



Add Item Plugin

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Overview

The Add Item and Add Item to PO plugins allow users to add a set of items with a specific quantity and unit of measure type to a sales document or a purchase order. Before proceeding, please visit the Security Settings section at the end of this document to ensure that you won't run into difficulties.

Setup

In order to properly use the Add Item plugin, you will need to set up the sub-securities for *Add Item* and *Add Item to PO*. For *Add Item*, The *Item Qty to Add*, *Item UofM to Add*, and *Items to Add* sub-securities will accept a semicolon delimited list, and these lists must match up with one another. Each item will match up with the corresponding UofM and Qty.

▼ Add Item Configuration	
Button Caption	Test
Item Qty To Add	10; 3
Item UofM To Add	EACH; EACH
Items To Add	HD-20; 100 XLG

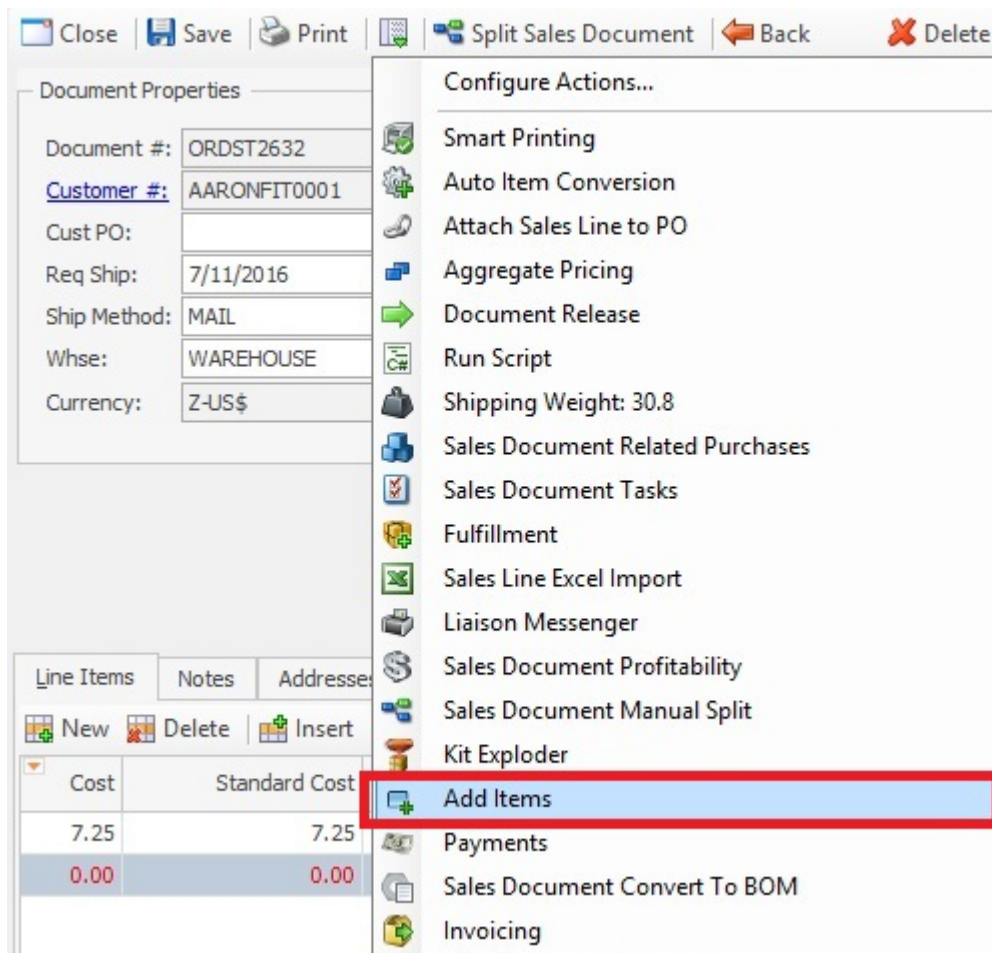
For *Add Item to PO*, you will need to list out the Item Qty, UofM, Number, and Warehouse. These lists will also need to have corresponding entries.

