

Knowledgebase > SalesPad > Purchasing > Purchase Order Generation

# Purchase Order Generation

Megan De Freitas - 2025-06-26 - Purchasing

## Overview

The Purchase Order Generation plugin automatically creates purchase orders on sales document line items that need purchasing. Vendors for purchase orders can either be specified by the user or be determined by the spcpGetVendorID.

The Purchase Order Generation plugin can also be set up to automatically email a vendor (**automatic vendor emailing**) as purchase orders are created.

**Note**: To use automatic emailing with Purchase Order Generation, first create a PO template for the body of the email. Refer to the Emailing and Email Templates documentation for information on email template creation.

**Note**: Refer to SalesPad's <u>Configuring SalesPad for Purchasing</u> document to set up purchasing before setting up automatic PO generation.

## User Fields

**Note**: The first user field used here is the same user field used for <u>Auto Item Conversion</u>. If Auto Item Conversion has already been set up according to the instructions, you should not set up an additional user field.

 Create the user field shown below in the User Field Editor that will be used as the Sales Line Vendor Smart Field. In the example, this field is called xVendor. For more information on setting up user fields, refer to SalesPad's <u>User Defined</u>

| 📓 Bus. Objects          | 📓 Us  | er Fields 🗢 New 🖊 Delete | New # Delete |                | Field Properties |                 |                    |  |  |
|-------------------------|-------|--------------------------|--------------|----------------|------------------|-----------------|--------------------|--|--|
| Bus. Object             | Seq / | Field                    | Disabled     |                |                  |                 |                    |  |  |
| Customer                | 0     | sf_CfgIndent             |              | Table Name:    | Sales Line Item  |                 |                    |  |  |
| Customer Addr           | 0     | sf_CfgKey                |              | Field Name:    | xVendor          |                 |                    |  |  |
| Inventory Serial Number | 0     | uf_ItemOptions           |              | Map To:        |                  |                 | - ×                |  |  |
| Item Master             | 0     | ufSmartField             |              | Screen Label:  | Vendor           |                 |                    |  |  |
| Purchase Line Item      | 0     | xAsSold                  |              | Gald Turney    | Taut             | - Lanatha       | 200                |  |  |
| Purchase Order          | 0     | xPackage                 |              | Field Type:    | Text             | • Length:       | 200 -              |  |  |
| Sales Document          | 0     | xTestSL                  |              | Default Value: |                  |                 |                    |  |  |
| Sales Line Item         | 0     | xVendor                  |              | Value Options: |                  |                 |                    |  |  |
| Vendor                  | 0     | xWeb                     |              | Ontions        |                  |                 |                    |  |  |
| Vendor Addr             | θ     | <del>xWeberTest</del>    |              | Field is Rea   | ad Only          | Field is Requi  | red (Returns Only) |  |  |
|                         | θ     | <del>xWebsite</del>      | $\checkmark$ | Field is a Fi  | le Attachment    | Field is Rich T | Text Memo          |  |  |
|                         |       |                          |              | Field is a C   | ustomer Lookup   | Field is an Im  | age                |  |  |
|                         |       |                          |              | Field is a H   | vperlink         |                 | -                  |  |  |

2. Paste the following script into the Quick Report field:

select Vendor=", Vendor\_Name=" union

select Vendor = Vendor\_ID , Vendor\_Name from spvVendor order by vendor

Another valid Quick Report if you only want to buy from vendors you have previously bought from.

```
select Vendor=", Item_Number=", Vendor_Item_Num=", Last_Receipt_Cost ="
union
select Vendor = ISNULL(ivm.VENDORID, "), Item_Number =
ISNULL(ivm.ITEMNMBR,"), Vendor_Item_Num = ISNULL(ivm.VNDITNUM, "),
Last_Receipt_Cost = ISNULL(CAST(ivm.LRCPTCST AS VARCHAR(50)), ")
from IV00103 as ivm (nolock)
WHERE ivm.ITEMNMBR = /*Item_Number*/
OR ivm. VNDITNUM = /*Item_Number*/
```

3. For automatic vendor emailing, create the user field shown below, xEmailOnly



4. If using version 4.1 or later, and you want to determine cost with a user defined field instead of based on the standard options under the PO Cost Selection setting (Current, Standard, Last Vendor Invoice Cost, or Manual), create a user defined field that will store this information (example: xCost). The name of this field will be added in Settings.

