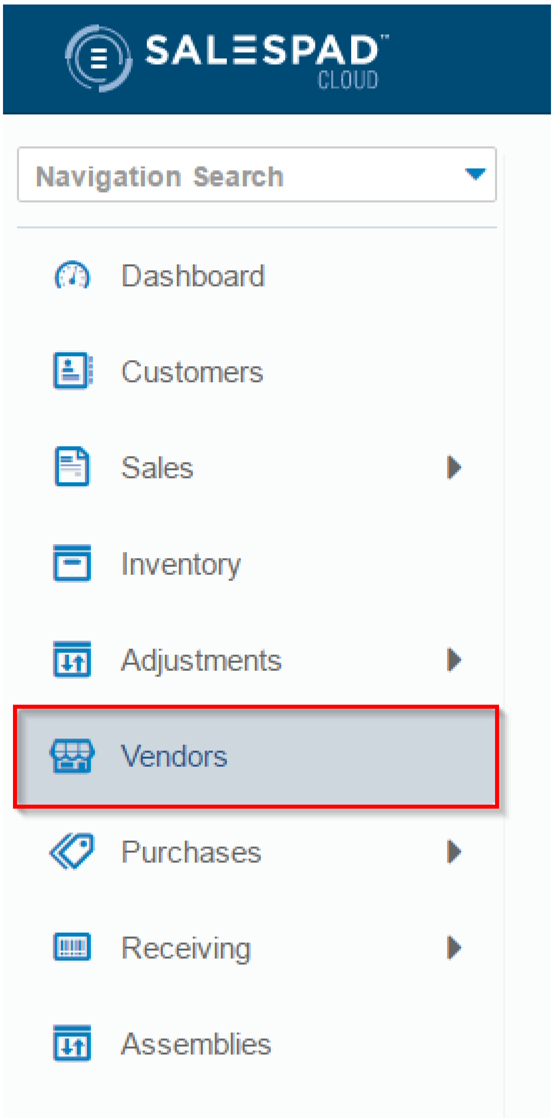
Vendors

Megan De Freitas - 2025-08-06 - Modules

Overview

The Vendors module of SalesPad Cloud allows you to create new vendors, edit existing vendors, and organize them.

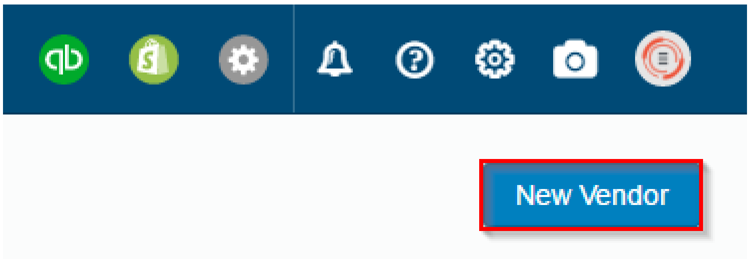
To get started, click the **Vendors** icon on the left-hand side of the screen.



Create and Edit Vendors

Create a new Vendor

To create a new vendor, click the **New Vendor** button in the top right-hand corner of the screen.



The Create Vendor drawer will appear. Fill in the information fields and click **Save** when finished.

Feedback

Create Vendor

×

Vendor Name

Vendor Class

No Vendor Class

Vendor Type

No Vendor Type

Payment Terms

No Payment Terms

Notes

Is 1099

Contact Person

Print Contact

Admin Lock

Is Custom

Name

Address 1

Address 2

City

State

Zip

Country

Save

For a brief explanation of the information fields in the Create Vendor drawer, click here:

Create Vendor

Vendor Name - Allows you to create a name for the vendor

Vendor Class - Assigns the vendor to a Vendor Class, which helps you categorize your vendors (if Coca Cola was one of your vendors, you might assign them to a Beverages vendor class)

Payment Terms - Assigns a set of Payment Terms to the vendor (Cash on Receipt, Net 10, etc.)

