Document Services: Purchase Order to Sales Order

SYSPRO 8

Reference Guide

Published: June 2025

SYSPRO

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Document Services: Purchase Order to Sales Order

Exploring

Where it fits in?

The **Purchase Order to Sales Order** feature enables the automatic creation of sales order header and line information directly from purchase order documents, such as PDFs or JPGs. By leveraging SYSPRO's existing **Document Services**, the solution seamlessly transforms incoming purchase documents into structured sales orders with minimal manual intervention.

Functionality

- Document recognition and automated data extraction:

  Converts purchase order documents into structured sales orders with minimal manual input.

- **Document Services** integration:

  Utilizes SYSPRO's existing document services framework for reliable and scalable processing.

- End-to-end digitization:

  Supports a fully digital workflow from document receipt to order creation.

Benefits

This capability empowers you to:

- Accelerated order processing:

  Reduce turnaround time by eliminating manual data entry.

- Enhanced accuracy:

  Minimize human error in order transcription.

- Improved customer satisfaction:

  Deliver faster, more reliable service.

- Boosted operational efficiency:

  Free up staff to focus on higher-value tasks.

- Increased business agility:

  Scale order processing capacity without proportional increases in headcount.

Navigation

The programs related to this feature are accessed from the **Program List** of the SYSPRO menu:

- *Program List > Sales Orders*

Terminology

Customer

A customer provides the mechanism for you to raise sales orders within SYSPRO.

The static information captured against a customer is used when processing sales transactions and determines, for example, the tax and discounts applicable.

Documents generated from these transactions (e.g. invoices, credit notes, debit notes) are also stored against the customer.

The customer code can be used as a filtering tool when generating reports.

Customers are maintained using the **Customers** program (*Program List > Accounts Receivable > Setup*).

Purchase order

A purchase order is the document used to define the details of a product or service provided by a seller to a buyer. It becomes a temporary legal contract to buy products or services once the seller accepts it.

Once the need for goods or services is identified and the pre-purchase activities (e.g. requisitioning, supplier sourcing and price negotiation) are complete, a purchase order for the goods is placed with the relevant supplier.

Sales order

Sales orders are used to record the sale or transfer of goods and services to both internal and external customers.

It forms a temporary legal contract between your company and the customer, as well a providing an audit trail of goods sold or transferred.

Starting

Prerequisites

To use this feature, the following must be installed and/or configured:

- The following service must be installed:

  SYSPRO 8 Cognitive Service

  - The machine or server where this service is installed must have an active internet connection.
  - For the **SYSPRO 8 Cognitive Service** to work, the **__SRS** operator is required. This a standard operator which is created by the system.

- The following setup option(s) must be configured within the **Setup Options** program:
  - Cognitive service
    - Service endpoint
    - Data center for AP Invoice OCR

Licensing

While the ***Document Services*** module is not licensed separately, there is a cost associated as credit bundles must be purchased to use the API that extracts the data from documents.

One credit is used each time a purchase order is uploaded and analyzed.

Deploying

Operator-Level Deployment in Web UI

When using the ***SYSPRO Web UI (Avanti)*** and deploying the capability at operator level directly within the **Sales Order Entry** or **Sales Order Entry Express** program, the process is as follows:

1. Open the relevant sales order entry program (*Program List* > *Sales Orders* > *Sales Order Processing*).
2. Select the **Customization** gear, hover over **Design Web View** and select the **Primary Layout**.
3. Once the editor screen is open, select the **Add toolbar item** function.

4. Add the **Document Analyzer** item, configure it according to your requirements and save your changes.
5. Adjust the new function accordingly on the toolbar and save the customization.
6. Exit the program.

Role-Level Deployment in Web UI

When using the ***SYSPRO Web UI (Avanti)*** and deploying the capability at role level for the **Sales Order Entry** or **Sales Order Entry Express** program, the process is as follows:

1. From the home page of the ***SYSPRO Web UI (Avanti)***:

   Select the **Customization** gear, hover over **Design Web Views by Role** and select the relevant role from the list.

   A toast notification informs you that you have entered design mode for the role.
2. Open the **Sales Order Entry** or **Sales Order Entry Express** program as required.
3. Select the **Customization** gear, hover over **Design Web Views for Role** and select the **Primary Layout**.
4. Once the editor screen is open, select the **Add toolbar item** function.
5. Add the **Document Analyzer** item, configure it according to your requirements and save your changes.
6. Adjust the new function accordingly on the toolbar and save the customization.
7. Exit the program.
8. Select the **Stop Designing by Role** option from the **Customization** gear.

