

TERNPOINT



USER GUIDE

TPS Vendor Certifications Documentation

TERNPOINT.SOLUTIONS



TPS Vendor Certifications Documentation

TPS Vendor Certifications Allows for the tracking of certificates such as BRC, HAACP, Organic, and Kosher, at the vendor, vendor and item or vendor and item category combinations. Documents can then be uploaded to the certificate card in Business Central for easy reference and storage. Certificates often need to be renewed, so a start and end date can be entered on the certificate, to ensure validity. The app prevents a purchase document from being released if there is not a valid (unexpired) certificate setup.

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LICENSING

A companion app to manage licensing is automatically installed with the first app that is installed from Ternpoint Solutions

1. A new **Permissions Set** was added as part of the app install. **TPS LM LICENSE MGT.** Assign this permission sets to users in advance of use, on the **User Setup** card.
2. **Extension Setup**
 - a. Search for and open **Extension Management**.
 - b. Select **Ternpoint License Management** and open.
 - c. Ensure *Allow HttpClient Requests* is activated.

3. **Ternpoint Product Registration**
 - a. Search for and open **Ternpoint Product Registration**.
 - i. On this page all subscription type Ternpoint Solutions apps that have been installed are shown. Also from this page contacting Support, viewing your subscription status, creating a trial license, applying for an extension to your trial license or requesting a full one year license can be done.
 - ii. Enter appropriate Contact Info and select **Register** in the ribbon.
 1. If registering the app in a separate company from one already purchased, ensure the same contact information is used across all Business Central companies to avoid a second monthly subscription fee. The license fee is per Business Central tenant,
 - iii. In the line section of the page select **Create Trial License**.
 1. A 30 day trial license will be created for evaluation purposes.
 2. If more time is needed to evaluate the app please select the **Extend License** or **Contact Support**.
 3. In order to purchase a full license please select **Request Full License**.
 4. *Email setup must be enabled in order to send emails requesting licenses or to contact support using the link.*
 - iv. In order to uninstall the app, navigate to **Extension Management**, select the app and select **Uninstall** in the ribbon.



VENDOR CERTIFICATION PERMISSIONS

1. Two new Permissions Sets were added as part of the app install. Vend Cert.-Read and Vend Cert. -Edit. Assign these permissions sets, as appropriate, to users, on their User Setup cards.

CERTIFICATE SETUP

1. Search for and open Certificate Setup. Look up and select a certificate no. series for Certification Nos.
 - a. If a new No. Series needs to be created, create a new one by selecting New, and entering a Code, Description, and clicking Default Nos.
 - b. After setting up the new code, drill into the Starting or Ending No. and populate the Starting No. with a unique alpha numeric code.

General

Certification Nos

CERTIFICATE DOCS

1. Search for and open Certificate Document.
2. Enter a Certificate Code and Description for the type of certificate that will be tracked.

Certificate Code ↑		Description	
	1099		1099 Certificate
	BRC		Brand Reputation through Compliance Certification
	COO		Country of Origin Certification
	HAACP		HAACP
	KOSHER		Kosher Certificate
	ORGANIC		Organic Certification
	INSURANCE		Insurance Certificate
	V-ONBOARDING		Vendor Onboarding Checklist
	S-ONBOARDING		Customer Onboarding Checklist
	HALAL		Halal Certification



ATTACHING A CERTIFICATE TO AN ITEM

- 1. Search for and open an Item Card.
- 2. Select Certificate Docs in the ribbon. Look up and select a Certificate Code(s) that is required, and if appropriate a City and State where the certificate is valid.

Item Card

1007 · Frozen Broccoli 4 1 Lb bags

Process

Item

Prices & Discounts

Request Approval

Actions

Related

Reports

Fewer options

Comments

Attachments

Attributes

Adjust Inventory

Certificate Docs

Item

No.1007

Blocked

DescriptionFrozen Broccoli 4 1 Lb bags

TypeInventory

Inventory

Shelf No.

