

Datasheet Number & Version	POP100Ver2
Based on Software Build No.	12.7.2019.13356
Function	
Module	Purchasing
Datasheet Name	Linking a PO to SO

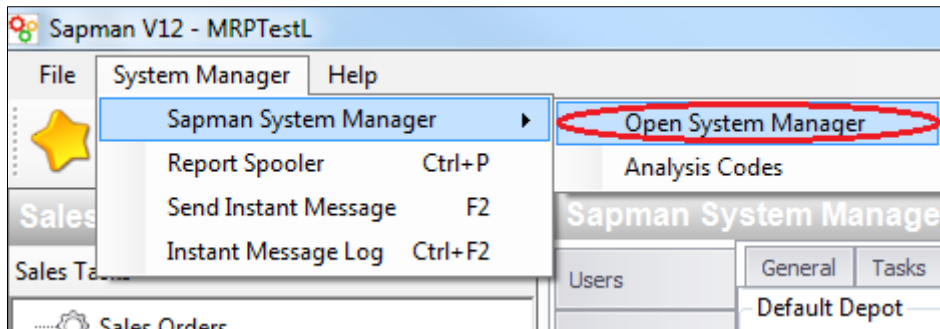
All new procedures and processes should be checked in a 'Test' environment before being applied to the 'Live' business system. Note that fields marked are mandatory and must have data entered. When commissioning a new module please note that the parameters will need to be set, and reference should be made to datasheet SYS101, System Manager – Module Parameter Settings

