Creating a Sales Order with a Linked PO & Linked WO

Last Modified on 01/17/2024 4:38 pm EST

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

∯rder Time					Cı	reating with a Lir	a Sales a Linked & nked We	ord PO	er				0	Sean Company	Logout	
👫 Home 🛛 🛷 Sa	les 🛛 📜 Purcl	nasing	Q ⁰ ₀ Production	🗑 Ware	house	🕒 Repo	rts									
Create New	Sales → Sal	es Orders 🕨 Sa	le Order							Creat	ted By sean bzd	ek 5/13/201	9 8:57 AM Mod	lified By sean bzd	ek 5/13/2019 8	3:57
Open Full List	Sales Or	der - 40 🖸	reate PDF 🚽								Status Approved					
ecent Pecords	T-STDN4000100 er Analysis - 2		Bill Address Ship Address							Summary Revision : 1						
		No. 40		BRAVO					BRAVO			Sub	total		1,530.00	
40	C	Customer BRAVO Change Date 5/13/2019			TED SHEPPARD 3025 JOHNSON ST, FL 33021				3025 JOHNSON ST, F	L 33021		Ship Amount Discount S			-0.00	
CISCO-PACK-HSEC-K9	Custo	omer PO							Taxes				0.00			
19	s	Contact hip Date								Total Amount				1,530.00		
▶ 44											Paid	d Amount		-0.00		
▶ 39				ructions Custom Payments Ship Docs Dependency Attachments							Balance Open Activities Activity History				1,530.00	
SEAGAT-STDN4000100 43	Items	Details	Memo & Instru							nments Op						
Reorder Analysis - 2	۵															
	LINEN	D. ITEM		ITEM TYPE	DESCRIPT	ION			QUANTITY	AVAILABLE	FILLED	UOM	PRICE	EXT.	CLEARED	
	1	CISCO-	RACK-HSEC-K9	Assembly	CISCO RA	CK MOUNTI	NG KIT		1	33	0	EA	1,500.00	1,500.00	0	
	2	2510-0	0002	Part	7 oz. FLU	TE CHAMPAG	GNE GLASS D&V	12/1	1	16	0	DZ	30.00	30.00	0	
Powered by NumberCrunch	27													Terms	; of Use F	

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

Order - 10409 TRANSFER CONVERT TO EDI ALLOC	ATE Create PDF 👻 Export	v Print Label v					Status App	roved N
eral	Bill Address map		Ship Address map			Summary Revision: 1		
No. 10409	1111 NELSON BROTHERS		1111 NELSON BROTHERS			Subtotal		78.00
Client 1111 Nelson Brothers - test: JOB 12 Change	2580 WYATT STREET FLOOR/SUITE BILL CARE OF		SHIP 2580 WYATT STREET SHIP SHIP CARE OF	P FLOOR/SUITE		Fedx		0.00Tax
Date 1/17/2024 Promise Date 1/17/2024	WEST PALM BEACH, FL J2KJ89		WEST PALM BEACH, FL 334040	0972350		Discount Amount		-0.00
Lustomer PO			USA			Additional Fee Amount		0.00
Contact						FL-Palm Beach (0.0 %)		0.00
Fotal Margin 32.58						Total Amount		78.00
Percentage						Paid		-0.00
						Balance		78.00
ns Details Memo & Instructions Custom	Payments Ship Docs	Dependency Dependence	y Item Attachments	Open Activities	Activity Histo	ry		
tch Action 👻 🏚 🖻							•	Linked PO
NO. TRAN TYPE RELATED	TO ENTITY NAME	RELATED TO ENTITY 1	ТҮРЕ	DATE 👻	MEMO	STATUS	POSTING DATE	

Go to the Dependency Tab to see them

Click on the button for Linked PO or Linked WO

Ørder Time		Sean Company Logout
🖷 Home 🛛 🛷 Sales	🐂 Purchasing 🚳 Production 😥 Warehouse 🚯 Reports	
Create New 👻	Linked PO	Create
Open Full List 👻	4 Filters	
Recent Records	Vendor - All - ▼	
2510-00002 CISCO-RACK-HSEC-K9	ITEM DESCRIPTION REQUIRED VENDOR QUANTITY COST DROP SHIP ADD TO PO NEW LIN	NE LOCATION ETA
 40 38 	CISCO-RACK-HSEC-K9 CISCO RACK MOUNTING KIT 1 0 344 O O	HQ
♣ 19	2510-00002 7 oz. FLUTE CHAMPAGNE GLASS D&V 12/1 1 Car • 1 20	HQ
 6 44 		
SEAGAT-STDN4000100	Click on the line to activate	
• 43	quantity being Ordered.	

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

Order Time						Sean Company	Logout
# Home 🏼 🛷 Sales	🐂 Purchasing 🛛 🖓 Production	🜍 Warehouse 🚯 Reports					
Create New 👻	Linked WO					Creat	e Canco
Open Full List 🛛 👻	Filters						
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 	ITEM	DESCRIPTION	REQUIRED	QUANTITY	ADD TO WO	E	A
 2510-00002 38 	CISCO-RACK-HSEC-K9	CISCO RACK MOUNTING KIT	1	1		¥ 5/13/2019	
▲ 19 ▲ 44							
		Choose the Qua Work Orde	ntity for				
 SEAGAT-STDN4000100 43 							

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

	Sales → Sa	les Orders 🕨	Sale Order							Created By sean bzdel	: 5/13/2019 8:5	7 AM Modified	By sean bzdek 5/	/13/2019
reate New 👻	 Sales Or 	rder - 40	Create PDF 🚽										Status Appr	oved
pen Full List 👻														
cent Records	General			Bill Addre	Bill Address Ship Address			dress	Summary Revision : 1					
		No. 40		BRAVO				BRAVO			Subtota			1,530.00
40	c	ustomer BR	AVO Change	TED SHEPPA 3025 JOHNS	TED SHEPPARD 3025 JOHNSON ST. FL 33021			TED SHEP 3025 JOHI	PARD NSON ST, FL 33021		Ship Amount			0.00
CISCO-RACK-HSEC-K9	Custo	omer PO	5/2015								Discoun	ts		-0.00
2510-00002		Contact									Total Amount Paid Amount			1.530.0
38	s	hip Date												-0.00
19											Balance			1,530.0
14														
39	Items	Details	Memo & Instructions	Custom	Payments	Ship Docs	Depe	ndency	Attachments	Open Activities	Activity I	History		
SEAGAT-STDN4000100 43	Batch	Action	* \$ 6 12							01	inked PO	O Linked	wo oo	uick B
				-							_			
		NO.	TRAN TYPE	RELATED	TO ENTITY NAME		REI	LATED TO EP	NTITY TYPE	DATE -		MEMO	STATUS	
		46 Work Order			Internal			Company			5/13/2019			
		27	Purchase Order	Cardinal	Health		Ver	ndor		5/13/20	19		Processing	ş
					You will n	ow see the S	O is a	approved	1					
ered by NumberCruncher					with a Li	iked wo and	a Lir	iked PO					Terms of U	Use

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.