

We are currently updating our site; thank you for your patience.

PROCUREMENT

ADD / EDIT / DELETE A SUPPLIER

Ribbon Access: Procurement > Suppliers

Help v2024.5.0.7/1.0 - Pg 1 - Printed: 04/07/2024

CO3 Technologies (Pty) Ltd © Company Confidential



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ADD SUPPLIER

The Supplier Listing screen will be displayed.

Help v2024.5.0.7/1.0 - Pg 2 - Printed: 04/07/2024



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• In this image **Durban** has been selected.



• Click on Add.

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ADD SUPPLIER DETAILS

The Add new Supplier screen will be displayed.

- **Type:** Click on the drop-down arrow and select from the list the Supplier Type, e.g. General Supplier or Finance House.
- **Class:** Click on the drop-down arrow and select from the list the Class of Item Supplied or Service Rendered.
- **Supplier Code:** Type in the code you wish to use to identify the Supplier.

Note 1: The Supplier Code is very important because it is linked to **Pastel Evolution** and all the supplier information and history will be linked to this code and not the Supplier Name.

Note 2: If you are manually entering the Supplier Code, the recommended standard is using a supplier code which is 6 characters long starting with 3 letters and then 3 numbers.

Note 3: From BPO2 v2.5.1.4 restrictions have been put into place to prevent special characters from being saved. You will only be allowed to save upper case characters and digits from 0 to 9.

- **Supplier Name:** Type in the name of the Supplier.
- **Primary Contact:** Type in the person who is your contact at this Supplier.
- VAT No: Type in the VAT No. of the Supplier.
- **Tax Rate:** Type in the tax rate. If the tax rate is not set, your procurement documentation will not calculate a tax value onto your items.
- Secondary Rate: Type in a secondary rate, if applicable.



• **Currency:** Click on the drop-down arrow and select from the list the currency applicable to this supplier.

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- **Payment Terms:** Click on the drop-down arrow and select from the list the payment terms of the Supplier.
- **Shipping Terms:** Click on the drop-down arrow and select from the list the shipping terms of the Supplier, if applicable.
- **Ship Via:** Click on the drop-down arrow and select from the list the type of transport used for shipping the item, if applicable.
- Freight Terms: Type in the Freight Terms, if applicable.
- Freight Carrier: Type the Freight Carrier, if applicable.



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SHIPPING COSTS INCLUDED FLAG

- If you wish Shipping Costs to be <u>included</u> in the cost of parts/items received from this supplier then ensure that this flag <u>is</u> selected.
- If you wish Shipping Costs <u>not</u> to be included in the cost of parts/items received from this supplier and would like the ability to add shipping costs to items/parts received then ensure that this flag is <u>not</u> selected.

Important Notes:

- If the flag is un-ticked, then any goods received from this supplier will then be <u>received into quarantine</u>, where they must have shipping costs added before the goods can be released, and then received into store.
- ii. The Company Configuration Enforce Quarantine must be selected.
- iii. In the Configurator, the <u>Include Shipping flag</u> on the Purchasing Centre must be ticked.



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SITES

- **Sites:** The particular **Site** check box will be auto populated according to your **site selection** in the beginning of this process.
- Make sure that the **correct site(s)** have been selected for the Supplier that you are setting up.



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ORDER METHOD

- Order Method: Click on the drop-down arrow and select the Order Method e.g. Email or Telephone.
- Order Address: Type in the Order Address e.g. the Email Address if the order method is Email.



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ADDRESSES

- Physical Address: Type in the Physical Address.
- **Postal Code:** Type in the Postal Code.
- **Billing Contact:** Type in the Billing Contact.
- Billing Address: Type in the Billing Address.
- Bill Postal Code: Type in the Bill Postal Code.



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ADDITIONAL DATA

Additional data allows for 10 extra fields of information that can be used depending on your company's requirements. The definition for these fields should be pre-determined and used as allocated. The labels for these fields can be configured via user rights.

