

# User Guide

Ver No :V01

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## Revision History & Approval Details

Version No	Date	Brief description of changes	Author	Reviewed By	Approved By
V01	01/25/5019	Initial Draft	Ravali C	Deebhan	Sharif

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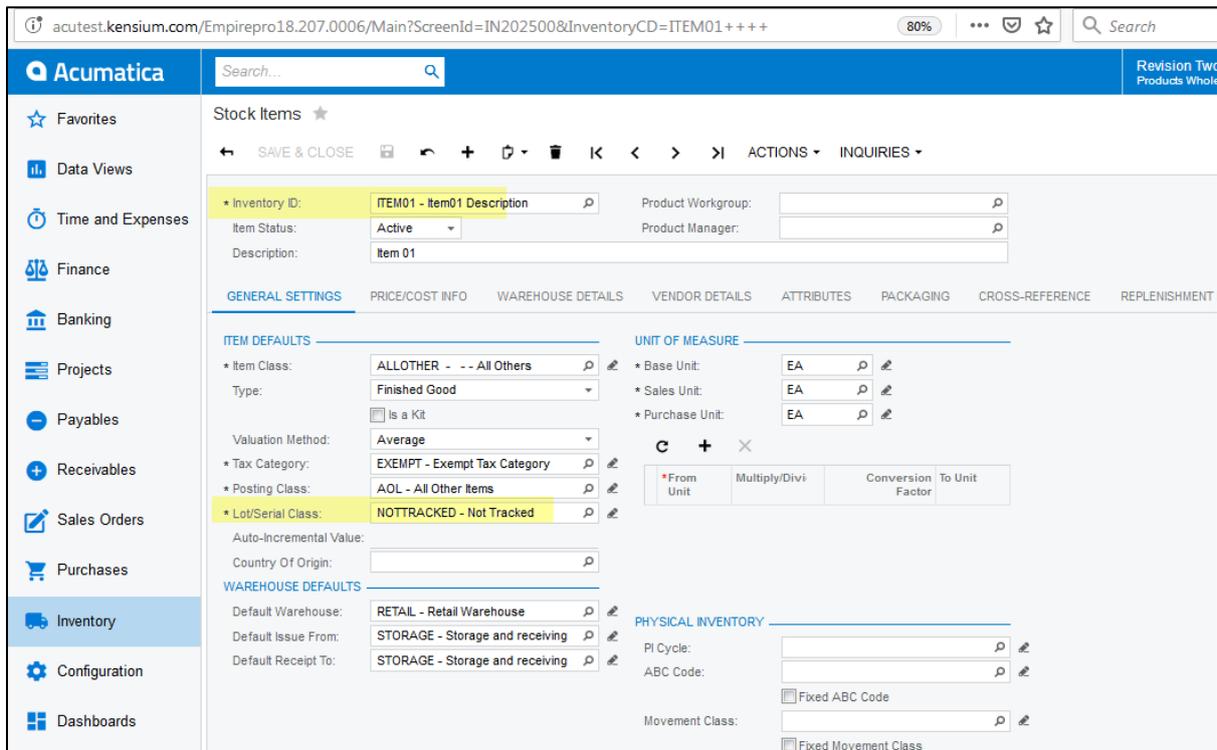
# 1. SO-PO Link with Simple Item:

## Requirement:

- I. **Sales Orders Screen:** A new non-editable column “Po Number” is available in the Sales Orders screen. If the Sales Order is linked to any Purchase Order then this column will display the respective Purchase Order number. The type of Purchase Order i.e., Normal (Purchase to Order) or Dropship (Dropship) is defined in Po Source column.
  - If the SO line is linked to any purchase Order then the user will not be able to delete the SO Line. If the respective Purchase Order is deleted then the link will be removed in the Po Number column.
- II. **Purchase Orders Screen:** A new column “Sales Order Nbr” is available in the Purchase Orders screen. If the Purchase Order is linked to any Sales Order its respective Sales Order number is displayed in Sales Order Nbr column.
- III. User has the ability to select Sales Order number manually in the Purchase Orders screen. The Sales Orders in which the item is present and which are not of Cancelled and Completed Order status are only displayed in the selector for selection.

## 1.1. SO-PO link with Po Source as “Purchase to Order”

- Navigate to Distribution ->Inventory-> Work Area-> Manage-> Stock Items
- Select 5 products for which Lot/Serial numbers are not tracked i.e., products which are not allocated



acutest.kensium.com/Empirepro18.207.0006/Main?ScreenId=IN202500&InventoryCD=ITEM+02+++ 80%

Acumatica Search... Revision Two Products Products Wholesale

Stock Items

SAVE & CLOSE ACTIONS INQUIRIES

Inventory ID: ITEM 02 - Item 02 Product Workgroup: Item Status: Active Product Manager: Description: Item 02

GENERAL SETTINGS PRICE/COST INFO WAREHOUSE DETAILS VENDOR DETAILS ATTRIBUTES PACKAGING CROSS-REFERENCE REPLENISHMENT INFO

ITEM DEFAULTS UNIT OF MEASURE

Item Class: ALLOTHER - - All Others Type: Finished Good Valuation Method: Average Tax Category: EXEMPT - Exempt Tax Category Posting Class: AOL - All Other Items Lot/Serial Class: NOTTRACKED - Not Tracked

Base Unit: EA Sales Unit: EA Purchase Unit: EA

From Unit Multiply/Divid Conversion Factor To Unit

WAREHOUSE DEFAULTS PHYSICAL INVENTORY

Default Warehouse: RETAIL - Retail Warehouse Default Issue From: STORAGE - Storage and receiving Default Receipt To: STORAGE - Storage and receiving

PI Cycle: ABC Code: Fixed ABC Code Movement Class: Fixed Movement Class

acutest.kensium.com/Empirepro18.207.0006/Main?ScreenId=IN202500&InventoryCD=ITEM+03+++ 67%

Acumatica Search... Revision Two Products Products Wholesale

Stock Items

SAVE & CLOSE ACTIONS INQUIRIES

Inventory ID: ITEM 03 - Item 03 Product Workgroup: Item Status: Active Product Manager: Description: Item 03

