Security Validate Customer PO

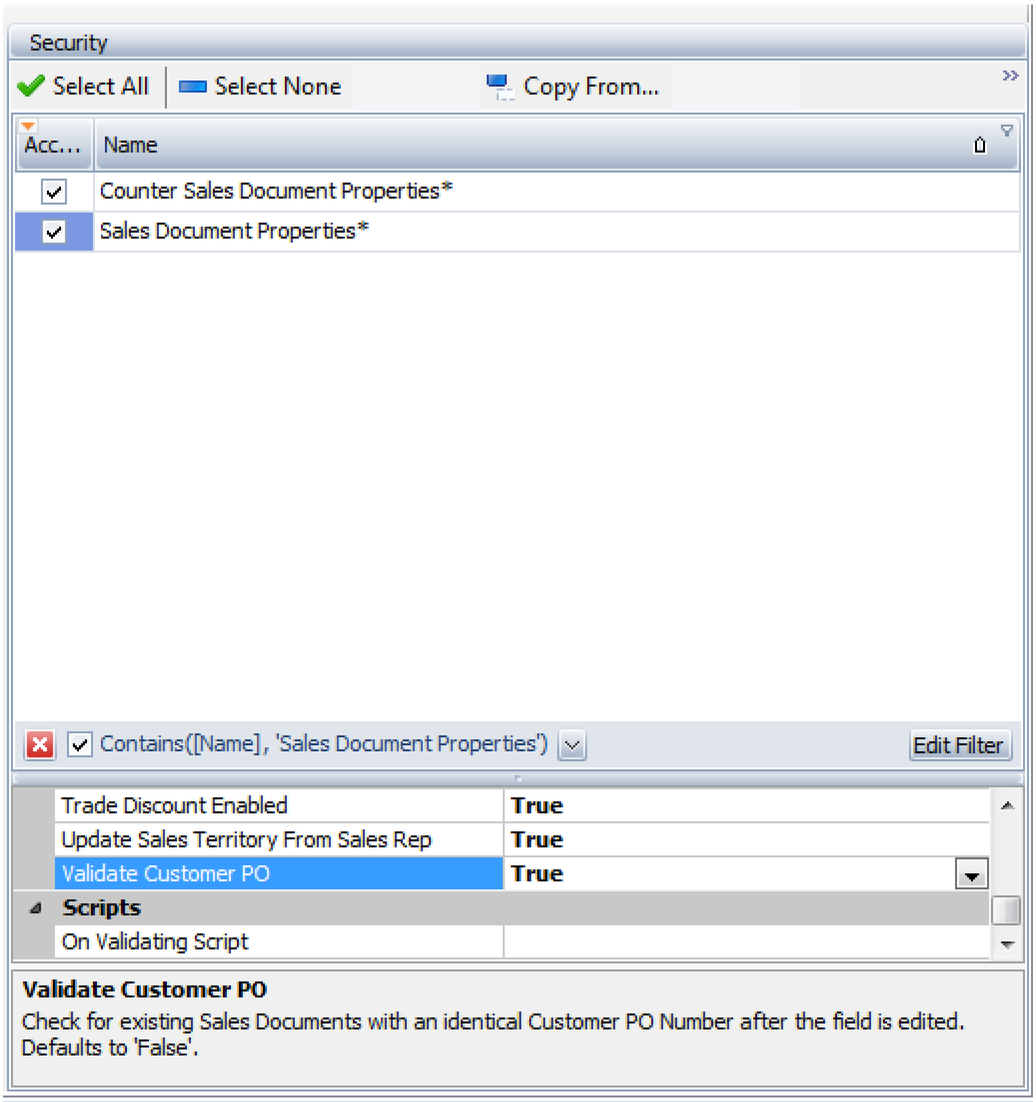
Megan De Freitas - 2024-11-22 - System

Overview

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

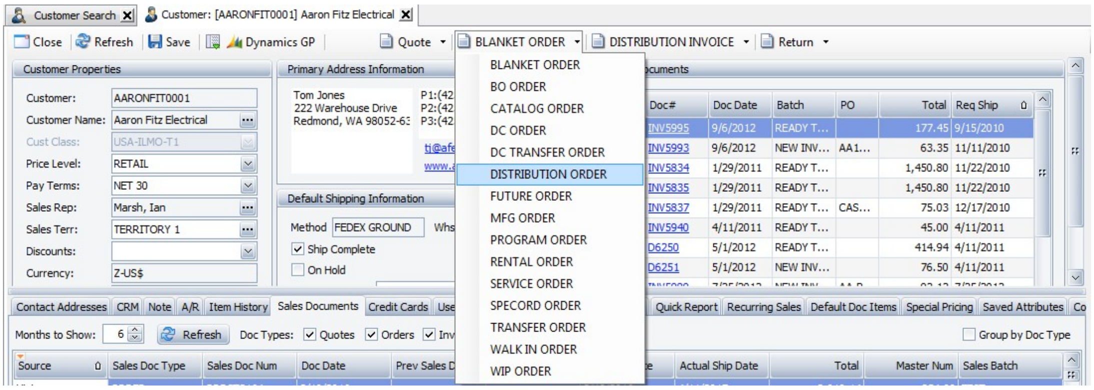
Security

