

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.

The screenshot shows the 'Supplier' window in the OPTO software. The 'Details' tab is active, displaying the following information:

Supplier Code: BOBBEAR | Supplier Name: Bob's Bearing Supplies | Tax Code: 6 GST

Date Entered: 28/09/2017 | Phone No: 07 6654 0054 | Fax No: | Employee Name: 5 Lisa LEWINS | Sub Contract: | Is Active: | QA - Approved:

Internet Details: Email: bob.bear@bbearingsupplies.com.au | Web Site: www.bbearingsupplies.com.au | ABN: 77 888 999 777

Postal Address: 88 Industrial Drive | Address Line 1: 88 Industrial Drive | Address Line 2: | City: CLEVELAND | State / Postcode: QLD 4183 | Currency / Country: AUD Australian Dollar | AUS AUSTRALIA

Delivery Address: 88 Industrial Drive | Address Line 2: | City: CLEVELAND | State / Postcode: QLD 4183 | Currency / Country: AUS AUSTRALIA

Category: P1 | PRODUCT SUPPLIER | Terms: 1 | C.O.D.

Contact Name	Email	Phone No	Mobile	Fax No	Position
Robert Bear	bob.bear@bbearingsupplies.com.au		0419 337799		Owner/Manager
Rebecca Bear	bec.bear@bbearingsupplies.com.au		0419 337700		Owner/Administrat

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.

