Vendor Card and Purchase Order Receipts Tab

Cavallo Support - 2024-11-22 - Purchasing

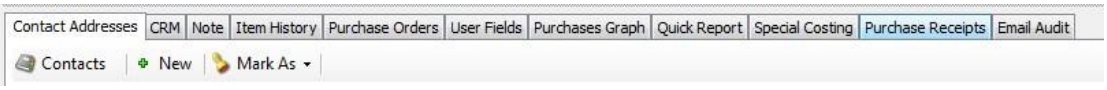
Overview

New Receipts Tabs have been added to the Vendor Card and Purchase Order business objects, giving you a new way to better aggregate information about vendors, POs, and receipts.

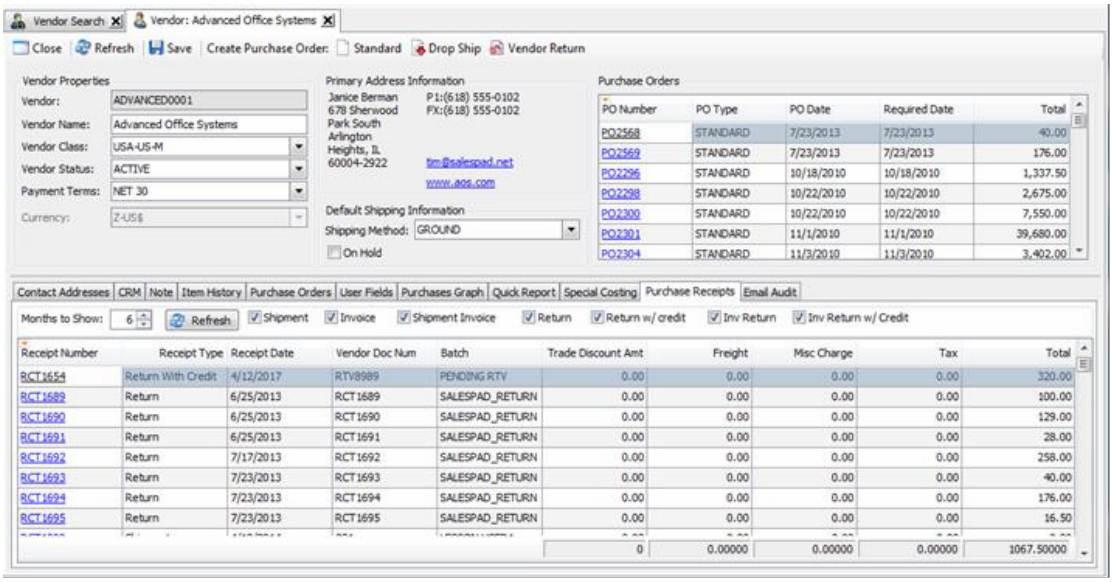
Note: Purchase Order receipts tabs is currently in beta.

Usage

To use the Receipts tab on the Vendor Card, click on **Vendor Search** and open the Vendor Card you want to see information for. Click on the Purchase Receipts tab.

