



## Linking POs and Sales Line Items

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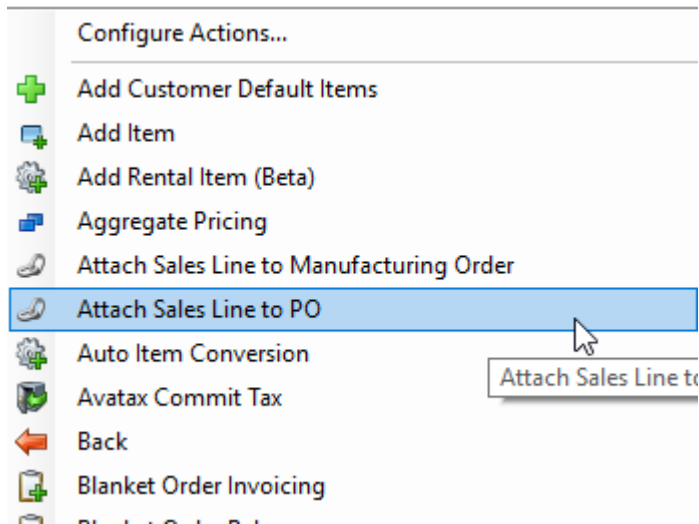
### Overview

The Attach Sales Line to PO plugin on a sales document and the Attach PO to Sales Line plugin on a purchase order allow users to link sales document line items with open purchase orders with item availability.

### Attach Sales Line to PO

To use the plugin, open or create a sales document with one or more backordered line items. The document must first be saved to use the plugin.

Click the **Actions** dropdown on the document header and select Attach Sales Line to PO.



The "Attach Sales Line to PO" screen displays items from the sales document that need to be purchased, and the open purchase orders they can be linked to.

**Attach Sales Line to PO**

Break Link

Sales Line Items					POs - Double click purchase line to create link							
NI	Item Number	Whse	Req Qty	Unit of Measure	PO	Vendor ...	Promi...	Location	Ordered	Available	UOM	Attached ...
<input type="checkbox"/>	HD-20	WAREHOUSE	500	EACH	PO2128	HD-20	11/19/2...	WAREH...	500	500	EACH	0
					PO2127	HD-20	11/15/2...	WAREH...	150	0	EACH	0
					PO2111	HD-20	7/17/2018	WAREH...	5,000	5,000	EACH	0
					PO2109	HD-20	6/20/2018	WAREH...	1	1	EACH	0
					PO2102	HD-20	5/11/2018	WAREH...	10,000	10,000	EACH	0
					PO2087	HD-20	2/13/2018	WAREH...	1	1	EACH	0
					PO2086	HD-20	2/5/2018	WAREH...	1	1	EACH	0
					PO2075	HD-20	1/31/2018	WAREH...	1	1	EACH	0
					PO2084	HD-20	1/18/2018	WAREH...	1	1	EACH	0
					PO2082	HD-20	1/18/2018	WAREH...	1	1	EACH	0
					PO2077	HD-20	1/2/2018	WAREH...	1	1	EACH	0
					PO2093	HD-20	4/12/2017	WAREH...	1	1	each	0
					PO2092	HD-20	4/12/2017	WAREH...	1	1	Each	0

Close

Quantity must be available in order to attach the sales line to it (Available quantity displays in green, no quantity available displays in red).

To create the link between the sales document and the purchase order, highlight a sales line item from the left grid and double-click a PO on the right to link. The line item quantity will be added to the purchase order's **Attached Qty** field for the selected PO and a chain link icon will appear on the Sales Line Items **Qty Req** field (Click **Break Link** to remove the link)

Click **OK** to return to the sales document. An orange/yellow triangle appears next to the line item, denoting an attached PO, and the attached PO will appear under the Purchases tab.

#### Attach PO to Sales Line

The linking process can also be accomplished directly from a PO. The Attach PO to Sales Line screen displays line items from the open purchase order and sales line items, from any sales documents, that need to be purchased.

Open the purchase order and select Attach PO to Sales Line from the **Actions** dropdown:

**Attach PO to Sales Line**

**Purchase Links**

PO	Vendo...	Location	Promis...	Ordered	Available
PO2321	100XLG	WARE...	10/20/...	65	59

**Sales Line Items**

NI	Item Number	Location	Qty On PO	Linked?
Fa...	100XLG	NORTH	0	
Fa...	100XLG	NORTH	0	
Fa...	100XLG	NORTH	0	
Fa...	100XLG	NORTH	0	
Fa...	100XLG	WAREHOUSE	6	
Fa...	100XLG	WAREHOUSE	0	
Fa...	100XLG	WAREHOUSE	0	
Fa...	100XLG	WAREHOUSE	0	
Fa...	100XLG	WAREHOUSE	0	
Fa...	100XLG	WAREHOUSE	0	
Fa...	100XLG	WAREHOUSE	0	
Fa...	100XLG	WAREHOUSE	0	
Fa...	100XLG	WAREHOUSE	0	
Fa...	100XLG	WAREHOUSE	0	
Fa...	100XLG	WAREHOUSE	0	
Fa...	100XLG	WAREHOUSE	0	
Fa...	100XLG	WAREHOUSE	0	
Fa...	100XLG	WAREHOUSE	0	
Fa...	100XLG	WAREHOUSE	0	
Fa...	100XLG	WAREHOUSE	0	

**Break Link**

OK

On this screen, purchase order and available quantity information appears on the left, and line item information appears on the right. Double-click a Sales Line Item from the right grid to make the link. The chain-link icon on the left denotes the link (Click **Break Link** to remove the link).

**Security**

*Attach PO to Sales Line* - Grants access to the plugin from the purchase order.

*Attach Sales Line to PO* - Grants access to the plugin from the Sales Document.