Quantity on Hand636

Qty. on Prod. Order

Qty. on Component Lines

Qty. on Purch. Order124

Qty. on Sales Order

1007 · Frozen Broccoli 4 1 Lb bags

Not saved

Source Certificate Docs

Search

+ New

Edit List

Delete

Certificate Code ↑

Description

City ↑

State ↑

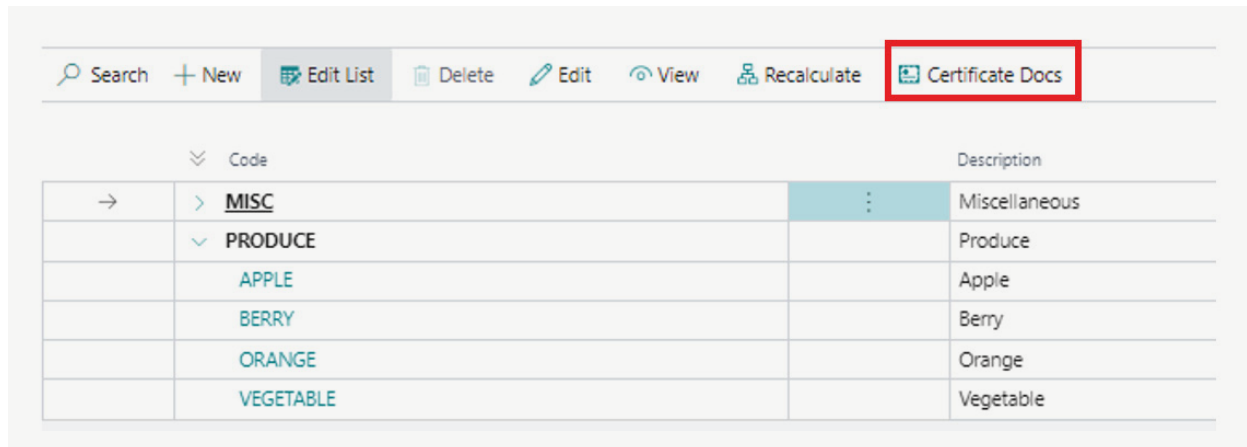
→ORGANIC

Organic Certification



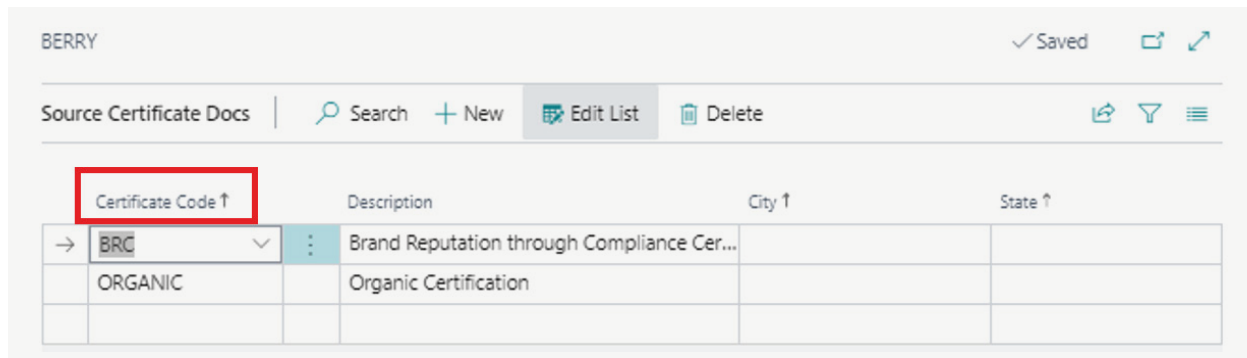
ATTACHING A CERTIFICATE TO AN ITEM CATEGORY CODE

1. Search for an open Item Categories.
2. Select an Item Category code then select Certificate Docs and select the appropriate Certificate Code(s) required for the Item Category



The screenshot shows the 'Item Categories' interface. At the top, there is a toolbar with buttons: Search, + New, Edit List, Delete, Edit, View, Recalculate, and Certificate Docs. The 'Certificate Docs' button is highlighted with a red rectangle. Below the toolbar is a table with columns: Code and Description. The table contains the following rows:

Code	Description
MISC	Miscellaneous
PRODUCE	Produce
APPLE	Apple
BERRY	Berry
ORANGE	Orange
VEGETABLE	Vegetable