GENERAL SETTINGS PRICE/COST INFO WAREHOUSE DETAILS VENDOR DETAILS ATTRIBUTES PACKAGING CROSS-REFERENCE R

ITEM DEFAULTS UNIT OF MEASURE

Item Class: ALLOTHER - - All Others Type: Finished Good Valuation Method: Average Tax Category: EXEMPT - Exempt Tax Category Posting Class: AOL - All Other Items Lot/Serial Class: NOTTRACKED - Not Tracked

Base Unit: EA Sales Unit: EA Purchase Unit: EA

From Unit Multiply/Divid Conversion Factor To Unit

WAREHOUSE DEFAULTS PHYSICAL INVENTORY

Default Warehouse: RETAIL - Retail Warehouse Default Issue From: STORAGE - Storage and receiving Default Receipt To: STORAGE - Storage and receiving

PI Cycle: ABC Code: Fixed ABC Code Movement Class: Fixed Movement Class

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Acumatica Search...

Stock Items

SAVE & CLOSE ACTIONS INQUIRIES

Inventory ID: ITEM 04 - Item 04 Product Workgroup: Item Status: Active Product Manager: Description: Item 04

GENERAL SETTINGS PRICE/COST INFO WAREHOUSE DETAILS VENDOR DETAILS ATTRIBUTES PACKAGING CROSS-REFERENCE REPL

ITEM DEFAULTS UNIT OF MEASURE

Item Class: ALLOTHER - -- All Others Type: Finished Good Is a Kit: Valuation Method: Average Tax Category: EXEMPT - Exempt Tax Category Posting Class: AOL - All Other Items Lot/Serial Class: NOTTRACKED - Not Tracked Auto-Incremental Value: Country Of Origin: Default Warehouse: RETAIL - Retail Warehouse Default Issue From: STORAGE - Storage and receiving Default Receipt To: STORAGE - Storage and receiving

Base Unit: EA Sales Unit: EA Purchase Unit: EA

From Unit Multiply/Divid Conversion Factor To Unit

PHYSICAL INVENTORY

PI Cycle: ABC Code: Fixed ABC Code Movement Class: Fixed Movement Class

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Acumatica Search...

Stock Items

SAVE & CLOSE ACTIONS INQUIRIES

Inventory ID: ITEM 05 - Item 05 Product Workgroup: Item Status: Active Product Manager: Description: Item 05

GENERAL SETTINGS PRICE/COST INFO WAREHOUSE DETAILS VENDOR DETAILS ATTRIBUTES PACKAGING CROSS-REFERENCE

ITEM DEFAULTS UNIT OF MEASURE

Item Class: ALLOTHER - -- All Others Type: Finished Good Is a Kit: Valuation Method: Average Tax Category: EXEMPT - Exempt Tax Category Posting Class: AOL - All Other Items Lot/Serial Class: NOTTRACKED - Not Tracked Auto-Incremental Value: Country Of Origin: Default Warehouse: RETAIL - Retail Warehouse Default Issue From: STORAGE - Storage and receiving Default Receipt To: STORAGE - Storage and receiving

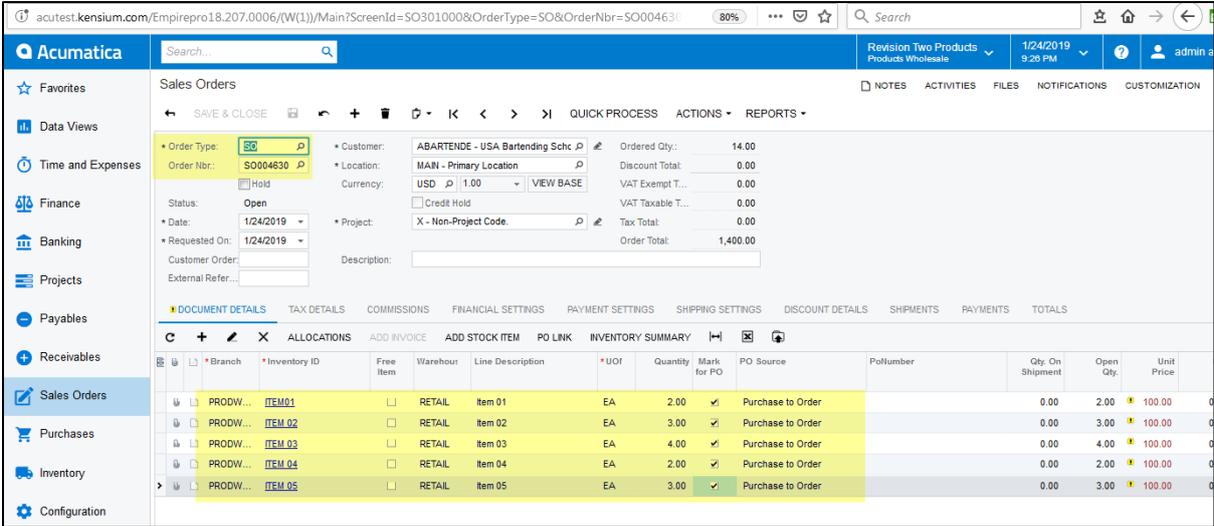
Base Unit: EA Sales Unit: EA Purchase Unit: EA