	Edit Supplier - Cod	le SPR001 - BPO: Ve	rsion 2.5.0.9 - Example C	Company			_ — X
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Open Windows 🔻						User : BiancaD 23/04/2022	Version : 2.5.0.9 Example Company

• Click on the **User Defined** dock panel tab to open the panel

• Type in the values as required if used by your company.



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Items Supplied			South Africa	Other4	Field 4	
	Primary Contact Harry Jackson	Postal Code	1234	Other5	Field 5	
	VAT No. 456789123			Other6	Field 6	
Notes	Tax Rate 15.00	bining contents		Other7	Field 7	
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	Currency South African Rand 🔻	•	Forest Hills	Other9	Field 9	
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USER DEFINED FIELDS

The inclusion of User Defined Fields is to provide more information within the Asset, Contract, Customer and Location modules so that associated work/processes can be carried out more efficiently. It will serve as connective tissue between contracts and call center functions to improve call center performance by having readily accessible information.

Version Compatibility¹

• Click on the User Defined dock panel tab to open the panel

¹ BPO2 v2.5.0.8 or higher. " Add Interest Rate " on page 3



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GRNs								
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Supplier Returns								
Open Windows 🕶						User : BiancaD	23/04/2022 Version : 2.5.0.9	Example Company

ADD NEW CUSTOM FIELD

New User Defined Customer Fields can be created from here. Any User Defined field created will be available for update on all suppliers.

Right click in User Defined panel and select Add New Custom
 Field



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- Type in a **Code** and **Description** for the new User Defined Field.
- Select the Input Type.
- Click on the **Save** button.

Home					Add new custom	element - BPO: V	ersion 2.5.0.9 - I	Example G	ompany				
	Equipment / Lo	cations Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities		- 8
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ADD LOOKUP ITEMS

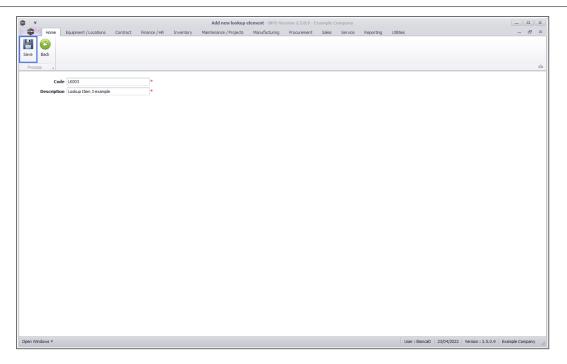
For Lookup Input Variables - the right click context menu includes the option to add items to the Lookup List.

 Right click on Lookup input type Custom Field and select Add new lookup item (you may need to scroll down).

Edit Supplier - Code SPR001 - BPO: Version 2.5.0.9 - Example Company	_ D X
with the Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities	_ @ ×
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Supplier Code SPR01 • Out Outcome Outc	
terrs Suppler Name Sprint Distributors Local Sprint Distributors Local PRCH_CODEDI Suppler/UP Free Input Text Example Text	User Defined
Primary Contact Harry Jackson Postal Code 123 + PRCH_COUCH Support Device Junct Actuative Text	Defi
VAT No. 456789123	<u>e</u>
Notes Tax Rate 15.00 • Billing Contact John Martin Add We	w Custom Field *
Secondary Rate 0.00 Billing Address 685 Forest Grove Road	tom Field
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Open Windows * User : BiancaD 23/04/2022 Version : 2.5.0.9	Example Company

- Type in the lookup item *Code* and *Description*.
- Click on the *Save* button.





UPDATE CUSTOM FIELD

This will update the detail for the User Defined Field for this contract.

• Variable Value: Type in, pick from the Lookup List or Toggle Yes/No depending on the Input type.