Linking a PO Line to SO Line

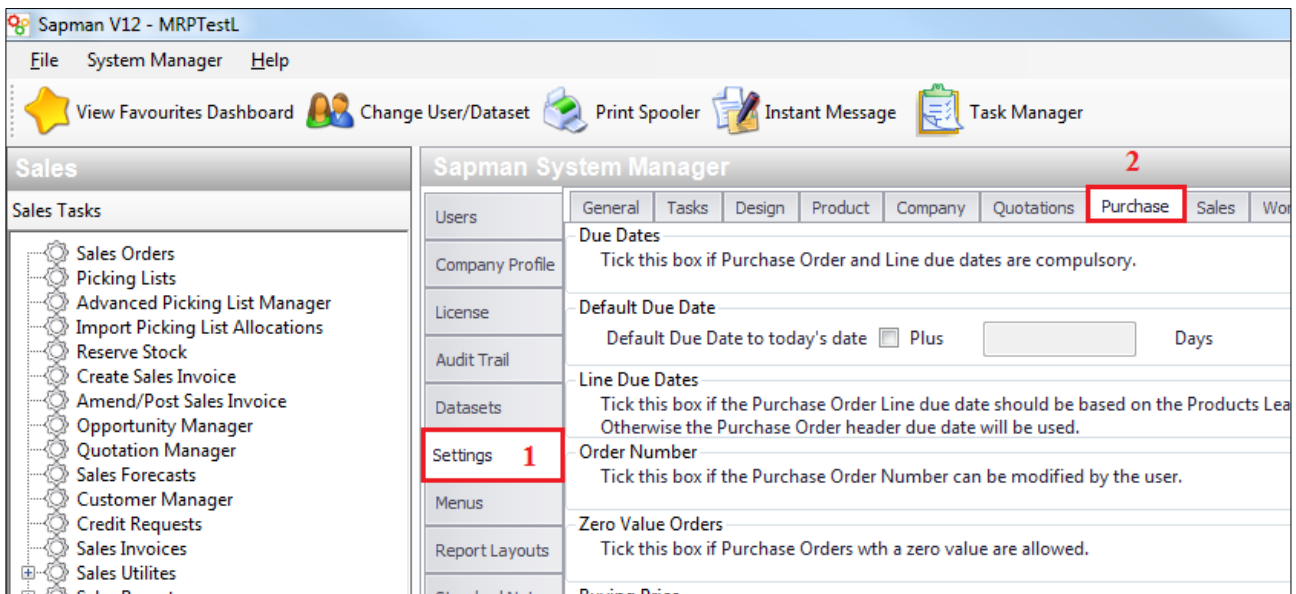
1. Purchase

1.1. Prompt to link Purchase Line to Sales Order Line

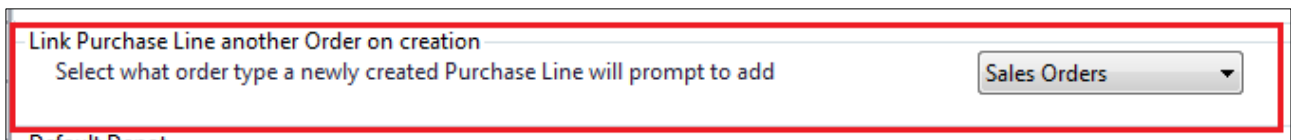
- a.) To have a prompt to appear on after adding/editing a purchase order line, a parameter setting can be set in System Manager. To do this select 'System Manager' on the menu bar then select 'Sapman System Manager' > 'Open System Manager' on the drop-down menu.



- b.) This will open the System Manager screen, select the 'Settings' tab then the 'Purchase' sub-tab.



- c.) Scroll down to Link Purchase Line to another Order on creation and select Sales Orders from the drop-down list. A prompt will now appear after adding or editing a Purchase Line to link to a Sales Order with the same product.

