



Vendor Search and New Vendor Creation

Megan De Freitas - 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.

The screenshot shows the Vendor Search interface. At the top, there are buttons for 'Close', 'Search', and 'New'. Below these is a 'Search By' section with input fields for Vendor ID, Contact, Phone, City, State, and Zip. To the right is a 'Search Options' section with a checkbox for 'Starts With'. Below the search fields is a 'Search Results' section containing a table of vendor information.

Vendor ID	Vendor Name	Address Code	Contact Per...	Address	Phone 1	Phone 2	Fax	City	State	Zip	Country
ACETRAVE000	asdfsdfasdfs	PRIMARY	Greg Powell	123456789012...	+61 2 9855...		+61 2 9455...	Sydney	NSW	2086	Australia
		REMIT TO	Greg Powell	Box 342	+61 2 9855...	000000000...	+61 2 9455...	Sydney	NSW	2000	Australia
ADVANCED...	Advanced O...	PRIMARY	Janice Berman	678 Sherwood ...	(618) 555-0...	000000000...	(618) 555-0...	Arlington H...	IL	60004-2922	USA
ALLENSON0...	Allenson Pro...	WAREHOUSE	Lindsey Vau...	283 42 St Norht	(618) 555-0...	(618) 555-0...	(618) 555-0...	Arlington H...	IL	60004-0283	USA
		PRIMARY	Doug Allen	543 Washington	(312) 555-0...	000000000...	000000000...	Chicago	IL	60608	USA

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.

New Vendor

Vendor Properties

Vendor ID: (AUTO ASSIGNED)

Name:

Short Name:

Vendor Class:

Shipping Method:

Payment Terms:

Tax Schedule:

Contact/Addr Code:

Currency:

OK Cancel

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.

Vendor: [ASSOCIAT0001] Associated Insurance Inc. x

Close Refresh Save Create Purchase Order: Standard Drop Ship Receipt Transaction

Vendor Properties

Vendor: ASSOCIAT0001

Vendor Name: Associated Insurance Inc.

Vendor Class: USA-US-M

Vendor Status: Active

Payment Terms: NET 30

Currency: Z-US\$

Primary Address Information

Wade Tonnesson
12345 West Pennsylvania Ave.
Waterville, ME

P1: (800) 555-0107
P2: (212) 555-0107

Default Shipping Information

Shipping Method:

On Hold

Purchase Orders

PO Number	PO Type	PO Date	Required D...	Total
PO2074	STANDARD	4/12/2017	4/12/2017	28.46
PO2099	STANDARD	5/10/2018	5/10/2018	100.00
PO2100	STANDARD	5/10/2018	5/10/2018	1.00

Contact Addresses VRM Note Item History Purchase Orders User Fields Purchases Graph Quick Report Email Audit Special Costing Audit Resources Inter: < >

Contacts New Mark As

Address Type	Address Code	Contact Person	Address Line 1	City	State	Zip	Phones	Web Site	Email
MAIN/SHIP FRO...	PRIMARY	Wade Tonnesson	12345 West Pe...	Waterville	ME	04901-0001	P1: (800) 555-0107 P2: (212) 555-0107 FX: (212) 555-0107		
REMIT TO	REMIT TO	Associated Ins...	P.O. Box 2847	Waterville	ME	04901-0001			

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 - Search the vendor contact's address code as part of the vendor search. Defaults to 'False'.

Search Contact Names - Search 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'.