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Vendor VRM

Megan De Freitas - 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.

Vendor Properties			Primary Add	Primary Address Information			- Purchase Orders					
endor:	ACETRAVE0001		Greg Powe	Powell P1: +61 2 9855 5010 ext. 1 Riley Street EX: +61 2 9455 5010 ext. 1		xt. 1	PO Numbe	er PO Type	PO Date	Required	Total	
endor Name:	A Travel Company		Sydney, NSW				PO2071	BLANKE	4/1/2017	4/12/2017	34,152.00	
endor Class:	AUS-NSW-M	~	2086				PO2077 DRO	DROPSH	HIP 5/31/2016	5/31/2016	50.00	
endor Status:	ACTIVE	\sim				PO2072 DROPS PO2078 STAND PO2079 STAND		4/1/2017	4/12/2017	39,480.00		
ayment Terms:	NET 30	\sim	– Default Ship	Default Shipping Information Shipping Method: OVERNIGHT				LD 6/2/2016	6/2/2016 6/2/2016	250,000.00		
urrency:	Z-US\$	\sim	Shipping M					RD 6/2/2016		300.00		
			Custon	Customer On Hold			PO2080 STAND		D 6/13/2016	6/13/2016	500.00	
ntact Addresses	VRM Note Item History	Pure	chase Orders	User Fi	ields Purchases Grap	h Ouick	Report Em	ail Audit	Special Costing	Audit	Resources	
	1				No data to display							

Creating a New Entry

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

Contact Add	VRM	VRM No				
Contact Log	Nev	N 🗶 D	elete			

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

🚑 [ACE	[RAVE0001] Vendor Not	e Entry			_		\times
Note	Call completed on 7/19/ Vendor seems ready to	2016. make a deal.					< >
Type:	VENDOR						~
	Created By: joseph.m Changed By:	nckni On On	7/19/2016 10:	25:06 AM			
				ОК		Cance	el

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.

Contact Addresses	VRM	Note	Item History	Purchase Orders			
Contact Log 🕈 New 🏼		elete					
Created	Ву		Note				
7/19/2016 10:25:06 AM	M josep	h.mcknigh	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* securitymust be set to True.

Security Settings

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