**Note:** You need to make sure to pick the appropriate data type and field length for the information that will be stored in the user field.

- 5. Click **Save** and then **Update Database**
- 6. Close the User Field Editor, which will log you out of SalesPad
- 7. Log back in

#### Settings

Follow the steps below in Settings.

- 1. Filter to "Sales Line Vendor"
- Next to Sales Line Vendor Smart Field, specify the name of your user defined field

| 🖉 🔗 Settings                  |         |
|-------------------------------|---------|
| 📑 Close 🛛 🛃 Save              |         |
| Filter:                       |         |
| Sales Line Vendor             |         |
| ₽ <mark>2</mark> ↓   =        |         |
| 🗆 Sales                       |         |
| Sales Line Vendor Smart Field | xVendor |

3. Filter to "purchasing"



- If the PO Cost Selection User field was created (User Fields section step 4), next to PO Cost Selection, select PO\_Cost\_Selection\_User\_Field
- Next to PO Cost Selection User Field, enter the name of the user field created in User Fields section step 4 (ex: xCost)
- In versions 4.1 and later, you can set the sales person ID as the Buyer ID. To do so, filter to "use sales person" and set *Use Sales Person ID as Buyer ID* to True.
   Note: The Sales Person must also be set up as a Buyer in Dynamics GP

## Security Editor

Follow the steps below in the Security Editor

1. On the Security column, filter to and check the box for Purchase Order Generation



- 2. Filter to Sales Document Entry
- 3. Under the Scripts, select Pre Save Script
- 4. Click the ellipses in the adjacent field

| Ξ | Misc                    |              |               |           |              |   |
|---|-------------------------|--------------|---------------|-----------|--------------|---|
|   | Allocate Button Enabled |              | True          |           |              |   |
|   | Allowed To Ship         |              | True          |           |              |   |
|   | Button Script           |              |               |           |              |   |
|   | Can Copy Invoice        |              | True          |           |              | = |
|   | Can Copy Order          |              | True          |           |              |   |
|   | Can Copy Quote          |              | True          |           |              |   |
|   | Can Copy Return         |              | True          |           |              |   |
|   | Pre Save Script         |              | }             | }         | return ""; 👻 |   |
|   | Pre Transfer So         |              |               |           |              |   |
|   | Print Queue Ac          |              |               |           |              |   |
|   | Oueue Accese            |              |               |           |              | - |
| P | re Save Scrip           | Press Ente   | er to begin a | new line. |              |   |
| C | # script that exe       | +Enter to ac | cept Text.    | aves.     |              |   |
|   |                         |              |               |           |              |   |
|   |                         |              |               |           |              |   |
|   |                         |              |               |           | ) SP03       |   |

Once the window has opened, click <u>here</u> to download a plain text version of the pre save script. Paste the script into the window (or create your own script).

1. For automatic vendor emailing, fill out the following sub-settings as in the screenshot below:

| Security                               |   |  |  |  |  |  |  |
|--|---|--|--|--|--|--|--|
| ✓ Select All 🛛 Select None             | n Copy From                             |  |  |  |  |  |  |
| Name                                   |   |  |  |  |  |  |  |
| purchase order ge                      |   |  |  |  |  |  |  |
| Purchase Order Generation* (Beta)      |   |  |  |  |  |  |  |
|  |   |  |  |  |  |  |  |
| 🗵 🗹 [Name] Like 'purchase order ge%' 🔽 |   |  |  |  |  |  |  |
| Purchase Order Generation              |   |  |  |  |  |  |  |
| Copy Line Comments                     | False                                   |  |  |  |  |  |  |
| Copy Required Dates                    | False                                   |  |  |  |  |  |  |
| Email Attachments                      | Purchase Order; Standard Purchase Order |  |  |  |  |  |  |
| Email From                             |   |  |  |  |  |  |  |
| Email Subject                          |   |  |  |  |  |  |  |
| Email Template                         | PO TEMP WITH TOTAL                      |  |  |  |  |  |  |
| Vendor Email Smart Field               | xEmailOnly                              |  |  |  |  |  |  |

**Note**: If the *Email From* field is left blank, it will use the *User Email* field in the user properties on the Security Editor. One of these fields must be populated in order to send an email.