From Unit Multiply/Divid Conversion Factor To Unit

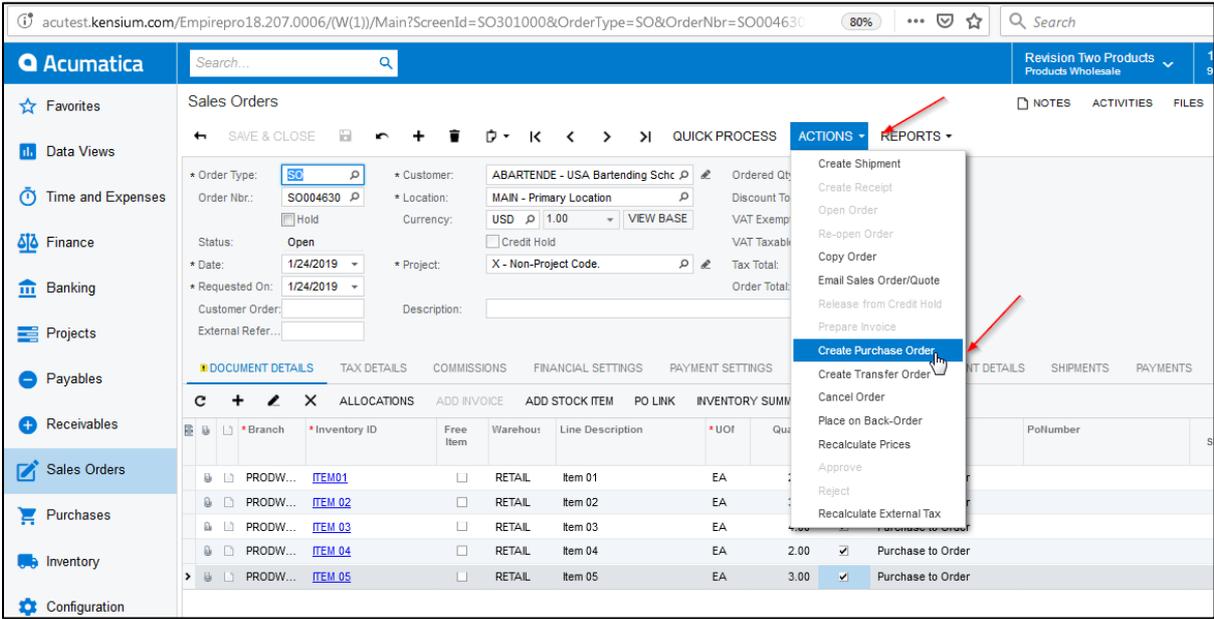
PHYSICAL INVENTORY

PI Cycle: ABC Code: Fixed ABC Code Movement Class: Fixed Movement Class

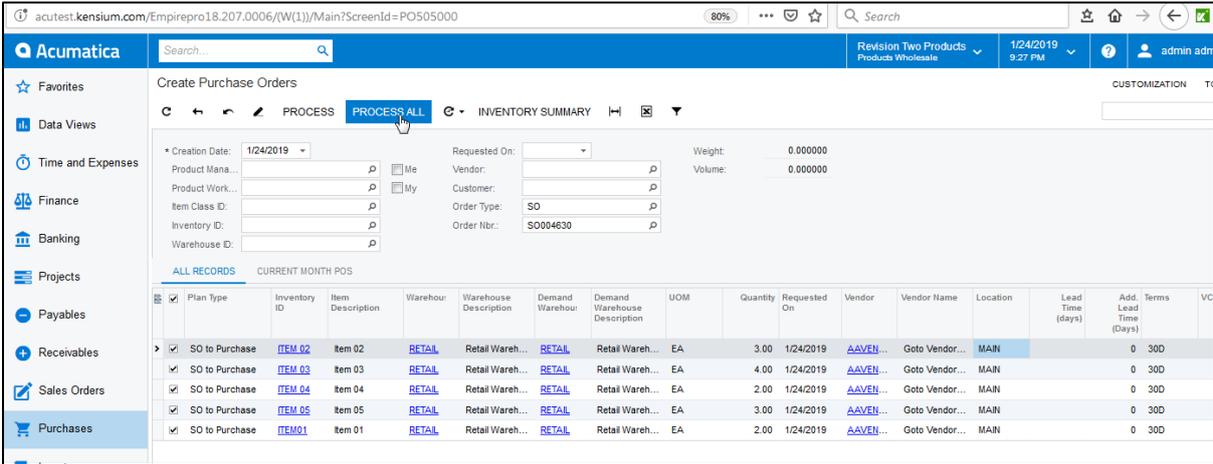
- Navigate to Distribution -> Sales Orders -> Work Area -> Sales Orders
- Create a Sales Order with 5 line items.
- Click on “Mark for PO” and select PO Source as “Purchase to order”



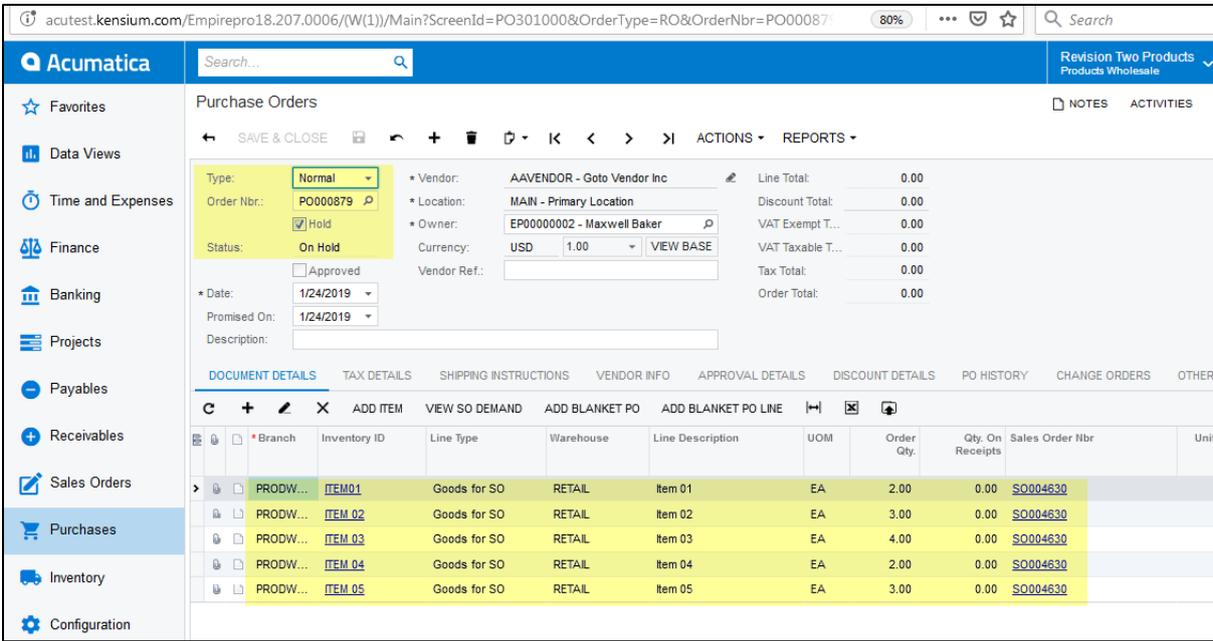
- Click on Actions->Create Purchase Order