Notes - Provides space for you to record any notes about the vendor

Is 1099 - Indicates whether or not this vendor has a 1099 form associated with them

Contact Person - Allows you to select the contact for this vendor

Print Contact - Prints the contact information on any purchase order for this vendor

Admin Lock - Prevents users other than admins from altering information on this vendor

Is Custom - Indicates an international address for this vendor's contact

Name, Address 1, etc: - Contact information for this vendor

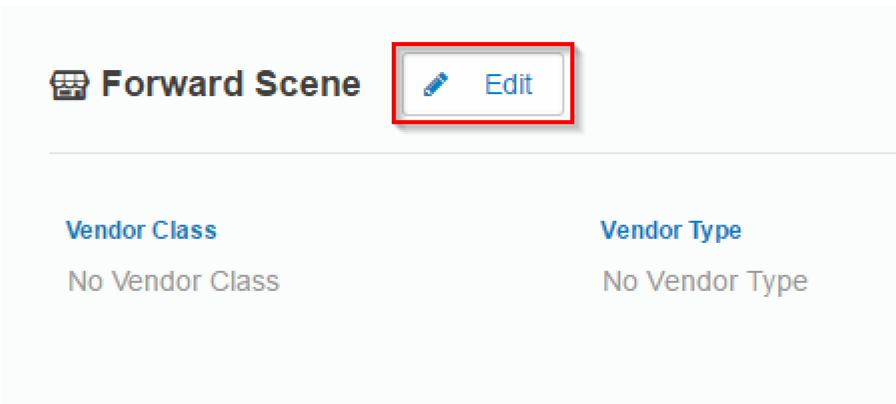
Once you have saved your changes, you will be redirected to the vendor card.

Edit an existing Vendor

To make changes to an existing vendor, select that vendor from your grid in the Vendor module.

Fat Paddle	Fat Paddle	Birmingham
Forward Scene	Forward Scene	Green Bay
Grammy Reds	Grammy Reds	Longmont
Happy Moon	Happy Moon	Bismark
John Wholesale Appliances	John Amos	Trenton

This will redirect you to the vendor card. Once inside the **v**endor card, click the **Edit** button next to the name of the vendor.



The Edit Vendor drawer will open. Make your necessary changes here and click **Save** when you are finished.

Feedback

Edit Vendor

×

Vendor Name

Forward Scene

Vendor Class

No Vendor Class

Vendor Type

No Vendor Type

Payment Terms

No Payment Terms

Notes

☐ Is 1099

Contact

Forward Scene

Ship from Contact

No Ship from Contact

Remit to Contact

The Governor

Set Inactive

Save

For a brief explanation of each of the information fields in the Edit Vendor drawer, click here:

Edit Vendor

Vendor Name - Allows you to create a name for the vendor

Vendor Class - Assigns the vendor to a Vendor Class, which helps you categorize your vendors (if Coca Cola was one of your vendors, you might assign them to a Beverages vendor class)

Payment Terms - Assigns a set of Payment Terms to the vendor (Cash on Receipt, Net 10, etc.)

Notes - Provides space for you to record any notes about the vendor

Is 1099 - Indicates whether or not this vendor has a 1099 form associated with them

Contact Person - Allows you to select the contact for this vendor

Print Contact - Prints the contact information on any purchase order for this vendor

Admin Lock - Prevents users other than admins from altering information on this vendor

Is Custom - Indicates an international address for this vendor's contact

Name, Address 1, etc: - Contact information for this vendor

Ship from Contact - Allows you to select a contact this vendor ships from (if you do not select a Ship from Contact, it defaults to your main vendor contact)

Remit to Contact - Allows you to select a contact this vendor remits to (if you do not select a Remit to Contact, it defaults to your main vendor contact)

Vendor Card Tabs

The bottom of the Vendor card contains tabs that utilize the following features: Active, Contacts, Purchase Orders, Item Purchases, Notes, Items, Interactions, and Audits.

Note: Any grid that appears inside a tab is searchable and customizable just like your main Inventory grid.