   When the role for which the **Document Analyzer** feature has been deployed logs in and launches the order entry program, the control displays.

Security

You can secure this feature by implementing a range of controls against the affected programs. Although not all these controls are applicable to each feature, they include the following:

- You restrict operator access to *activities* within a program using the **Operator Maintenance** program.
- You can restrict operator access to the *fields* within a program (configured using the **Operator Maintenance** program).
- You can restrict operator access to *functions* within a program using passwords (configured using the **Password Definition** program). When defined, the password must be entered before you can access the function.
- You can restrict access to the eSignature *transactions* within a program at operator, group, role or company level (configured using the **Electronic Signature Configuration Setup** program). Electronic Signatures provide security access, transaction logging and event triggering that gives you greater control over your system changes.
- You can restrict operator access to *programs* by assigning them to groups and applying access control against the group (configured using the **Operator Groups** program).
- You can restrict operator access to *programs* by assigning them to roles and applying access control against the role (configured using the **Role Management** program).

Restrictions and Limits

- When processing purchase order documents with the **Document Analyzer**, it is crucial to ensure that the **Customer Stock Code Cross-Reference** application is properly maintained. Inaccurate or missing cross-references can lead to issues such as unrecognized (non-stocked) items or system errors during document analysis and the subsequent creation of sales orders.

  To avoid these issues, always verify that customer-specific stock codes are correctly mapped to your internal item codes before initiating the analysis process.

Solving

FAQs

How can I purchase credits?

You can purchase document credits by accessing the **OneView Portal Credit Management** page from directly within the **Consumption Based Licensing Log** program. To do this, simply select the **Top Up** button.

Once you have opened and signed into the **OneView Portal Credit Management** page within your browser:

1. Select **Top Up**.

   The **Transaction Top Up** window is displayed.
2. Select the amount of credits you would like to purchase in the **Total** field.
3. Enter a reference in the **Reference** field.
4. Select **Submit**.
5. In SYSPRO, select the **Refresh the Current Credit Balance** button in the **Consumption Based Licensing Log** program to reflect the purchased credits.

How can I view my available credits?

You can view your available credits in the **Current Balance** field within the **Consumption Based Licensing Log** program. Select the **Refresh the Current Credit Balance** button to refresh the field if required.

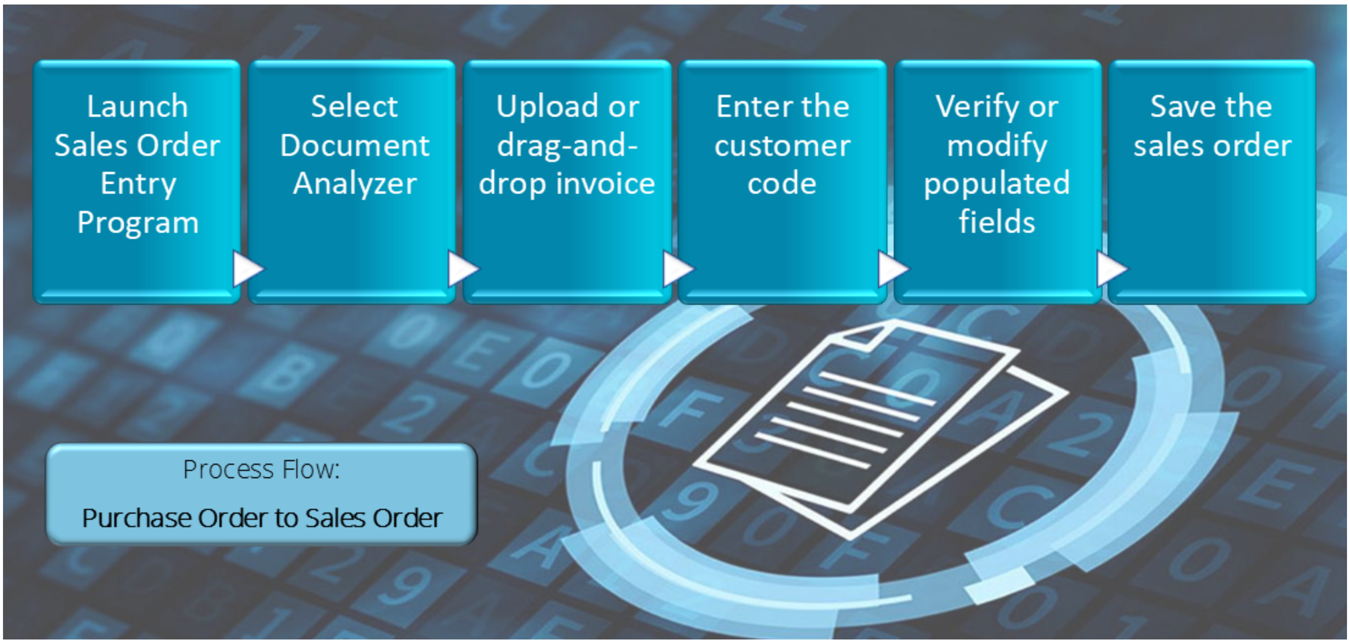
Which document types are supported?