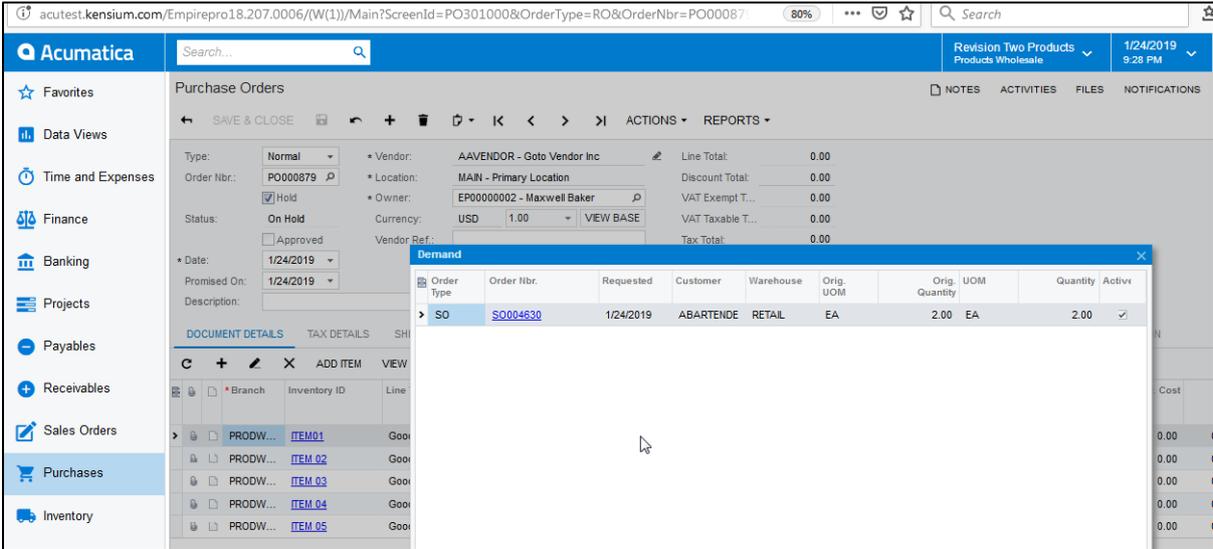
- Click on Process All



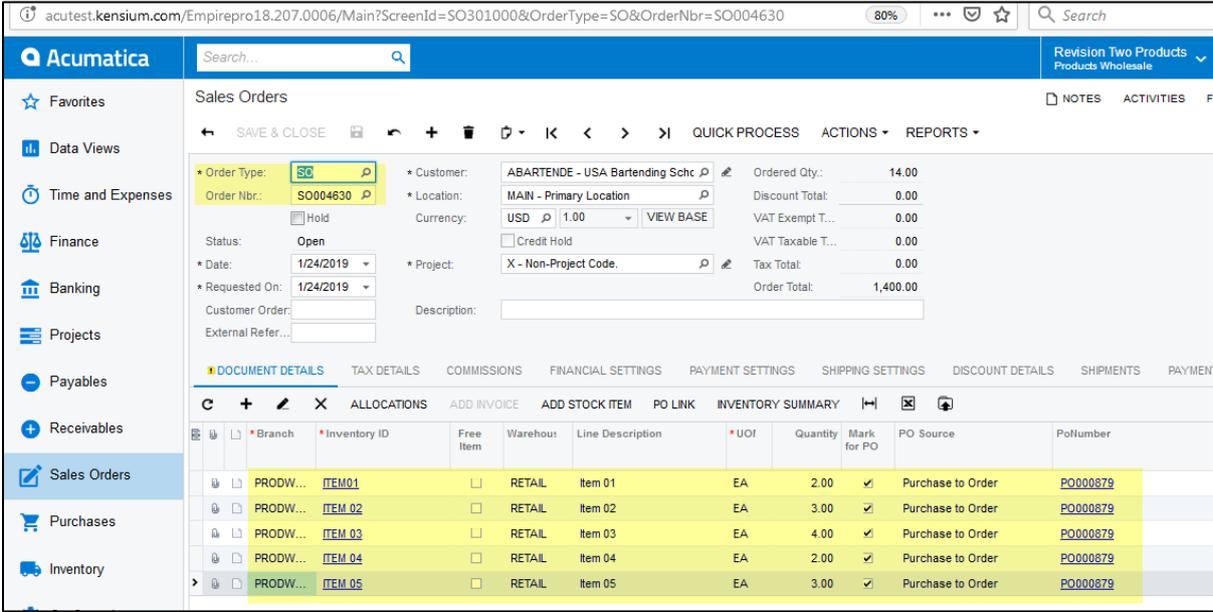
- Purchase Order is created and the Sales order number is displayed in the Sales Order number column