- Active Tab - Shows open purchase orders associated with this vendor
- Contacts Tab - Shows all contact people associated with this vendor; click **New Contact** to add a contact, check the box next to an existing contact and click the **Set As** dropdown to assign that contact to another contact type
    - For a brief explanation of all the information fields in the New Contact drawer, click here:

New Contact

Contact Code - Provides a space for you to assign a contact code for this contact

Contact Person - Allows you to name this contact

Company - Allows you to indicate a company associated with this contact

Tax Code - Assigns a tax code to this contact

Shipping Method - Indicates the Shipping Method used for this contact

Address Information fields - Address information for this contact

Contact Methods fields - Select a Contact Method Type from the first dropdown, enter pertinant information for this method in the middle field, and use the second dropdown to mark this contact method as Acceptable, Never, or Preferred

---

- Purchase Orders Tab - Shows all purchase orders associated with this vendor
- Item Purchases Tab - Shows inventory and non-inventory item purchases associated with this vendor
- Receipts Tab - Shows all purchase receipts associated with this vendor
- Notes Tab - Displays notes associated with this vendor; you can add more notes by clicking in the notes field and typing your information
- Items Tab - Shows all inventory and non-inventory items associated with this vendor; see the Vendor Items section for more details
- Interactions Tab - Keeps a record of communication with this vendor; click **New** to add an interaction
  - For a brief explanation of all the information fields in the Create Interaction drawer, click here:

Create Interaction

Subject - Allows you to give a subject line for this interaction

Notes - Provides a space to record notes on the interaction

Starts On - Indicates when the interaction starts

Ends On - Indicates when the interaction ends

All Day Event - Indicates whether or not the interaction is an all-day event

Remind On - Allows you to choose a date for a reminder from SalesPad Cloud (this appears as a notification in the upper right-hand corner of the screen)

Interaction Type - Assigns the interaction to an Interaction Type such as Email, Phone, In-Person, etc.

