
- The Corporate Parent dropdown is disabled.

2.3.2.2 Edits

Upon selection of the Search button:

- The system will initiate a check for valid search information.
- If no data has been entered for any of the search controls, the system invokes a standard error message with the text "You must enter information to perform a search."
- If any of the following controls contain incomplete data:
 - Vendor ID masked edit box
 - Vendor ZIP masked edit box
 - Owner Telephone Number masked edit box
 - Social Security Number masked edit box

The system will invoke a standard error message with the text "A complete entry is required for the {Name of Control}."

- If partial SSN entry does not begin in the first most left position of the field, the system invokes a standard error message "SSN has invalid search criteria."
- Once the controls have been validated, a search will be performed. The results of the search will be displayed in the Vendor List grid of the Vendor List window.
- If no vendor information is found that matches the search criteria, the system invokes a standard error message box with the text "No vendor information was found to match the search criteria." Upon dismissal of the error message, the system will redisplay the Vendor Search dialog.

2.3.2.3 Clear

Selecting the Clear button will reset all controls to their initial state.