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Creating and Opening Purchase Orders

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Overview

Purchase orders can be created in SalesPad from a sales document with backordered line items, or from a vendor card. They can then be sent to the vendor via email or print. Existing POs can be found via Purchase Order Search, the Vendor Card, or a linked sales document. Proper configuration is required; refer to the [Configuring SalesPad for Purchasing](#) document for more information.

Usage

Creating POs from a Sales Document

To create a PO from a sales document, first create and save a sales document. If any item on a document is backordered or marked as Dropship, the Purchase button will appear in the header upon saving:



Click the **Purchase** button to open the The Choose Purchase Plan Items window.

The screenshot shows the 'Purchase Plan ORDST2432 Total Cost: \$ 5000.00' window. It is divided into two main sections: 'Purchase Plans' on the left and 'Purchase Plans Items' on the right. The 'Purchase Plans' section shows 'ORDST2432 (no vendor assigned)'. The 'Purchase Plans Items' section has a table with columns: Item Number, Item Description, Sales Doc Num, DS, NI, Unit Cost, Quantity, and Extended The table contains one row: HD-20, 20 Gig Hard Drive, ORDST2432, with Unit Cost 10.00, Quantity 500, and Extended 5000.00. Above the table are buttons: Select All, Select None, Remove, Group Like Item Numbers, and Create PO. Below the table are 'Line Options' (Show Comments, Copy Comments, Copy Req Dates) and 'Copy Sales Document Named Notes' (Copy to PO Comment, Copy to PO Note). At the bottom, there are checkboxes for 'Close When PO is Created' and 'Use Drop Ship Line Cost', an 'Adjustment' dropdown, 'PO Cost: Standard Cost', and a 'Close' button.

Item Number	Item Description	Sales Doc Num	DS	NI	Unit Cost	Quantity	Extended ...
HD-20	20 Gig Hard Drive	ORDST2432			10.00	500	5000.00

Under Purchase Plans Items, select the items to purchase and any desired options to copy from the sales document to the PO.

Click **Create PO** to open the Purchase Order entry window. The selected Items will appear on the purchase order.

The screenshot shows the 'STANDARD' Purchase Order Entry screen. The top section contains fields for PO Properties (Purch. Order #, PO Status, PO Type, Vendor ID, Vendor Name, Currency), PO Dates (PO Date, Required Date, Promised Date, Promised Ship), Other (Terms, Shipping Method, Buyer, Confirm With, Revision Number, Location), Ship To Address (Ship to Customer, Edit Address, Fabrikam, Inc. address), and Totals (Discount, Freight, Misc. Charge, Tax, Total). Below these is a table of Line Items with columns: Item #, Description, Co..., NI, Vendo..., Qty, U..., Qty Co..., Qty ..., Unit Cost, Extd. Cost, PO Li..., Loca..., Req..., Prom..., Pro..., xPur..., Landed Cost ... The table contains one item: '20 Gig Hard Drive' with a quantity of 500 and a unit cost of 10.00. The total amount is 5,000.00.

Make any needed changes (see the Purchase Order Entry Screen section of this document for more information) and click **Save**. If not already entered, a purchase order number will be assigned.

To send the PO to the vendor, click **Print**. In versions prior to 4.0, a preview of the PO will open and from this preview, purchase orders can either be emailed or printed. In versions 4.0 and later, the standard Print dialog will appear, allowing unlimited PO formats and allowing users to fax or email POs to the vendor directly from SalesPad using predefined templates. Printing a PO in 4.0 or later is now the same as printing a Sales Document. Refer to the E-mailing and Email Templates document and the ["How do I email/fax/print a sales document"](#) FAQ for more information.

Creating a PO From a Vendor Card

After selecting the desired vendor, open the vendor card (for further info on the Vendor Search, refer to the [SalesPad Vendor Search](#) document).

