

Creating a Sales Order with a Linked PO & Linked WO

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In this article we will explain how to connect a Linked Purchase Order or a Linked Work Order to a Sales Order.

Creating a Sales Order with a Linked PO & Linked WO

LINE NO.	ITEM	ITEM TYPE	DESCRIPTION	QUANTITY	AVAILABLE	FILLED	UOM	PRICE	EXT.	CLEARED
1	CISCO-RACK-HSEC-K9	Assembly	CISCO RACK MOUNTING KIT	1	33	0	EA	1,500.00	1,500.00	<input type="radio"/>
2	2510-00002	Part	7 oz. FLUTE CHAMPAGNE GLASS D&V 12/1	1	16	0	DZ	30.00	30.00	<input type="radio"/>

The Sales Order needs to be in the Approved status so that the buttons will show.

Go to the Dependency Tab to see them

NO.	TRAN TYPE	RELATED TO ENTITY NAME	RELATED TO ENTITY TYPE	DATE	MEMO	STATUS	POSTING DATE
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Click on the button for Linked PO or Linked WO

OrderTime

Home Sales Purchasing Production Warehouse Reports

Sean Company Logout

Create New Open Full List

Recent Records

- 2510-00002
- CISCO-RACK-HSEC-K9
- 40
- 38
- 19
- 44
- 39
- SEAGAT-STDN4000100
- 43

Linked PO

Filters

Vendor: -- All -- Group: -- All --

ITEM	DESCRIPTION	REQUIRED	VENDOR	QUANTITY	COST	DROP SHIP	ADD TO PO	NEW LINE	LOCATION	ETA
CISCO-RACK-HSEC-K9	CISCO RACK MOUNTING KIT	1		0	344				HQ	
2510-00002	7 oz. FLUTE CHAMPAGNE GLASS D&V 12/1	1	Car	1	20				HQ	

Create Cancel

Click on the line to activate quantity being Ordered.

Click on the line and you can change the quantity ordered for a Linked Purchase Order, then click on Create

OrderTime

Home Sales Purchasing Production Warehouse Reports

Sean Company Logout

Create New Open Full List

Recent Records

- 40
- CISCO-RACK-HSEC-K9
- 2510-00002
- 38
- 19
- 44
- 39
- SEAGAT-STDN4000100
- 43

Linked WO

Filters

Group: -- All --

ITEM	DESCRIPTION	REQUIRED	QUANTITY	ADD TO WO	ETA
CISCO-RACK-HSEC-K9	CISCO RACK MOUNTING KIT	1	1		5/13/2019

Create Cancel

Choose the Quantity for Work Order.

For a Linked Work Order it is similar and you choose the Quantity and click on Create

OrderTime

Home Sales Purchasing Production Warehouse Reports

Sean Company Logout

Create New Open Full List

Recent Records

- 40
- CISCO-RACK-HSEC-K9
- 2510-00002
- 38
- 19
- 44
- 39
- SEAGAT-STDN4000100
- 43

Sales > Sales Orders > Sale Order

Created By sean bidez 5/13/2019 8:57 AM Modified By sean bidez 5/13/2019 8:57 AM

Sales Order - 40 Create PDF Status Approved

General

No. 40
Customer BRAVO Change
Date 5/13/2019
Customer PO
Contact
Ship Date

Bill Address

BRAVO
TED SHEPPARD
3025 JOHNSON ST, FL 33021

Ship Address

BRAVO
TED SHEPPARD
3025 JOHNSON ST, FL 33021

Summary Revision: 1

Subtotal	1,530.00
Ship Amount	0.00
Discount \$	-0.00
Taxes	0.00
Total Amount	1,530.00
Paid Amount	-0.00
Balance	1,530.00

Items Details Memo & Instructions Custom Payments Ship Docs Dependency Attachments Open Activities Activity History

Batch Action

Linked PO Linked WO Quick Build

NO.	TRAN TYPE	RELATED TO ENTITY NAME	RELATED TO ENTITY TYPE	DATE	MEMO	STATUS
46	Work Order	Internal	Company	5/13/2019		Waiting
27	Purchase Order	Cardinal Health	Vendor	5/13/2019		Processing

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You will now see the SO is approved with a Linked WO and a Linked PO.

In the Dependency tab you will now see the linked transactions and the status of those individual

documents. The transactions have now been successfully linked.