



Related Purchases

Megan De Freitas - 2024-11-22 - Purchasing


Overview

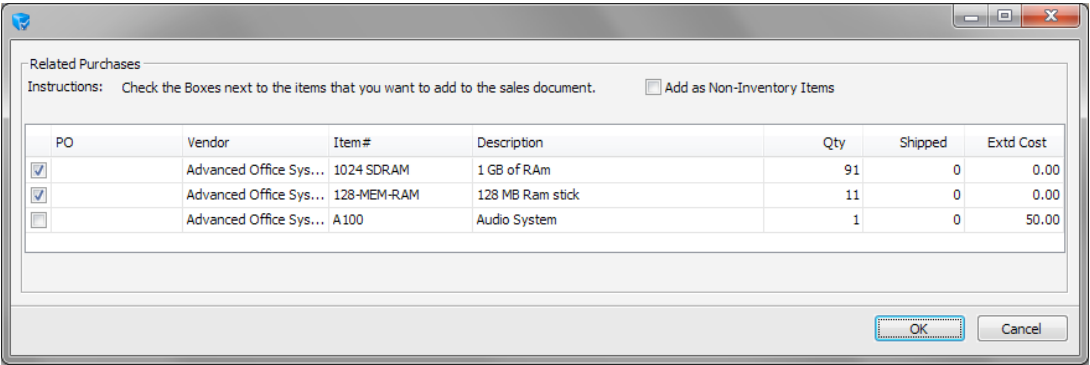
The Related Purchases plugin allows users to pull additional line items from an attached PO onto a sales document.

Security

Sales Document Related Purchases must be enabled in Modules > Security Editor.

Use

In a sales document with a linked PO (refer to the Linking POs and Sales Line Items document for more information), click the **Actions** dropdown () and select Related Purchases. The "Related Purchases" screen appears, listing all items on the linked PO:



PO	Vendor	Item#	Description	Qty	Shipped	Extd Cost
<input checked="" type="checkbox"/>	Advanced Office Sys...	1024 SDRAM	1 GB of RAM	91	0	0.00
<input checked="" type="checkbox"/>	Advanced Office Sys...	128-MEM-RAM	128 MB Ram stick	11	0	0.00
<input type="checkbox"/>	Advanced Office Sys...	A 100	Audio System	1	0	50.00

Using the check boxes on the left hand side, check the items you wish to add to the sales document. Items not already on the sales document will be checked by default.

Note: If you check an item that already exists on the sales document, another line for that item will be added.

To add line items as non-inventory, check the **Add as Non-Inventory Items** box. Non-Inventory items will be indicated on the sales line with the NI column check box checked and the Non Inventory Item Prefix (entered in Modules > Settings, ^ in the example) visible:

Item	Description	NI	Qty
128-MEM-RAM	128 MB Ram stick	<input type="checkbox"/>	0
^1024 SDRAM	1 GB of RAM	<input checked="" type="checkbox"/>	0

Note: Total purchase quantities appear on this screen, but quantity to add to the sales document is not chosen here – added items will appear on the sales document with a quantity of zero.

Click **OK** to return to the sales document and enter the quantity to add under the Qty column. Click **Save** to save the added line items.