Vendor VRM

Cavallo Support - 2024-11-22 - Purchasing

Overview

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

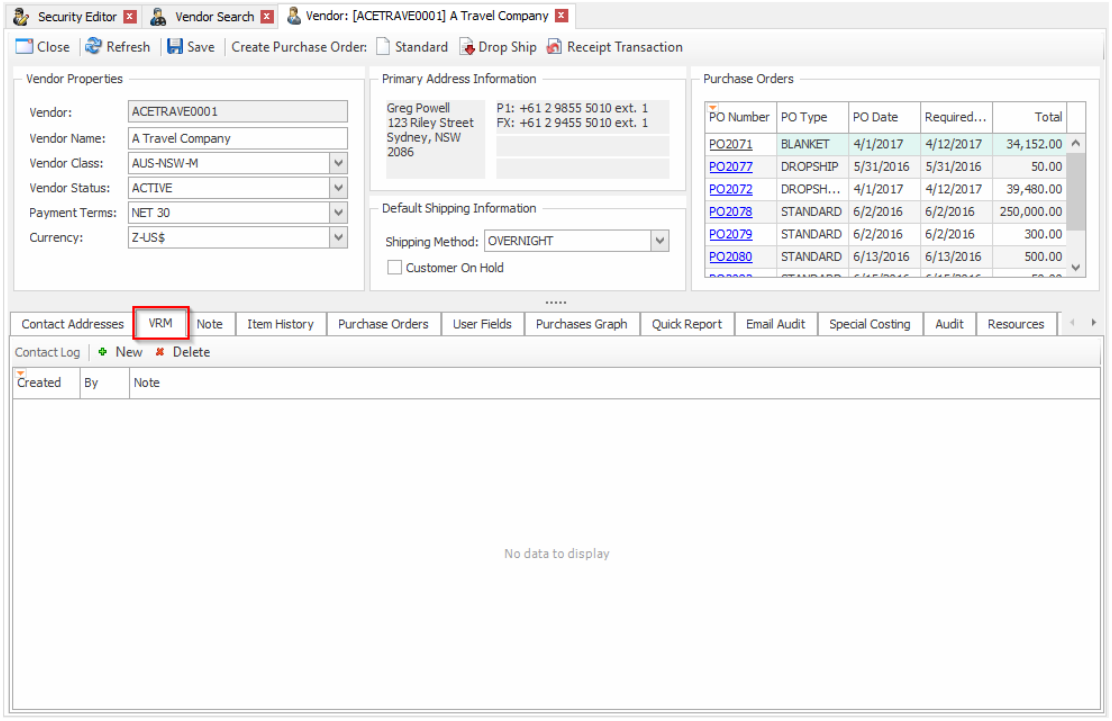
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Usage

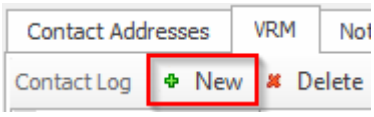
VRM Tab

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

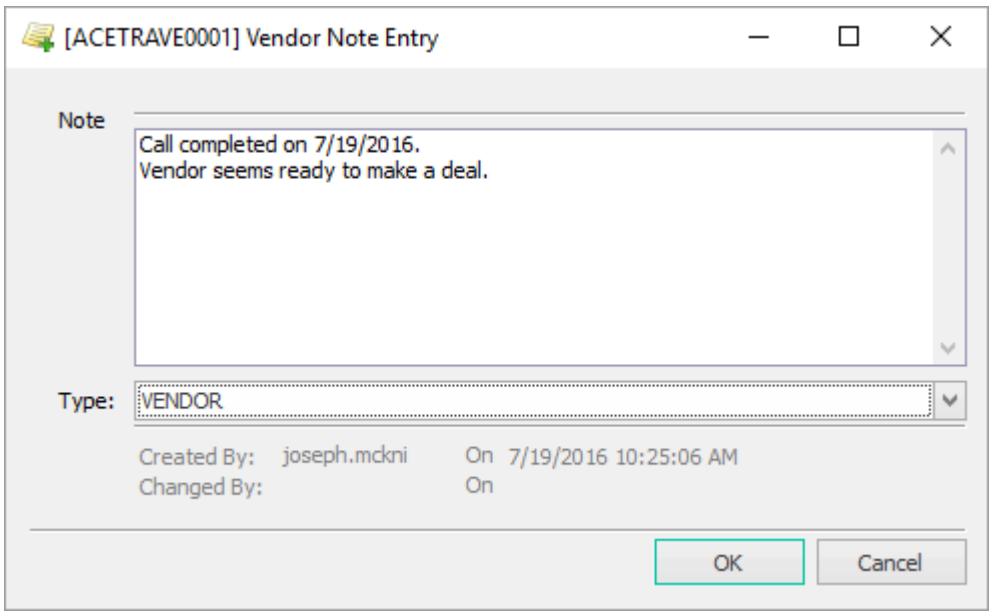


Creating a New Entry

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



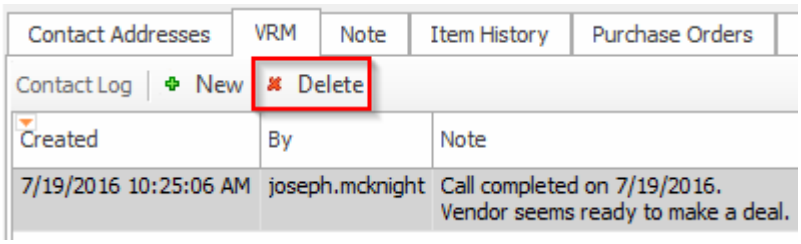
You can enter the note in the Note text box and select the type of note with the Type dropdown menu.



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.



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* securitymust be set to True.

Security Settings

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