Help v2024.5.0.7/1.0 - Pg 21 - Printed: 04/07/2024



\$ •			Edit Supplier - Cod	e SPR001 - BPO: Ve	rsion 2.5.0.9 - Example C	ompany			
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Links 4						User Defined			+
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Trens supplied	Primary Contact				South Africa	PRCH_CODE01	SupplierUDF Free Input Text Example	Text	
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	Tax Rate		• •	Billing Contact	John Mastin	I PRCH_CODE03	Supplier UDF Yes No Field Example	Z	
Notes	Secondary Rate		•		685 Forest Grove Road	-			
		South African Rand	•	billing Address	Forest Hills	-			
					New Town	-			
Addresses		60 Days from Invoice	•		KZN	-			
	Shipping Terms		-		South Africa	-			
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	-	30 days from Delivery							
	Freight Carrier	The Courier Guy		Sites					
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Purchase Orders									
GRNs									
Supplier Invoices									
Supplier Returns									
pen Windows 🔻							User : BlancaD 23/04/2022	Version : 2.5.0.9 Example	e Company

SAVE SUPPLIER

• When you have finished entering all the new Supplier details, click on **Save**.



·		Add new Suppli	er - BPO: Version 2.1.0.31	Example Comp	any			7		
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Contraction of the local division of the loc	Supplier Name	Stone Rowe & Co.			Surrey					
Addresses	Primary Contact	David Christopher		1000000000	United Kingdon	1				
	VAT No.	1122334455		Postal Code	5W141HQ					
	Tax Rate	14.00		Billing Contact	Moneypenny B	ond				
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		Pretoria								
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Suppler Invoices	Order Method	Enal	•							
softendi sussentes		davidr@stonerowe.co.uk								



VIEW NEW SUPPLIER

• You will return to the **Supplier Listing** screen where you can see the new supplier has now been added to the list.

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		SPRO	02	Sprint Int	ernational		George Matthews	GEN	A	PS	456258741	0.00	2			
		TON	002	Tonys Co	py Shop		Tony	SHPA	A	PS	9874561321	0.00	2	1	3	
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		APD	001	Apple Dis	tributors		Sammy Jones	GEN	A	PT	345678201	0.00	6	1	4	
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EDIT A SUPPLIER

In the Supplier Listing screen,

Select the Site

• In this image **Durban** has been selected.



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		SPR002	Sprint International	George Matthews	GEN	A	456258741	0.00			2
		TON001	Tonys Copy Shop	Tony	9.94	A	9874561321	0.00	DHL	C00	2
Notes		YES001	Young Electric	Grant	GEN	A	3245064654	0.00			3
		PR3005	Printer World 2	Richard Sage	GEN	A	98076523	0.00	Wheels on Wings	30 days from delivery	5
		PR1007	Printer World Forex	Matthew Sage	SHPA	A	768594444	0.00	Wheels on wings	60 days from invoice	3
Addresses		PRI010	Printer World	Maggie Sage	GEN	A	456123789	0.00	Wheels with Wings	30 days from delivery	4
		PR10012	Printer World	Maggie Saggie	GEN	A	13456789	0.00	Wheels with Wings	30 days from delivery	3
		TW1001	Twinkle Office Automation	Gary Marks	GEN	A	9876543210	0.00	Wing It Couriers	30 day	2
		BON001	Bonsai Bonanza	Teddy Miler	GEN	A	987654321	0.00	Wing It Couriers	30 day	2
		PRE001	Pretoria Copy Shop	Jannie van Wyk	GEN	A	9876543210	0.00	Wing It	30 Days	4
Processing		DUR001	Durban Copy Shop	Megan Jones	GEN	A	987654321	0.00			3
rocessing		PAP001	The Paper Warehouse	Joseph Manning	GEN	A	1234567890	0.00	Wing It	30 day	4
Requisitors		MET001	Metro Peach	Jessica Johns	GEN	A	1234567	0.00	Wheels with Wings	30 days from delivery	5
		PRE005	Pretoria West Office Auto	Jackie Simmons	GEN	A	987654321	0.00			3
		NEW006	New Way Recycling	Patrick Smith	GEN	A	9876543210	0.00			3
Auchase Orders		WON001	Wonderboom IT Hub	Mark Jones	GEN	A	987654321	0.00			3
Purulase uruera		888	Abs Store	Abi	GEN	A	654789	0.00	DHL	14 days after payment	2
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GRNs	,	00998877	Stone Rowe & Co.	David Christopher	FINH	A	1122334455	0.00	Shipmark		2



SELECT SUPPLIER

- Select the **row** of the **Supplier** where you wish to make changes.
- Click on **Edit**.