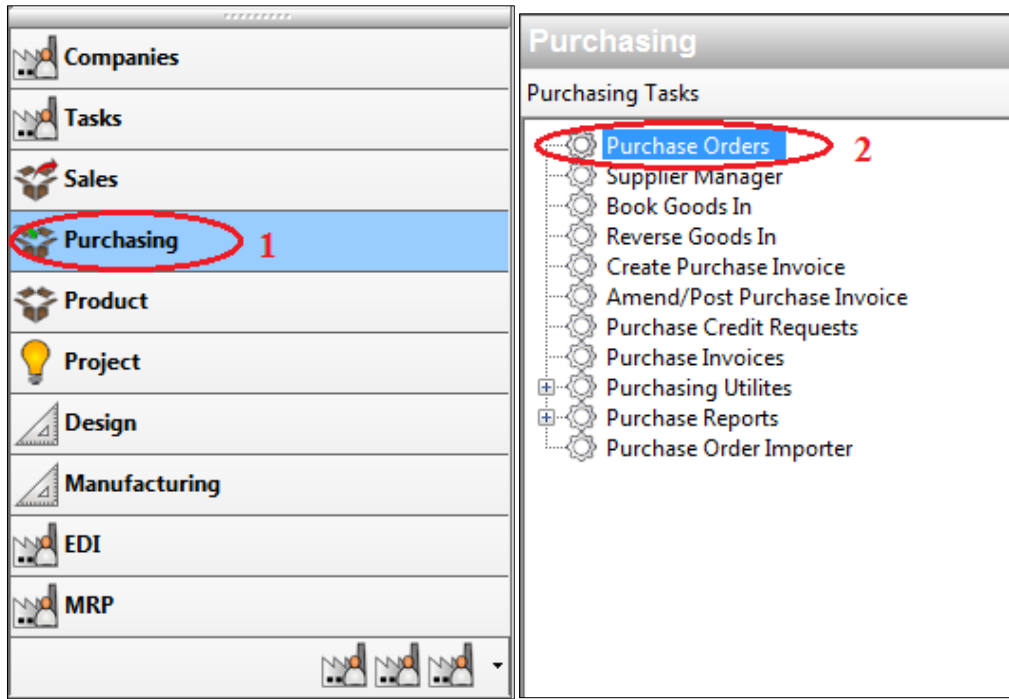


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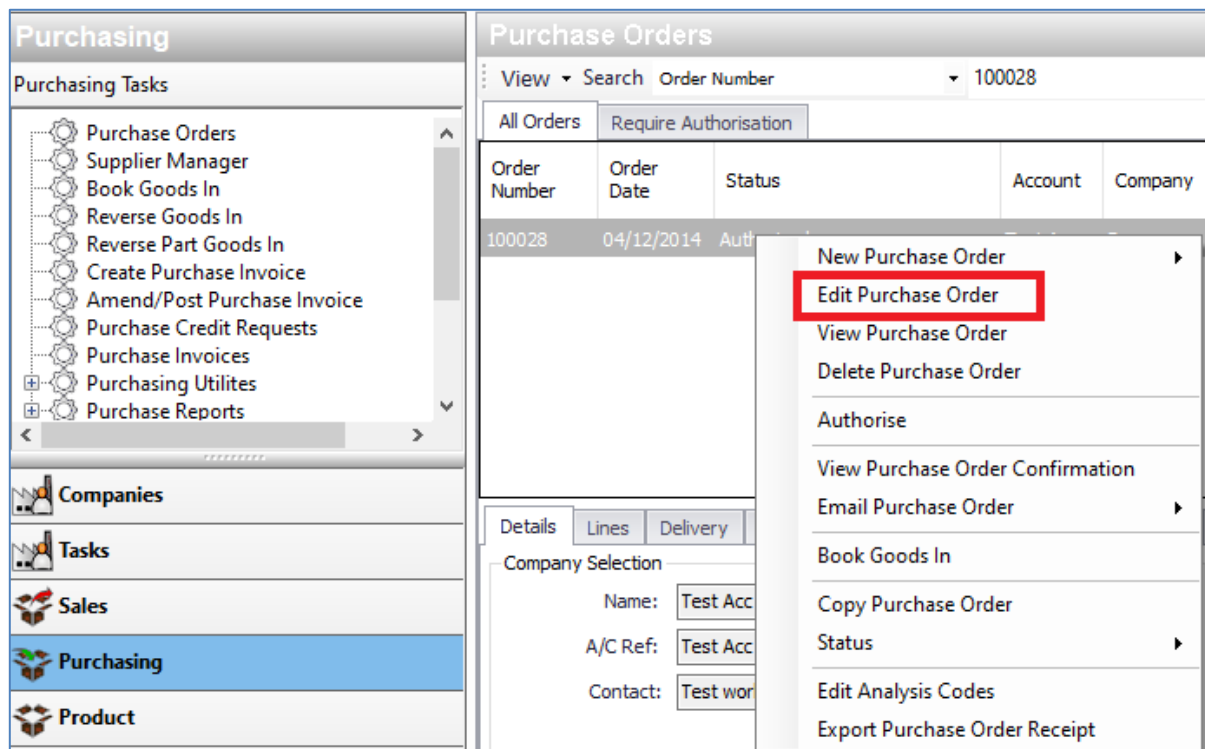
1.2. Linking Purchase Line to Sales Line

(Note: Example will be in the form of editing a Purchase Order Line.)

- a.) To link a Purchase Line to a Sales Line, select 'Purchasing' Module then select the 'Purchase Order' Option.

