Suppliers Window

Overview:

The Suppliers Window in OPTO is used to access all the supplier's data including static information such as contacts, and address details, as well as Dynamic information such as Current and Past Purchases, Delivery, Materials, Financial History and Contact Relation Management (CRM) notes. In the dynamic section, all records can be opened using drill down methods.

In the Suppliers Details Window, the following Tabs are used for Static Information: -

- 1. Details Tab
- 2. Supplier Info Tab
- 3. More Info Tab

To access the Suppliers Window – From the OPTO ribbon, select the 'Contacts' tab then **click** on the 'New/Edit Suppliers' icon to open the 'Supplier Details' window.

Details Tab

General Information including full Company Name, Address, Email Address, A.B.N., Trading Terms, and Personnel Contacts.

File HOME CONTACTS	RESOURCES	INVENTOR	Y QUO	TES	PURCHASING	ORDERS	JOBS/SCHEDULIN	
New Save Clipboard	New/Edit Clients	New/Edit Suppliers	R2	Show Notes	📰 Dat 📰 Uti 📲 Spe	a Set 👻 lities 👻 ecials 👻		
I Supplier								
Supplier Code:	Supplier Name:						Tax Code: 🖉	
BOBBEAR	Bob's Bearing Su	pplies					6 🔻 GST	
Details Supplier Info More In	fo Purchases D	elivery Mate	rials Finan	icial Hist	Notes QN	1S		
Date Entered: Phone No:	Fax No:	Employ	yee Name:	[Sub Contra	ct	✓ Is Active	
28/09/2017 07 6654 0054		5	- Lisa LE	WINS			🗹 QA - Approved	
Internet Details				A	3N: 77 888 99	9 777	-	
Email: bob.bear@bbearing	supplies.com.au			PRODUCT	UCT SUPPLIER			
Web Site: www.bbearingsuppl	ies.com.au			C.O.D				
Postal Address:				Deli	very Address:			
88 Industrial Drive		Addr	ess Line 1:		88 Industrial D	rive		
		Addr	ess Line 2:	Ē				
CLEVELAND	City: CLEVELAND							
	4102		city.				4102	
	State / Postcode: QLD					4105		
AUD - Australian Dollar		Curren	cy / Country	· [TKALIA		
Contact Name	Email		Phone No	D	Mobile	Fax No	Position	
Robert Bear bob.bear Rebecca Bear bec.bear	.com.au 0419 337799 com.au 0419 337700					Owner/Manager Owner/Administrat		
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Supplier Info Tab

This tab enables USERS to make Internal Comments, create Job Ticket Text, and Invoice Text. The tab displays supplier information used for exporting data to the accounting system and purchase totals summary.

Supplier								-		×
Supplier Code:		Supplier Nam	2:					Tax Code:		Ø
BOBBEAR	-	Bob's Bearing	Supplies					6 🗸	GST	
Details Suppl	ier Info More Info	Purchases	Delivery	Materials	Financial	Hist Notes	QMS			
Comments:	TEST>>>>>>>>	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	>>>>>>>	>>>>						< >
Add Text for Purchase Order:	GOODS RECEIVED) by supplier;	*****							< >
Add Text for Purchase Quote Request:	TESTING>>>>>	>>>								< >
Export Informa Export Code:	ation Export Name 1 (Co	ompany or Last	Name):		Export	Name 2 (First	t Name):			
6-1222 🔻	Bob's Bearing Su	pplies								=1
Purchase Infor Total Amount \$.00	rmation : Period S.C	11: Pe	riod 2: \$.00	Perioc \$.(1 3:)0 3f0a3a98-4	Period 4: \$.00 920-4b1b-bc3	Period 5: \$.00 d-1b81e5a202f1	Peri	iod 6: \$.00	

More Info Tab

There is an 'Alert Message Text' feature for pop-up messages in regards to Orders, also a Default Transport Company function and a File Attachment area.

