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Partners

Data about customers, suppliers, members, individuals, banks and so on is maintained in the program "Partners".

To assist data processing in Brix a partner is set as one of the following types:


- Bank
- Business - Ltd's, Sole traders, Political parties, NGOs...
- Card company - Credit Card Companies
- Individual - Actual persons. All personal data and information that could be pieced together to identify an individual is regulated by GDPR legislation. The Brix [GDPR - General Data Protection Act](#) module helps with keeping such data in compliance with GDPR rules.
- Virtual - Used to group partners we don't have or need any specific information (name, address...), for example shop customers.

Partners can have departments representing their organizational structure. For example a company could have a chain of hotels. Each hotel would represent a department of a single customer. You can issue invoices directly to individual departments of that customer.

All **common and publicly available data**¹⁾ of partners, with the exception of individuals²⁾, are held in a central database if entities within Brix and are available to all users of Brix. Any specific data like contacts, notes, archived documents etc. are not shared and are accessible only to users within the company "owning" that data.

Entering a new partner

The procedure for entering a new partner:

1. First choose a partner type (Bank, Business, Card company, Individual or Virtual).
2. Partially enter a few characters of the partners' name - wait a bit and then, if available, choose an entity from the drop down list, save, add any necessary additional data and save again.
3. If the partner is not in the dropdown list, use the  icon to open the *Entity* form and enter the new company or individual, save the data and exit back to the Partner form.
4. Enter any extra data in the Partner form and save

Note: Prefixes and suffixes to a persons name are entered in the name and surname fields correspondingly. For example "Capt. Brian" "White" or "Jemima" "Brown Ph.D.".

¹⁾

name, adress, company number, tax number, departments...

²⁾

Due to GDPR regulation, data on individuals is not shared and "belong" to each company using Brix.

From:

<https://wiki.micro-process.hr/> -

Permanent link:

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Last update: **13/12/2024 05:24**