Assigned To - Allows you to assign the interaction to a company user

Contact Person - Indicates the contact person for this interaction

Location - Indicates the location for this interaction

Completed On - Indicates the completion date

Is Complete - Indicates whether or not the interaction is complete

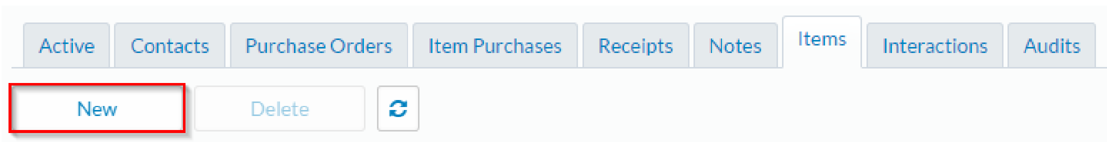
---

- Audits Tab - Audits vendor activity

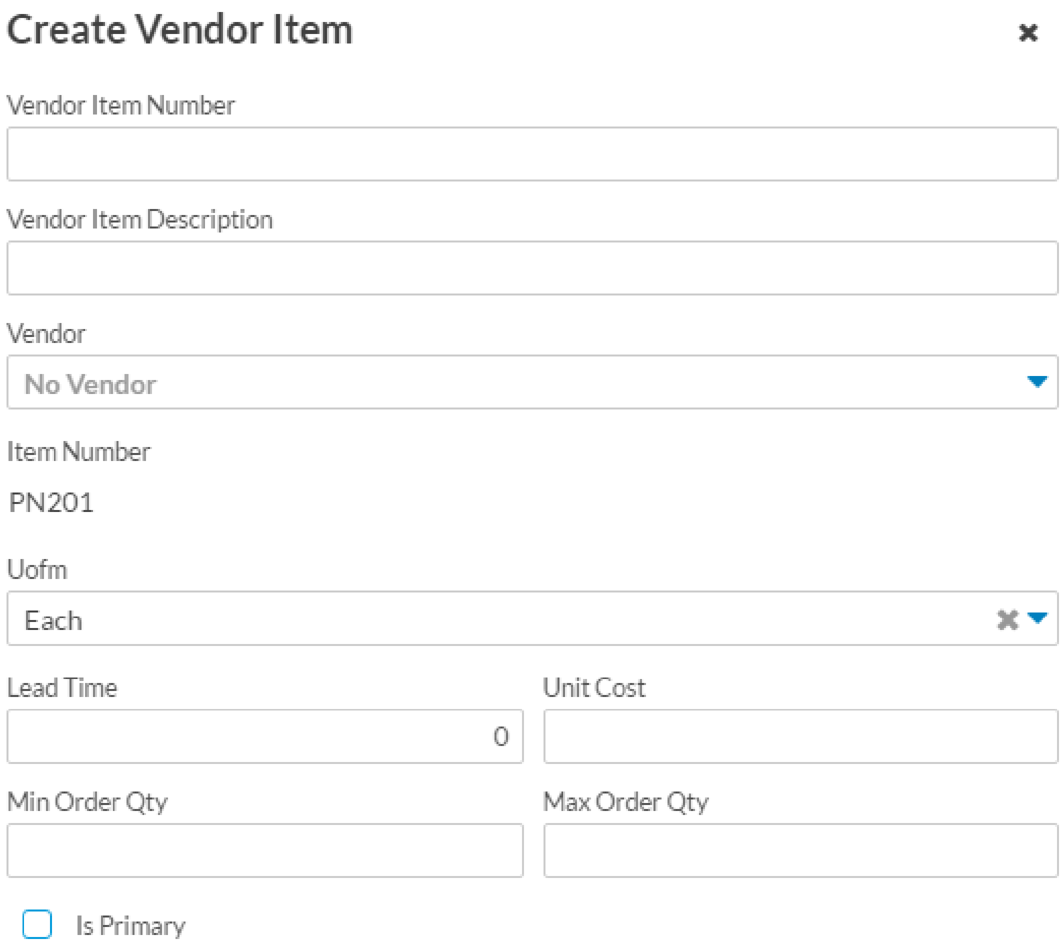
Vendor Items

You can create and view vendor items from Items tab of the Vendor card, or from the Vendor Items tab of the Item card.

From either location (the process is identical), click the **New** button.



The Create Vendor Item drawer will appear. Make your necessary changes here and click **Save** when you are finished.



For a brief explanation of each of the information fields in the Create Vendor Item drawer, click here:

Create Vendor Item

Vendor Item Number - Allows you to name the vendor item

Vendor Item Description - Allows you to describe the vendor item

Vendor - Allows you to select the vendor for this vendor item

Item Number - Indicates the inventory item that the vendor item is associated with