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		PR1010	Printer World		Maggie Sage	GEN	A	456123789	0.00	Wheels with Wings	30 days from delivery	4
	- [,	TW1001	Twinkle Office Aut	omation	Gary Marks	GEN	A	9876543210	0.00	Wing It Couriers	30 day	2
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EDIT SUPPLIER DETAILS

- The Edit Supplier Code [] screen will be displayed.
 - In this image the **Primary Contact** has been selected to be changed.

Help v2024.5.0.7/1.0 - Pg 28 - Printed: 04/07/2024



·		Edit Supplier - Code	e TWI001 - BPO: Version 2.1	0.31 - Example C	ompany			Ξ.	0	
Home Equipment	and Locations Contract	Finance and HR Inventory	Maintenance and Projects	Manufacturing	Procurement	Sales Service	e Reporting	Utilities	-	ð
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lddresses	Primary Contact	NAMES AND ADDRESS OF			South Africa					
		9876543210		Postal Code	1234					
	Tax Rate			Rilling Contact			_			
	South and the second			Billing Contact						
	Secondary Rate			Billing Address	New Town					
ocessing	Currency	South African Rand	•		Forest Hills					
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urchase Orders	Freight Carrier	Wing It Couriers								
	Sites	🖌 Durban								
	1000	Pretoria								
78N6										
	Order Method	Telephone								
Suppler Invoices										



SAVE CHANGES

- Make the required changes.
 - In this image the **new** Primary Contact name has been typed in.
- Click on Save.

Help v2024.5.0.7/1.0 - Pg 30 - Printed: 04/07/2024



•		Edit Supplier - Code	TWI001 - BPO: Version 2.	1.0.31 - Example C	ompany			28)
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	Supplier Code	TW1001			ForestHills		_			
iddresses	Supplier Name	Twinkle Office Automation Su	pples		KZN		_			
-007 CSB(5)	Primary Contact	Jason King		Probablicada	South Africa		_			
	VAT No.	9876543210		Postal Code	1234					
	Tax Rate	14.00	-	Billing Contact			-			
	Secondary Rate	0.00		Billing Address	PO Box 1234		-			
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• You will return to the **Supplier Listing** screen where the edited details can now be viewed.

CO3 Technologies (Pty) Ltd © Company Confidential



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		SPR002	Sprint Internation		George Matthews		A	456258741	0.00			2
		TON001	Tonys Copy Shop		Tony	SHPA	A	9874561321		DHL	C00	2
Notes		YES001	Young Electric		Grant	GEN	A	3245064654				3
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DELETE A SUPPLIER

In the Supplier Listing screen,

Select the Site

• In this image **All Sites** has been selected.

