



## Security Validate Customer PO

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### Overview

When the security setting *Validate Customer PO* is enabled, a warning prompt automatically pops up when you are entering a new document that has an identical Customer PO number.

### Security

In the Sales Pad Security Editor ( Modules > Security Editor), search for Sales Document Properties. You will see the sub-setting, *Validate Customer PO*. Set to True to enable the functionality, which checks for existing Sales Documents with an identical Customer PO Number after the field is edited.

The screenshot shows the 'Security' editor window. At the top, there are buttons for 'Select All' (with a green checkmark), 'Select None' (with a blue square), and 'Copy From...'. Below these is a table with two columns: 'Acc...' and 'Name'. Two items are listed: 'Counter Sales Document Properties\*' and 'Sales Document Properties\*', both with checked checkboxes. Below the table is a search filter bar containing 'Contains([Name], 'Sales Document Properties\*)' and an 'Edit Filter' button. The main area displays a list of settings: 'Trade Discount Enabled' (True), 'Update Sales Territory From Sales Rep' (True), and 'Validate Customer PO' (True, highlighted in blue). Below this is a section for 'Scripts' with 'On Validating Script'. At the bottom, a box titled 'Validate Customer PO' contains the text: 'Check for existing Sales Documents with an identical Customer PO Number after the field is edited. Defaults to 'False'.'

Acc...	Name
<input checked="" type="checkbox"/>	Counter Sales Document Properties*
<input checked="" type="checkbox"/>	Sales Document Properties*

Contains([Name], 'Sales Document Properties\*) Edit Filter

Trade Discount Enabled	True
Update Sales Territory From Sales Rep	True
Validate Customer PO	True

**Scripts**

On Validating Script	
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**Validate Customer PO**  
Check for existing Sales Documents with an identical Customer PO Number after the field is edited.  
Defaults to 'False'.

## Usage

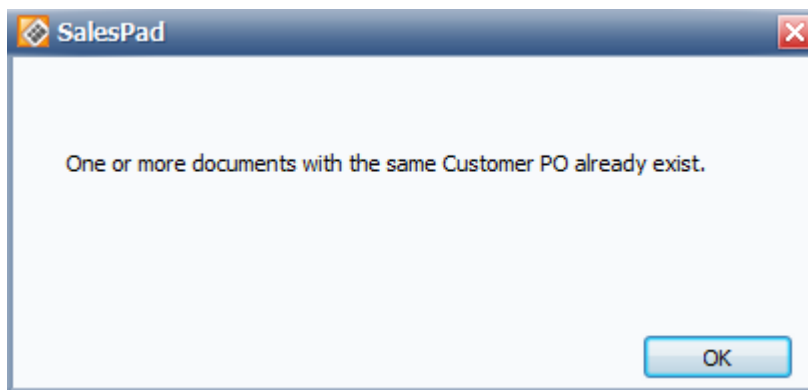
In the Customer Card, create a new sales order.

The screenshot shows the 'Customer Card' for 'AARONFIT0001 Aaron Fitz Electrical'. The 'Customer Properties' section includes fields for Customer, Customer Name, Cust Class, Price Level, Pay Terms, Sales Rep, Sales Terr, Discounts, and Currency. The 'Primary Address Information' section shows the address: 222 Warehouse Drive, Redmond, WA 98052-65. The 'Default Shipping Information' section shows the shipping method: FEDEX GROUND. A dropdown menu is open, showing various order types, with 'DISTRIBUTION ORDER' selected. The background shows a table of documents with columns: Doc#, Doc Date, Batch, PO, Total, and Req Ship.

Enter a PO# in the Cust PO field on the order.

The screenshot shows the 'ORDER (DISTRIBUTION)' form. The 'Document Properties' section includes fields for Document #, Customer # (AARONFIT0001), Cust PO (TSH-0099), Req Ship (10/8/2013), Ship Method (FEDEX GROUND), Whse (WAREHOUSE), Currency (Z-US\$), Sales Rep (IAN M.), Pay Terms (NET 30), Doc Date (10/8/2013), Created By (sa), and Approved By. The 'Shipping Address' section shows the address: Aaron Fitz Electrical, Robert Fitz Jr., 1201 56th Ave., Chicago, IL 60603-0776, P:(312) 555-0102, F:(312) 555-0102. The 'Ship Complete' checkbox is checked.

If the PO# is the same as an existing document, a prompt will automatically pop up notifying you that one or more documents with the same PO already exist in the system.



Click **OK**. You can then choose to change the PO number of the new document, or keep it as is.