## **Rename or Combine Supplier Codes**

## **Overview:**

Supplier codes will need to be change at times due to company expansion, merges, buy-outs, or simply name changes. The USER will need to have permission and an internal employee password to change or rename a Supplier code.

## Rename Supplier Code

To rename a Supplier code, go to the **Contacts** tab on the Opto Ribbon and **click** on the 'Utilities' drop down arrow and select Rename Suppliers from the list.

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File HOME	CONTACTS	RESOURCES	INVENTORY	QUOTES	PURCHASING	ORDERS	JOBS/S
New Save	Copy Cut Paste	New/Edit Clients	New/Edit Suppliers	Show Notes	Data Se Data Se Utilities Upd	et • • • • • • • • • • • • • • • • • • •	
					👵 Rena	ame Clients ame Suppliers	

Enter your internal employee password and **press** <TAB>. **Click** in the "Old Supplier Code" field and enter the Supplier code or **press** <F2> and select the code from the pop-up list and then **click** <u>OK</u>. **Click** in the "New Supplier Code" field, type in the new code and then **click** on Run.

L' R	ename Supplier Code 📃 💷 🎫
Em	ployee Password
•	
Ор	tions
	Combine two suppliers together
Old	d Supplier Code
QL	D_METAL_SUPP -
Ne ST	w Supplier Code ATEWIDE_MEATL_SUPP
Thi: nev eve	s will change the code for a supplier to a v code. This code will be changed rywhere in the system.
	🕞 Run 🚫 Finish

Once the renaming is complete, **click** on Finish. This function only renames the Supplier code, you will need to open the record and edit the Supplier's name and any other details.

I Supplier			- • •
Supplier Code: S	pplier Name:		Tax Code: 🖉
STATEWIDE_METAL_SUP			6 🔻 GST
Details Supplier Info More Info	Purchases Delivery Materials	Financial Hist Notes QMS	
Date Entered: Phone No:	Fax No: Employee I	Name: Sub Contract	✓ Is Active
27/07/2011 07 5568 2231	07 5568 2233 2 🗸	Larry Moreton	QA - Approved

1

## **Combine Supplier Codes and their Data.**

**IMPORTANT NOTE:** The following functions cannot be reversed once run, the USER must be completely confident with the procedure before **click**ing on the Run icon. We suggest that you make a backup of the DATA folder inside of the OPTO >AppData folder before combining Supplier codes and data.

Open the **Contacts** tab, **click** on 'Utilities' drop down arrow and select Rename Suppliers option. Enter your internal password and **press** <TAB>, and then **click** in the box of the "Combine two Suppliers together" tick box. **Click** in the "Supplier to REPLACE" field, enter the Supplier code or **press** <F2> and select the Supplier from the pop-up list and **click** <u>OK</u>. When the USER is confident, **click** on the on the Run icon and then **click** on the Finish icon when the procedure is complete.

Will keep Supplier contact details, combine data fron code	Name, and m this Envename Supplier Code		
	Options Combine two suppliers together Supplier to REPLACE ENTFR	K a	eeps this Supplier Code nd data is combined but contact details are overwritten from above Supplier code
	Supplier to KEEP QUICKER		
	This will move all the quotes, order, jobs, etc. from one supplier to another supplier. This code will be changed everywhere in		
	🔗 Run 📀 Finish		

🗈 Rename Supplier Code 💼 🔳 🗾
Employee Password
•
Options
Combine two suppliers together
Supplier to REPLACE
QUICKER 🗸
Supplier to KEEP
QUICKER
This will move all the quotes, order, jobs, etc. from one supplier to another supplier. This code will be changed everywhere in
😔 Run 💽 Finish



2