



## Purchase Order User Fields Security Allow Historical Edit

Megan De Freitas - 2024-11-22 - Purchasing

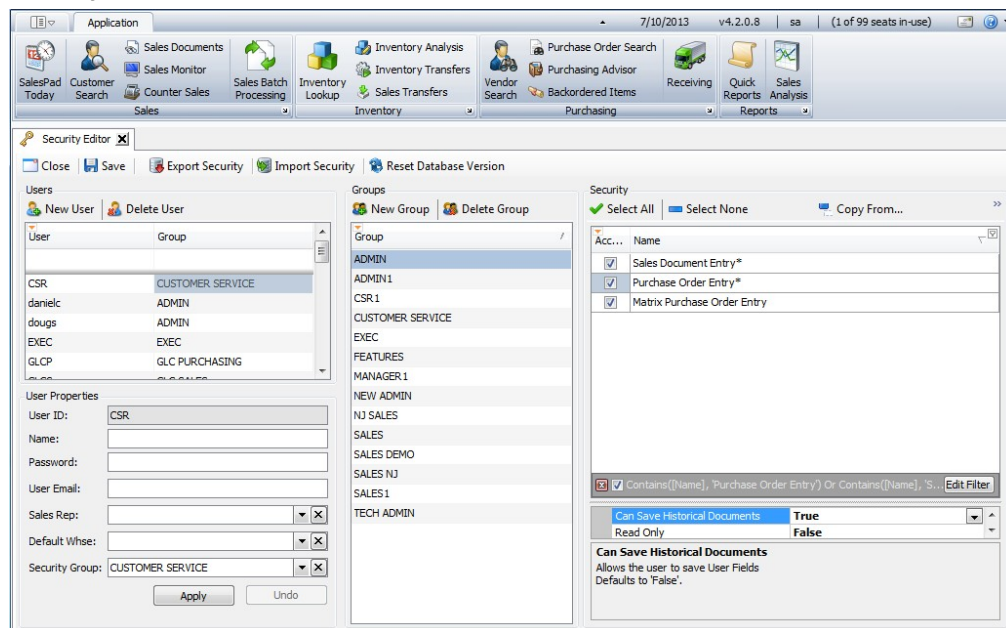
### Overview

A new security setting in Sales Pad allows you to edit User Fields on historical purchase orders.

### Setup

#### Security

1. In the Security Editor, search for purchase order and select the *Purchase Order Entry* setting. Under Misc., set the item *Can Save Historical Documents* to True. This allows you to save user fields.



2. Next, also in the Security Editor, search for purchase order and select the *Purchase Order User Fields* setting. Under Misc., set the item *Allow Historical Edit* to True. With this setting enabled, you are now able to edit the information in the user defined fields on historical documents.

Application 7/10/2013 v4.2.0.8 sa (1 of 99 seats in-use)

SalesPad Today Customer Search Counter Sales Sales Batch Processing Inventory Lookup Inventory Analysis Inventory Transfers Sales Transfers Vendor Search Purchasing Advisor Backordered Items Purchase Order Search Receiving Quick Reports Sales Analysis

Security Editor

Close Save Export Security Import Security Reset Database Version

Users New User Delete User

User	Group
CSR	CUSTOMER SERVICE
danielc	ADMIN
dougs	ADMIN
EXEC	EXEC
GLCP	GLC PURCHASING

User Properties

User ID: CSR

Name:

Password:

User Email:

Sales Rep:

Default Whse:

Security Group: CUSTOMER SERVICE

Apply Undo

Groups New Group Delete Group

Group
ADMIN
ADMIN1
CSR1
CUSTOMER SERVICE
EXEC
FEATURES
MANAGER1
NEW ADMIN
NJ SALES
SALES
SALES DEMO
SALES NJ
SALES1
TECH ADMIN

Security

Select All Select None Copy From...

Acc...	Name
<input checked="" type="checkbox"/>	Sales Document User Fields*
<input checked="" type="checkbox"/>	Purchase Order User Fields*

☒ Contains([Name], 'Sales Document User Fields') Or Contains([Name], 'Purchase Order User Fields') Edit Filter

Misc

Allow Historical Edit True

Allow Historical Edit

Allow users to edit User Fields on historical purchase orders

Defaults to 'True'.

## Usage

On historical purchase orders, you can now edit the user fields as needed.

Purchase Order Search (STANDARD) PO2162

Close Save Print Copy Cancel Dynamics GP

PO Properties

Purch. Order #: PO2162

PO Status: Change Order

PO Type: STANDARD

Vendor ID: ADVANCED0001

Vendor Name: Advanced Office Systems

Currency: Z-US\$

PO Dates

PO Date: 4/12/2012

Required Date: 4/12/2017

Promised Date: 4/12/2013

Promised Ship: 2/12/2013

Other

Terms: NET 30

Shipping Method: FEDEX-OVERNIGHT

Buyer:

Confirm With:

Revision Number: 0

☐ On Hold

Ship To Address

☐ Ship to Customer Edit Address

Fabrikam, Inc.  
Taylor Stewart-Cray  
4277 West Oak Parkway  
Chicago, IL 60601-4277  
P:(312) 436-2671  
F:(312) 436-2896

Totals

Discount: 0.00

Freight: 0.00

Misc. Charge: 0.00

Tax: 0.00

Total: 2,706.00

Line Items Notes Audit Addresses User Fields Links

Factory Order #

Order Priority

Buyer Nickname: Stan

Line Items Notes Audit Addresses User Fields Links

Factory Order #

Order Priority 2

Buyer Nickname

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Buyer Nickname

Line Comment

Order was sent

OK Cancel