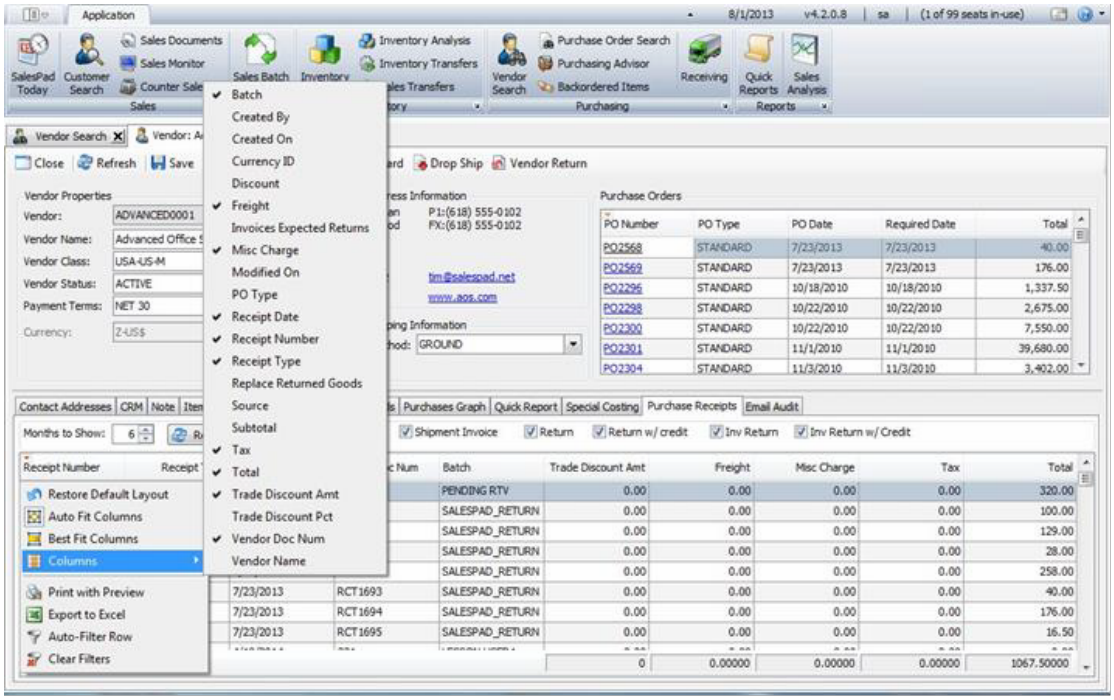


This opens a new form that displays all PO receipts associated with that vendor, based on search criteria including Months to Show and receipts types such as Shipment, Invoice, Shipment Invoice, Return, Return with Credit, Inv Return, and InvReturn with Credit.



You can also add additional fields to the window with the Column Chooser. Click on the Columns icon (small red triangle above the Receipt Number field).

Select Column Chooser to add other columns to the screen.

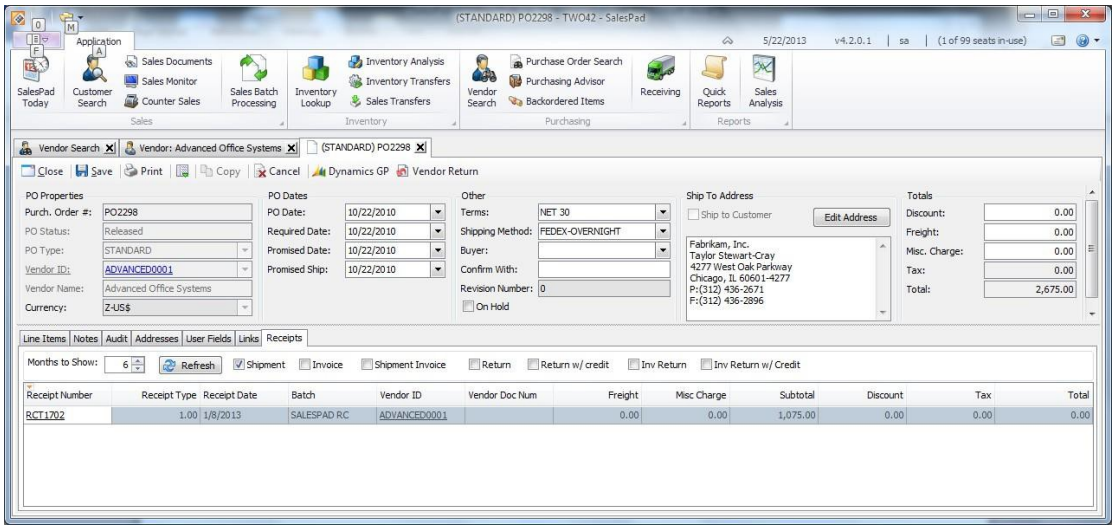


A similar tab has been added to the Purchase Order business object in SalesPad. This screen displays PO Receipts based on the same search criteria identified earlier for the selected vendor.