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.

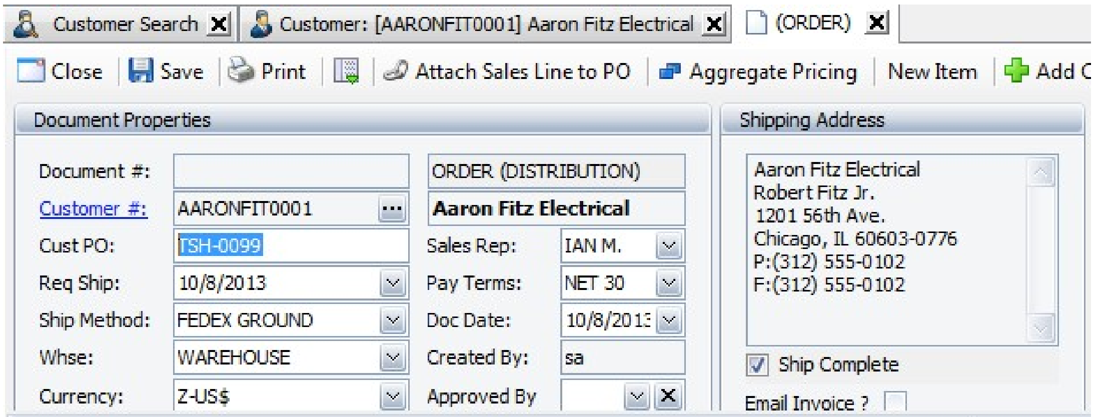


Usage

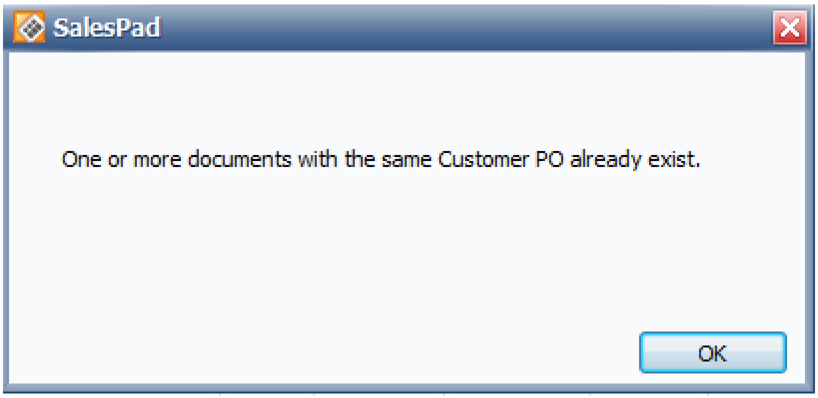
In the Customer Card, create a new sales order.



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.