Uofm - Allows you to select a Unit of Measure to use for this vendor item

Lead Time - Indicates the expected wait time on this vendor item

Unit Cost - Indicates the unit cost for this vendor item

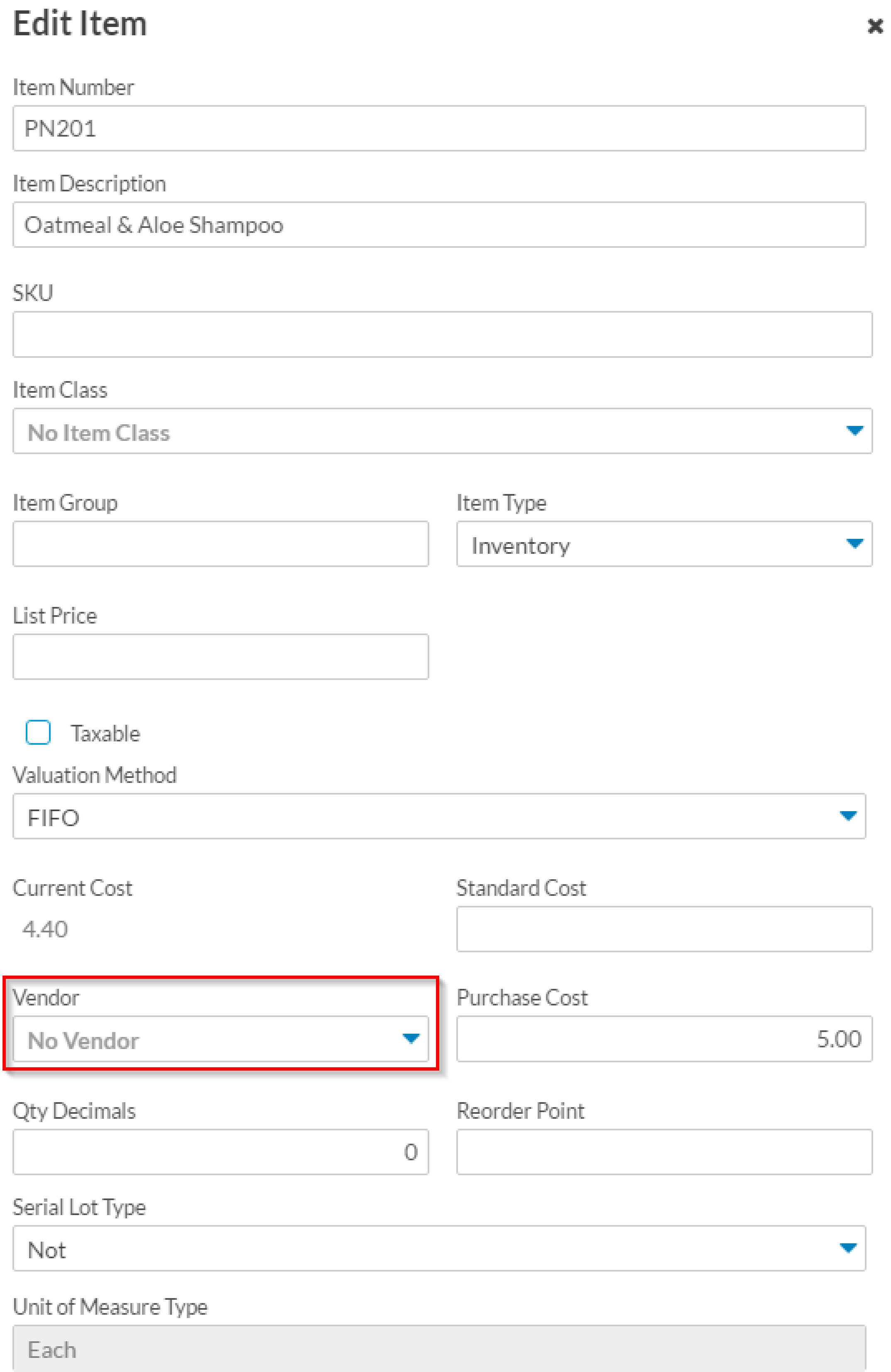
Min Order Qty - Designates a minimum order quantity for this vendor item

Max Order Qty - Designates a maximum order quantity for this vendor item

Is Primary - Indicates whether or not this is the primary vendor item for this inventory item

---

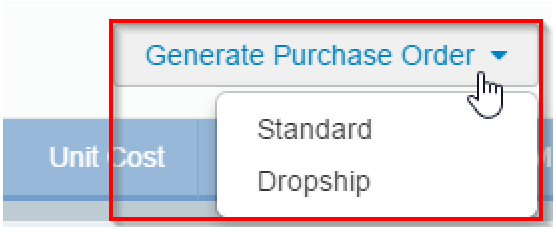
Vendor items are also created through the Item drawer by entering information into the vendor field when creating new items or editing existing items.



When you assign a vendor to an item in this way, and save the item, a vendor item record is automatically created. The vendor item's cost will match the value in the Purchase Cost field in the item drawer. If you didn’t have a Purchase Cost entered prior to saving the item card, you'll need to manually update the cost for the vendor item.

Note: If the Vendor field is changed in the Item drawer, the previous vendor item records will need to be manually deleted.

To generate a purchase order from the Items tab of the Vendor card, check the box next to the item(s) you wish to generate the purchase order for, then click the **Generate Purchase Order** dropdown in the upper right-hand corner of the Items tab.

