



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 [Configuring SalesPad for Purchasing](#) document for more information.

PO Number	PO Type	PO Date	Required ...	Total
PO2568	STANDARD	7/23/2013	7/23/2013	40.00
PO2569	STANDARD	7/23/2013	7/23/2013	176.00
PO2575	STANDARD	8/29/2013	8/29/2013	107.50
PO2576	STANDARD	8/29/2013	8/29/2013	11.04
PO2296	STANDARD	10/18/2010	10/18/2010	1,337.50
PO2298	STANDARD	10/22/2010	10/22/2010	2,675.00

Address Type	Address Code	Contact Person	Address Line 1	City	State	Zip	Phone 1	Web Site	Email
	ADV2	Terrence Worth	678 Sherwood P...	Arlington Heights	IL	60004-2922	(618) 555-0102		
	GREG FORRESTER	Greg Forrester	678 Sherwood P...	Arlington Heights	IL	60004-2922	(618) 555-0102		
MAIN/PURC/REMT	PRIMARY	Janice Berman	678 Sherwood P...	Arlington Heights	IL	60004-2922	(618) 555-0102	www.aos.com	tim@salespad.net
SHIP	WAREHOUSE	Lindsey Vaughn	283 42 St North,...	Arlington Heights	IL	60004-0283	(618) 555-0104		

Access/add individual Vendor Cards via Modules > Purchasing > Vendor Search. Refer to the [VendorSearch](#) 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.

Top

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.

Purchasing Summary

Date	Total Billed	Total Paid	Freight Cost
2014 (01/01-01/09)	\$658,884.32	\$2,828.54	\$0.00
2013	\$658,884.32	\$2,828.54	\$0.00
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:

Address Type	Address Code	Contact Person	Address Line 1	City	State	Zip	Phone 1	Web Site	Email
MAIN/SHIP/PURC	PRIMARY	Greg Powell	123 Riley Street	Sydney	NSW	2086	(298) 555-0101		
REMIT	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:

- Primary Address
- Primary Ship From
- Primary Purchase
- Primary Remit To

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

SP03 - SalesPad

File Modules View Help Customer Search Inventory Lookup Sales Documents Sales Monitor

Vendor Search Vendor: A Travel Company Contact: REMIT TO/Greg Powell

Close Save

Vendor

Vendor ID: ACETRAVE0001 Vendor Name: A Travel Company

Address

Code: REMIT TO

Contact Name: Greg Powell

Address: Box 342

Zip: 2000

City: Sydney State: NSW

Country: Australia

Contact Information

Contact Type: HOME (298) 555-0102

WORK

CELL

Fax: (294) 555-0102

Email:

Web Site:

Other Address Info

Ship Method: OVERNIGHT

Tax Code: AUSNSWST+20

Comments

Vendor Contact 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.

SP03 - SalesPad

File Modules View Help Customer Search Inventory Lookup Sales Documents Sales Monitor

Vendor Search Vendor: A Travel Company

Close Refresh Save Create Purchase Order: Standard Drop Ship

Vendor Properties

Vendor: ACETRAVE0001

Vendor Name: A Travel Company

Vendor Class: AUS-NSW-M

Vendor Status: ACTIVE

Payment Terms: NET 30

Primary Address Information

Greg Powell P1:(298) 555-0101
123 Riley Street FX:(294) 555-0101
Sydney, NSW
2086

Default Shipping Information

Shipping Method: OVERNIGHT

On Hold

Purchase Orders

PO Number	PO Type	PO Date	Required ...	Total
ORDST2231-4	STANDARD	11/6/2007	11/6/2007	0.00
ORDST2231-6	STANDARD	11/6/2007	11/6/2007	0.00
ORDST2250-1	STANDARD	12/5/2007	12/5/2007	0.00
ORDST2267-3	STANDARD	11/6/2007	11/6/2007	0.00
ORDST2267-6	STANDARD	11/6/2007	11/6/2007	0.00
ORDST2272-5	STANDARD	12/5/2007	12/5/2007	0.00
ORDST2329-1	STANDARD	1/7/2008	1/7/2008	0.00

Contact Addresses CRM Note Item History Purchase Orders User Fields Purchases Graph Quick Report

Contact Log New Delete

Created	By	Note
11/04/2010 12:06 PM	Erin	3 weeks to ship

Click **New** to create a new CRM note, and then **OK** to return to the Vendor Card:

Customer Vendor Note Entry

Note

Type: Vendor

Created By: Erin On 11/4/2010 12:08:23 PM
 Changed By: On

OK Cancel

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

ORDST2267-6	STANDARD	11/6/2007	11/6/2007	0.00
ORDST2272-5	STANDARD	12/5/2007	12/5/2007	0.00
ORDST2329-1	STANDARD	1/7/2008	1/7/2008	0.00

Contact Addresses CRM **Note** Item History Purchase Orders User Fields Purchases Graph Quick Report

Notes

Comment Lines
 Comment 1:
 Comment 2:

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.

