

Document Definition for Purchase Orders

The **Document Definition for Purchase Orders** specifies how purchase orders generated from Surface Solutions are structured in terms of content and appearance. As with other document types (e.g., offers or invoices), all standard information can be maintained centrally, ensuring that each purchase order is consistent and automatically includes the correct sender and address details.

Purchase Order

Under the **Purchase Order** section, the basic details that apply to all of the organization's purchase orders are defined:

- **Logo and PDF background:**

A separate logo and PDF background can be set for purchase orders. This allows purchase orders to differ visually from offers or invoices — for example, when different colors or branding are desired.

- **Sender address, billing address, and delivery address:**

A key feature of the purchase order definition is the separate management of these three address types.

This enables you to, for example, use a central billing address but specify a project-specific delivery address. These addresses are inserted automatically when creating a purchase order, but can be adjusted in the order form.

- **Delivery terms, notes, and footer:**

As with other documents, standard texts such as delivery terms, payment conditions, shipping information, or general notes can be stored here. These are automatically included on every purchase order to ensure a consistent external appearance.

Purchase number will be printed here

Description

Dear Sir or Madam,
We hereby order the following goods and services:

Positions will be printed here

Bottom Note

Please confirm receipt of this order.

Payment Terms

Payment Terms

Payment within 30 days net after receipt of invoice.

Delivery Terms

Delivery Terms

Delivery free to point of use

Shipping

Shipping

Delivery including shipping costs

General Notes

General Notes

Deliveries must meet our quality standards. We reserve the right to inspect goods upon delivery. Defective deliveries will be rejected.

Purchase Order Number

Similar to other document types, purchase orders have their own **number sequence**, which is defined in the **Purchase Order Number** section.

Here you can:

- define the **format** of the purchase order number using placeholders,
- view a **preview of the next number**, and
- seamlessly **continue existing numbering sequences** if migrating from another system.

The numbering is assigned automatically when the purchase order is finalized, ensuring a unique identifier for every order.

Revision #1

Created 5 November 2025 11:41:00 by Admin2

Updated 5 November 2025 11:46:35 by Admin2