



Vendor Card and Purchase Order Receipts Tab

Megan De Freitas - 2024-11-22 - Purchasing

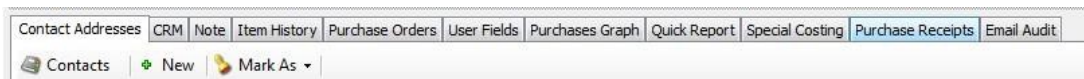
Overview

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.

Vendor Properties:

Vendor: ADVANCED0001
Vendor Name: Advanced Office Systems
Vendor Class: USA-US-M
Vendor Status: ACTIVE
Payment Terms: NET 30
Currency: 2-US\$

Primary Address Information:

Janice Berman P1:(618) 555-0102
678 Sherwood Park South FX:(618) 555-0102
Arlington Heights, IL 60004-2922
jm@salespad.net
www.aos.com

Default Shipping Information:

Shipping Method: GROUND
 On Hold

Purchase Orders:

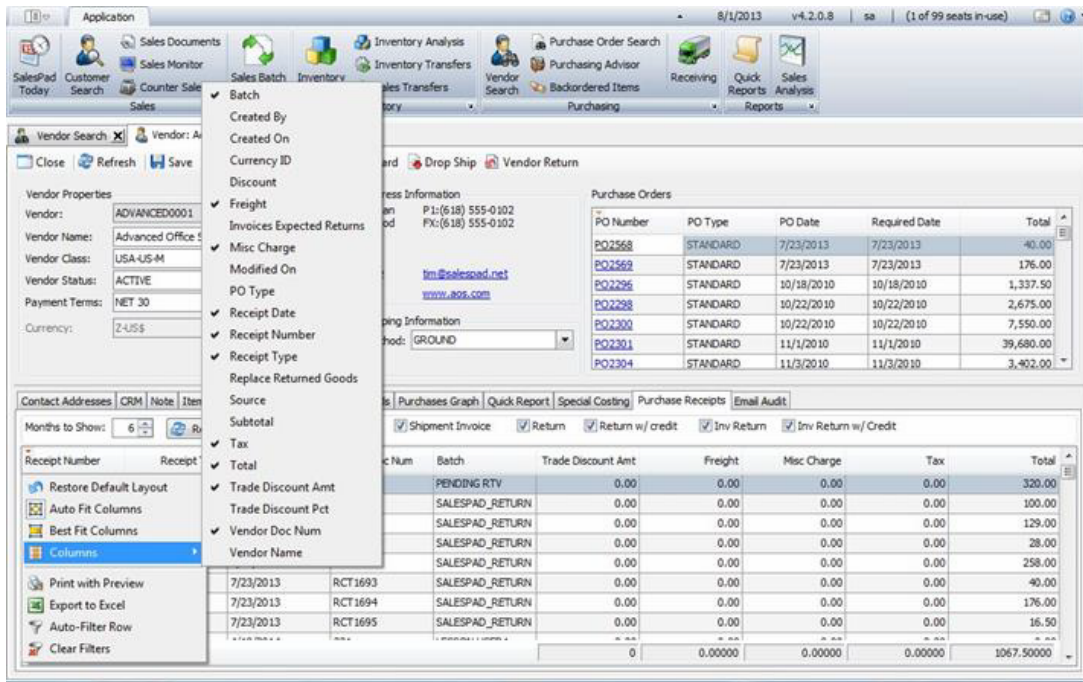
PO Number	PO Type	PO Date	Required Date	Total
PO2568	STANDARD	7/23/2013	7/23/2013	40.00
PO2569	STANDARD	7/23/2013	7/23/2013	176.00
PO2296	STANDARD	10/18/2010	10/18/2010	1,337.50
PO2298	STANDARD	10/22/2010	10/22/2010	2,675.00
PO2300	STANDARD	10/22/2010	10/22/2010	7,550.00
PO2301	STANDARD	11/1/2010	11/1/2010	39,680.00
PO2304	STANDARD	11/3/2010	11/3/2010	3,402.00

Months to Show: 6 | Refresh | Shipment | Invoice | Shipment Invoice | Return | Return w/ credit | Inv Return | Inv Return w/ Credit

