

Knowledgebase > SalesPad > Purchasing > Vendor Card

# Vendor Card

Megan De Freitas - 2024-11-22 - Purchasing

## Overview

The SalesPad Vendor Card allows users to access detailed vendor information including existing purchase orders, contact information and item history. Users can also create new POs from the Vendor Card (refer to the Creating/Opening Purchase Orders document).

Proper configuration is required; refer to the <u>Configuring SalesPad for Purchasing</u> document for more information.

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Curtana Cara	h 🗙 🔏 Vendor :	Sauch Ml 🛛 Vor	dor: [ADVANCED000	1 Advanced Office	Sustana VI								
Close 😪 Re	fresh 📙 Save	Create Purchase C	rder: Standard	👼 Drop Ship 👩	Vendor Return								
Vendor Properties			Primary Addr	ess Information			Purchase Ord	Orders					
Vendor:			Janice Berm 678 Sherwo				PO Number	РО Туре	PO Da	ite	Required	Total	^ #
Vendor Name:	Advanced Office S	ystems	Park South Arlington	tim@salesp	i.net		PO2568	STANDARD	7/23/2	2013	7/23/2013	40.00	"
Vendor Class:	USA-US-M		Heights, IL	www.aos.c	om		PO2569	STANDARD	7/23/2	2013	7/23/2013	176.00	
Vendor Status:	ACTIVE				_		PO2575	STANDARD	8/29/2	2013	8/29/2013	107.50	
Payment Terms:	NET 30		Default Shipp	ing Information			PO2576	STANDARD	8/29/2	2013	8/29/2013	11.04	
Currency:	Z-US\$		Shipping Met	hod: GROUND	~		PO2296	STANDARD	10/18	/2010	10/18/2010	1,337.50	
			On Hold			-	PO2298	STANDARD	10/22	/2010	10/22/2010	2,675.00	~
Contact Addresses	CPM Note Item	History Purchase (	Orders User Fields	Purchases Graph (	Duick Report Email	Audit	Purchase Rec	eints Special	Costing	1			
	New S Mark.		orders oser rields		zuck report Endi	Addit	T di chuse rece	opta opeou	cosung				
g contacts	New Vidik.	HS T		í.				il.	_				
Address Type	Address Code	Contact Person	Address Line 1	City	State	Zip	•	Phone 1		Web S	ite	Email	
	ADV2	Terrence Worth	678 Sherwood P	Arlington Heights	IL	600	004-2922	(618) 555-0	102				
	GREG FORRESTER	Greg Forrester	678 Sherwood P	Arlington Heights	IL	600	004-2922	(618) 555-0	102				
1AIN/PURC/REMT	PRIMARY	Janice Berman	678 Sherwood P	Arlington Heights	IL	600	004-2922	(618) 555-0	102	www.a	los.com	tim@salespad.	net
SHIP	WAREHOUSE	Lindsey Vaughn	283 42 St North	Adiantes Histolate	IL		004-0283	(618) 555-0	10.4				

Access/add individual Vendor Cards via Modules > Purchasing > Vendor Search. Refer to the <u>VendorSearch</u> document for detailed instructions.

#### Header

You can create a new PO from the Create Purchase Order options (Standard or Dropship) in the header. You can also Refresh or Save any changes, or Close the Vendor Card, from the Vendor Card header.

## Тор

The Vendor Properties section displays information such as vendor name and ID, class, status, and payment terms. You can select a default shipping method for the vendor in the Default Shipping Information section. Primary Address Information and a list of existing POs also appear on the top of the Vendor Card.

**Note**: If the *Show Vendor Hint* sub-setting under *Vendor Overview* is enabled in Modules > Security, a Purchasing Summary hint with purchase order totals will display over the Name field when users hover over the Vendor field on the Vendor Card.

Vendor:		NCED0001	Janice Berma 678 Sherwoo		
Vendor Name:	Advar	red Office Systems	Park South	tim@sales	nad net
Vendor Class:	USA-	Purchasing Summary			
Vendor Status:	ACTI	Date	Total Billed	Total Paid	Freight Cost
Payment Terms:	NET	2014 (01/01-01/09)	\$658,884.32	\$2,828.54	\$0.00
rayment remis.		2013	\$658,884.32	\$2,828.54	\$0.00
Currency:	Z-USS	2012	\$658,884.32	\$2,828.54	\$0.00
		2011	\$658,884.32	\$2,828.54	\$0.00