▼ Add Item Configuration	
Button Caption	Test
Item Qty To Add	10; 2
Item UofM To Add	EACH; EACH
Items To Add	HD-20; 100XLG
Warehouse Codes To Add	NORTH; WAREHOUSE

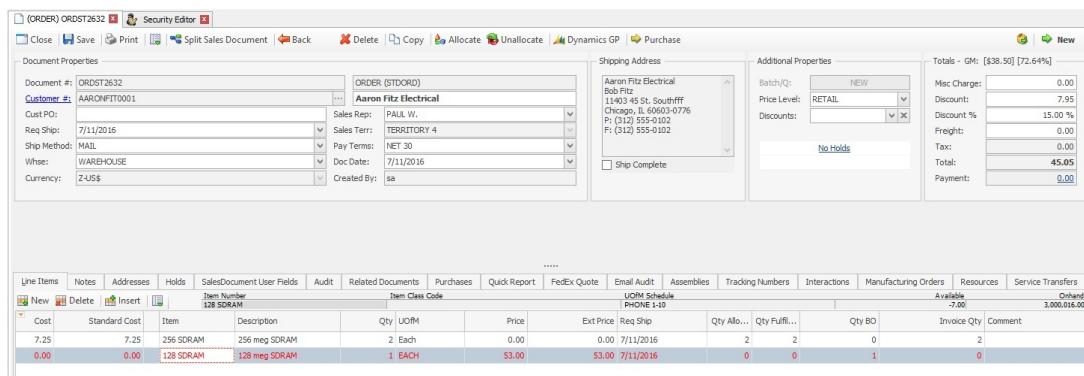
Usage

Adding Items to a Sales Document

To add items to a sales document, open an existing sales document or create a new sales document. Then, open the Sales Document **Actions** dropdown. From there, choose the Add Items Plugin. The items setup within Security Editor will now be added to the Sales Document.



The results of the plugin are displayed below.



Adding Items to a Purchase Order

To add an item to a purchase order, open an existing purchase order or create a new purchase order. Next, open the Purchase Order **Actions** dropdown menu. From there, choose the Add PO Items Plugin. The items setup within Security Editor will now be added to the purchase order.

Close Save Print Copy Cancel Dynarr

PO Properties

Purch. Order #:

PO Status:

PO Type:

Vendor ID:

Vendor Name:

Currency:

Configure Actions...

- Add PO Item
- Attach PO to Sales Line
- Purchase Line Excel Import
- Shipping Weight: 0

Line Items Notes Addresses User Fields Links Quick Report

The results of the plugin are displayed below.

Customer Search Vendor Search Vendor: [ACETRAVE000] A Travel Company (STANDARD) PO2166

Close Save Print Copy Cancel Dynamics GP

PO Properties

Purch. Order #: PO2166

PO Status: New

PO Type: STANDARD

Vendor ID: ACETRAVE000

Vendor Name: A Travel Company

Currency: Z-US\$

PO Dates

PO Date: 7/12/2016

Required Date: 7/12/2016

Promised Date: 7/12/2016

Promised Ship: 7/12/2016

Other

Terms: CREDIT CARD

Shipping Method: OVERNIGHT

Buyer: LESSONUSER2

Confirm With:

Revision Number: 0

Location:

☐ On Hold

Ship To Address

☐ Ship to Customer

TWO, Inc. Warehouse
Nagata, Summe
4300 West Elm St.
Chicago, IL 60601-4300
P: (312) 555-0101
F: (312) 555-0101

Totals

Discount: 0.00

Freight: 0.00

Misc. Charge: 0.00

Tax: 0.00

Total: 0.00

Line Items Notes Addresses User Fields Links Quick Report Audit Receipts Email Audit Resources

Details

New Cancel Insert

Item #	Description	UOM	Vendor Item #	Qty	UOM	Unit Cost	Extd. Cost	Location	Req. Date	Prom. Date	Prom. Ship	Comment
1000LG	Green Phone		1000LG	2	Each	0.00	0.00	WAREHOUSE	7/12/2016	7/12/2016	7/12/2016	

Update Missing Vendor Items

Security Settings

*Add Item** – Enable the Add Item module for Sales Documents

*Add Item To PO** – Enable the Add Item module for Purchase Orders

Note: Securities with an asterisk (such as *Add Item*) have sub-securities that are listed in the middle section of the Security field. Sub-security descriptions appear in the bottom section of the field. Review and customize these as desired.