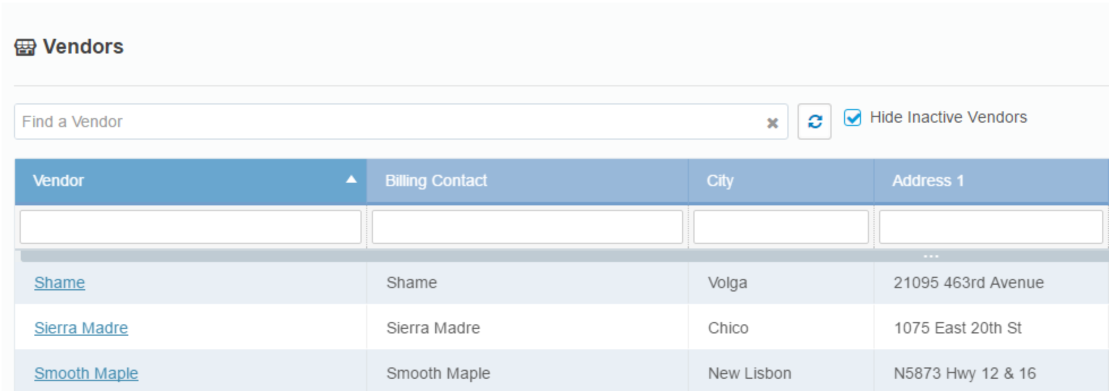


Select a standard or dropship purchase order and procede.

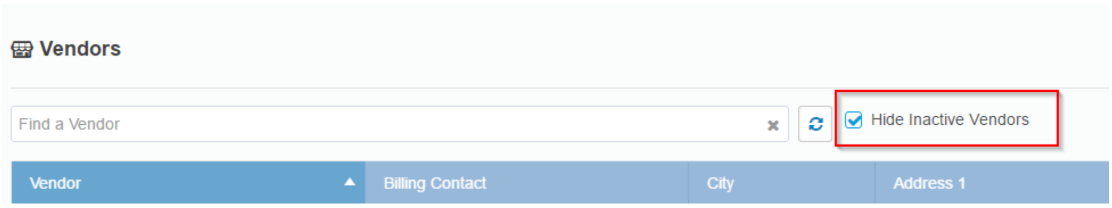
Note: You cannot generate a purchase order from the Vendor Items tab of the Item card.

Search for a Vendor

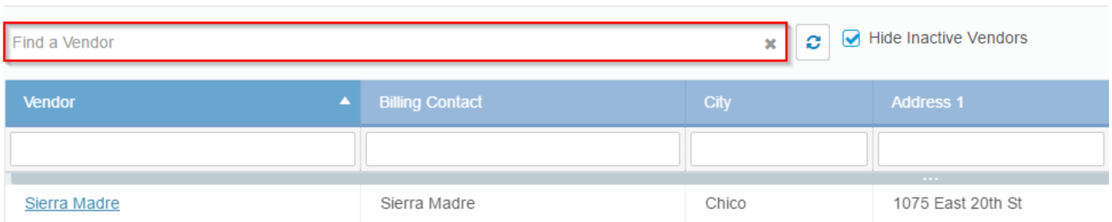
Once you've opened the Vendors module, you will see a grid displaying your existing vendors.



There are several ways to search for a vendor. Before you begin your search, though, decide whether or not you want inactive vendors to be displayed in your search results. Check the box just to the right of the search bar accordingly.

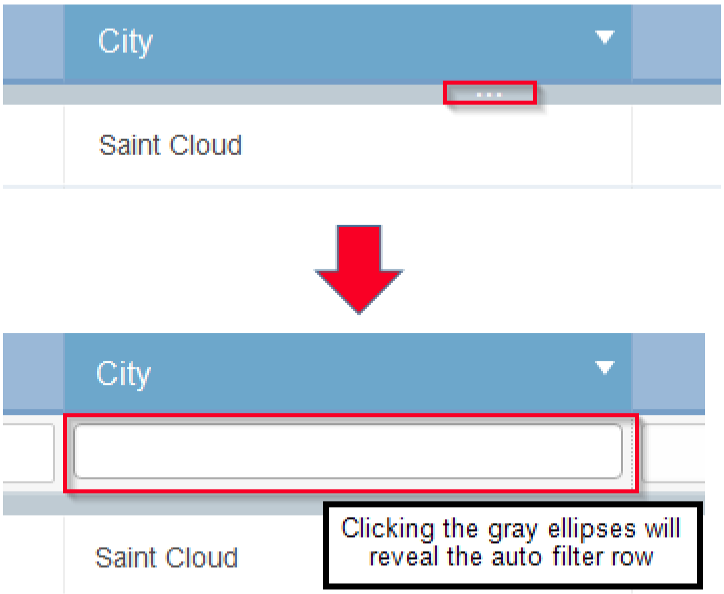


To search for a specific vendor by name, simply type the name (or partial name, if you don't know the exact name) into the search bar located just above your grid.



