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GENERAL PRINCIPLES OF THE NEW SUPPLIER CARD

The new design of Supplier card is ready to use! Open a supplier card and switch on the new design with the **Try new** button in the document header.

There is a **new design** available of this document. [Try new version](#) x



Please pay attention and make sure that everything works as you expect on the new document. Not all functionality has been moved to the new design yet, and some actions work slightly differently.

General instructions for using documents with the new design can be found [HERE](#).

Card structure

Tabs

The supplier data is divided into tabs:

The screenshot shows the 'Supplier 6671' card in the Directo system. The 'Supplier' tab is selected and highlighted with a red box. The card displays the following information:

- Reg no:** 10652749
- Name:** Osaühing Directo
- Vat reg no:** EE100615311
- Type:** Ettevõtte
- Closed:** ☐

Below the tabs, there are sections for:

- GENERAL INFO
- ADDRESS
- CONTACT
- BANK
- DEFAULT PROCEEDER(S)

- **Supplier** – the supplier's general info, address, contact details, bank details and default proceeders.
- **Contacts** – the supplier's contact persons.
- **Bank accounts** – the supplier's bank accounts, if the supplier has more than one account.
- **Automation** – rules that Directo uses to post, group and, if needed, confirm the rows of the supplier's e-invoices. The tab has the sub-tabs **XML automaatika** and **PDF automaatika**.
- **Transport** – settings that define how Directo exchanges electronic documents with the supplier: how the supplier's e-invoices reach Directo and which document Directo creates from them.

Sections

On the **Supplier** tab, the fields are divided into sections: **GENERAL INFO, ADDRESS, CONTACT,**

BANK and **DEFAULT PROCEEDER(S)**. At the bottom of the tab there is the supplier's additional fields table.

NewSaveCopyDiscardDeleteAttachmentsMailPrintStatementsReports

Supplier 6671 SavedLast changed by LAURA2 (19.10.2026 at 12:01:29)

Create: EventSurvey

Reg no10652749NameOsaühing DirectoVat reg noEE100615311TypeEttevõtteClosed

SupplierContactsBank accountsAutomationTransport

GENERAL INFOADDRESSCONTACTBANKDEFAULT PROCEEDER(S)

	Field name	Content	Parameter
1	Account type		
2	Realisatsiooni email		
3	Lingike2 Üldine		
4	Võõrkeelne nimetus		
5	Promoaktiivsus		
6			

Click a section heading to show or hide the section. Directo remembers your choice the next time you open the card.

- **Selecting fields** - under the wrench icon “Field settings” on the right edge of each section, you can choose which fields are visible on the document. As there are a lot of fields, most of them are hidden by default, and each user can display only the fields they need.
- **Important fields** - the field selection window has a separate group “Important fields”, which brings the most important fields to the top of the list.

Important fields

The **important fields** are at the top of the card, separate from the sections. They are always visible, whichever tab you are on. By default, the important fields are:

NewSaveCopyDiscardDeleteAttachmentsMailPrintStatementsReports

Supplier 6671 SavedLast changed by LAURA2 (19.10.2026 at 12:01:29)

Create: EventSurvey

Reg no10652749NameOsaühing DirectoVat reg noEE100615311TypeEttevõtteClosed

SupplierContactsBank accountsAutomationTransport

GENERAL INFO

- **Reg no** – the supplier's registry code. Enter the supplier's name or registry code in the field and click the icon. The Business Register search opens, and when you select a company, Directo fills in the supplier's name and address for you.
- **Name** – the supplier's name.
- **Vat reg no** – the supplier's VAT registration number.
- **Type** – the supplier's legal form.
- **Closed** – select this if you no longer work with the supplier. You cannot select a closed supplier on new documents, but earlier transactions are kept.

You can also move other fields that you use most often in your daily work to the important fields.

Sidebar

On a saved supplier card, you can open the **sidebar** by clicking the **Show side panel** icon in the header. The sidebar has separate tabs **Attachments** and **Messages**.

Next to the icon you can also choose whether the panel is on the right side of the card or below it. Directo remembers your choice for the next document of the same type.

The screenshot shows the 'Supplier 6671' card. The sidebar is open on the right side, displaying the 'Messages' tab. The sidebar has a 'Hide sidebar' button in the top right corner. The main card area shows fields for 'Reg no', 'Name', and 'Vat reg no', along with a 'Type' dropdown and a 'Closed' checkbox. Below these are tabs for 'Supplier', 'Contacts', 'Bank accounts', 'Automation', and 'Transport'. The 'Supplier' tab is active, showing a 'GENERAL INFO' section with expandable sections for 'ADDRESS', 'CONTACT', 'BANK', and 'DEFAULT PROCEEDER(S)'. At the bottom, there is a table with columns 'Field name', 'Content', and 'Parameter'.

Change log

In the Change log window you can see who changed which fields and when. On the new supplier card, the change log replaces the old card's **Changes** tab.



Moving the change log of the old card to the new card is still in development.

The screenshot shows the 'Supplier 6671' card with the 'Change log' window open. The window title is 'Change log: Supplier 6671'. It has a toolbar with buttons for 'Close', 'Refresh', 'Empty', 'Choose columns', 'Save view', 'Settings', 'Print', and 'Excel'. Below the toolbar is a 'Browse' button and a 'Rows' dropdown set to 20. The main area is a table with columns 'NO', 'DATE MODIFIED', 'MODIFIED BY', and 'CLOSED'. The table contains two rows of data. The first row has 'NO' 83, 'DATE MODIFIED' 26.10.2026 09:47:34, 'MODIFIED BY' LAURA2, and 'CLOSED' Yes. The second row has 'NO' 82, 'DATE MODIFIED' 26.10.2026 09:47:34, 'MODIFIED BY' LAURA2, and 'CLOSED' Yes. At the bottom, there is a 'LINK ACTION' section with a 'List will appear immediately' checkbox and a 'Rows' dropdown set to 20.

Supplier card view settings

The large wrench icon in the top right corner of the header opens the the „Page settings“ window.

Content sections

On this tab, you can tick whether a content section is shown on the document at all. The **“Restore display and layout default settings”** button restores the display and layout of sections and fields (visibility, size, order, precision) to the defaults set by the administrator.

To apply the changes, click **Save**.

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Copy

Discard

Delete

Attachments

Mail

Print

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Save

Settings

×

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Behaviour

Content sections

☒ **SUPPLIER**

☒ General info

☒ Address

☒ Contact

☒ Bank

☒ Default proceeder(s)

☒ **CONTACTS**

☒ **BANK ACCOUNTS**

☒ **AUTOMATION**

☒ Xml automaatika

☒ Pdf automaatika

☒ **TRANSPORT**

☒ Main

☒ Delivery channel

☒ Posti.fi

☒ Edi / d2d

☒ Exported documents

☒ Finvoice

☒ Directo in (dev)

☐ Always visible

☒ Directo out (dev)

↶ Restore display and layout default settings

Restores section and field display and layout settings - including visibility, order, widths, number precision - to the administration-defined defaults

☒ Save

☒ Close

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https://wiki.directo.ee/en/hankija_yld?rev=1793177552

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