Vendor Search and New Vendor Creation

Cavallo Support - 2024-12-03 - Purchasing

Overview

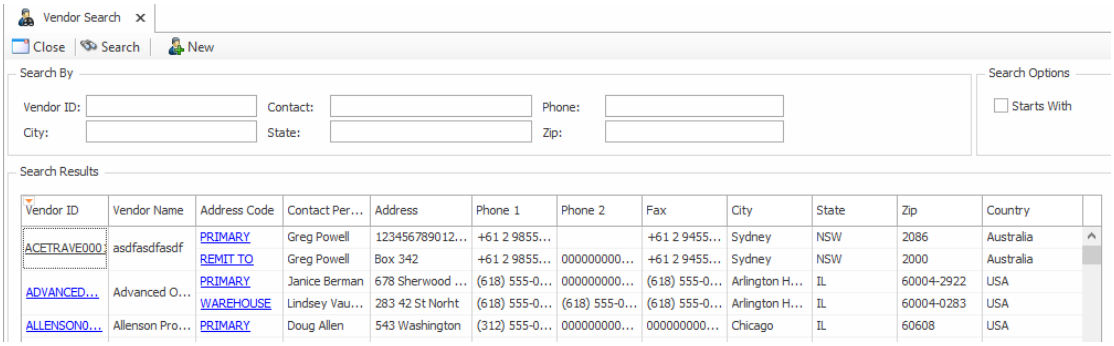
SalesPad Vendor Search allows users to quickly find vendors and access detailed vendor information via individual Vendor Cards. New vendors can also be created from the Vendor Search Module

Usage

In the Vendor Search moduel, enter search criteria in the search fields. With proper settings (see settings, below), the Vendor ID field can be set to search multiple fields.

Once the search criteria is entered, click **Search** (or hit **Enter**). Ysearching with no criteria will display all vendors in the system.

The results are displayed in the Search Results grid.

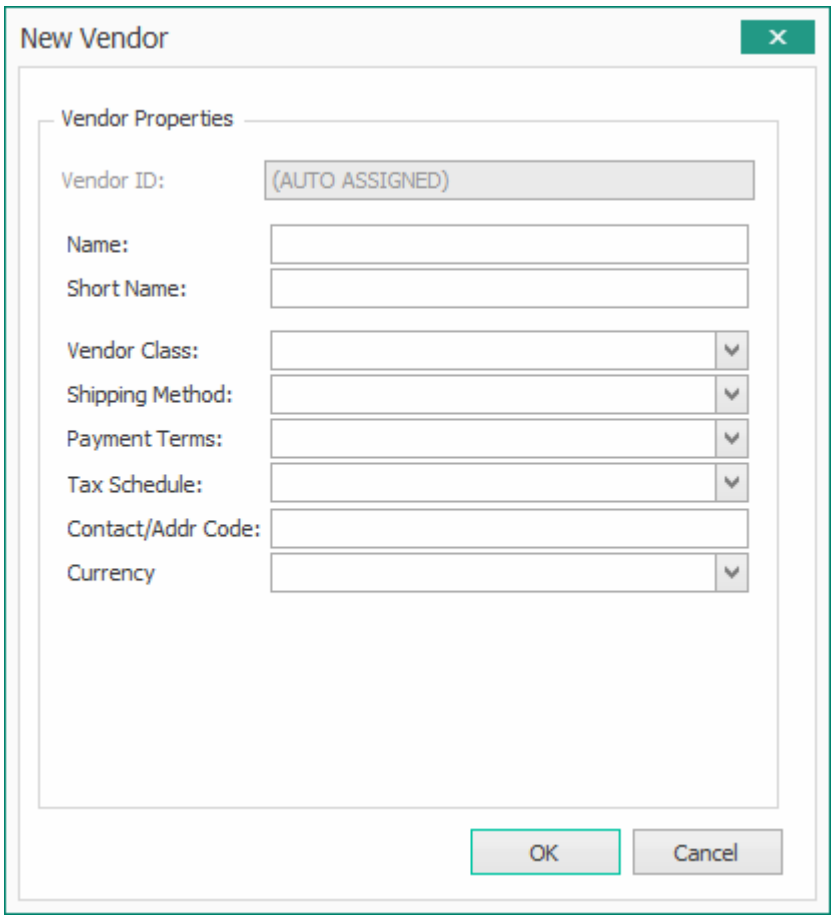


If **Starts With** is checked under Search Options, the Search Results grid will only show results starting with the entered search criteria. If **Starts With** is not selected, the grid will display results with search criteria in any part of the word.

Click on a Vendor ID to open the Vendor Card.

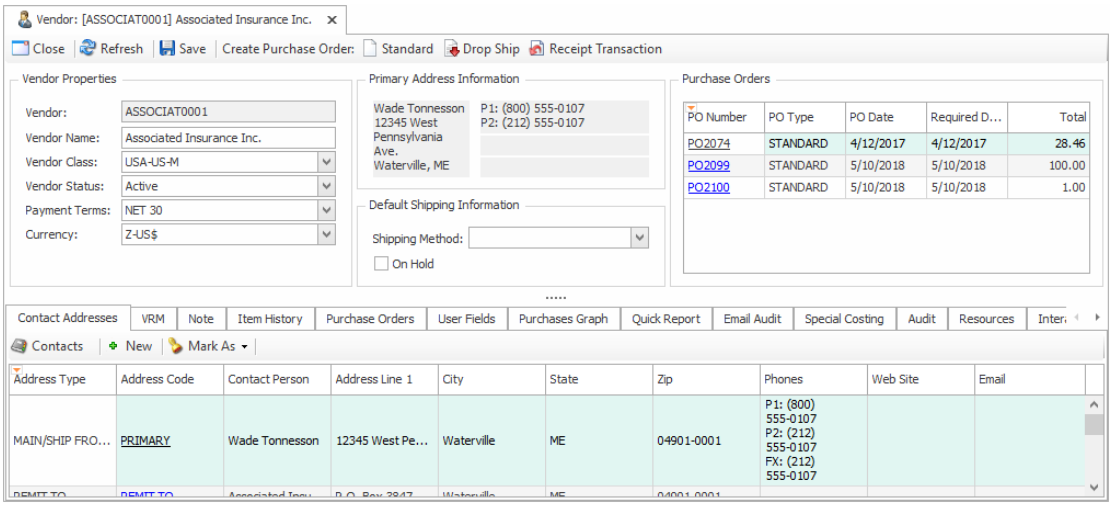
New Vendor Creation

To create a new vendor from the Vendor Search Module, click the **New** button. In the New Vendor window, enter the vendor information.



Note: if security is configured, the Vendor ID can be automatically assigned, and certain options can be set by default.

The vendor's contact information will be visible in the Contact Addresses tab of the vendor card.



To add additional contacts on the same Vendor Card, click **New** on the Contact Addresses tab.

Security

New Vendor - Allows for the creation of new vendors from the Vendor Search module.

Vendor Search - Grants access to the Vendor Search module.

Settings

Search 1st Address Line For Vendor Name - Search the vendor's first address line for the vendor's name.

Defaults to 'False'.

Search Contact Address Codes - *S*earch the vendor contact’s address code as part of the vendor search. Defaults to 'False'.

Search Contact Names - *S*earch the vendor contact’s name as part of the vendor search. Defaults to 'False'.

Search Vendor Name Only - If True, will only search by the vendor name (not the vendor name and ID). Defaults to 'False'.