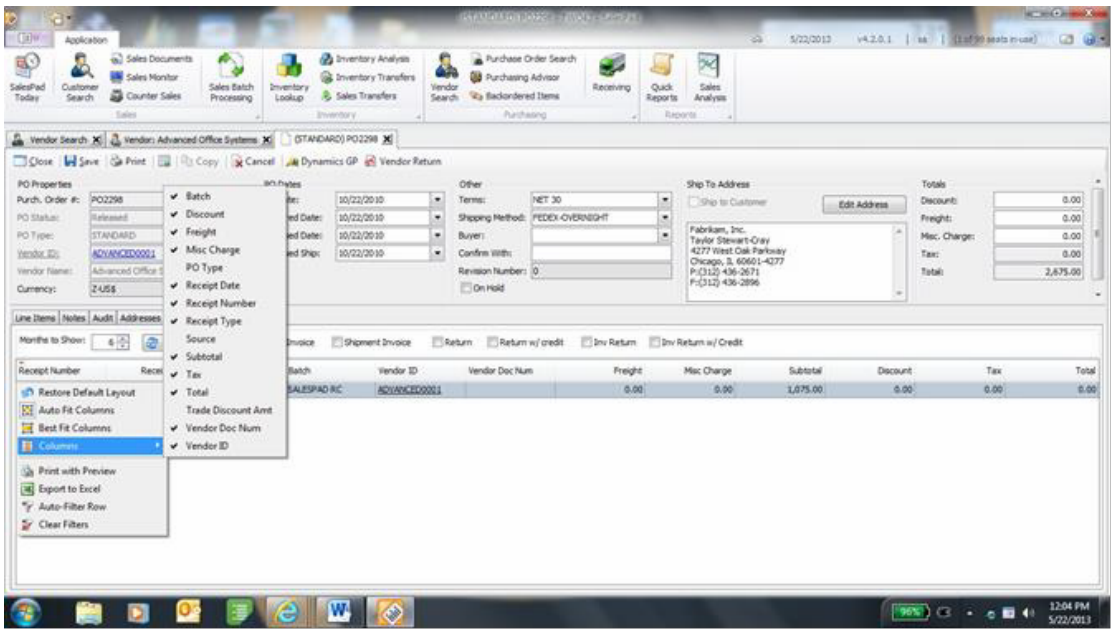
From a Vendor record, click on the **Purchase Order Search** button in the Vendor Card header.



Search for, select, and open a Purchase Order (any PO with a receipt). Click the Receipts tab. From this tab, you can see all receipts associated with the PO.



Click on the Columns icon (small red triangle above the Receipt Number field). Select Column Chooser to add additional columns to the screen.


Application
SalesPad Today
Customer Search
Sales Documents
Sales Monitor
Counter Sales
Sales Batch Processing
Inventory Lookup
Inventory Analysis
Inventory Transfers
Sales Transfers
Vendor Search
Purchase Order Search
Purchasing Advisor
Backordered Items
Receiving
Quick Reports
Sales Analysis
Vendor Search
Vendor: Advanced Office Systems
(STANDARD) PO2298
Close
Save
Print
Copy
Cancel
Dynamics GP
Vendor Return
PO Properties
Purch. Order #: PO2298
PO Status: Released
PO Type: STANDARD
Vendor ID: ADVANCED0001
Vendor Name: Advanced Office S
Currency: Z-US$
Other
Terms: NET 30
Shipping Method: FEDEX-OVERNIGHT
Buyer:
Confirm With:
Revision Number: 0
On Hold
Ship To Address
Ship to Customer
Edit Address
Fabrikam, Inc.
Taylor Stewart-Gray
4277 West Oak Parkway
Chicago, IL 60601-4277
P:(312) 436-2671
F:(312) 436-2896
Totals
Discount: 0.00
Freight: 0.00
Misc. Charge: 0.00
Tax: 0.00
Total: 2,875.00
Line Items
Notes
Audit
Addresses
Months to Show: 6
Invoice
Shipment Invoice
Return
Return w/ credit
Inv Return
Inv Return w/ Credit
Receipt Number
Batch
Vendor ID
Vendor Doc Num
Freight
Misc Charge
Subtotal
Discount
Tax
Total
SALESPAD RC
ADVANCED0001
0.00
0.00
1,075.00
0.00
0.00
0.00
Batch
Discount
Freight
Misc Charge
PO Type
Receipt Date
Receipt Number
Receipt Type
Source
Subtotal
Tax
Total
Trade Discount Amt
Vendor Doc Num
Vendor ID
Restore Default Layout
Auto Fit Columns
Best Fit Columns
Columns
Print with Preview
Export to Excel
Auto-Filter Row
Clear Filters
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