

Setting Up New Suppliers

Maintaining accurate Supplier data is a critical part of the inventory management process.

This course will introduce you to the key fields found on the General, Addresses, Contacts, Options and Purchasing tabs of Supplier properties.

When using Microsoft Dynamics GP as your financials package, suppliers are managed and maintained in GP.

New suppliers are automatically brought into BisTrack and should not be created directly in BisTrack.

Supplier Addresses, Contacts and the BisTrack Options are maintained in BisTrack once the supplier has been added in GP.

For those not using Microsoft Dynamics GP, go to the 'Suppliers' view right-click, and select 'New'.

You can also click the 'New' icon.

The top section of the General tab is for setting the Supplier 'Code' and 'Name' fields.

Enter a unique 'Code' used to identify individual suppliers.

Codes can be alphanumeric.

The 'Short Name' can be used as an additional search element for this Supplier. If you do not have a different name, enter the Supplier name here.

Enter a 'Display name'. It is used throughout BisTrack and on all purchasing documents.

The 'Trading as' is automatically taken from the 'Display name' but can be changed to the legal name if different.

If you pay a different Supplier for purchases made by this Supplier, enter the 'Pay To' here.

As the 'Pay To' Supplier must already be entered in BisTrack you can search for them by clicking on the 'Pay To' button.

The 'Supplier type' and 'Default country' are selected from a drop down list of preconfigured entries.

The 'Supplier type' is used for reporting purposes.

BisTrack allows Suppliers to have multiple Addresses on file.

The 'Default' Address is noted by a red dot on the rolodex icon.

Buttons are available to 'Add' a new Address, change existing 'Properties', 'Remove' an Address and designate the 'Default'.

When adding a new address BisTrack automatically provides a numeric 'Code'.

This field only needs to be unique within this Supplier.

Consider using 'Main' for the default Address code and the numeric code generated by BisTrack for all additional Addresses.

Use the 'Communication' tab for entry of 'Telephone', 'Fax', 'Email' and 'Web address' details.

A 'Contact name' and 'telephone' can be entered here.

This 'Contact name' is not added to the 'Contacts' on file for the Supplier. We will discuss the Contact tab in the next section of this course.

Addresses can have settings that differ from the Supplier defaults including 'Tax area' on the 'Options' tab and individual 'Notes'.

When complete click the 'Add' button.

Enter another Address or 'Close' if finished.

Suppliers can have multiple 'Contacts' on file.

These can be accessed from within the Supplier properties 'Contacts' tab or by using the 'Supplier Contacts' option from the 'Views' pane.

Contacts are entered on purchase documents and Notepads for keeping track of communications.

Buttons are available to 'Add', change existing 'Properties', 'Remove' a contact and designate the 'Default'.

The 'Add' option is selected.

On the 'General' tab, enter the 'First name', 'Last name', 'Telephone and 'Email' information.

Click the 'Add' button.

Enter another Contact or 'Close' if finished.

The 'Options' tab can indicate the Supplier's category used for reporting and filtering search functions.

'Stock' and 'Overhead' suppliers are the main selections used.

'Overhead' suppliers are for non-stock purchases or services such as office supplies, utilities and government agencies.

Selecting between 'Stock' and 'Overhead' automatically sets the 'Default purchase order type' on the 'Purchasing' tab.

Two 'Purchasing' settings are mandatory when adding a new Supplier.

Both have been previously configured in System Manager.

First, select the 'Tax Area' applicable from the drop down list.

Second, select the 'Payment terms' from the drop down list.

'Payment terms' determine when you are required to pay for purchases from this Supplier.

Payment Terms also determine if discounts are available for early payment.

The terms '1% 30 Days' indicates the possible discount percent available when an invoice is paid within 30 days of the invoice date.

Based on the selection, 'This is a stock supplier', the 'Default purchase order type' is set to 'Stock'.

Each time this Supplier is selected when creating a purchase order, it will default to this type.

With the required fields set, click the 'Save and Close' button.

The new Supplier is added.

While there are many entries available for adding a new Supplier, you should now be aware of key fields found on the General, Addresses, Contacts, Options and Purchasing tabs.

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