For a Dropship PO:

On the Vendor Card header, click **Drop Ship**:

The screenshot shows the Vendor Card for 'ADVANCED0001 Advanced Office Systems'. The top toolbar includes buttons for Close, Refresh, Save, Create Purchase Order, Standard, Drop Ship (highlighted), and Receipt Transaction. The Vendor Properties section shows fields for Vendor, Vendor Name, Vendor Class, Vendor Status, Payment Terms, and Currency. The Primary Address Information section shows the vendor's address and phone numbers. The Default Shipping Information section shows the Shipping Method set to 'DROP SHIP' and an 'On Hold' checkbox.

On the following screen, find and select (by clicking the Customer ID) a customer:

Select Customer to Drop Ship to...

Search | Clear | New

Search By

Customer: Contact: Phone: Sales Rep:
City: State: Zip: Statement Name:

Search Options

☐ Starts With
☐ Show Inactive
Max Results:

Search Results

Addr Code	Cust#	Cust Name	Sales Person ID	Contact Sales Rep	Contact Name	Email	A
=	=	=	=	=	=	=	=

No data to display

OK Cancel

On the following Dropship PO entry screen, the Ship to Customer box will be selected and the selected customer's address entered under Ship To Address:

Vendor Search x **Vendor: [ADVANCED0001] Advanced Office Systems** x **(DROPSHIP)** x

Close | Save | Print | Add Item | Copy | Cancel | Dynamics GP

PO Properties

Purch. Order #:
PO Status: New
PO Type: DROPSHIP
Vendor ID: ADVANCED...
Vendor Name: Advanced Office
Currency: Z-US\$
Batch: SP_PURCH...

PO Dates

PO Date: 11/20
Required Date: 11/20
Promised Date: 11/20
Promised Ship: 11/20

Other

Terms: NE...
Shipping Method: LO...
Buyer:
Confirm With:
Revision Number: 0
Location:
☐ On Hold

Ship To Address

☒ Ship to Customer [Edit Address](#)
Aaron Fitz Electrical
One Microsoft Way
Grand rapids, MI 49888

Totals

Discount: 0.00
Freight: 0.00
Misc. Charge: 0.00
Tax: 0.00
Total: 0.00

For a Standard PO:

On the Vendor Card header, click **Standard**.

Vendor Search x **Vendor: [ADVANCED0001] Advanced Office Systems** x

Close | Refresh | Save | Create Purchase Order: **Standard** | Drop Ship | Receipt Transaction

Vendor Properties

Vendor: ADVANCED0001
Vendor Name: Advanced Office Systems
Vendor Class: USA-US-M
Vendor Status: Active
Payment Terms: NET 30
Currency: Z-US\$

Primary Address Information

Standard
Janice B
678 Sherwood
Park South
Arlington Heights,
IL 60004-2922
P1: (618) 555-0102
FX: (618) 555-0102

Default Shipping Information

Shipping Method: DROP SHIP
☐ On Hold

Purchase line items can be entered on the following screen.

If desired, enter a PO number under PO Properties. Otherwise, after the PO is saved, the next available PO number from GP will be generated and assigned to the PO.

Under the Line Items tab, click **New**.

Enter the item number (or search for an item by clicking the ellipsis), item location, etc. and hit Enter. Repeat for additional items.

Note: The Location field must be populated on each line item to successfully save a purchase order.

When finished, click **Save**

To send the PO to the vendor, click **Print**. In versions prior to 4.0, a preview of the PO will open and from this preview, users can print or email the purchase order. In versions 4.0 and later, the standard Print dialog will appear, allowing unlimited PO formats and allowing users to fax or email POs to the vendor directly from SalesPad using predefined templates. Printing a PO in 4.0 or later is now the same as printing a Sales Document. Refer to the Emailing and Email Templates document and the [How do I email/fax/print a sales document FAQ](#) for more information.

The SalesPad Purchase Order Entry screen allows users create POs and add line items, as well as add/access notes and User Fields on the PO, and view/update ship to and vendor addresses and linked sales documents. Users can also email, fax, or print the purchase order to send to the vendor.

Purchase Order Components

On the Purchase Order header, various plugins can be accessed from the Actions dropdown menu.

The **Print** button allows printing, faxing, or emailing the PO. Click **Save** to save any changes, or click **Close** to exit the Vendor Card, from the Purchase Order header.

