

Associate Purchase Orders to Sales Orders

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A Linked PO is when you link a purchase order with a sales order. One way of doing this is directly from the sales order. At other times you will want to do this directly on the Purchase Order for multiple sales orders. The Associate function takes care of this.

After your Sales Orders have been created and approved, you will generate a Purchase Order. You will want to add the items to the Purchase Order and make sure that the status of the Purchase Order is Approved.

On this Purchase Order example notice the the qty on the line is qty. 5 and that our PO is at an approved status.

The screenshot shows the OrderTime web application interface for a Purchase Order. The browser address bar shows the URL: <https://app.ordertime.com/purchaseorder/Details/10000960>. The application header includes navigation tabs for Home, Sales, Purchasing, Production, Warehouse, and Reports. The main content area displays the details for Purchase Order 10000960, which is in an 'Approved' status. The order was created by Ian Benoitel on 8/13/2018 at 11:05 AM and modified by the same user at 11:08 AM. The order details are organized into several sections: General, Bill Address, Ship Address, and Summary. The General section includes Vendor: 080613&R Plastics, No.: 10000960, Date: 8/13/2018, and Promise Date: 8/13/2018. The Bill Address is 4651 SHERIDAN ST., 300B, HOLLYWOOD, FL 33021, UNITED STATES. The Ship Address is ALL ORDERS DEMO, 4651 SHERIDAN ST, 300B, HOLLYWOOD, FL, USA. The Summary section shows a Total Amount of 6.25. Below these sections is a table of items. The first item is highlighted with a red box:

| ITEM | DESCRIPTION | QUANTITY | UOM | COST | EXT. |
|------|-------------|----------|-----|------|------|
| 110 | | 5.0 | EA | 1.25 | 6.25 |

Under the 'Dependency' Tab, you will use the "Associate" Button to search for the Sales Order that you want to create the link/dependency to.

Purchase Order - 10000960

Status: Approved

Vendor: 080613&R Plastics
No. 10000960
Date: 8/13/2018
Promise Date: 8/13/2018

Bill Address: 4651 SHERIDAN ST. 3008 HOLLYWOOD, FL 33021 UNITED STATES

Ship Address: ALL ORDERS DEMO 4651 SHERIDAN ST, 3008 HOLLYWOOD, FL USA

Summary Revision: 1
Total Amount: 6.25

Dependency

Associate

Associate Required

Line No. 1 Promise Date 8/13/2018

Item 110 Description

Associated 5 Remaining 0

| NO. | TRAN TYPE | DATE | PROMISE DATE | LINE NO. | PREV. ASSOCIATED | QUANTITY | ASSOCIATED |
|-----|-------------|-----------|--------------|----------|------------------|----------|------------|
| 73 | Sales Order | 5/2/2018 | 5/2/2018 | 2 | 0 | 1.0 | 0.0 |
| 333 | Sales Order | 8/13/2018 | 8/13/2018 | 1 | 0 | 4.0 | 0.0 |
| 334 | Sales Order | 8/13/2018 | 8/13/2018 | 1 | 0 | 6.0 | 0.0 |

Save Cancel

Depending on the Qty of the Items, you will be able to allocate the Sales Orders that will equal to that qty. entered on the Purchase Order. Select the "Line No." to generate the list of Sales Orders that you will be able to Associate with. In the "Associated" Column you can adjust the qty.

Purchase Order - 10000960

Status: Approved

Vendor: 080613&R Plastics
No. 10000960
Date: 8/13/2018
Promise Date: 8/13/2018

Bill Address: 4651 SHERIDAN ST. 3008 HOLLYWOOD, FL 33021 UNITED STATES

Ship Address: ALL ORDERS DEMO 4651 SHERIDAN ST, 3008 HOLLYWOOD, FL USA

Summary Revision: 1
Total Amount: 6.25

Dependency

Associate

Associate Required

Line No. 1 Promise Date 8/13/2018

Item 110 Description

Associated 5 Remaining 0

| NO. | TRAN TYPE | DATE | PROMISE DATE | LINE NO. | PREV. ASSOCIATED | QUANTITY | ASSOCIATED |
|-----|-------------|-----------|--------------|----------|------------------|----------|------------|
| 73 | Sales Order | 5/2/2018 | 5/2/2018 | 2 | 0 | 1.0 | 0.0 |
| 333 | Sales Order | 8/13/2018 | 8/13/2018 | 1 | 0 | 4.0 | 0.0 |
| 334 | Sales Order | 8/13/2018 | 8/13/2018 | 1 | 0 | 6.0 | 0.0 |

Save Cancel

In our example we entered a qty. of 5. When we link the Sales Orders you will notice that the "Associated" will be 5.

The screenshot shows the OrderTime web application interface. The main page displays a Purchase Order for 10000960. A modal dialog titled "Associate Required" is open, showing the following information:

Line No. 1, Promise Date: 8/13/2018
Item 110, Description
Associated 5, Remaining 0

| NO. | TRAN TYPE | DATE | PROMISE DATE | LINE NO. | PREV. ASSOCIATED | QUANTITY | ASSOCIATED |
|-----|-------------|-----------|--------------|----------|------------------|----------|------------|
| 73 | Sales Order | 5/2/2018 | 5/2/2018 | 2 | 0 | 1.0 | 1.0 |
| 333 | Sales Order | 8/13/2018 | 8/13/2018 | 1 | 0 | 4.0 | 4.0 |
| 334 | Sales Order | 8/13/2018 | 8/13/2018 | 1 | 0 | 6.0 | 0.0 |

If you allocate more than the purchase order qty. you will get an error message and you will either have to increase the purchase order qty. or delete other dependencies in order to create the link.

The screenshot shows the OrderTime interface for a purchase order (10000960). A dialog box titled "Associate Required" is open, displaying a table of associated transactions. The table has columns for NO., TRAN TYPE, DATE, PROMISE DATE, LINE NO., PREV. ASSOCIATED, QUANTITY, and ASSOCIATED. The data is as follows:

| NO. | TRAN TYPE | DATE | PROMISE DATE | LINE NO. | PREV. ASSOCIATED | QUANTITY | ASSOCIATED |
|-----|-------------|-----------|--------------|----------|------------------|----------|------------|
| 73 | Sales Order | 5/2/2018 | 5/2/2018 | 2 | 0 | 1.0 | 1.0 |
| 333 | Sales Order | 8/13/2018 | 8/13/2018 | 1 | 0 | 4.0 | 4.0 |
| 334 | Sales Order | 8/13/2018 | 8/13/2018 | 1 | 0 | 6.0 | 1 |

The dialog box also includes fields for Line No. (1), Item (110), and Promise Date (8/13/2018). The "ASSOCIATED" column in the table has a small input field next to the value "1" for line 334.

Under the Dependency Tab we now have multiple target transactions that are linked to one source.

The screenshot shows the OrderTime interface for a purchase order (10000960) with the "Dependency" tab selected. The table below shows the dependencies between the source purchase order and target sales orders.

| ITEM | TARGETINFO TRAN TYPE | TARGETINFO NO. | TARGETINFO PROMISE DATE | QUANTITY | UOM | ACTIONS |
|------|----------------------|----------------|-------------------------|----------|-----|---------|
| 110 | Sales Order | 333 | 8/13/2018 | 4.0 | EA | ⊖ |
| 110 | Sales Order | 334 | 8/13/2018 | 1.0 | EA | ⊖ |