Receipt Number	Receipt Type	Receipt Date	Vendor Doc Num	Batch	Trade Discount Amt	Freight	Misc Charge	Tax	Total
RCT1654	Return With Credit	4/12/2017	RTV9989	PENDING RTV	0.00	0.00	0.00	0.00	320.00
RCT1689	Return	6/25/2013	RCT1689	SALESPAD_RETURN	0.00	0.00	0.00	0.00	100.00
RCT1690	Return	6/25/2013	RCT1690	SALESPAD_RETURN	0.00	0.00	0.00	0.00	129.00
RCT1691	Return	6/25/2013	RCT1691	SALESPAD_RETURN	0.00	0.00	0.00	0.00	28.00
RCT1692	Return	7/17/2013	RCT1692	SALESPAD_RETURN	0.00	0.00	0.00	0.00	258.00
RCT1693	Return	7/23/2013	RCT1693	SALESPAD_RETURN	0.00	0.00	0.00	0.00	40.00
RCT1694	Return	7/23/2013	RCT1694	SALESPAD_RETURN	0.00	0.00	0.00	0.00	176.00
RCT1695	Return	7/23/2013	RCT1695	SALESPAD_RETURN	0.00	0.00	0.00	0.00	16.50
					0	0.00000	0.00000	0.00000	1067.50000

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.

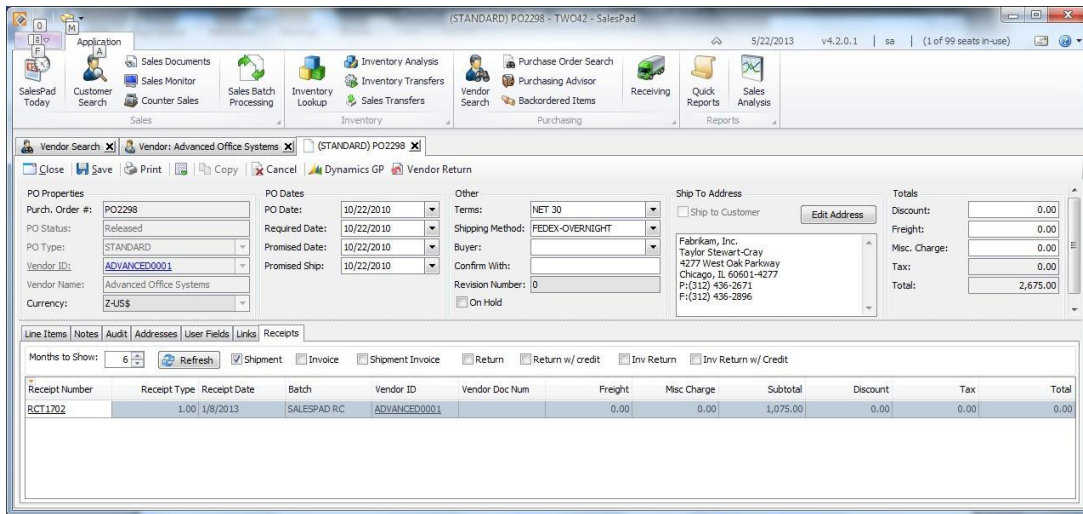


A similar tab has been added to the Purchase Order business object in SalesPad. This screen displays PO Receipts based on the same search criteria identified earlier for the selected vendor.

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: 5/22/2013 v4.2.0.1 | SA | (1 of 30 tabs in use)

Sales: Sales Documents, Sales Monitor, Counter Sales, Sales Batch Processing, Inventory Lookup, Inventory Analysis, Inventory Transfers, Sales Transfers, Purchasing: 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 Systems, Currency: ZUS\$

Batch: 10/22/2010, Released Date: 10/22/2010, Invoiced Date: 10/22/2010, Invoiced Ship: 10/22/2010

Other: Terms: NET 30, Shipping Method: FEDEX-OVERNIGHT, Buyer: , Confirms With: , Revision Number: 0, On Hold:

Ship To Address: Ship to Customer, Edit Address, Fabrikam, Inc., Taylor Stewart-Cray, 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: 2,675.00

Receipt Number: Receipt: Receipt Type: Source: Subtotal: Tax: Total: Trade Discount Amt: Vendor Doc Num: Vendor ID

Line Items: Notes: Audit: Addresses: Months to Show: 6, Restore Default Layout, Auto Fit Columns, Best Fit Columns, Columns, Print with Preview, Export to Excel, Auto-Filter Row, Clear Filters

Invoice	Shipment Invoice	Return	Return w/ credit	Inv Return	Inv Return w/ Credit			
Batch	Vendor ID	Vendor Doc Num	Freight	Misc Charge	Subtotal	Discount	Tax	Total
SALESPOD-RC	ADVANCED0001		0.00	0.00	1,675.00	0.00	0.00	8.00

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