



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

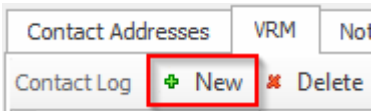
To use Vendor VRM, open the Vendor Card. There will be a VRM tab to select at the bottom of the card.

The screenshot shows the Vendor Card for 'A Travel Company' (Vendor ID: ACETRAVE0001). The interface includes a top navigation bar with 'Security Editor', 'Vendor Search', and 'Vendor: [ACETRAVE0001] A Travel Company'. Below this is a toolbar with 'Close', 'Refresh', 'Save', 'Create Purchase Order', 'Standard', 'Drop Ship', and 'Receipt Transaction'. The main content area is divided into three sections: 'Vendor Properties', 'Primary Address Information', and 'Purchase Orders'. The 'Vendor Properties' section contains fields for Vendor, Vendor Name, Vendor Class, Vendor Status, Payment Terms, and Currency. The 'Primary Address Information' section contains fields for Primary and Secondary addresses and phone numbers. The 'Purchase Orders' section contains a table with columns for PO Number, PO Type, PO Date, Required Date, and Total. The 'VRM' tab is highlighted in the bottom navigation bar. The 'Contact Log' section 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 screenshot 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. 'OK' and 'Cancel' buttons are 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.