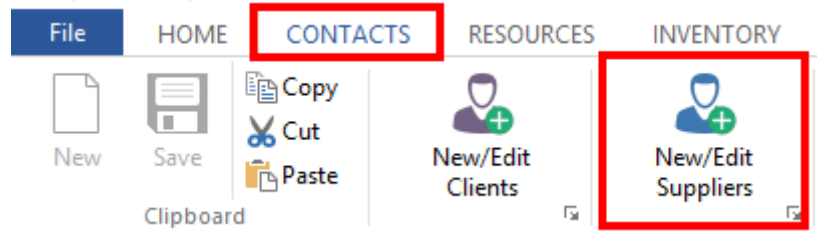


## 2002-202 - Create a New Supplier Record

### Overview:

The Supplier window contains all the data that has been entered into the iTMS system in relation to the Supplier. Please use the <TAB> or <Enter> key to advance through the fields when creating new records in OPTO.

To access the 'Supplier's' window, click on the **CONTACTS** tab on the OPTO Ribbon. **Click** on the 'New/Edit Suppliers' icon.



Enter the new "Supplier Code" code and **press** <TAB> to advance to "Supplier's Name" field, type in the name of the new supplier. **Press** <TAB> to generate the Tax Code field, change if necessary by clicking on the drop-down arrow. <TAB> through the information boxes to generate the date entered, then enter the supplier's phone and fax number and A.B.N. The "Employee Name" field is the employee entering the supplier's information. Select the Terms for the supplier by clicking on the drop-down arrow. Enter the supplier's email address and web site information and continue to enter the supplier's details. Enter the Supplier's Postal and Delivery Address and any supplier contact details. Ensure to **click** on the 'Active' box to make the new supplier active. The 'QA – Approved' tick box is for the purpose of internal quality assurance approval. If the supplier's product and service was to the company's level of standard, then the box would be ticked.

The image shows a screenshot of the 'Supplier' window in the OPTO software. The form contains the following fields and values:

- 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: [empty]
- Employee Name: Lisa LEWINS
- Sub Contract:
- Is Active:
- QA - Approved:
- ABN: 77 888 999 777
- Category: P1 PRODUCT SUPPLIER
- Terms: 1 C.O.D.
- Postal Address: 88 Industrial Drive, CLEVELAND, QLD 4183
- Delivery Address: 88 Industrial Drive, CLEVELAND, QLD 4183
- Currency / Country: AUD AUSTRALIA

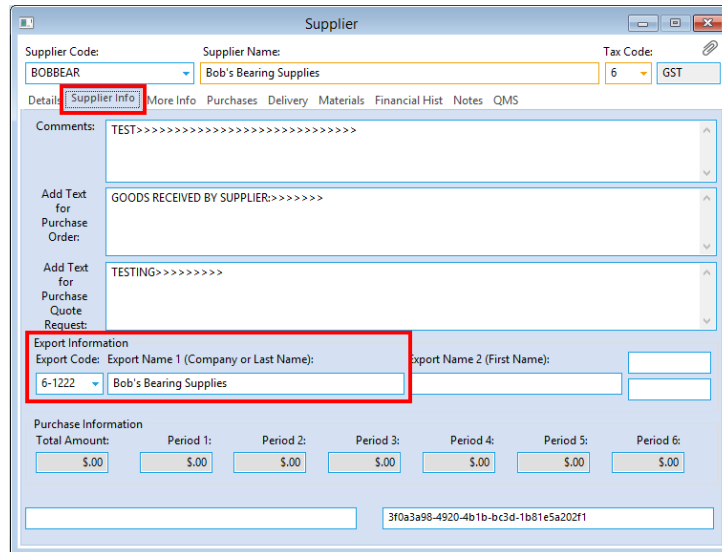
Two callouts are present on the left side of the form:

- 'Email this supplier' pointing to the Email field: bob.bear@bbearingsupplies.com.au
- 'Visit supplier website' pointing to the Web Site field: www.bbearingsupplies.com.au

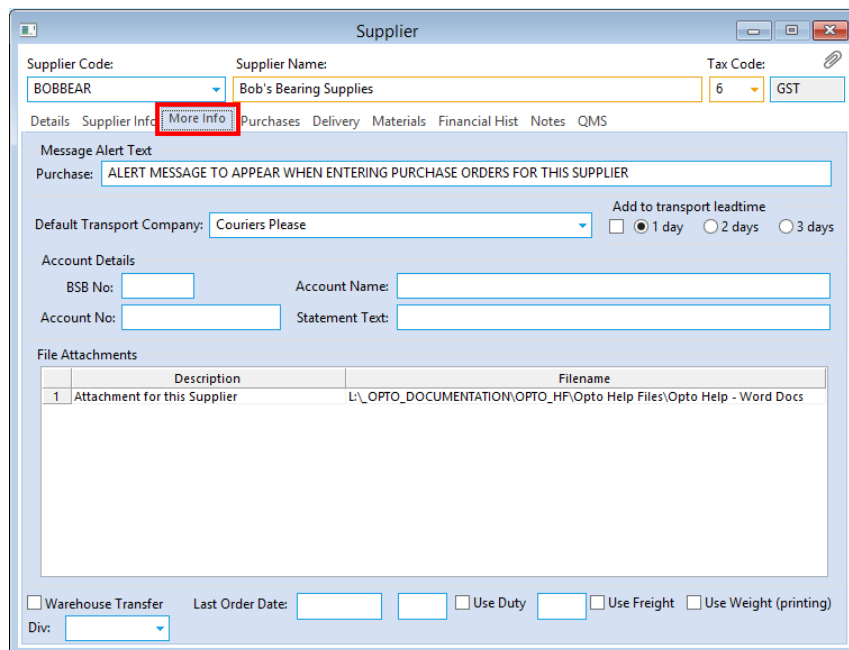
Contact Name	Email	Phone No	Mobile	Fax No	Position
Robert Bear	bob.bear@bbearingsupplies.com.au		0419 337799		Owner/Manager
Rebecca Bear	bec.bear@bbearingsupplies.com.au		0419 337700		Owner/Administrat