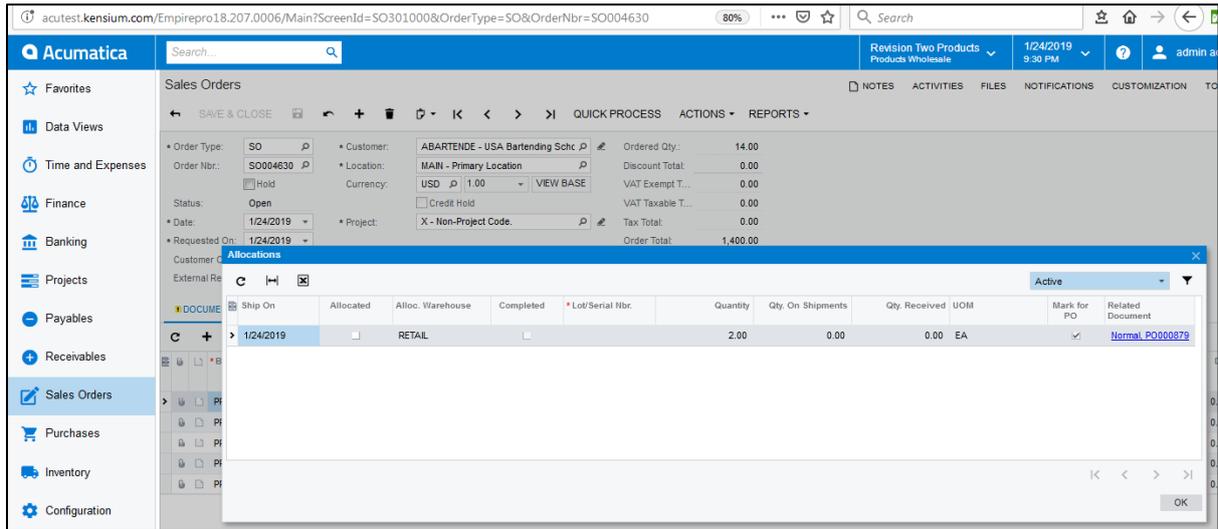
- Click on "View SO Demand". Sales Order number is displayed for all the products



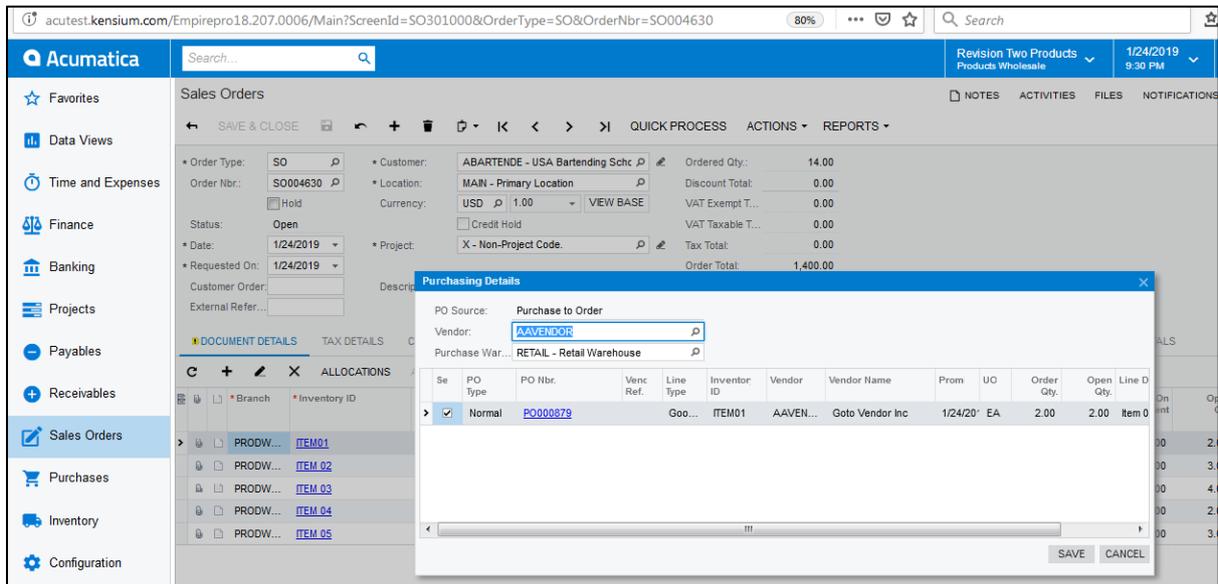
- Navigate to the Sales Orders screen and select the above Sales Order
- Purchase order Number is displayed in the Po Number column for all the line items



- Click on Allocations. Purchase Order number is displayed for all the products



- Click on PO Link. Purchase Order number is displayed for all the products



- Navigate to Purchase Orders screen
- Click on Actions ->Enter PO Receipt

acutest.kensium.com/Empirepro18.207.0006/(W(1))/Main?ScreenId=PO301000&OrderType=RO&OrderNbr=PO00087

Acumatica Search... Revision Two Product Products Wholesale

Purchase Orders

SAVE & CLOSE ACTIONS REPORTS

Type: Normal \* Vendor: AAVENDOR - Goto Vendor Inc  
 Order Nbr.: PO000879 \* Location: MAIN - Primary Location  
 Status: Open \* Owner: EP00000002 - Maxwell Baker  
 \* Date: 1/24/2019 Currency: USD 1.00  
 Promised On: 1/24/2019 Vendor Ref.:  
 Description:

DOCUMENT DETAILS TAX DETAILS SHIPPING INSTRUCTIONS VENDOR INFO

Branch	Inventory ID	Line Type	Warehouse	Line Description	UOM	Order Qty.	Qty. On Receipts	Sales Order Nbr
PROD...	ITEM 01	Goods for SO	RETAIL	Item 01	EA	2.00	0.00	SO004630
PROD...	ITEM 02	Goods for SO	RETAIL	Item 02	EA	3.00	0.00	SO004630
PROD...	ITEM 03	Goods for SO	RETAIL	Item 03	EA	4.00	0.00	SO004630
PROD...	ITEM 04	Goods for SO	RETAIL	Item 04	EA	2.00	0.00	SO004630
PROD...	ITEM 05	Goods for SO	RETAIL	Item 05	EA	3.00	0.00	SO004630

- Save the Receipt
- Release the Receipt

acutest.kensium.com/Empirepro18.207.0006/(W(1))/Main?ScreenId=PO302000&ReceiptType=RT&ReceiptNbr=PR0008

Acumatica Search... Revision Two Product Products Wholesale

Purchase Receipts

SAVE & CLOSE RETURN RELEASE ACTIONS REPORTS 00:00:16

Type: Receipt \* Vendor: AAVENDOR - Goto Vendor Inc Total Qty.: 14.00  
 Receipt Nbr.: PR000860 \* Location: MAIN - Primary Location Control Qty.: 14.00  
 Status: Released \* Create Bill Unbilled Quant...: 0.00  
 \* Date: 1/24/2019 \* Vendor Ref.: Purchase Order 01  
 \* Post Period: 01-2019 Workgroup: Owner:

