



## 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 interface. At the top, there are options 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 the text '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

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

Contains([Name], '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	

**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

Close | Save | Print | Attach Sales Line to PO | Aggregate Pricing | New Item | Add Customer Default Items | Delete | Copy | Allocate | Dynamics GP

Document Properties

Document #: 00315 INVOICE (WI)  
Customer #: SUPERFOO0001 Super Foods Plus  
Cust PO: Sales Rep: GREG E.  
Req Ship: 7/12/2011 Sales Terr:  
Ship Method: FEDEX GROUND Pay Terms: NET 30  
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

New | Delete | Insert | Package Editor

Item	Description	Qty	UOM	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.

Customer Search | Sales Documents | (INVOICE) 00315

Close | Save | Print | Attach Sales Line to PO | Aggregate Pricing | New Item | Add Customer Default Items | Delete | Copy | Allocate | Dynamics GP

Document Properties

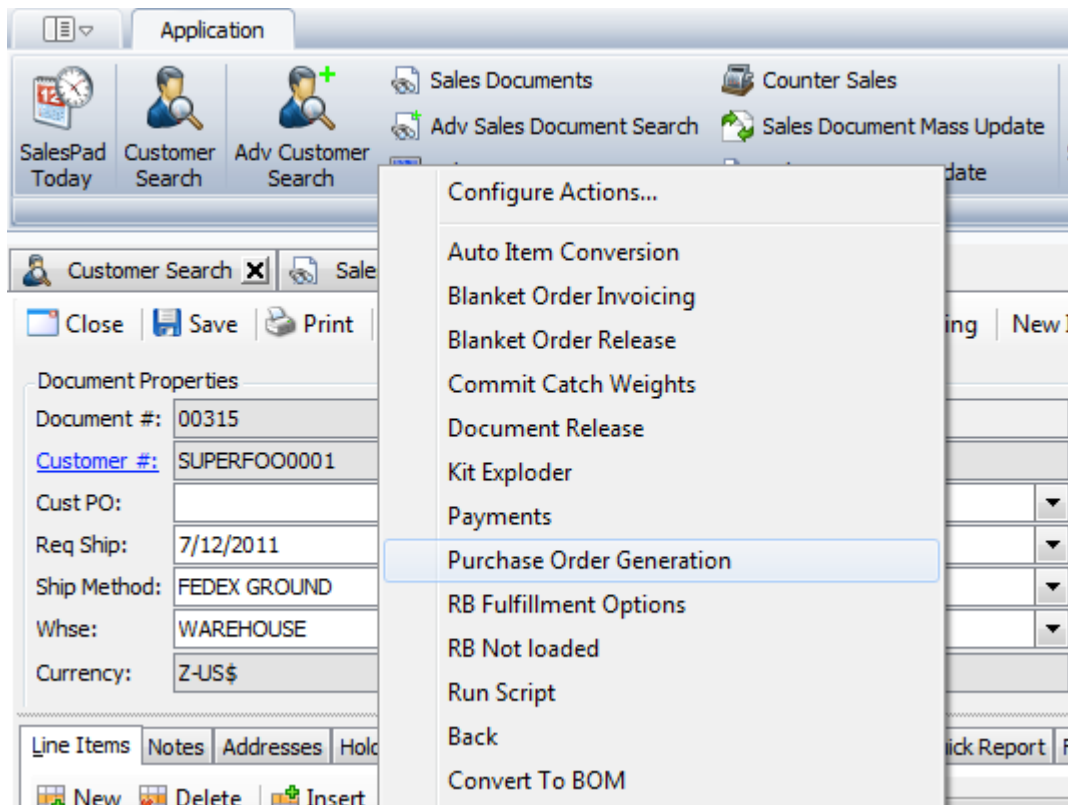
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Discount %: 0.00 %  
Freight: 0.00  
Tax: 0.00  
Total: 475.00  
Payment: 0.00

Select Purchase Order Generation from the dropdown menu.



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