SP03 - SalesPad

File Modules View Help Customer Search Inventory Lookup Sales Documents Sales Monitor

Vendor Search Vendor: A Travel Company

Vendor Properties: Vendor: ACETRAVE0001 Vendor Name: A Travel Company Vendor Class: AUS-NSW-M Vendor Status: ACTIVE Payment Terms: NET 30

Primary Address Information: Greg Powell P1:(298) 555-0101 123 Riley Street Sydney, NSW 2086 FX:(294) 555-0101

Purchase Orders

PO Number	PO Type	PO Date	Required ...	Total
ORDST2231-4	STANDARD	11/6/2007	11/6/2007	0.00
ORDST2231-6	STANDARD	11/6/2007	11/6/2007	0.00
ORDST2250-1	STANDARD	12/5/2007	12/5/2007	0.00
ORDST2267-3	STANDARD	11/6/2007	11/6/2007	0.00
ORDST2267-6	STANDARD	11/6/2007	11/6/2007	0.00
ORDST2272-5	STANDARD	12/5/2007	12/5/2007	0.00
ORDST2329-1	STANDARD	1/7/2008	1/7/2008	0.00

Contact Addresses CRM **Note** **Item History** Purchase Orders User Fields Purchases Graph Quick Report

Months to Show: 1 Refresh

Item Number	Item Description	Qty Or...	Qty Shi...	Unit C...	Ext Cost	Req Date	Promised Shi... /	PO	PO Date
100XLG	Green Phone 2	34,341	0	28.46	977,344.86	10/20/2010	10/20/2010		10/20/2010
128 SDRAM	128 meg SDRAM	3,333,333	0	152.10	506,999,949.30	10/20/2010	10/20/2010		10/20/2010
100XLG	Green Phone 2	1	0	28.46	28.46	10/20/2010	10/20/2010		10/20/2010
100XLG	Green Phone 2	65	0	28.46	1,849.90	10/20/2010	10/20/2010		10/20/2010
100XLG	Green Phone 2	1	0	28.46	28.46	10/27/2010	10/27/2010		10/27/2010
A100	Audio System	1	0	53.99	53.99	10/27/2010	10/27/2010		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.

Vendor: ACETRAVE0001
 Vendor Name: A Travel Company
 Vendor Class: AUS-NSW-M
 Vendor Status: ACTIVE
 Payment Terms: NET 30

Primary Address Information
 Greg Powell P1:(298) 555-0101
 123 Riley Street FX:(294) 555-0101
 Sydney, NSW 2086

PO Number	PO Type	PO Date	Required ...	Total
ORDST2231-4	STANDARD	11/6/2007	11/6/2007	0.00
ORDST2231-6	STANDARD	11/6/2007	11/6/2007	0.00
ORDST2250-1	STANDARD	12/5/2007	12/5/2007	0.00
ORDST2267-3	STANDARD	11/6/2007	11/6/2007	0.00
ORDST2267-6	STANDARD	11/6/2007	11/6/2007	0.00
ORDST2272-5	STANDARD	12/5/2007	12/5/2007	0.00
ORDST2329-1	STANDARD	1/7/2008	1/7/2008	0.00

PO Number	PO Type	PO Date	Promised Ship Date	Shipping Method	Subtotal	Total
PO2071	BLANKET	4/1/2017	4/12/2017	OVERNIGHT	34,152.00	34,152.00
PO2072	DROPSHIPBLANKET	4/1/2017	4/12/2017	LOCAL DELIVERY	39,480.00	39,480.00
PO2081	STANDARD	4/12/2017	4/12/2017	OVERNIGHT	1,000.00	1,000.00
PO2085	STANDARD	4/12/2017	4/12/2017	OVERNIGHT	0.00	0.00
PO2088	STANDARD	4/12/2017	4/12/2017	OVERNIGHT	15,210.00	15,210.00
PO2089	STANDARD	4/12/2017	4/12/2017	OVERNIGHT	100.00	100.00
PO2090	STANDARD	4/12/2017	4/12/2017	OVERNIGHT	22,500.00	22,500.00
PO2125	STANDARD	4/12/2017	4/12/2017	OVERNIGHT	0.00	0.00
PO2126	STANDARD	4/12/2017	4/12/2017	OVERNIGHT	212.80	212.80
PO2127	STANDARD	4/12/2017	4/12/2017	OVERNIGHT	1,121.50	1,121.50
PO2128	STANDARD	4/12/2017	4/12/2017	OVERNIGHT	681.50	681.50
PO2130	STANDARD	4/12/2017	4/12/2017	OVERNIGHT	339.75	339.75
PO2131	STANDARD	4/12/2017	4/12/2017	OVERNIGHT	388.95	388.95
PO2132	STANDARD	4/12/2017	4/12/2017	OVERNIGHT	0.00	0.00

USER FIELDS

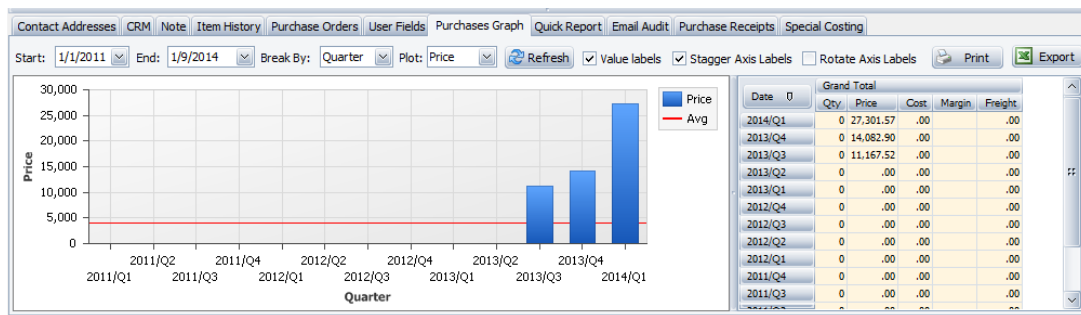
The User Fields tab displays all user defined fields created on the Vendor Business Object. Refer to the SalesPad [User Defined Fields](#) document for more information.

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

Vendor Rating: A
 Acres of Corn:
 Vendor Contract: User documents\timh\Documents\Demo Documents\Quote Templates\BY 40...

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.

The screenshot shows the 'Special Costing' window with a table of custom costing items. The table has the following columns: Item Number, Item Description, UORM, Cost, Vendor Item Number, Vendor Item Des..., Begin Date, End Date, Qty Start, and Qty End.

Item Number	Item Description	UORM	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	1,000,000