DOCUMENT DETAILS PURCHASE ORDERS PR HISTORY BILLING HISTORY LANDED COSTS OTHER INFORMATION

Branch	Inventor ID	Line Type	Warehouse	Location	Transaction Descr.	UOM	Ordered Qty.	Open Qty.	Receipt Qty.	Project
PROD...	ITEM 01	Goods for SO	RETAIL	STORAGE	Item 01	EA	2.00	0.00	2.00	X
PROD...	ITEM 02	Goods for SO	RETAIL	STORAGE	Item 02	EA	3.00	0.00	3.00	X
PROD...	ITEM 03	Goods for SO	RETAIL	STORAGE	Item 03	EA	4.00	0.00	4.00	X
PROD...	ITEM 04	Goods for SO	RETAIL	STORAGE	Item 04	EA	2.00	0.00	2.00	X
PROD...	ITEM 05	Goods for SO	RETAIL	STORAGE	Item 05	EA	3.00	0.00	3.00	X

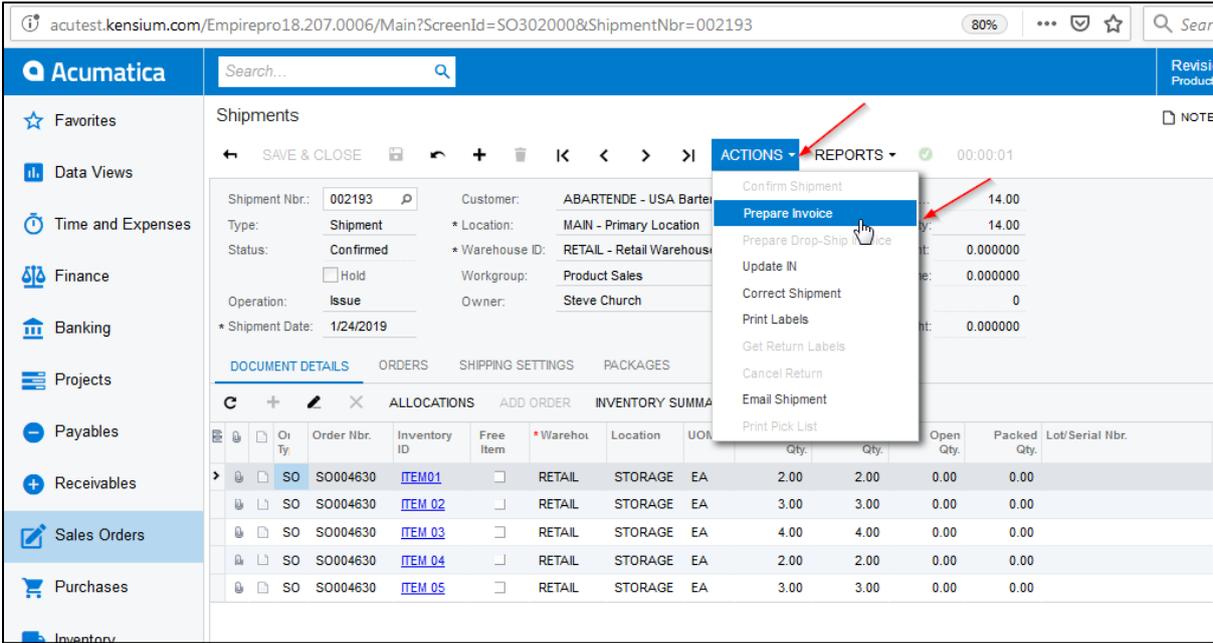
- Navigate to the Sales Order screen.
- Select the Sales Order
- Click on Actions->Create Shipment

The screenshot shows the Acumatica Sales Orders interface. The 'ACTIONS' dropdown menu is open, and 'Create Shipment' is highlighted. The background shows order details for Order Nbr: SO004630, Status: Open, and a list of items including ITEM01 through ITEM05.