Tabs

# CONTACT ADDRESSES

The Contact Addresses tab displays all contacts related to the vendor:

SP03 - SalesPa	d										
<u>File</u> <u>M</u> odules	<u>V</u> iew <u>H</u> elp	🙇 Customer Sea	ch 🛃 Inventory Lo	ookup 😞 Sale	es Documents 🖳	Sales Monitor					
2 Vendor Sea	arch 🐍 Vendor:	A Travel Compan	Y								
📑 Close 🛛 🍣 Re	efresh 🛛 🛃 Save	Create Purchase C	rder: 📄 Standard	🔒 Drop Ship							
Vendor Properties			Primary Address I	nformation		Purchase Orders					
Vendor:	ACETRAVE0001		Greg Powell 123 Riley Street	P1:(298) 555 FX:(294) 555		PO Number	Total				
Vendor Name:	A Travel Company	8	Sydney, NSW	1 A.(294) 333	-0101	ORDST2231-4	PO Type STANDARD	PO Date 11/6/2007	Required 11/6/2007	0.00	
endor Class:	AUS-NSW-M	-	2086	2086			STANDARD	11/6/2007	11/6/2007	0.00	
/endor Status:	ACTIVE	•					STANDARD	12/5/2007	12/5/2007	0.00	
ayment Terms:	NET 30	•				ORDST2250-1 ORDST2267-3	STANDARD	11/6/2007	11/6/2007	0.00	
			Default Shipping I	nformation	ORDST2267-6		11/6/2007	11/6/2007	0.00		
			Shipping Method:	OVERNIGHT	-	ORDST2272-5	STANDARD	12/5/2007	12/5/2007	0.00	
			On Hold			ORDST2329-1	STANDARD	1/7/2008	1/7/2008	0.00	
ontact Addresses	CRM Note Item		Orders User Fields F	Purchases Graph	Quick Report						
Address Type	Address Code	Contact Person	Address Line 1	City	State	Zip	Phone	2 1	Web Site	Email	
MAIN/SHIP/PURC	PRIMARY	Greg Powell	123 Riley Street	Sydney	NSW	2086	(298)	555-0101			
REMT	REMIT TO	Greg Powell	Box 342	Sydney	NSW	2000	(298)	555-0102			
	WAREHOUSE 2	test	123 Riley Street	Sydney	NSW	2086	(298)	555-0101			

Select a contact and make a selection from the Mark As dropdown to set an address code for a contact:

ot	te	Item History	Purchase Orders
9	5	Mark As 👻	
		Primary A	ddress
		Primary SI	hip From
		Primary P	urchase
đ		Primary R	emit To

Click **New** to add a contact, or click an Address Code to modify existing contact information:

SP03 - Sale	sPad							- 0 <b>X</b>
Eile Modu	les <u>V</u> iew <u>H</u> elp 🧟 Custome	r Search  Inventory Lookup 🗧	🔊 Sales Document	s 県 Sales Monitor				
🙎 Vendor	Search 💈 Vendor: A Travel Com	pany Contact: REMIT TO/Greg	g Powell					
Close 📙	Save							
Vendor								
Vendor ID:	ACETRAVE0001	Vendor Name:	A Travel Company					
Address			Contact Inform	ation		Other Address	Info	
Code:	REMIT TO		Contact Type:		-	Ship Method:	OVERNIGHT	•
Contact Name:	Greg Powell		HOME	(298) 555-0102		Tax Code:	AUSNSWST+20	-
Address:	Box 342		WORK					
			CELL					
			Fax:	(294) 555-0102				
Zip:	2000		Email:					
City:	Sydney	State: NSW	Web Site:					
Country:	Australia							
Comments			Vendor Contac	t User Fields				
		*						

When finished, click **Save** to save the changes and return to the Vendor Card.

# CRM

The CRM tab lists any notes added to the Vendor Card along with the date/time of creation, and the user name. With proper security, users can delete CRM notes by clicking the **Delete** button.

