



[Knowledgebase](#) > [SalesPad](#) > [System](#) > [Security Validate Customer PO](#)

# 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' window with a search filter 'Contains([Name], 'Sales Document Properties')'. The search results list 'Counter Sales Document Properties\*' and 'Sales Document Properties\*'. Below the search results, the 'Validate Customer PO' setting is highlighted, showing it is set to 'True'. The 'Scripts' section is also visible, showing 'On Validating Script'. The 'Validate Customer PO' section at the bottom explains the functionality: '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*

  

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

  

Scripts	
On Validating Script	

  

**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.

Customer Search X Customer: [AARONFIT0001] Aaron Fitz Electrical X

Close Refresh Save Dynamics GP Quote BLANKET ORDER DISTRIBUTION INVOICE Return

Customer Properties

Customer: AARONFIT0001  
 Customer Name: Aaron Fitz Electrical  
 Cust Class: USA-ILMO-T1  
 Price Level: RETAIL  
 Pay Terms: NET 30  
 Sales Rep: Marshy, Ian  
 Sales Terr: TERRITORY 1  
 Discounts:  
 Currency: Z-US\$

Primary Address Information

Tom Jones P1:(42)  
 222 Warehouse Drive P2:(42)  
 Redmond, WA 98052-61 P3:(42)  
 t@af  
 www.

Default Shipping Information

Method FEDEX GROUND Whs  
☒ Ship Complete  
☐ On Hold

Order Type: DISTRIBUTION ORDER

Documents

Doc#	Doc Date	Batch	PO	Total	Req Ship
INV5995	9/6/2012	READY T...		177.45	9/15/2010
INV5993	9/6/2012	NEW INV...	AA1...	63.35	11/11/2010
INV5834	1/29/2011	READY T...		1,450.80	11/22/2010
INV5835	1/29/2011	READY T...		1,450.80	11/22/2010
INV5837	1/29/2011	READY T...	CAS...	75.03	12/17/2010
INV5940	4/11/2011	READY T...		45.00	4/11/2011
D6250	5/1/2012	READY T...		414.94	4/11/2011
D6251	5/1/2012	NEW INV...		76.50	4/11/2011

Quick Report: Recurring Sales Default Doc Items Special Pricing Saved Attributes Co

Group by Doc Type

Actual Ship Date Total Master Num Sales Batch

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

Customer Search X Customer: [AARONFIT0001] Aaron Fitz Electrical X (ORDER) X

Close Save Print Attach Sales Line to PO Aggregate Pricing New Item Add C

Document Properties

Document #: ORDER (DISTRIBUTION)  
 Customer #: AARONFIT0001 Aaron Fitz Electrical  
 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  
 Approved By:

Shipping Address

Aaron Fitz Electrical  
 Robert Fitz Jr.  
 1201 56th Ave.  
 Chicago, IL 60603-0776  
 P:(312) 555-0102  
 F:(312) 555-0102

☒ Ship Complete  
 Email Invoice ?

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.

SalesPad

One or more documents with the same Customer PO already exist.

OK

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