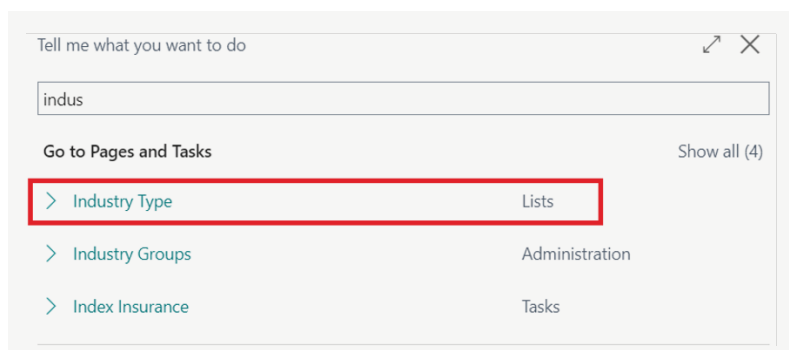


The screenshot shows the 'BERRY' item category's 'Source Certificate Docs' interface. At the top, there is a toolbar with buttons: Search, + New, Edit List, and Delete. Below the toolbar is a table with columns: Certificate Code, Description, City, and State. The 'Certificate Code' column has a dropdown menu with 'BRC' selected. The table contains the following rows:

Certificate Code	Description	City	State
BRC	Brand Reputation through Compliance Cer...		
ORGANIC	Organic Certification		

ATTACHING A CERTIFICATE TO AN INDUSTRY CODE

1. Search for and open Industry Type.



The screenshot shows a search results interface. At the top, there is a search bar with the text 'indus'. Below the search bar is a section titled 'Go to Pages and Tasks' with a 'Show all (4)' link. The section contains the following items:

- > Industry Type Lists
- > Industry Groups Administration
- > Index Insurance Tasks



2. Create a new type by entering a Code and Description. For each Industry Type, Certificate Docs can be assigned by selecting Certificate Docs.

Industry Type

Search + New Edit List Delete **Certificate Docs** Actions Fewer options

Industry Code ↑	Description
→ FRESH FRUIT	Fresh Fruit Grower
MEAT	Meat Supplier
PACKAGING	Packaging Supplier
RAW MATERIAL	Raw Materials

FRESH FRUIT ✓ Saved

Source Certificate Docs Search + New Edit List Delete

Certificate Code ↑	Description	City ↑	State ↑
→ BRC	Brand Reputation through Compliance Cer...		
ORGANIC	Organic Certification		

ASSIGNING INDUSTRY TYPES TO VENDORS

1. Search for an open the required Vendor Card.
2. On the ribbon there is an option for Vendor Industry Type, where a Vendor record can be linked to one or more Industry Types

Vendor Card

10000 · Berry West Growers, inc

Process Report Request Approval New Document Navigate **Vendor** Actions Related Reports Fewer options

Dimensions Ledger Entries Statistics Comments Approvals Item References **Vendor Industry Type** Create a New Certificate Vendor Certificate List

← 10000 · Berry West Growers, inc ✓ Saved

Vendor Industry List Search + New Edit List Delete

Industry Code ↑	Industry Code Description	No. of Certificate Docs
→ FRESH FRUIT	Fresh Fruit Grower	2

3. The No. of Certificate Docs shows how many required certificates are setup for this type.



CREATING A VENDOR CERTIFICATE FROM A VENDOR CARD

1. Search for and open the Vendor Card for which a certificate will be setup.
2. On the ribbon select New Vendor Certificate.

Vendor Card

10000 · Berry West Growers, inc

Process Report Request Approval New Document Navigate Vendor Actions Related Reports Fewer options

Dimensions Ledger Entries Statistics Comments Approvals Item References Vendor Industry Types **New Vendor Certificate** Vendor Certificates

General

No.	10000	Balance (\$)	3,632.53	IC Partner Code
Name	Berry West Growers, inc	Balance (\$) As Customer	0.00	Purchaser Code
Blocked		Balance Due (\$)	3,632.53	Responsibility C
Privacy Blocked	<input type="checkbox"/>	Document Sending Profile		Disable Search t
Last Date Modified	7/5/2022	Search Name	BERRY WEST GROWERS, INC	