Help v2024.5.0.7/1.0 - Pg 34 - Printed: 04/07/2024



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	SPR002	Sprint International	George Matthews	GEN	A	456258741	0.00			2
	TON001	Tonys Copy Shop	Tony	SHPA	A	9874561321	0.00	DHL	C00	2
Notes	YE5001	Young Electric	Grant	GEN	A	3245064654	0.00			3
	PR3005	Printer World 2	Richard Sage	GEN	A	98076523	0.00	Wheels on Wings	30 days from delivery	5
	PR1007	Printer World Forex	Matthew Sage	SHPA	A	768594444	0.00	Wheels on wings	60 days from invoice	3
Addresses	PRI010	Printer World	Maggie Sage	GEN	A	456123789	0.00	Wheels with Wings	30 days from delivery	4
103603522	PRJ0012	Printer World	Maggie Saggie	GEN	A	13456789	0.00	Wheels with Wings	30 days from delivery	3
	TW1001	Twinkle Office Automation	Jason King	GEN	A.	9876543210	0.00	Wing It Couriers	30 day	2
	BON001	Sonsai Bonanza	Teddy Miller	GEN	A	987654321	0.00	Wing It Couriers	30 day	2
	PRE001	Pretoria Copy Shop	Jannie van Wyk	GEN	A	9876543210	0.00	Wing It	30 Days	4
Brococcion	DUR001	Durban Copy Shop	Megan Jones	GEN	A	987654321	0.00			3
Processing	PAP001	The Paper Warehouse	Joseph Manning	GEN	A	1234567890	0.00	Wing It	30 day	4
Regulations	MET001	Metro Peach	Jessica Johns	GEN	A	1234567	0.00	Wheels with Wings	30 days from delivery	5
	PRE005	Pretoria West Office Auto	Jackie Simmons	GEN	A	987654321	0.00			3
	NEW006	New Way Recycling	Patrick Smith	GEN	A	9876543210	0.00			3
	WON001	Wonderboom IT Hub	Mark Jones	GEN	A	987654321	0.00			3
Purchase Orders	888	Abs Store	Abi	GEN	A	654789	0.00	DHL	14 days after payment	2
	MSSS	A	A	GEN	A	986789	0.00	DHL	10 days	2
	00998877	Stone Rowe & Co.	David Christopher	FINH	A	1122334455	0.00	Shipmark		2



SELECT SUPPLIER

- Select the **row** of the **supplier** you wish to **delete**.
- Click on **Delete**.

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	1	SUP001	Buy Back Suppler	Supplier Contact	BUY	A	000000000	0.00			2
Items Supplied		SPR001	Sprint Distributors Local	Harry Jackson	GEN	A	456789123	0.00	The Courier Guy	30 days from Delivery	3
		SPR002	Sprint International	George Matthews	GEN	A	456258741	0.00			2
		TONOD1	Tonys Copy Shop	Tony	SHPA	A	9874561321	0.00	DHL	COD	2
Notes		YE5001	Young Electric	Grant	GEN	A	3245064654	0.00			3
		PR1005	Printer World 2	Richard Sage	GEN	A	98076523	0.00	Wheels on Wings	30 days from delivery	5
		PR3007	Printer World Forex	Matthew Sage	SHPA	A	768594444	0.00	Wheels on wings	60 days from invoice	3
Addresses		PR1010	Printer World	Maggie Sage	GEN	A	456123789	0.00	Wheels with Wings	30 days from delivery	4
		PR30012	Printer World	Maggie Saggie	GEN	A	13456789	0.00	Wheels with Wings	30 days from delivery	3
		TW1001	Twinkle Office Automation	Gary Marks	GEN	A.	9876543210	0.00	Wing It Couriers	30 day	2
		80N001	Bonsai Bonanza	Teddy Miller	GEN	A	987654321	0.00	Wing It Couriers	30 day	2
		PRE001	Pretoria Copy Shop	Jannie van Wyk	GEN	A	9876543210	0.00	Wing It	30 Days	4
Processing		DUR001	Durban Copy Shop	Megan Jones	GEN	A	987654321	0.00			3
Trocessing		PAP001	The Paper Warehouse	Joseph Manning	GEN	A	1234567890	0.00	Wing It	30 day	4
Requisitors		MET001	Metro Peach	Jessica Johns	GEN	A	1234567	0.00	Wheels with Wings	30 days from delivery	5
Andreas and the		PRECOS	Pretoria West Office Auto	Jadie Smnons	GEN	A	987654321	0.00			3
		NEW006	New Way Recycling	Patrick Smith	GEN	A	9876543210	0.00			3
Purchase Orders		WON001	Wonderboom IT Hub	Mark Jones	GEN	A	987654321	0.00			3
		888	Abs Store	Abi	GEN	A	654789	0.00	DHL	14 days after payment	2
	L	M\$\$\$	A	A	GEN	A	986789	0.00		10 days	2
)	0998877	Stone Rowe & Co.	David Christopher	FINH	A	122334455	0.00	Shipmark		2



CONFIRM DELETION

- A message box will pop up asking:
 - Are you sure you want to remove this supplier, code
 []?
- Click on Yes.