Header

The header portion of the Purchase Order entry screen displays PO Properties - the PO number, status, type, Vendor ID, and Vendor Name. These fields are editable with proper security. Dates*, terms, shipping method and buyer can also be edited. Ship To Address and purchase order totals display toward the right, and can be adjusted with proper security.

reports. With proper security, notes and comments can be freely added, or click **Add Comment** or **Add Note** to access popup screens:

The image displays two screenshots of software popups. The top screenshot is titled 'Comments' and contains a table with the heading 'Choose a Comment to Add...'. The table has two columns: 'ID' and 'Comment'. It lists three comments: 'THANKS' with the text 'Thanks for your business.', 'THANKS-SA...' with 'Thanks for your business from the sales department at Fabrikam.', and 'UNTITLED*' with 'Need this ASAP'. The first row is highlighted in blue. At the bottom are 'OK' and 'Cancel' buttons. The bottom screenshot is titled 'New Note'. It features input fields for 'User ID' (containing 'sa') and 'Note Timestamp' (containing '11/20/2018 4:41:04 PM'). There is a 'Search:' field with a 'Search' button. Below these is a table with columns 'Note Shortcut' and 'Note Text', which is currently empty. At the bottom right are 'OK' and 'Cancel' buttons.

Pre-saved comments (added in GP - refer to the [Setting Up Pre-Saved Comments](#) article) can be selected from the "Comments" popup. Time-stamped notes can be added from the "Notes" popup. Click **OK** to return to the Purchase Order Entry screen.

Addresses

Ship To, Vendor, and Bill To addresses are visible from the Addresses tab and can be modified with proper security.

User Fields

The User Fields tab displays all user defined fields created on the Purchase Order Business Object. Refer to the SalesPad User Defined Fields document for more information.

Note: In versions 4.0 and later, Vendor UDFs will automatically copy to the same Purchase Order UDF.

Links

The Links tab displays any sales documents attached to the open PO. Click the sales document number to view a linked sales document, or select a document and click **Remove Link** to remove the link.

Audit

In version 4.0 and higher, the Purchase Order Entry screen has an Audit tab where changes to the PO are logged.

Quick Report

In later version 4 builds (approximately .1058+), the Purchase Order Entry screen has a Quick Report tab where one or more Quick Reports can be viewed. Refer to [SalesPad's Quick Report documents](#) for more information on Quick Reports.

Note: When Quick Reports have been added, the name of the tab changes from Quick Report to the title of the Quick Report (single) or Purchase Order Quick Reports (multiple).

Once POs are created, they can be viewed from:

- The Vendor Card Purchase Orders tab – displays all POs assigned to that vendor:

Vendor: ADVANCED0001
Vendor Name: Advanced Office Systems
Vendor Class: USA-US-M
Vendor Status: Active
Payment Terms: NET 30
Currency: Z-US\$

Primary Address Information
Janice Berman
678 Sherwood
Park South
Arlington Heights,
IL 60004-2922
P1: (618) 555-0102
FX: (618) 555-0102

Default Shipping Information
Shipping Method: DROP SHIP
☐ On Hold

PO Number	PO Type	PO Date	Required Date	Total
PO2075	STANDARD	1/31/2018	1/31/2018	50.00
PO2085	DROPSHIP	2/2/2018	2/2/2018	51.00
PO2105	DROPSHIP	6/6/2018	6/6/2018	250.00
PO2108	DROPSHIP	6/12/2018	6/12/2018	0.00
PO2109	STANDARD	6/20/2018	6/20/2018	58.85
PO2112	DROPSHIP	7/25/2018	7/25/2018	1.00

Contact Addresses

Address Type	Address Code	Contact Person	Address Line 1	City	State	Zip	Phones	Web Site	Email
MAIN/PURCHASE/...	PRIMARY	Janice Berman	678 Sherwood Par...	Arlington Heights	IL	60004-2922	P1: (618) 555-0102 FX: (618) 555-0102		
SHIP FROM	WAREHOUSE	Lindsey Vaughn	283 42 St Norrit	Arlington Heights	IL	60004-0283	P1: (618) 555-0104 P2: (618) 555-0104 FX: (618) 555-0104		

- The sales document Purchases tab – displays all POs created from or linked to (refer to Linking POs and Sales Line Items document) the sales document:

PO Number	Item Number	Item Description	Qty On PO	Unit Cost	Qty Received	Promised Date	Promised Ship Date
PO2121	HD-20	20 Gig Hard Drive	1	5.00	0	8/24/2018	8/24/2018

- Purchase Order Search

Purchase Order Search

To search for an existing PO, open the Purchase Order Search module. Enter desired search criteria in the search fields and click **Search**. The Search Results grid will display all POs that match the search criteria.

