Linking POs and Sales Line Items

Cavallo Support - 2024-12-03 - Purchasing

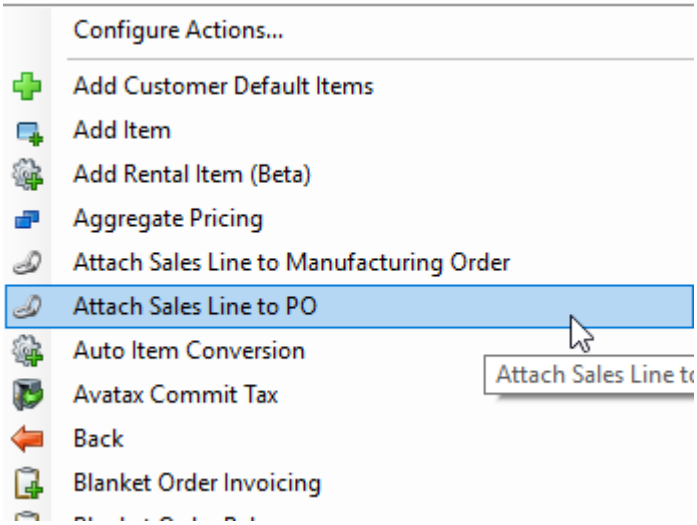
Overview

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.

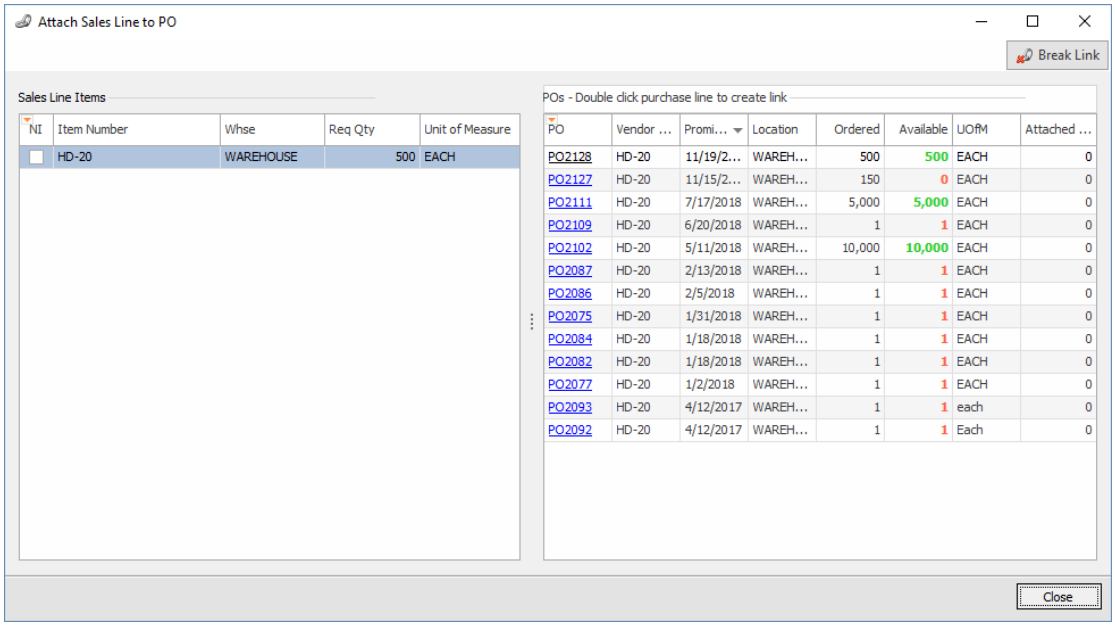
Attach Sales Line to PO

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.



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

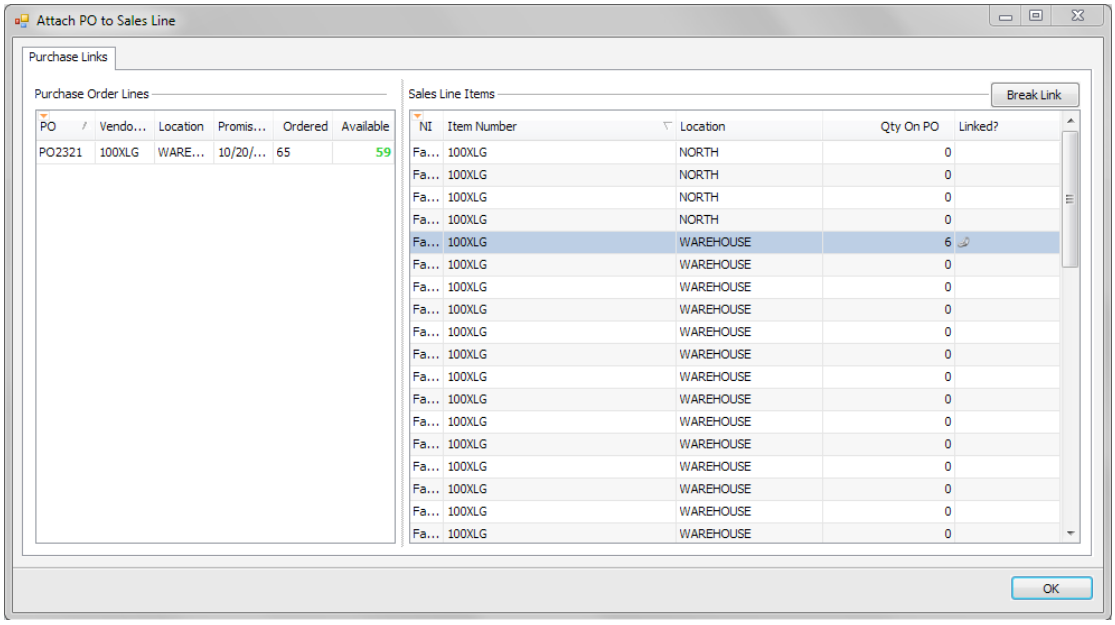
To create the link between the sales document and the purchase order, highlight a sales line item from the left grid and double-click a PO on the right to link. The line item quantity will be added to the purchase order's **Attached Qty** field for the selected PO and a chain link icon will appear on 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:



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.