Economix

User Guide

Module SUPPLIER v2.0

ECONOMIX Solutions

Module SUPPLIER

Ⓔ Introduction to the module

The module « SUPPLIER » is designed to answer your needs in the management of your supplier forms. This tool allows you to manage entirely the information related to your suppliers, with two functions integrated to other Economix solutions modules:

- Ⓔ Creation/modification of active supplier forms
- Ⓔ Consultation of the history of the supplier activities
- Ⓔ Integration of the supplier forms to related modules
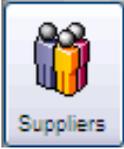
Module SUPPLIER

Training plan

Module SUPPLIER

Reaching the module SUPPLIER

1. Click on the button **Supplier** or, under the menu **Forms**, click **Supplier**

Creating a supplier form

1. Click **Add**
2. Complete the desired field, such as: name, address, email, etc.
3. Click on the button **Save** after completing the desired modifications, if need be

   NOTE   The field **Language** will determine in which language the supplier will receive its communications.

   NOTE   The buttons GST and PST can be checked at « No » for suppliers benefiting tax exemption.

Consulting the list of suppliers

1. Click on the button **Suppliers**
2. Click on the button **Supplier**
3. Consult the list of suppliers, placed in alphabetical order
4. Select, among the list of suppliers, the desired supplier by double-clicking
5. Click on the button **Save** after completing the desired modifications, if need be

Reaching a specific supplier form

1. Click on the button **Suppliers**
2. Click on the button **Search**
3. Search for the supplier with the search criterion offered

   NOTE   For the search criterion **2. Name** and **3. Contact**, the order of inscription for the information is not necessary for more flexibility.

4. Once the search criterion completed, click **OK**

5. Select, among the list of the suppliers corresponding to the used research criterion, the desired supplier by double-clicking

6. Click **Save**   [💾 Save]   after completing the desired modifications, if need be