Close Refresh Sav	lor: A Travel Company e Create Purchase Or		Drop Ship						
/endor Properties		Primary Address Info	mation						
endor: ACETRAVE0001		Greg Powell P1:(298) 555-0101 123 Riley Street FX:(294) 555-0101 PO Number				PO Date	Required	Total	
ndor Name: A Travel Company ador Class: AUS-NSW-M	Sydney, NSW 2086	ORDST2231-4	STANDARD	11/6/2007	11/6/2007	0.00			
/endor Class: AUS-NSW-M	-		ORDST2231-6	STANDARD	11/6/2007	11/6/2007	0.00		
dor Status: ACTIVE		ORDST2250-1	STANDARD	12/5/2007	12/5/2007	0.00			
Payment Terms: NET 30	-			ORDST2267-3	STANDARD	11/6/2007	11/6/2007	0.00	
		Default Shipping Info	ORDST2267-6	STANDARD	11/6/2007	11/6/2007	0.00		
		Shipping Method: O	ERNIGHT -	ORDST2272-5	STANDARD	12/5/2007	12/5/2007	0.00	
		On Hold		ORDST2329-1	STANDARD	1/7/2008	1/7/2008	0.00	
ontact Addresses CRM Note I		ders User Fields Purc	nases Graph Quick Report						
Created	By		Note						
1/04/2010 12:06 PM	Erin		3 weeks to ship						

Click New to create a new CRM note, and then  $\mathbf{OK}$  to return to the Vendor Card:

Customer V	/endor Note E	intry					x
Note							*
							Ŧ
Type:	Vendor						-
	Created By: Changed By:	Erin	On On	11/4/2010	12:08:23 PM		
					ОК	Cance	:

CRM items will be inserted into the SalesPad Today modules as Task items. **Note**: Values in the **Type** dropdown are created in the *Note Type List* setting under Vendor Notes in Modules > Settings.

# NOTE

Enter notes and comments for the vendor on the Notes tab:

	Default Shipping Information Shipping Method: OVERNIGHT On Hold	ORDST2267-6 STAND ORDST2272-5 STAND ORDST2329-1 STAND	IDARD 1	1/6/2007 2/5/2007 /7/2008	11/6/2007 12/5/2007 1/7/2008	0.00 0.00 -
Contact Addresses   CRM Note   Item History   Purchase Ord	iers   User Fields   Purchases Graph   Quick Report	A	Comme Comme Comme			

## ITEM HISTORY

The Item History tab displays a complete history of all items purchased from the vendor. You can filter the display by number of months and click **Refresh** to view only items purchased during the selected time frame.

<u>File</u> <u>Modules</u>	View Help	ch 🛃 Inventory Lo	okup 😞 Sal	les Docume	nts 🖳 Sales M	onitor				
🙎 Vendor Se	arch 🐰 Vendor: A Travel Compan	Y								
📑 Close 🛛 🍣 R	efresh 🛛 🛃 Save 🛛 Create Purchase C	rder: 🗋 Standard	Drop Ship							
Vendor Properties		Primary Address In	formation		Purcha	se Order:	5			
Vendor:	ACETRAVE0001	Greg Powell 123 Riley Street	P1:(298) 55 FX:(294) 55		PO Nu	mber	PO Type	PO Date	Required	Total
Vendor Name:	A Travel Company	Sydney, NSW	1 (294) 33	5-0101					11/6/2007	
Vendor Class:	AUS-NSW-M	2086				T2231-4		ANDARD 11/6/2007		0.00
Vendor Status:	ACTIVE					F2231-6	STANDARD			0.00
Payment Terms:	NET 30					F2250-1	STANDARD	12/5/2007	12/5/2007	0.00
r ayment rema.	NET 30	Default Shipping In	formation				0.00			
		Shipping Method:				12267-6	STANDARD	12/5/2007	11/6/2007	0.00
			OVERNIGHT				STANDARD	1/7/2008	1/7/2008	0.00
		On Hold			OKUS	2329-1	STANDARD	1/7/2008	1/7/2008	0.00
Contact Addresses	G CRM Note Item History Purchase (	Orders User Fields Pu	urchases Grapi	h Quick Rep	ort					
Ttem Number	Item Description	Qty Or	Qty Shi	Unit C	Ext Cost	Req Da	te Pro	mised Shi /	PO	PO Date
100XLG	Green Phone 2	34,341	0	28.46	977,344.86	10/20/2	010 10/3	20/2010		10/20/2010
128 SDRAM	128 meg SDRAM	3,333,333	0	152.10	506,999,949.30	10/20/2	010 10/3	20/2010		10/20/2010
100XLG	Green Phone 2	1	0	28.46	28.46	10/20/2	010 10/3	20/2010		10/20/2010
100XLG	Green Phone 2	65	0	28.46	1,849.90	10/20/2	010 10/2	20/2010		10/20/2010
100XLG	Green Phone 2	1	0	28.46	28.46	10/27/2	010 10/2	27/2010		10/27/2010

PURCHASE ORDERS

The Purchase Orders tab displays a list of POs linked to the vendor. Unlike the Purchase Orders listing on the top of the Vendor Card, you can filter the display by number of months, or order type. Make selections and click **Refresh** to view only POs that meet the selected criteria.