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		SUP001	Buy Back Suppler		Supplier Contact	BUY	A	0000000000	0.00			2
Items Suppled		SPR001	Sprint Distributors	Local	Harry Jackson	GEN	A	456789123	0.00	The Courier Guy	30 days from Delivery	3
		SPR002	Sprint Internation	a	George Matthews	GEN	A	456258741	0.00			2
		TON001	Tonys Copy Shop		Tony	SHPA	A	9874561321	0.00	DHL	COD	2
Notes		YE5001	Young Electric		Grant	GEN	A	3245064654	0.00			3
		PRIOOS	Printer World 2		Richard Sage	GEN	A	98076523	0.00	Wheels on Wings	30 days from delivery	5
		PR1007	Printer World For	tx	Matthew Sage	SIPA	A	768594444	0.00	Wheels on wings	60 days from invoice	3
Addresses		PR3010	Printer World		Maggie Sage	GEN	A	456123789	0.00	Wheels with Wings	30 days from delivery	4
		PR10012	Printer World		Maggie Saggie	GEN	A	13456789	0.00	Wheels with Wings	30 days from delivery	3
		TW1001	Twinkle Office Au	tomation	Gary Marks	GEN	A	9876543210	0.00	Wing It Couriers	30 day	2
		BON001	Bonsai Bonanza		Teddy Miler	GEN	A	987654321	0.00	Wing It Couriers	30 day	2
	ſ	Delete (A	-	•	9876543210	0.00	Wing It	30 Days	4
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rrocessing								1234567890	0.00	Wing It	30 day	4
Requisitons		2 A	re you sure you w	ant to remo	ove this supplier, c	ode 0998877?		1234567	0.00	Wheels with Wings	30 days from delivery	5
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	2	M555	A		A	GEN	A:	986789	0.00	DHL	10 days	2
	and the second	0998877	Stone Rowe & Co	6	David Christopher	FINH	A	122334455	0.00	Shipmark		2



• The Supplier will now be **removed** from the **Supplier Listing** screen.

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		SPR002	Sprint International	George Matthews		A	456258741	0.00		ov obja nom dener y	3
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Notes		YES001	Young Electric	Grant	GEN	A	3245064654	0.00			3
		PRIOOS	Printer World 2	Richard Sage	GEN	A	98076523		Wheels on Wings	30 days from delivery	5
		PR1007	Printer World Forex	Matthew Sage	SHPA	A	768594444		Wheels on wings	60 days from invoice	3
Addresses	1	PR1010	Printer World	Maggie Sage	GEN	A	456123789		Wheels with Wings	Conference description	4
	Ľ	PR30012	Printer World	Maggie Saggie	GEN	A	13456789		and the second sec	30 days from delivery	3
	ľ	TW1001	Twinkle Office Automation	Gary Marks	GEN	A	9876543210		Wing It Couriers	30 day	2
		BON001	Bonsai Bonanza	Teddy Miler	GEN	A	987654321	0.00	Wing It Couriers	30 day	2
		PRE001	Pretoria Copy Shop	Jannie van Wyk	GEN	A	9876543210	0.00	Wing It	30 Days	4
Descention		DUR001	Durban Copy Shop	Megan Jones	GEN	A	987654321	0.00			3
Processing	. 1	PAP001	The Paper Warehouse	Joseph Manning	GEN	A	1234567890	0.00	Wing It	30 day	4
Requisitions	1	MET001	Metro Peach	Jessica Johns	GEN	A.	1234567	0.00	Wheels with Wings	30 days from delivery	5
	l	PRE005	Pretoria West Office Auto	Jackie Simmons	GEN	A	987654321	0.00			3
		NEW006	New Way Recycling	Patrick Smith	GEN	Ą	9876543210	0.00			3
and the second		WON001	Wonderboom IT Hub	Mark Jones	GEN	A	987654321	0.00			3
Purchase Orders		888	Abs Store	Abi	GEN	A	654789	0.00	DHL	14 days after payment	2
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