Supplier Code: Supplier Name: Tax Code: BOBBEAR Bob's Bearing Supplies 6 Details Supplier Info Purchases Delivery Message Alert Text Purchase: ALERT MESSAGE TO APPEAR WHEN ENTERING PURCHASE ORDERS FOR THIS SUPPLIER Default Transport Company: Couriers Please Add to transport leadtime Default Transport Company: Couriers Please Account Details BSB No: Account Name: Account No: Statement Text: File Attachments Description I Attachment for this Supplier L_OPTO_DOCUMENTATION\OPTO_HF\Opto Help Files\Opto Help - Word Docs	Supplier		- • ×					
BOBBEAR Bob's Bearing Supplies G GST Details Supplier Info Purchases Delivery Materials Purchase: ALERT MESSAGE TO APPEAR WHEN ENTERING PURCHASE ORDERS FOR THIS SUPPLIER Default Transport Company: Couriers Please Add to transport leadtime Default Transport Company: Couriers Please Account Details BSB No: Account Name: Account No: Statement Text: File Attachments File Attachment for this Supplier L'_OPTO_DOCUMENTATION\OPTO_HF\Opto Help Files\Opto Help - Word Docs	Supplier Code:	Supplier Name:	Tax Code: 🖉					
Details Supplier Internet More info Purchases Delivery Materials Financial Hist Notes QMS Message Alert Text Purchase: ALERT MESSAGE TO APPEAR WHEN ENTERING PURCHASE ORDERS FOR THIS SUPPLIER Add to transport leadtime Default Transport Company: Couriers Please I day I da	BOBBEAR	 Bob's Bearing Supplies 	6 🔫 GST					
Message Alert Text Purchase: ALERT MESSAGE TO APPEAR WHEN ENTERING PURCHASE ORDERS FOR THIS SUPPLIER Default Transport Company: Couriers Please Default Transport Company: Couriers Please Account Details Image: Couriers Please BSB No: Account Name: Account No: Statement Text: File Attachments Filename 1 Attachment for this Supplier L_OPTO_DOCUMENTATION\OPTO_HF\Opto Help Files\Opto Help - Word Docs	Details Supplier Info	More Info Purchases Delivery Materials Financial Hist Notes QMS						
Purchase: ALERT MESSAGE TO APPEAR WHEN ENTERING PURCHASE ORDERS FOR THIS SUPPLIER Default Transport Company: Couriers Please Image:	Message Alert Text							
Default Transport Company: Couriers Please Account Details BSB No: Account Name: Account No: Statement Text: File Attachments Description I Attachment for this Supplier L_OPTO_DOCUMENTATION\OPTO_HF\Opto Help Files\Opto Help - Word Docs	Purchase: ALERT MES	SSAGE TO APPEAR WHEN ENTERING PURCHASE ORDERS FOR THIS SUPPLIER						
Default Transport Company: Couriers Please 1 day 2 days 3 days Account Details BSB No: Account Name: Account No: Statement Text: File Attachments Description Attachment for this Supplier L'_OPTO_DOCUMENTATION\OPTO_HF\Opto Help Files\Opto Help - Word Docs 		- Add to transpor	rt leadtime					
Account Details BSB No: Account Name: Account No: Statement Text: File Attachments I Description Filename Attachment for this Supplier L_OPTO_DOCUMENTATION\OPTO_HF\Opto Help Files\Opto Help - Word Docs	Default Transport Com	pany: Couriers Please 🔹 🗌 💿 1 day	◯ 2 days					
BSB No: Account Name: Account No: Statement Text: File Attachments File Attachment for this Supplier Filename 1 Attachment for this Supplier L:_OPTO_DOCUMENTATION\OPTO_HF\Opto Help Files\Opto Help - Word Docs	Account Details							
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1 Attachment for this Supplier L:_OPTO_DOCUMENTATION\OPTO_HF\Opto Help Files\Opto Help - Word Docs		Description Filename						
	1 Attachment for this Supplier L:_OPTO_DOCUMENTATION\OPTO_HF\Opto Help Files\Opto Help - Word Docs							
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The following Tabs are for the Dynamic Information: -

- 1. Purchases Tab Displays All Material Purchases and Purchase Orders for the Supplier.
- 2. Delivery Tab Displays all Purchase deliveries for the Supplier.
- 3. Materials Tab Displays all materials supplied by the Supplier including the material codes, description, preferred supplier and prices.
- 4. Financial History Tab Displays a four-year history of monthly purchases for the supplier.
- 5. Notes Tab Displays CRM Notes. (Contact Relation Management)
- 6. QMS Tab Displays Quality Assurance Records for the Supplier.

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Supplier Code:	S	Supplier Name	e:					Tax C	ode:		Ø
BOBBEAR	→ [ob's Bearing Supplies						6	•	GST	
Details Supplier Info	More Info	Purchases	Delivery	Materials	Financial Hist	Notes	QMS				
Message Alert Text DYNAMIC INFORMATION											