File Modules \			Day a						
<u>File M</u> odules <u>\</u>	View Help	mer Search 🛛 🛃 Invento	ory Lookup  ᠲ Sales Docume	ents 🖳 🤅	Sales Monitor				
Vendor Search	h 🕺 🔱 Vendor: A Travel (	Company							
📑 Close 🛛 🍣 Refre	esh 🛛 🚽 Save 🛛 Create Pur	rchase Order: 📄 Stand	dard 🛛 🙀 Drop Ship						
Vendor Properties		Primary Add	ress Information		Purchase Order	5			
Vendor: AC	CETRAVE0001	Greg Powell			PO Number	PO Type	PO Date	Required	Total
Vendor Name: A	Travel Company	123 Riley St Sydney, NS							Total
Vendor Class: AL	US-NSW-M	2086			ORDST2231-4	STANDARD	11/6/2007	11/6/2007	0.00
	CTIVE	-			ORDST2231-6	STANDARD	11/6/2007	11/6/2007	0.00
	ET 30				ORDST2250-1	STANDARD	12/5/2007	12/5/2007	0.00
Payment Terms: INC	ET 30		·····		ORDST2267-3	STANDARD	11/6/2007	11/6/2007	0.00
				•	ORDST2267-6	STANDARD	11/6/2007	11/6/2007	0.00
			thod: OVERNIGHT		ORDST2272-5	STANDARD	12/5/2007	12/5/2007	0.00
		On Hold			ORDST2329-1	STANDARD	1/7/2008	1/7/2008	0.00
		irchase Orders User Fie Standard 🔽 Drop Shi							
				ip Blanket	ping Method		Subto	tal	Total
Months to Show:	6 🗧 🔀 Refresh	Standard 📝 Drop Shi	ip 📝 Blanket 📝 Drop Sh	nip Blanket Ship			Subto 34, 15	-	
Months to Show:	6 🕀 😥 Refresh 🔽	Standard 🔽 Drop Shi	ip 📝 Blanket 📝 Drop Sh Promised Ship Date	nip Blanket Ship OVE	ping Method			2.00	
Months to Show: PO Number PO2071 PO2072	6 PO Type BLANKET	Standard V Drop Shi PO Date 4/1/2017	p V Blanket V Drop Sh Promised Ship Date 4/12/2017	nip Blanket Ship OVE LOC	ping Method RNIGHT		34,15	2.00 0.00	34, 152.00 39, 480.00
Months to Show: PO Number PO2071 PO2072 PO2081	6 Refresh V PO Type BLANKET DROPSHIPBLANKET	Standard V Drop Shi PO Date 4/1/2017 4/1/2017	p ♥ Blanket ♥ Drop Sh Promised Ship Date 4/12/2017 4/12/2017	nip Blanket Ship OVE LOC	ping Method RNIGHT AL DELIVERY		34,15 39,48 1,00	2.00 0.00	34,152.00
Months to Show: PO Number PO Number PO2071 PO2072 PO2081 PO2085	6  PO Type BLANKET DROPSHIPBLANKET STANDARD	Standard V Drop Shi PO Date 4/1/2017 4/12/2017	Image: pipe of the state of the s	nip Blanket Ship OVE LOC OVE	ping Method RNIGHT AL DELIVERY RNIGHT		34,15 39,48 1,00	2.00 0.00 0.00 0.00	34,152.00 <b>39,480.00</b> 1,000.00
Months to Show: PO Number PO2071 PO2072 PO2081 PO2085 PO2088	6 © Refresh V PO Type BLANKET DROPSHIPBLANKET STANDARD STANDARD	Standard V Drop Shi PO Date 4/1/2017 4/12/2017 4/12/2017	Promised Ship Date           4/12/2017           4/12/2017           4/12/2017           4/12/2017	hip Blanket Ship LOC OVE OVE	ping Method RNIGHT AL DELIVERY RNIGHT RNIGHT		34,15 39,48 1,00	2.00 0.00 0.00 0.00	34,152.00 39,480.00 1,000.00 0.00
Months to Show: PO Number PO2071 PO2081 PO2085 PO2088 PO2089	PO Type BLANKET DROPSHIPBLANKET STANDARD STANDARD STANDARD	PO Date 4/1/2017 4/1/2017 4/12/2017 4/12/2017 4/12/2017	Promised Ship Date           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017	hip Blanket Ship OVE LOC OVE OVE OVE	ping Method RNIGHT AL DELIVERY RNIGHT RNIGHT RNIGHT		34,15 39,48 1,00	2.00 0.00 0.00 0.00 0.00 0.00	34,152.00 39,480.00 1,000.00 0.00 15,210.00
PO Number PO 20271 PO 20272 PO 2085 PO 2085 PO 2088 PO 2088 PO 2089 PO 2090	PO Type BLANKET DROPSHIPBLANKET STANDARD STANDARD STANDARD STANDARD	Po Date         4/1/2017           4/1/2017         4/1/2017           4/1/2017         4/1/2/017           4/1/2/017         4/1/2/017           4/1/2/2017         4/1/2/2017	Promised Ship Date           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017	nip Blanket Ship COVE COVE OVE OVE OVE OVE	ping Method RNIGHT AL DELIVERY RNIGHT RNIGHT RNIGHT		34,15 39,48 1,00 15,21 10 22,50	2.00 0.00 0.00 0.00 0.00 0.00	34,152.00 39,480.00 1,000.00 0.00 15,210.00 100.00