Purchase Order Search

Close Search

Search By

PO#:

Vendor:

PO Type

☒ Drop Ship ☒ Blanket

☒ Standard ☒ Drop Ship Blanket

Search Options

☐ Match Beginning

Prior Months:

Search Results

PO Number	Vendor Name	Vendor ID	PO Date	Primary Ship To A...	PO Type	Promised Date	Shipping Method	Subtotal
PO0997	Advanced Office ...	ADVANCED0001	4/10/2014	PRIMARY	DROPSHIP	4/10/2014	DROP SHIP	90.25
PO0999	Advanced Office ...	ADVANCED0001	4/12/2014	Primary	STANDARD	4/10/2014	DROP SHIP	103.79
PO2001	Advanced Office ...	ADVANCED0001	1/9/2016	Primary	STANDARD	1/5/2016	DROP SHIP	90.25
PO2003	Advanced Office ...	ADVANCED0001	1/17/2016	Primary	STANDARD	1/5/2016	DROP SHIP	103.79
PO2021	Advanced Office ...	ADVANCED0001	2/27/2016	Primary	STANDARD	2/27/2016	DROP SHIP	50.25
PO2024	Advanced Office ...	ADVANCED0001	2/28/2016	Primary	STANDARD	3/3/2016	DROP SHIP	313.06
PO2026	Advanced Office ...	ADVANCED0001	3/6/2016	Primary	STANDARD	8/3/2016	DROP SHIP	28.46
PO2027	Advanced Office ...	ADVANCED0001	3/8/2016	Primary	STANDARD	8/3/2016	DROP SHIP	142.30
PO2028	Advanced Office ...	ADVANCED0001	3/10/2016	Primary	STANDARD	8/3/2016	DROP SHIP	284.60
PO2030	Advanced Office ...	ADVANCED0001	3/13/2016	Primary	STANDARD	8/3/2016	DROP SHIP	85.38
PO2031	Advanced Office ...	ADVANCED0001	3/14/2016	Primary	STANDARD	8/3/2016	DROP SHIP	28.46
PO2032	Advanced Office ...	ADVANCED0001	3/15/2016	Primary	STANDARD	8/3/2016	DROP SHIP	56.92

Click on a PO number to open the PO. The Vendor ID can also be clicked to open the Vendor Card.

Security

Choose Purchase Plan - Allows the creation of a PO from a sales document.

Purchase Order Addresses - Grants access to the addresses tab on the Purchase Order Entry screen.

Purchase Order Audit - Grants access to the Audit tab on the Purchase Order Entry screen.

Purchase Order Email Audit - Grants access to the Email Audit tab on the Purchase Order Entry screen.

Purchase Order Entry - Grants access to the Purchase Order Entry screen.

Purchase Order Line Items - Grants access to the Line Items tab on the Purchase Order Entry screen.

Purchase Order Links - Grants access to the Links tab on the Purchase Order Entry screen.

Purchase Order Notes - Grants access to the Notes tab on the Purchase Order Entry screen.

Purchase Order Properties - Grants access to the Properties section of the Purchase Order Entry screen.

Purchase Order Quick Report - Grants access to the Quick Reports tab on the Purchase Order Entry screen.

Purchase Order Receipts - Grants access to the receipts tab on the Purchase Order Entry screen.

Purchase Order Resources - Grants access to the Resources tab on the Purchase Order Entry screen.

Purchase Order Search - Grants access to the Purchase Order Search module.

Purchase Order User Fields - Grants access to the User Fields tab on the Purchase Order Entry screen.