Supplier Contact Tab Transcript

Keeping track of your supplier information helps keep your business running smoothly. In this course, we'll show you how to manage supplier contacts and the different tabs found on the Supplier Contact Sheet. Let's get started.

We'll begin by adding a contact to a supplier. From the home page, select the Suppliers View. Type the name of the company in the Find box and press Go. Double-click the supplier. Select the Contacts tab, and then press the Add button.

Enter the Supplier Contact's name, Job title, Telephone, and so on. Use the other tabs to add any other pertinent information. When you complete updating the information, click Add. The window fields clear and you may continue to add more contacts. When you're done, press Close.

You can see the new contact listed in the grid. To select someone as the primary supplier contact, select their name and press Default. A red dot appears on the card next to their name indicating that they are the default contact.

If someone leaves the company, highlight the contact and press Remove. When asked to confirm, select Yes. When you've added or removed all of the contacts, close the window.

You can also update the supplier contact properties from the Supplier Contacts view. Enter the name in the Find section and press Go. Double click the contact name to open it. The general tab shows the contact's name, Mobile, and contact information. An image of the customer will display here if it has been added.

Under Organization, select the location for the supplier contact and whom they report to, if applicable. Under the Identification tab, you can add or change the contact picture and load an image of their signature. The Notes tab allows you to keep a record of any changes made with a particular client. This is a great place to leave relevant information when creating a Purchase Order.

Attachments allow you to add related documents from the clipboard or your PC. Finally, the More Fields tab can display any user-defined fields that you have

created. If you need to create a template letter for one of the supplier contacts, select the Microsoft document link in the bottom right corner. The system automatically imports the contact information to the template.

Having an accurate and easy to locate list of supplier contacts makes purchasing much easier. You should now be able to add, delete, and modify supplier contacts properties.

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