The **“Supplier Info”** tab - enables the user to record text to be displayed on purchase orders and purchase quotes for the supplier.

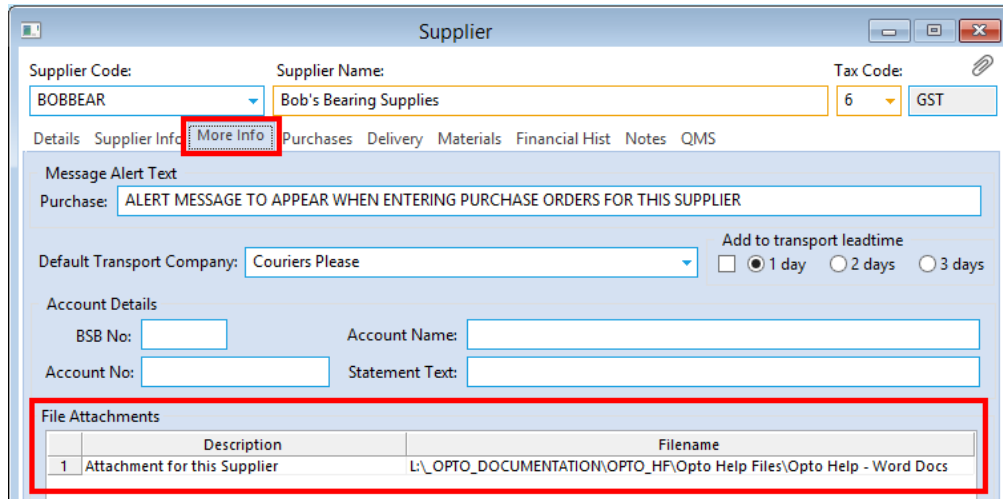
The Supplier’s ‘Export Name’ is automatically generated when the supplier name field is completed on the Details tab. Enter the export account code in the “Acc Code” field, this account code must be the same code used in OPTO and your accounting system. Ensure that there are no extra spaces before, in or after the supplier’s name as this will cause errors when exporting data.



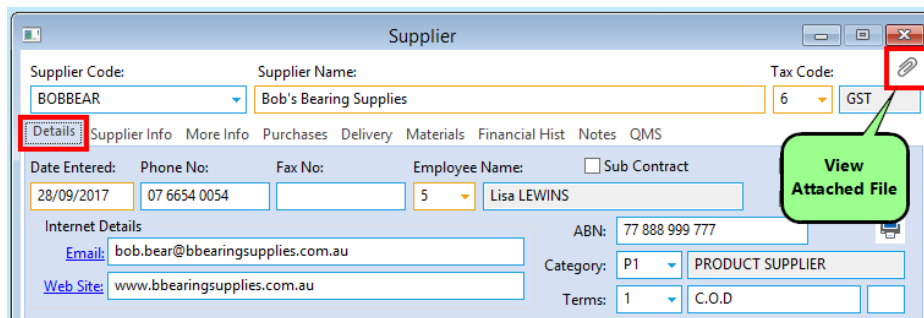
The **“More Info”** tab - The “Message Alert Text” field creates a pop-up message that will appear displaying the text entered here, whenever a Purchase Order is created for the supplier. The user can also select a “Default Transport Company” and add lead-time to transport. The supplier’s bank account details are also entered on this tab. The “File Attachments” area enables the user to attach files in relation to the supplier for quick viewing.



To attach a file on the **More Info** tab – click on the first line in the “Description” table and type in a description for the file or document, **press** <TAB> to move to the “Filename” area. **Dbf-click** on the field to browse your computer system for the required file. **Click** on the file to highlight and then **click** on **Open**.



To view the attached file, go to the ‘Details’ tab and **click** on the **View Attached file** button



The other tabs in the Supplier window do-not require the user to enter any data. These tabs collect data via other functions within the system.

- The **Purchases** tab displays the current and/or past material purchases and all the purchase orders for the supplier.
- The **Delivery** tab displays all the purchase deliveries for the supplier.
- The **Materials** tab displays all the materials purchased from the supplier.
- The **Financial Hist** tab displays a four-year history of purchases for the supplier
- The **Notes** tab displays all the ‘Contact Relation Management’ records in relation to the supplier and/or their products.
- The **QMS** tab displays all the quality assurance records for the supplier.