The following document types are supported in the ***SYSPRO Desktop*** and ***SYSPRO Web UI (Avanti)***:

Model	PDF	Image: JPEG/JPG	Image: TIFF	Image: PNG	Image: BMP
Read	Yes	Yes	Yes	Yes	Yes
Layout	Yes	Yes	Yes	Yes	Yes
General Document	Yes	Yes	Yes	Yes	Yes
Prebuilt	Yes	Yes	Yes	Yes	Yes
Custom	Yes	Yes	Yes	Yes	Yes

Using

Process



1. Open the **Sales Order Entry** or **Sales Order Entry Express** program.
2. Select the **Document Analyzer** function from the toolbar.

   The **Sales Order Review** program is launched.
3. Using the **Document Analyzer** pane, upload the customer's purchase order document.
4. Once the document is uploaded, enter the appropriate customer code in the toolbar field.
5. The system then analyzes the data within the document and populates the new sales order with the details extracted from the purchase order.

   From here, you can review the data captured or modify it based on your requirements.
6. Save the order.
7. Once the new sales order has been created successfully, the **Sales Order Review** program is closed and you are returned to the original order entry program.

> When processing purchase order documents with the **Document Analyzer**, it is crucial to ensure that the **Customer Stock Code Cross-Reference** application is properly maintained. Inaccurate or missing cross-references can lead to issues such as unrecognized (non-stocked)

items or system errors during document analysis and the subsequent creation of sales orders.

To avoid these issues, always verify that customer-specific stock codes are correctly mapped to your internal item codes before initiating the analysis process.

Affected programs

The following indicates areas in the product that may be affected by implementing this feature:

Setup programs

Customers

Program List > Contact Management > Setup

The **Date format** field (within the **General Details** pane) enables you to indicate the pre-defined date format for the customer.

Transaction Processing programs

Sales Order Entry

Program List > Sales Orders > Sales Order Processing

The **Document Analyzer** button launches the **Sales Order Review** program, from where you can upload customer purchase order for conversion to sales orders.

Sales Order Entry Express

Program List > Sales Orders > Sales Order Processing

The **Document Analyzer** button launches the **Sales Order Review** program, from where you can upload customer purchase order for conversion to sales orders.

Review programs

Sales Order Review

Program List > Sales Orders

This program enables the upload of a customer's purchase order document and its automatic conversion into a structured sales order (using the **Document Services Purchase Order to Sales Order** capability).

Query programs

Customer Query

Program List > Accounts Receivable

The **Date format** field (within the **Customer Information** pane) displays the selected date format for the customer.

Consumption Based Licensing Log

Program List > Administration > Consumption Based Licensing

This program enables you to view your current document credit balance, as well as access the **OneView Portal Credit Management** portal for credit replenishment when using **Document Services**.

Affected business objects

The following indicates the business objects that are affected by this feature:

Query objects

AR Customer Query

The `<DateFormat>` element returns the date format defined against the customer.

Utility objects

COM Retrieve Files Stored on Server

This business object is responsible for reviewing documents to determine if a specified sales order exists, as well as returning the document so it can be displayed.

Store XML File on Server

This business object is responsible for saving the order document within the relevant SQL table.

In addition, the `<DateFormat>` element within the XML-IN allows operators to define the customer date formats.

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