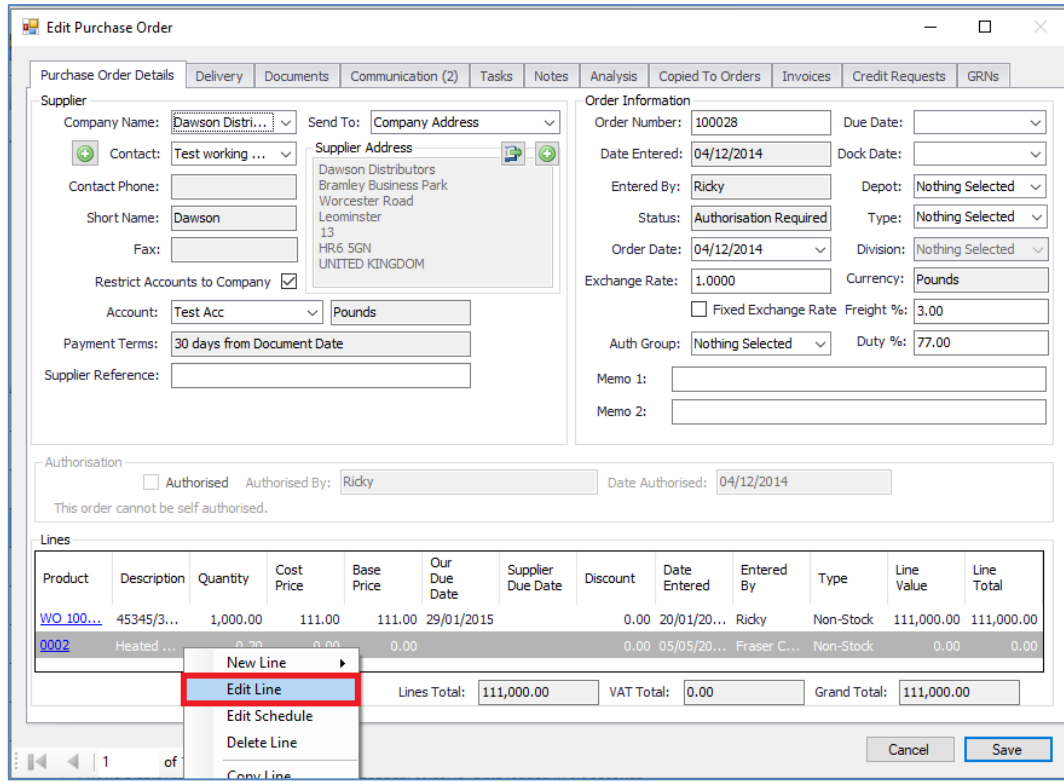


- b.) This will open the Purchase Order Manager Form, select and right-click the Purchase and select 'Edit Purchase Order' from the drop-down list.



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c.) This will open the Edit Purchase Order form, select and right-click the Purchase Line and select 'Edit Line' from the drop-down menu.



Edit Purchase Order

Purchase Order Details | Delivery | Documents | Communication (2) | Tasks | Notes | Analysis | Copied To Orders | Invoices | Credit Requests | GRNs

Supplier
 Company Name: Dawson Distri... | Send To: Company Address
 Contact: Test working ... | Supplier Address: Dawson Distributors, Bramley Business Park, Worcester Road, Leominster, 13, HR6 5GN, UNITED KINGDOM
 Contact Phone: | Short Name: Dawson | Fax: | Restrict Accounts to Company:
 Account: Test Acc | Pounds | Payment Terms: 30 days from Document Date | Supplier Reference:

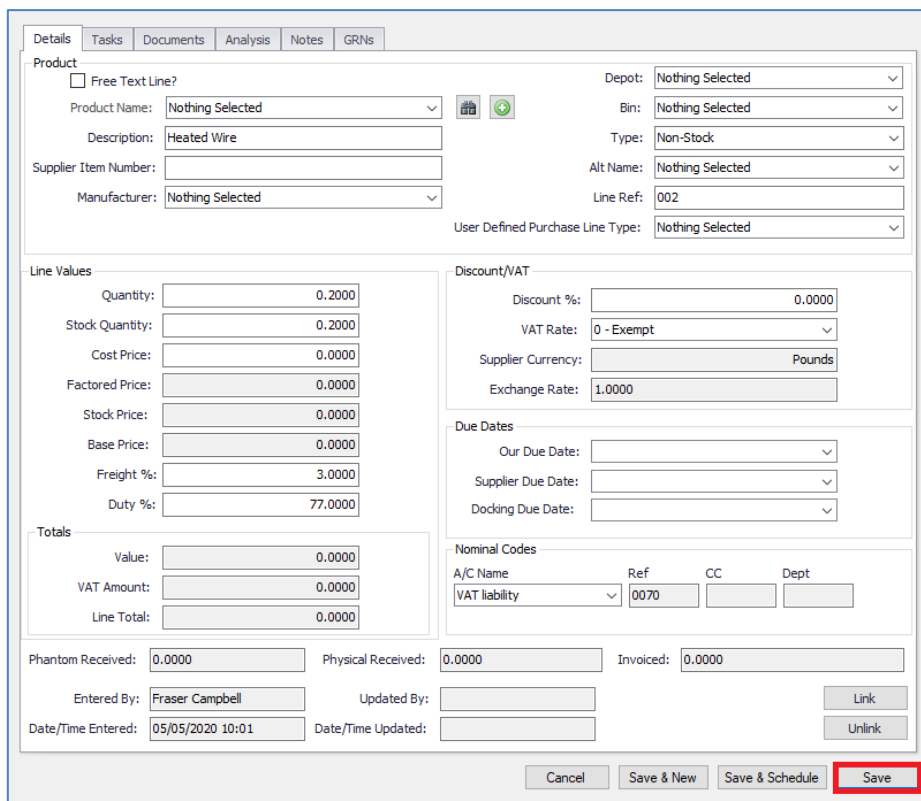
Order Information
 Order Number: 100028 | Due Date: | Date Entered: 04/12/2014 | Dock Date: | Entered By: Ricky | Depot: Nothing Selected
 Status: Authorisation Required | Type: Nothing Selected | Order Date: 04/12/2014 | Division: Nothing Selected
 Exchange Rate: 1.0000 | Currency: Pounds | Fixed Exchange Rate: | Freight %: 3.00
 Auth Group: Nothing Selected | Duty %: 77.00
 Memo 1: | Memo 2:

Authorisation
 Authorised | Authorised By: Ricky | Date Authorised: 04/12/2014
 This order cannot be self authorised.

