



## Purchase Order Setting Can Generate PO on Invoice

Megan De Freitas - 2024-11-22 - Purchasing

### Overview

By enabling purchase order generation settings in SalesPad, you have the ability to generate Purchase Orders directly from Invoices.

### Settings

In the SalesPad Security Editor ( Modules > Security Editor), search for *Purchase Order Generation*.

Under this setting, find the sub-setting *Can Generate PO On Invoice* and set to True. This will allow PO generation in invoices.

The screenshot shows the 'Security' editor window. At the top, there are buttons for 'Select All' (checked), 'Select None', and 'Copy From...'. Below this is a table with columns 'Acc...' and 'Name'. The first row is 'Purchase Order Generation\*' with a checked checkbox. Below the table is a filter bar with a search box containing 'Contains([Name], 'Purchase Order Generation\*)' and an 'Edit Filter' button. The main area shows a list of settings under the heading 'Purchase Order Generation':

Purchase Order Generation	
Can Generate PO On Invoice	True
Copy Line Comments	False
Copy Required Dates	False
Email Attachments	
Email From	
Email Subject	
Email Template	
Respect Purchase Order Pre Save Script	True
Vendor Email Smart Field	

Below the list is a section titled 'Can Generate PO On Invoice' with the description: 'Set to TRUE to allow purchase order generation on Invoices. Defaults to 'False'.'

Also under the *Purchase Order Generation* setting, find the sub-setting *Respect Purchase Order Pre Save Script*. Set to True.

Security

Select All  
  Select None  
 Copy From...

Acc...	Name
<input checked="" type="checkbox"/>	Purchase Order Generation*

Contains([Name], 'Purchase Order Generation')  
 Edit Filter

**Purchase Order Generation**

Can Generate PO On Invoice	True
Copy Line Comments	False
Copy Required Dates	False
Email Attachments	
Email From	
Email Subject	
Email Template	
Respect Purchase Order Pre Save Script	True
Vendor Email Smart Field	

**Respect Purchase Order Pre Save Script**  
 Set to TRUE to respect the purchase order pre save script during generation. Defaults to 'False'.

### Usage

Open the customer Invoice you wish to create a Purchase Order from.

Customer Search | Sales Documents | (INVOICE) 00315

Document Properties

Document #: 00315   INVOICE (WI)

Customer #: SUPERFOO0001   Super Foods Plus

Cust PO:   Sales Rep: GREG E.

Req Ship: 7/12/2011   Sales Terr:   Pay Terms: NET 30

Ship Method: FEDEX GROUND   Whse: WAREHOUSE   Doc Date: 7/12/2011

Currency: Z-US\$   Created By: tmh

Shipping Address

Super Foods Plus  
 Isaac Frye  
 6543 N.E. Pusher Rd.  
 Detroit, MI 48233-1232  
 P:(313) 555-0199

Additional Properties

Batch/Q: COMPLETE

Price Level: RETAIL

Discounts:   No Holds

Totals - GM: [\$171.50] [36.11%]

Misc Charge: 0.00

Discount: 0.00

Discount %: 0.00 %

Freight: 0.00

Tax: 0.00

Total: 475.00

Payment: 0.00

Line Items   Notes   Addresses   Holds   User Fields   Audit   Related Documents   Purchases   Quick Report   FedEx Quote   Email Audit   Assemblies   Tracking Numbers   Sales Line Tracking Numbers

Item Class Code: RETAIL   UORM Schedule: EACH   Available: 6,594.00   Onhand: 20,687.00

Item	Description	Qty	UORM	Price	Cost	Ext Price	Req Ship	Qty BO	Comment
HD-40	40 Gig hard drive	1	EACH	11.00	12.00	11.00	7/12/2011	0	
HD-50	50 Gig Hard Drive	1	EACH	44.00	21.50	44.00	7/12/2011	0	
A100	Audio System	12	EACH	35.00	22.50	420.00	7/12/2011	0	

Click on the **Configure Actions** button in the Invoice header.

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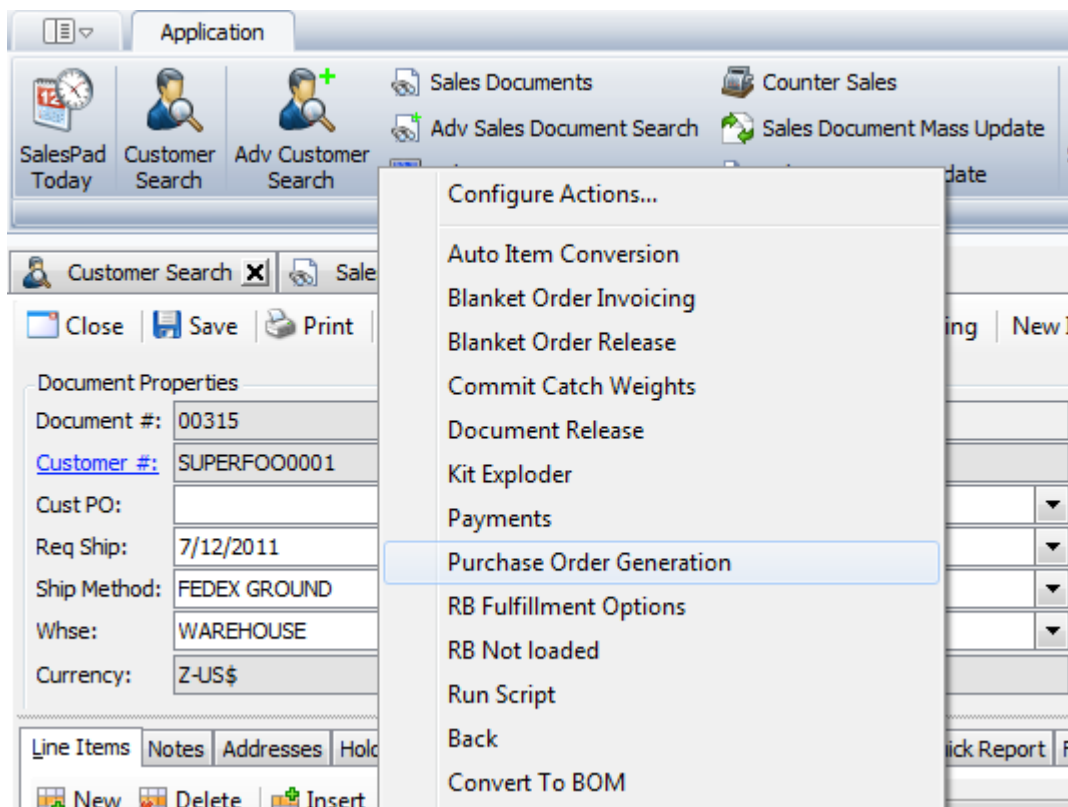
Freight: 0.00

Tax: 0.00

Total: 475.00

Payment: 0.00

Select Purchase Order Generation from the dropdown menu.



A Purchase Order is automatically generated from the Invoice. It will appear under the Purchases tab.