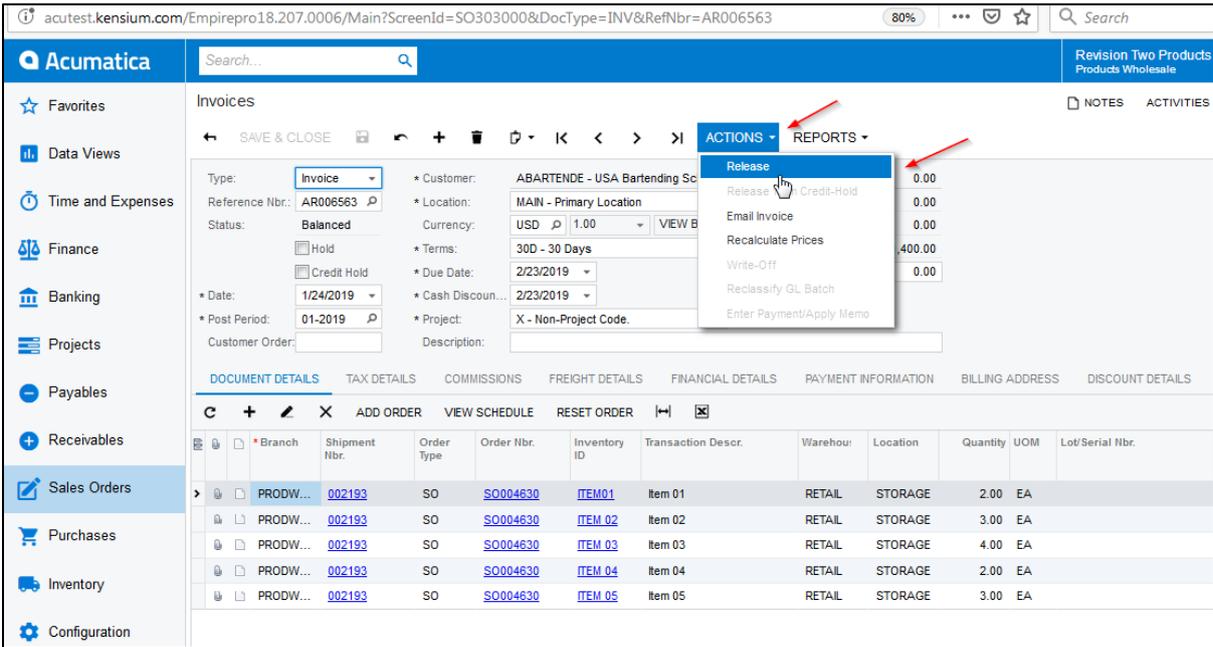
- Click on Actions->Confirm Shipment

The screenshot shows the Acumatica Shipments interface. The 'ACTIONS' dropdown menu is open, and 'Prepare Invoice' is highlighted. The background shows shipment details for Shipment Nbr: 002193, Type: Shipment, and a list of items including ITEM01 through ITEM05.

- Click on Actions->Prepare Invoice



- Click on Actions->Release



The screenshot shows the Acumatica 'Invoices' screen. The top navigation bar includes 'Acumatica', a search field, and 'Revision Two Products Wholesale'. The left sidebar contains navigation icons for Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders, Purchases, and Inventory. The main content area displays invoice details for 'Invoice' type, reference number 'AR006563', and status 'Open'. Key fields include Customer: 'ABARTENDE - USA Bartending School', Location: 'MAIN - Primary Location', Currency: 'USD', and Date: '1/24/2019'. A summary table on the right shows 'Balance: 1,400.00' and 'Amount: 1,400.00'. Below the details are tabs for 'DOCUMENT DETAILS', 'TAX DETAILS', 'COMMISSIONS', 'FREIGHT DETAILS', 'FINANCIAL DETAILS', 'PAYMENT INFORMATION', 'BILLING ADDRESS', and 'DISCOUNT DE'. A table below the tabs lists five line items with columns for Branch, Shipment Nbr., Order Type, Order Nbr., Inventory ID, Transaction Descr., Warehouse, Location, Quantity, UOM, and Lot/Serial Nbr.

Branch	Shipment Nbr.	Order Type	Order Nbr.	Inventory ID	Transaction Descr.	Warehouse	Location	Quantity	UOM	Lot/Serial Nbr.
PRODW...	002193	SO	SO004630	ITEM01	Item 01	RETAIL	STORAGE	2.00	EA	
PRODW...	002193	SO	SO004630	ITEM02	Item 02	RETAIL	STORAGE	3.00	EA	
PRODW...	002193	SO	SO004630	ITEM03	Item 03	RETAIL	STORAGE	4.00	EA	
PRODW...	002193	SO	SO004630	ITEM04	Item 04	RETAIL	STORAGE	2.00	EA	
PRODW...	002193	SO	SO004630	ITEM05	Item 05	RETAIL	STORAGE	3.00	EA	

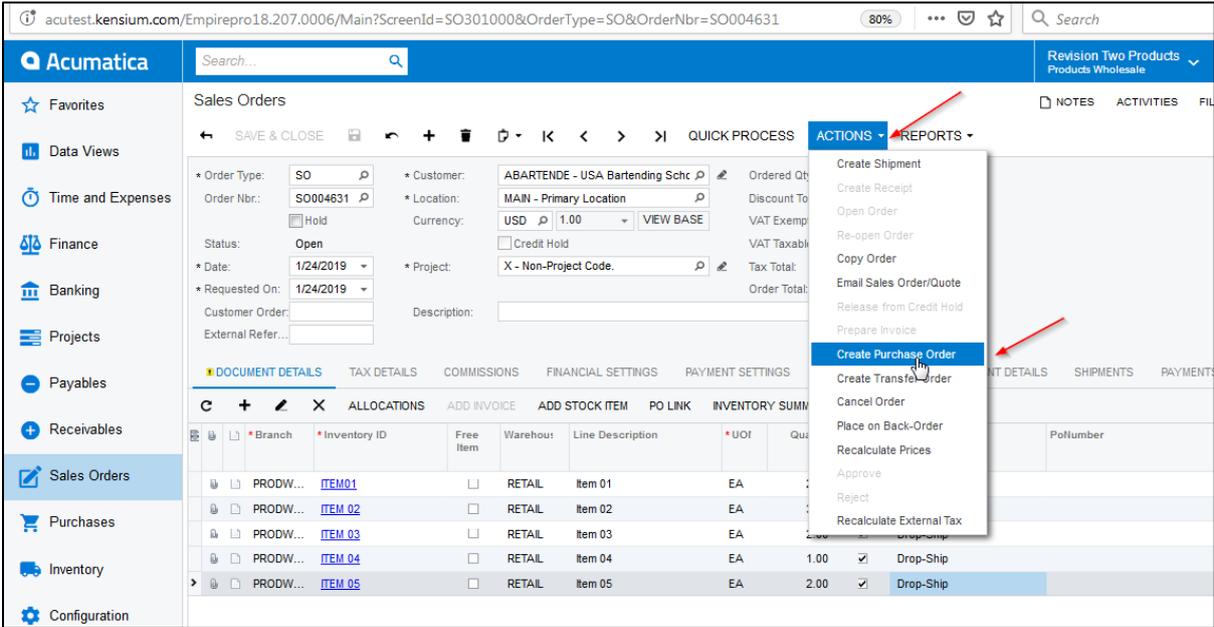
### 1.2. SO-PO link with Po Source as “Dropship”

- Navigate to Distribution -> Sales Orders -> Work Area -> Sales Orders
- Create a Sales Order with 5 line items
- Click on “Mark for PO” and select Po Source as “Dropship”