2. Save, log out, and log back in

## Custom spcpGetVendorID (optional)

To use the spcpGetVendorID stored procedure to determine a vendor, run the following script inside your GP database with your vendor determining logic:

CREATE procedure [dbo].[spcpGetPOVendorID]

@SalesDocNum varchar(65)

,@SalesDocType varchar(15)

,@Line\_Num varchar(65)

```
,@ComponentSeqNum varchar(15)
,@VendorID varchar(65) output
AS
set nocount on
select @VendorID = 'JENSENSY0001' GO
```

#### **Manual Vendor Selection**

1. In a sales order, add the user defined field onto the sales line items by right-clicking on the column header of the sales line items and selecting Column Chooser



2. The Customization window appears. Select the field you wish to add to the grid (Vendor, in this case) and drag it onto the column header:

| Customization                   |          |           |        |
|---------------------------------|----------|-----------|--------|
| Columns Bands                   |          |           |        |
| Tax Amount                      | ^        |           |        |
| Tax Schedule                    |          |           |        |
| Vendor                          |          |           |        |
| Whse                            |          |           |        |
| xSLChilledShipping              | .=)<br>• |           |        |
| Line Items Notes Addresses Hold | ls Use   | er Fields | Audit  |
| 📑 New 🙀 Delete 🛛 📫 Insert       |          | Item Op   | otions |
| Item Vendor                     |          |           | UOf    |
|                                 |          |           |        |

 To specify a vendor for each line item, double-click a vendor from the vendor dropdown

| Line | - Items | Notes    | Addresses  | Holds        | User      | Fields  | Audit            | Related Documents       | Purchases         | Fedex Quote     | Tracking N  | umbers   |
|------|---------|----------|------------|--------------|-----------|---------|------------------|-------------------------|-------------------|-----------------|-------------|----------|
| 4    | New     | 🚮 Dele   | te 🛛 🟥 Ins | sert 🛛       |           |         | Item N<br>WIRE-N | umber<br>MCD-0001       | Item Cl<br>ATT CC | ass Code<br>ORD |             | UC<br>WI |
| *    | Item    |          |            | Ve           | endor     | Descr   | iption           |                         | Qty               | JOfM            | Price       | Cost     |
|      | WIRE    | -MCD-000 | )1         | A            | 🔻         | Multi d | onduct           | or wire                 | 200 F             | Foot            | 0.29        | 0.54     |
|      | A100    |          | V          | Vendor       |           |         |                  | Vendor_Name             |                   |                 | <u>^ )0</u> |          |
|      |         |          |            |              | 223       |         |                  |                         |                   |                 |             |          |
|      |         |          | 2          | 256          |           |         |                  | TEST                    |                   |                 |             |          |
|      |         |          | A          | ACETRAVE0001 |           |         |                  | A Travel Company        |                   |                 |             |          |
|      |         |          | A          | ADVANCED0001 |           |         |                  | Advanced Office Systems |                   |                 |             |          |
|      |         |          | A          | ALLENSON0001 |           |         |                  | Allenson Properties     |                   |                 |             |          |
|      |         |          |            | A            | MERI      | CANOO   | D1               |                         | AmericaCha        | rge             |             |          |
|      |         |          |            |              | sooo<br>X |         |                  |                         | • • • • •         | • •             |             |          |

## **Triggering Purchase Order Generation**

### MANUALLY

In the sales document header, select Purchase Order Generation from the **Actions** dropdown

| <u>F</u> ile <u>M</u> odu                                     | ıles <u>V</u> iew <u>H</u> elp | 1 | 🕻 Customer Search 🛛 🛃 Inventory Lookup |  |  |  |  |  |  |  |
|---|--------------------------------|---|--|--|--|--|--|--|--|--|
| 🕵 Customer Search 🐻 Sales Documents 🗋 (ORDER) 000016          |                                |   |  |  |  |  |  |  |  |  |
| 📑 Close   🛃 Save   🍛 Print   📖 🛛 🖊 Delete   🗅 Copy   🍰 Alloca |                                |   |  |  |  |  |  |  |  |  |
| - Document Pro  | perties                        |   | Configure Actions                      |  |  |  |  |  |  |  |
| Document #:   | 000016                         |   | Smart Printing                         |  |  |  |  |  |  |  |
| Customer #:   | TIMELINE                       |   | Purchase Order Generation              |  |  |  |  |  |  |  |
| Cust PO:  |                                |   | Commit Catch Weights                   |  |  |  |  |  |  |  |
| Req Ship:   | 2/15/2010                      |   | Attach Salas Line to BO                |  |  |  |  |  |  |  |

Purchase Orders will be generated for line items that need purchasing (indicated by red text or a small orange triangle on the sales line), based on the vendor information provided.