3. Select the Type for the certificate (Industry, Item, Category). The Certificate(s) will auto-populate based on the earlier setup. Select a Starting and Ending Date for the Certificate.
4. Note: if the Certificate is for a setup checklist, 1099, bank ach etc., that has no expiration date use a Starting Date of today and an Ending Date several years into the future.
5. A certificate can now be scanned or uploaded from a received attachment to the line or to the certificate by selecting the number to the right of the documents in the page factbox

Vendor Certificate

CERT100040 · 10000

Release Reopen More options

General

No.	CERT100040	Source Code	FRESH FRUIT	Vendor No.	10000
Type	Industry	Description	Fresh Fruit Grower	Vendor Name	Berry West Growers, inc
				Status	Open

Vendor Certificate Line Manage

Document Code	Document Code Description	City	State	Start Date	Expiration Date
→ BRC	Brand Reputation through Compliance Certification			1/1/2022	12/31/2022
ORGANIC	Organic Certification			4/1/2022	4/1/2023



Vendor Certificate

CERT100040 - 10000

Release Reopen More options

General

No. CERT100040 Source Code FRESH FRUIT Vendor No. 10000
 Type Industry Description Fresh Fruit Grower Vendor Name Berry West Growers, inc
 Status Open

Vendor Certificate Line Manage

Document Code	Document Code Description	City	State	Start Date	Expiration Date
→ BRC	Brand Reputation through Compliance Certification			1/1/2022	12/31/2022
ORGANIC	Organic Certification			4/1/2022	4/1/2023

Attached Certificate
Documents 0

Notes +
(There is nothing to show in this view)

Attached Certificate Line
Documents 1

6. When complete Release the Certificate by selecting Release.

VIEWING/EDITING EXISTING CERTIFICATES

1. Search for and open the Vendor Card.
2. From the ribbon select Vendor Certificate List

Vendor Card

10000 · Berry West Growers, inc

Process Report Request Approval New Document Navigate Vendor Actions Related Reports Fewer options

Dimensions Ledger Entries Statistics Comments Approvals Item References Vendor Industry Type Create a New Certificate Vendor Certificate List

General

No. 10000 Balance (\$) 3,632.53 IC Partner Code
 Name Berry West Growers, inc Balance (\$) As Customer 0.00 Purchaser Code
 Blocked Responsibility Center
 Privacy Blocked Document Sending Profile
 Last Date Modified 7/5/2022 Search Name BERRY WEST GROWERS, INC

View - Vendor Certificate List - 10000 · Berry West Growers, inc

Search Certificate Document Actions Fewer options

No. ↑	Description	Vendor No. ↑	Vendor Name	Type	Source Code	Order Code
CERT100040	Fresh Fruit Grower	10000	Berry West Growers, inc	Industry	FRESH FRUIT	



CERT100040 · 10000

Release Reopen More options

General

No. CERT100040 Source Code FRESH FRUIT Vendor No. 10000
 Type Industry Description Fresh Fruit Grower Vendor Name Berry West Growers, Inc.
 Status Open

Vendor Certificate Line Manage

Document Code	Document Code Description	City	State	Start Date	Expiration Date
→ BRC	Brand Reputation through Compliance Certification			1/1/2022	12/31/2022
ORGANIC	Organic Certification			4/1/2022	4/1/2023

3. If edits are needed, select **Reopen** in the ribbon. When edits are complete select **Release**.
4. If a Certificate has expired and a new one is to be uploaded. Search for and open the certificate, **Reopen** then select **Manage** then **Create Certificate Lines** in the lines action ribbon. This will add a new set of lines based on the header information where a new **Start Date**, **End Date**, and document can be uploaded to the line.

Vendor Certificate

Release Reopen More options

General

No. Source Code
 Type Industry Description

Vendor Certificate Lines Manage

Delete Line Create Certificate Lines

CERTIFICATE VALIDATION

1. When a **Purchase Order** is released the system will check for a valid **Vendor** and **Item** or **Vendor** and **Item Category** combination unexpired certificate. The release process is prevented until a valid certificate is created or updated.

! Vendor Certifications must exist for Vendor No. 10000 and Item No. 1007

How to report this issue >

Was this information helpful? Yes No OK

! A valid, unexpired certificate for item 1007 cannot be found

How to report this issue >

Was this information helpful? Yes No OK

