



Security Validate Customer PO

Megan De Freitas - 2024-11-22 - System

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.

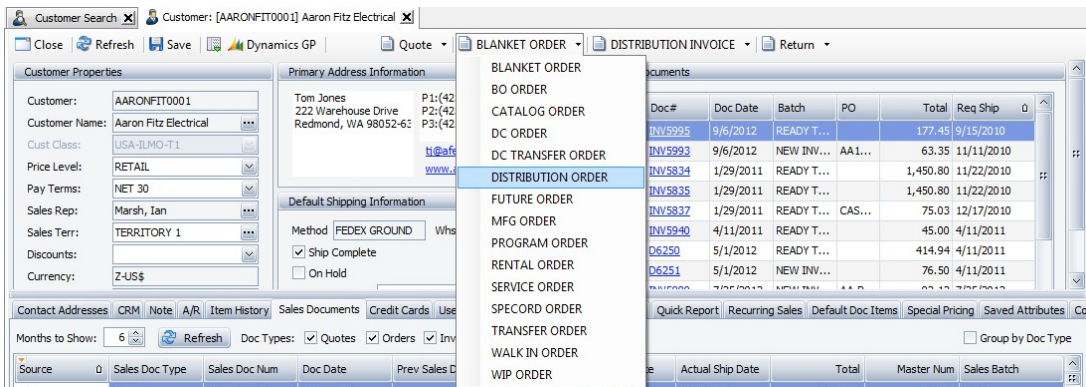
The screenshot shows the Security Editor window. At the top, there are buttons for 'Select All', 'Select None', and 'Copy From...'. Below this is a table with columns 'Acc...' and 'Name'. Two items are listed: 'Counter Sales Document Properties*' and 'Sales Document Properties*', both with checked boxes. A filter bar at the bottom of the table shows 'Contains([Name], 'Sales Document Properties*)'. Below the table is a list of settings:

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

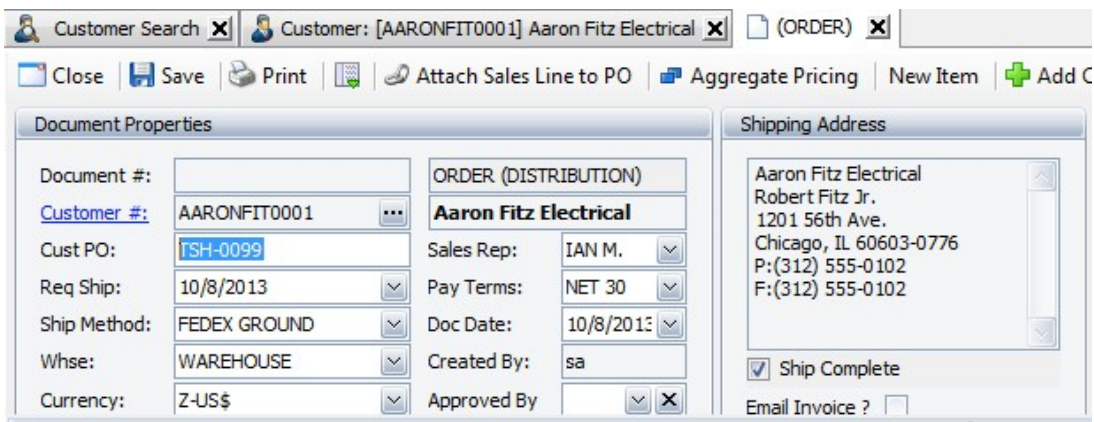
Below the settings list is a section for 'Scripts' with a sub-setting 'On Validating Script'. At the bottom, there is a section titled 'Validate Customer PO' with the following text: 'Check for existing Sales Documents with an identical Customer PO Number after the field is edited. Defaults to 'False'.'

Usage

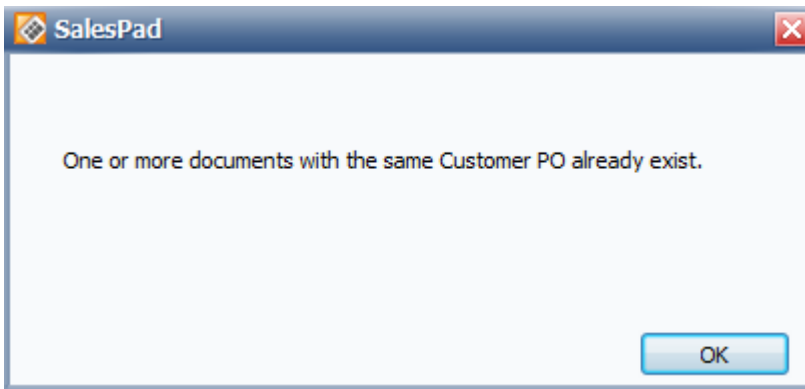
In the Customer Card, create a new sales order.



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



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.