



Vendor VRM

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Overview

Vendor VRM is a contact log that is available in the Vendor Card. Users can add, edit, and delete notes about contacts.

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Usage

VRM Tab

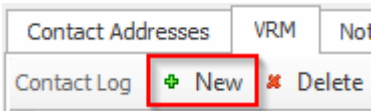
To use Vendor VRM, open the Vendor Card. There will be a VRM tab to select at the bottom of the card.

The screenshot displays the Vendor Card for 'A Travel Company' (Vendor ID: ACETRAVE0001). The interface includes several sections: Vendor Properties, Primary Address Information, Default Shipping Information, and Purchase Orders. The 'VRM' tab is highlighted in the bottom navigation bar. Below the navigation bar, the 'Contact Log' section is visible, showing a table with columns for 'Created', 'By', and 'Note'. The table is currently empty, displaying 'No data to display'.

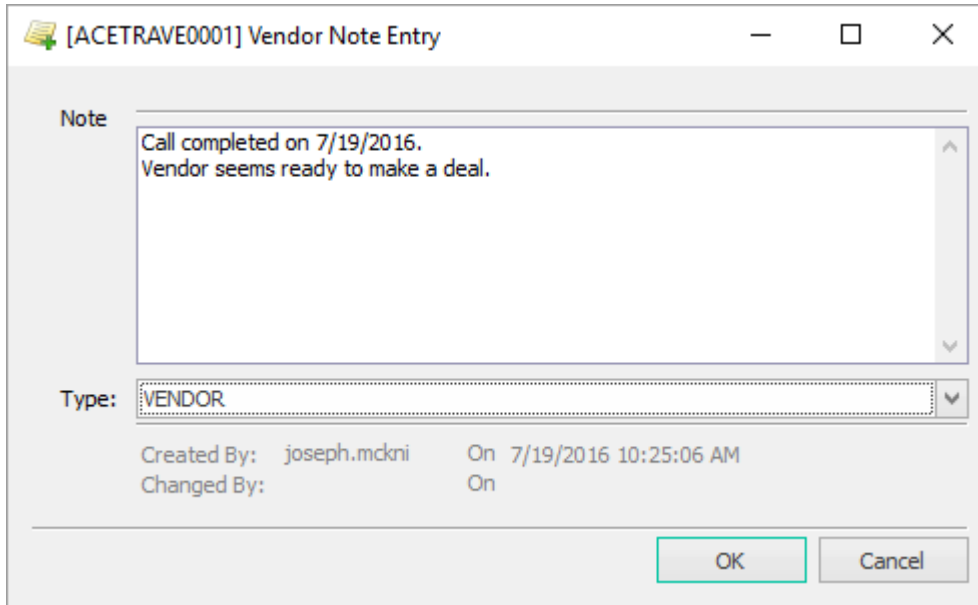
PO Number	PO Type	PO Date	Required...	Total
PO2071	BLANKET	4/1/2017	4/12/2017	34,152.00
PO2077	DROPSHIP	5/31/2016	5/31/2016	50.00
PO2072	DROPSH...	4/1/2017	4/12/2017	39,480.00
PO2078	STANDARD	6/2/2016	6/2/2016	250,000.00
PO2079	STANDARD	6/2/2016	6/2/2016	300.00
PO2080	STANDARD	6/13/2016	6/13/2016	500.00

Creating a New Entry

To create an entry, click the **New** button. This will open the Vendor Note Entry window.



You can enter the note in the Note text box and select the type of note with the Type dropdown menu.

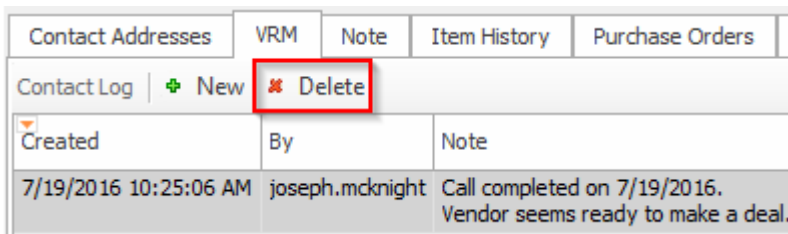


The image shows a window titled '[ACETRAVE0001] Vendor Note Entry'. It contains a text area with the note: 'Call completed on 7/19/2016. Vendor seems ready to make a deal.' Below the text area is a dropdown menu labeled 'Type:' with 'VENDOR' selected. At the bottom, there are 'Created By: joseph.mckni' and 'On 7/19/2016 10:25:06 AM' fields, and 'Changed By:' and 'On' fields. There are 'OK' and 'Cancel' buttons at the bottom right.

Press the **OK** button to save the notes, or the **Cancel** button to cancel the entry.

Delete an Entry

To delete an entry, select a VRM note from the log and press the **Delete** button. SalesPad will ask you to confirm the delete. Simply click **Yes** to delete the note.



The image shows a table with columns: 'Created', 'By', and 'Note'. The 'Delete' button in the navigation bar is highlighted with a red box. The table contains one entry:

Created	By	Note
7/19/2016 10:25:06 AM	joseph.mcknight	Call completed on 7/19/2016. Vendor seems ready to make a deal.

Editing an Entry

To edit the note, click into the text box and edit the text as necessary. The sub-security *Can Edit Notes* under the *Vendor VRM* security must be set to True.

Security Settings

*Vendor VRM** - Allows users to see the VRM tab.