Product	Description	Quantity	Cost Price	Base Price	Our Due Date	Supplier Due Date	Discount	Date Entered	Entered By	Type	Line Value	Line Total	
WO 100...	45345/3...	1,000.00	111.00	111.00	29/01/2015		0.00	20/01/20...	Ricky	Non-Stock	111,000.00	111,000.00	
0002	Heated ...		0.00	0.00			0.00	05/05/20...	Fraser C...	Non-Stock	0.00	0.00	
Lines Total:											111,000.00	VAT Total: 0.00	Grand Total: 111,000.00

1 of ... | Cancel | Save

d.) This will open the Edit Purchase Line form, amend any details. Once complete, select 'Save'.



Details | Tasks | Documents | Analysis | Notes | GRNs

Product
 Free Text Line? | Product Name: Nothing Selected | Description: Heated Wire | Supplier Item Number: | Manufacturer: Nothing Selected | Depot: Nothing Selected | Bin: Nothing Selected | Type: Non-Stock | Alt Name: Nothing Selected | Line Ref: 002 | User Defined Purchase Line Type: Nothing Selected

Line Values
 Quantity: 0.2000 | Stock Quantity: 0.2000 | Cost Price: 0.0000 | Factored Price: 0.0000 | Stock Price: 0.0000 | Base Price: 0.0000 | Freight %: 3.0000 | Duty %: 77.0000

Discount/VAT
 Discount %: 0.0000 | VAT Rate: 0 - Exempt | Supplier Currency: Pounds | Exchange Rate: 1.0000

Due Dates
 Our Due Date: | Supplier Due Date: | Docking Due Date:

Totals
 Value: 0.0000 | VAT Amount: 0.0000 | Line Total: 0.0000

Nominal Codes
 A/C Name: VAT liability | Ref: 0070 | CC: | Dept:

Phantom Received: 0.0000 | Physical Received: 0.0000 | Invoiced: 0.0000
 Entered By: Fraser Campbell | Updated By: | Date/Time Entered: 05/05/2020 10:01 | Date/Time Updated: | Link | Unlink

Cancel | Save & New | Save & Schedule | **Save**

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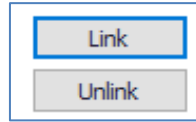
- e.) The prompt to Link the Purchase Line to Sales Line will appear. Enter the Sales Order that has the Sales Line to be linked to the Purchase Line then select the Sales Line from the drop-down list. Once complete, select 'OK'.
(Note: This requires the Sales Line to be the same as the Product used on the Purchase Line.)

- f.) A prompt to change the Sales Line to Resale if the Line isn't set already, select 'Yes' to change the Sales Line to a Resale Line type otherwise select 'No'.

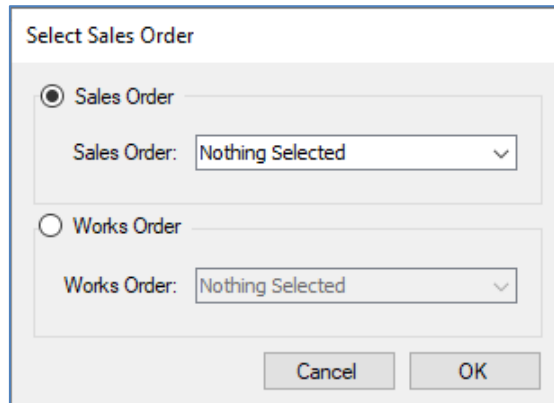
- g.) The Purchase Line will then be linked to the Sales Line shown at the bottom right of the Edit Purchase Line form. Selecting Unlink will remove the link between the Purchase Line and Sales Line.

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h.) You also can link your purchase order to a sales order or works order using the Link/Unlink buttons on the bottom right of the purchase order.



i.) Selecting Link will give you the options to pick a sales or works order from the drop down list.



j.) Selecting Unlink will remove the link from the purchase order to its linked to order.

