Configuring SalesPad for Purchasing

Cavallo Support - 2024-11-22 - Purchasing

Security Settings

Go to **Modules > Security Editor** to modify security settings.

Note: You must log out and back in for security changes to take effect.

SEARCHING

The following security settings should be enabled to allow for searching:

Vendor Search, Purchase Order Search

To enable adding a new vendor from the Vendor Search screen, **New Vendor** should be enabled. Refer to the SalesPad Security Settings article for more information on configuring the sub--settings under New Vendor.

VENDOR CARD

Enable the following security settings to allow for full access to the Vendor Card (filter to "*Vendor" to find them quickly):

Note: Security settings with an *asterisk have sub--settings to be configured. Refer to the SalesPad Security Settings article for more details.

Vendor Card*

Vendor Addr Card* – Vendor Card header **Vendor Overview** – Vendor Card header **Vendor Contact Addresses** – Vendor Card tab **Vendor Item History** – Vendor Card tab **Vendor Quick Reports** – Vendor Card tab **Vendor Purchase Orders*** – Vendor Card tab **Vendor Note** – Vendor Card tab

Vendor CRM – Vendor Card tab

Vendor Purchases Graph – Vendor Card tab **Vendor User Fields** – Vendor Card tab **Vendor Special Costing** – Vendor Card tab

PURCHASE ORDERS

Enable the following security settings to allow for full access to Purchase Orders (filter to "*purchas" to find them quickly):

Note: Security settings with an *asterisk have sub--settings to be configured. Refer to the SalesPad Security Settings article for more details.

Purchase Order Entry*

Purchase Order Properties* – Enables header--level fields on the PO Entry screen

Can Change PO Number – Set to True to allow manual entry of PO Numbers

Print PO Report – (not in version 4.0+; filter to "print") Enables the Print dialog on the sales document Purchases tab

Purchase Order Report – Enables printing the Purchase Order Report from the Purchase Order Entry Print screen

Print Purchasing Report – Enables the Print dialog on the Purchasing screen (and in version 4.0+, also enables the Print dialog on the sales document Purchases tab)

Choose Purchase Plan – Enables the Purchase button in sales documents with backordered line items

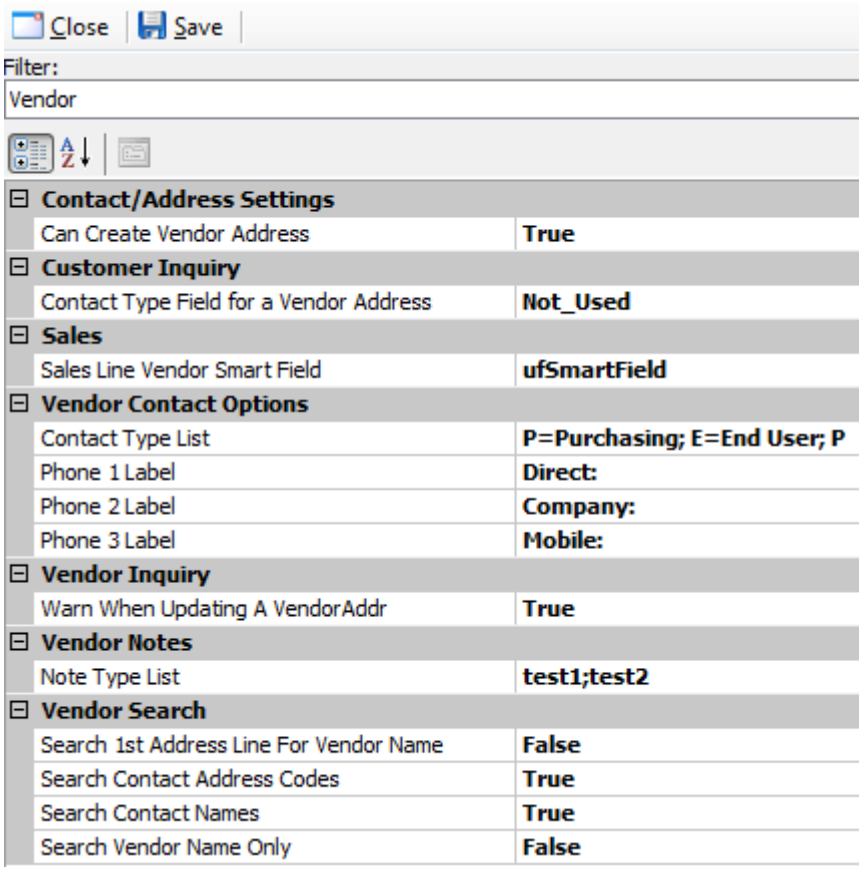
Purchase Order Addresses* – PO tab **Purchase Order Audit*** – PO tab **Purchase Order Line Items** – PO tab **Purchase Order Links*** – PO tab **Purchase Order Notes*** – PO tab **Purchase Order Quick Report*** – PO tab

Settings

Go to **Modules > Settings** to modify settings.

VENDOR

The following settings apply to the Vendor Card and Vendor Search (filter to "Vendor" to find them quickly) and demonstrate an example configuration. Refer to the SalesPad Settings Guide for details on individual settings:



PURCHASING

The following Settings apply to Purchasing. Refer to the SalesPad Settings Guide for more information:

PO Cost Selection

Use Drop Ship Sales Line Item Cost

Backorder Service Items—Automatically backorders service items on a sales order, so the service items can be included on a PO

Use Service Item Cost on a Linked PO

Purchasing Functionality

Once all security and settings are configured, you can access the following purchasing--related functionality:

Vendor Card Vendor Search

Creating/Opening Purchase Orders

PO Search (see Creating/Opening Purchase Orders)

Refer to the corresponding SalesPad documents for information on how to use purchasing functionality.

See also:

Purchasing Advisor Purchased Line Editor

Linking POs and Sales Line Items

Automatic Purchase Order Generation (version 4.0+) Receiving

Vendor Special Costing

These may require that additional security and settings be enabled.