Nonths to Show:	PO Type     BLANKET     DROPSHIPBLANKET     STANDARD     STANDARD     STANDARD     STANDARD     STANDARD     STANDARD	PO Date         4/1/2017           4/1/2017         4/1/2017           4/1/2017         4/1/2/017           4/1/2017         4/1/2/017           4/1/2/017         4/1/2/017           4/1/2/017         4/1/2/017	Promised Ship Date           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017	nip Blanket Ship LOC OVE OVE OVE OVE OVE	ping Method RNIGHT AL DELIVERY RNIGHT RNIGHT RNIGHT RNIGHT		34,15 39,48 1,00 15,21 10 22,50	2.00 0.00 0.00 0.00 0.00 0.00 0.00	34,152.00 39,480.00 1,000.00 0.00 15,210.00 100.00 22,500.00
Norths to Show:	6 The second sec	PO Date 4/1/2017 4/1/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017	Promised Ship Date           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017           4/12/2017	hip Blanket Ship COVE COVE COVE COVE COVE COVE COVE COVE	ping Method RNIGHT AL DELIVERY RNIGHT RNIGHT RNIGHT RNIGHT RNIGHT		34,15 39,48 1,00 15,21 10 22,50	2.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00	34,152.00 39,480.00 1,000.00 15,210.00 100.00 22,500.00 0.00
PO2021 PO2089 PO2082 PO2089 PO2082 PO2082 PO2089 PO2082 PO2082 PO2089 PO2082 PO	6 Terresti V PO Type BLANKET DROPSHIPBLANKET STANDARD STANDARD STANDARD STANDARD STANDARD STANDARD STANDARD STANDARD STANDARD	Standard ♥ Drop Shi PO Date 4/1/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017	p ♥ Blanket ♥ promised Ship Date 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017	hip Blanket Ship OVE OVE OVE OVE OVE OVE OVE OVE OVE	ping Method RNIGHT AL DELIVERY RNIGHT RNIGHT RNIGHT RNIGHT RNIGHT RNIGHT		34,15 39,48 1,00 15,21 10 22,50 21 1,12	2.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00	34,152.00 39,480.00 1,000.00 15,210.00 100.00 22,500.00 0.00 212.80
Months to Show:	Comparing the second seco	PO Date         PO Date           4/1/2017         4/1/2017           4/1/2017         4/1/2017           4/1/2/2017         4/12/2017           4/12/2017         4/12/2017           4/12/2017         4/12/2017           4/12/2017         4/12/2017           4/12/2017         4/12/2017           4/12/2017         4/12/2017           4/12/2017         4/12/2017	p ♥ Blanket ♥ Orop Sh Promised Ship Date 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017 4/12/2017	Ship Blanket OVE LOC OVE OVE OVE OVE OVE OVE OVE OVE OVE OVE	ping Method RNIGHT AL DELIVERY RNIGHT RNIGHT RNIGHT RNIGHT RNIGHT RNIGHT RNIGHT		34, 15 39, 48 1,00 15, 21 10 22, 50 21 1, 12 68	2.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 2.80 1.50	34,152.00 39,480.00 1,000.00 0.00 15,210.00 100.00 22,500.00 0.00 212.80 1,121.50
PO Number PO2021 PO2081 PO2088 PO2088 PO2088 PO2089 PO2089 PO2125 PO2125 PO2126 PO2127 PO2128	Comparing the second seco	Po Date         Po Date           4/1/2017         4/1/2017           4/1/2017         4/1/2/017           4/12/2017         4/12/2017           4/12/2017         4/12/2017           4/12/2017         4/12/2017           4/12/2017         4/12/2017           4/12/2017         4/12/2017           4/12/2017         4/12/2017           4/12/2017         4/12/2017	p         ♥         Blanket         ♥         Orop Sh           Promised Ship Date         4/12/2017         4/12/2017         4/12/2017           4/12/2017         4/12/2017         4/12/2017         4/12/2017           4/12/2017         4/12/2017         4/12/2017         4/12/2017           4/12/2017         4/12/2017         4/12/2017         4/12/2017           4/12/2017         4/12/2017         4/12/2017         4/12/2017	Ship Blanket OVE LOC OVE OVE OVE OVE OVE OVE OVE OVE OVE OVE	ping Method RNIGHT AL DELIVERY RNIGHT RNIGHT RNIGHT RNIGHT RNIGHT RNIGHT RNIGHT		34, 15 39, 48 1,00 15, 21 10 22, 50 21 1, 12 68 33	2.00 2.00 2.00 2.00 2.28 1.50 2.20 2.20 2.20 2.20 2.20 2.20 2.20 2.20 2.20 2.20 2.20 2.20 2.00	34,152.00 399,480.00 1,000.00 0.00 15,210.00 100.00 22,500.00 0.00 212.80 1,121.50 681.50