#### THROUGH WORKFLOW

You can also trigger Purchase Order Generation to occur at a certain workflow point. Set up the desired workflow in Workflow Setup to include the Purchase Order Generation plugin (refer to the SalesPad Workflow document if needed):

| 👻 Workflow Setup 🗧                                     |                       |   |       |           |                   |               |                           |        |      |       |  |
|--|-----------------------|---|-------|-----------|-------------------|---------------|---------------------------|--------|------|-------|--|
| Close   🚽 Save   🔞 Export Workflow   🕲 Import Workflow |                       |   |       |           |                   |               |                           |        |      |       |  |
| Sales Document Types Workflow Queues                   |                       |   |       |           |                   |               |                           |        |      |       |  |
| Sciect a doci type to                                  | configure its worknow | _ |       |           | Actes Acted actes |               |                           |        |      |       |  |
| Doc. Type 🛛 🛆  | Doc. ID               |   | Seq / | Queue     | Button Caption    | Next Queue(s) | Plugin                    | Print? | Eval | Force |  |
| BACKORDER  | BKORD                 |   | 0     | GENERATPO | Generate BABY     | PO            | Purchase Order Generation |        | 7    |       |  |
| INVOICE  | CAINV                 | * | 10    | PO        |                   |               |                           |        |      |       |  |
| INVOICE  | FULORD                |   |       |           |                   |               |                           |        |      |       |  |
| INVOICE  | POSINV                | * |       |           |                   |               |                           |        |      |       |  |

## Automatic Vendor Emailing

For automatic vendor emailing, set up the vendor for Purchase Order email in Vendor Search:

- 1. Find the vendor you wish to set up
- 2. Click on the User Fields tab
- 3. Check the **Email Only** box on the vendor's User Fields tab

| Contact Addresses       | CRM | Note | Item History | Purchase Orders | User Fields | Quick Report |  |  |
|-------------------------|-----|------|--------------|-----------------|-------------|--------------|--|--|
| Email Only V Email Only |     |      |              |                 |             |              |  |  |

4. Under the Contact Address for the vendor you are modifying, specify an email on the Primary Address line

| Primary       | Address line                          |                      |        |         |                 |                   |
|---------------|---------------------------------------|----------------------|--------|---------|-----------------|-------------------|
| 🙎 Vendor :    | Search 🚨 Vendor: Jensen Systems Conta | act: PRIMARY/Erin L. | Jensei | 1       |                 |                   |
| 📑 Close 🛛 📙   | Save                                  |                      |        |         |                 |                   |
| Vendor        |                                       |                      |        |         |                 |                   |
| Vendor ID:    | JENSENSY0001                          | Vendor Name:         | Jensen | Systems |                 |                   |
| Address       |                                       |                      |        |         | Contact Informa | ation             |
| Code:         | PRIMARY                               |                      |        |         | Contact Type:   |                   |
| Contact Name: | Erin L. Jensen                        |                      |        |         | Home Phone 1:   | (403) 555-0157    |
| Address:      | 678 Prince Court                      |                      |        |         | Cell Phone 2:   |                   |
|               |                                       |                      |        |         | Work Phone3:    |                   |
|               |                                       |                      |        |         | Fax:            | (403) 555-0157    |
| Zip:          | T95 9K8                               |                      |        |         | Email:          | person@jensen.com |
| City:         | Edmonton                              |                      | State: | AB      | Web Site:       |                   |
|               |                                       |                      |        |         |                 |                   |

Repeat these steps for each vendor to receive automatic emails. Automatic emails will be sent to each vendor set up for automatic emailing when the Purchase Order Generation plugin is triggered.