You can also search each column in your grid. To reveal the auto filter row for your columns, click the gray

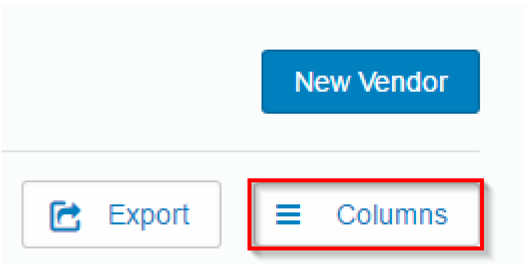
ellipses found just below the column headers.



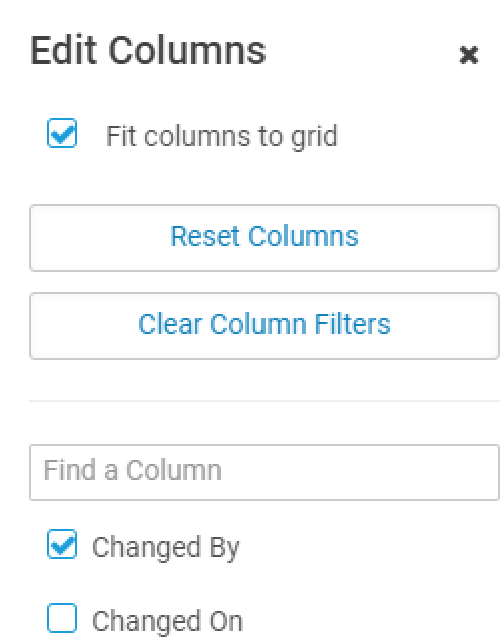
Enter your search criteria into whichever auto filter row is most useful for your particular search.

Certain vendor columns, such as Ship Complete, also offer dropdown options in the auto filter row.

If the column you'd like to search is not visible in your grid, click the **Columns** button in the upper right-hand side of the screen.



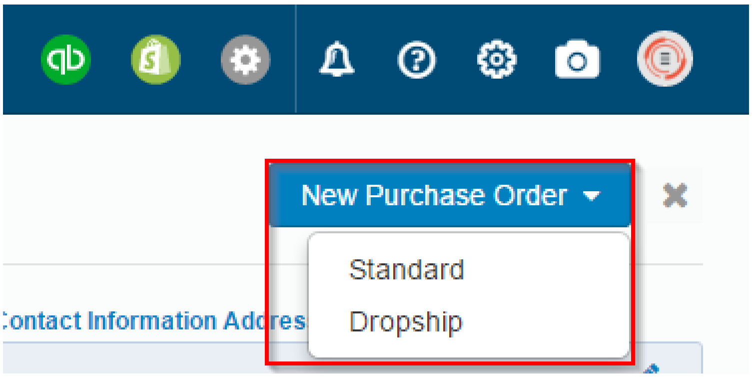
Clicking this button reveals the Edit Columns drawer. Check the boxes for columns you want visible and uncheck the boxes for those you'd rather not see.



The **Reset Columns** button in the Edit Columns drawer will restore your grid to its default view, and the **Clear Column Filters** button will clear any search criteria you have currently entered into the auto filter row.

Create a PO from the Vendor Module

To create a purchase order from the Vendors module, open the vendor card for the vendor you wish to create the purchase order for, click **New Purchase Order** in the upper right-hand side of the screen, and select from the list of Purchase Order Types.



A purchase order card will appear with vendor information prepopulated. Continue filling out the purchase order.

Note: The purchase order card saves automatically.

Vendors

SalesPad Cloud does not sync every vendor to QuickBooks Online. We only sync this data once the vendor appears on a posted purchase receipt.