## USER FIELDS

The User Fields tab displays all user defined fields created on the Vendor Business Object. Refer to the SalesPad User Defined Fields document for more information.

Note: In versions 4.0 and later, Vendor UDFs will automatically copy to the same Purchase Order UDF.

Contact A	Addresses	CRM	Note	Item History	Purchase Orders	User Fields	Purchases Graph	Quick Report	Email Audit	Purchase Receipts	Special Costing
Vendor Ra	ating A						$\checkmark$	×			
Acres of C	Corn							•••			
Vendor Co	ontract 🎚	er docu	uments	\timh \Documer	nts\Demo Documen	ts\Quote Ten	nplates\BY 40.) 🚥	Þ			

#### PURCHASES GRAPH

The Purchases Graph tab displays a graphical look at purchases from the vendor for a user specified time period. Grand Totals appear on the right. You can break the graph by day, week, quarter, month, or year, and display plot price, cost, freight, or GM Pct. Make selections and click **Refresh** to update the graph. The graph can also be printed or exported.



#### **Purchases Graph Price Calculation:**

To calculate prices, the Purchases Graph uses a stored procedure that looks at vendor invoices and credit memos. It treats the amount (price) on the vendor invoice as a positive amount, and the credit memos as a negative amount. If the total credit memo amount for a time period is greater than the total vendor invoice amount, then the Purchases Graph will display a negative price.

#### QUICK REPORT

If a Vendor Quick Report is specified in Modules > Security Editor, it will display in the Quick Reports tab and any Quick Reports added to the Vendor Card. Refer to SalesPad documentation on Quick Reports and SalesPad

Security Settings guide for more information.

**Note:** When Quick Reports have been added, the name of the tab changes from Quick Report to the title of the Quick Report (single) or Vendor Quick Reports (multiple).

# EMAIL AUDIT

The Email Audit tab displays emails relevant to the vendor, shown by date, PO number, user ID, email From and To, Email Subject, and Email Body.

## SPECIAL COSTING

In versions 4.0+, there is a Special Costing tab that displays existing special costing and, with proper security, allows users to add new special costing and change cost levels. Refer to the Vendor Special Costing document for more information.

Contact Addresses CA	RM Note Item History	Purchase Orders Use	er Fields Purchases Gra	aph Quick Report Sp	ecial Costing				
Custom Costing									
🖶 New 💥 Delete	e								
Item Number	Item Description	UOfM	Cost	Vendor Item Number	Vendor Item Des /	Begin Date	End Date	Qty Start	Qty End
WIRE-SCD-0001	Single conductor wire	FOOT	0.11	WIRE SINGLE	Single Conductor Wire	5/13/2011	5/13/2012	1	1,000,00