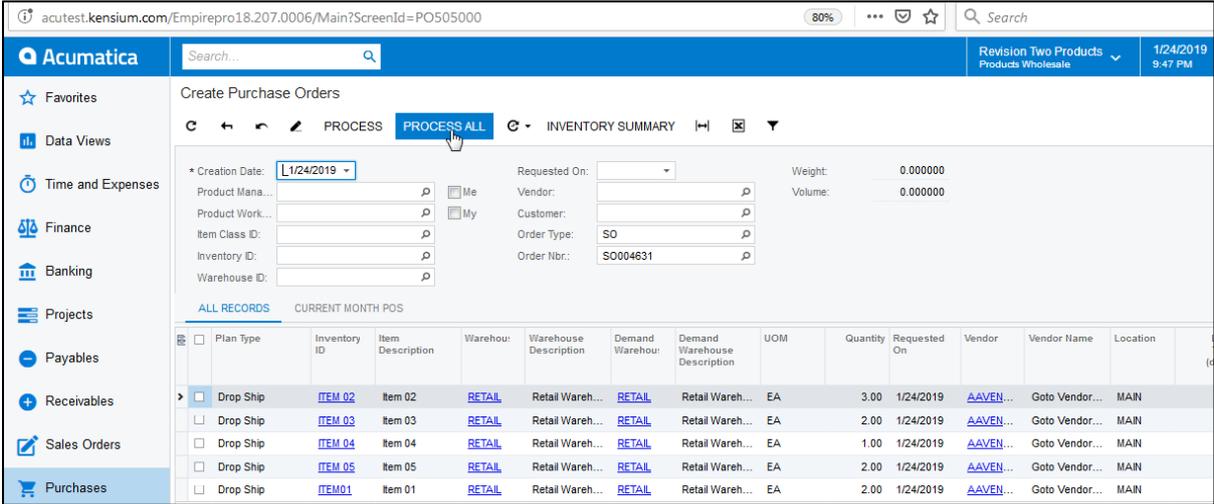
The screenshot shows the Acumatica 'Sales Orders' screen. The top navigation bar includes 'Acumatica', a search field, and 'Revision Two Products Wholesale'. The left sidebar contains navigation icons for Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders, Purchases, and Inventory. The main content area displays sales order details for 'SO' type, order number 'SO004631', and status 'Open'. Key fields include Customer: 'ABARTENDE - USA Bartending Schc', Location: 'MAIN - Primary Location', Currency: 'USD', and Date: '1/24/2019'. A summary table on the right shows 'Ordered Qty.: 10.00' and 'Order Total: 1,000.00'. Below the details are tabs for 'DOCUMENT DETAILS', 'TAX DETAILS', 'COMMISSIONS', 'FINANCIAL SETTINGS', 'PAYMENT SETTINGS', 'SHIPPING SETTINGS', 'DISCOUNT DETAILS', 'SHIPMENTS', and 'PAYMEN'. A table below the tabs lists five line items with columns for Branch, Inventory ID, Free Item, Warehouse, Line Description, UOI, Quantity, Mark for PO, PO Source, and PoNumber.

Branch	Inventory ID	Free Item	Warehouse	Line Description	UOI	Quantity	Mark for PO	PO Source	PoNumber
PRODW...	ITEM01		RETAIL	Item 01	EA	2.00	✓	Drop-Ship	
PRODW...	ITEM02		RETAIL	Item 02	EA	3.00	✓	Drop-Ship	
PRODW...	ITEM03		RETAIL	Item 03	EA	2.00	✓	Drop-Ship	
PRODW...	ITEM04		RETAIL	Item 04	EA	1.00	✓	Drop-Ship	
PRODW...	ITEM05		RETAIL	Item 05	EA	2.00	✓	Drop-Ship	

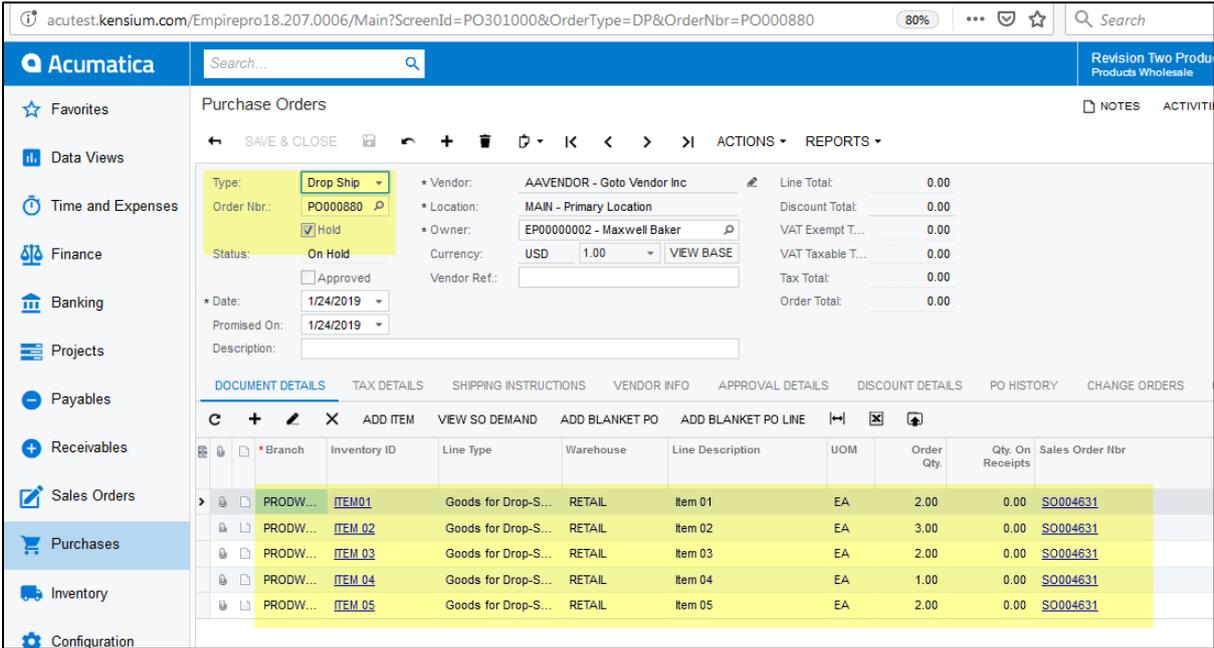
- Click on Actions->Create Purchase Order



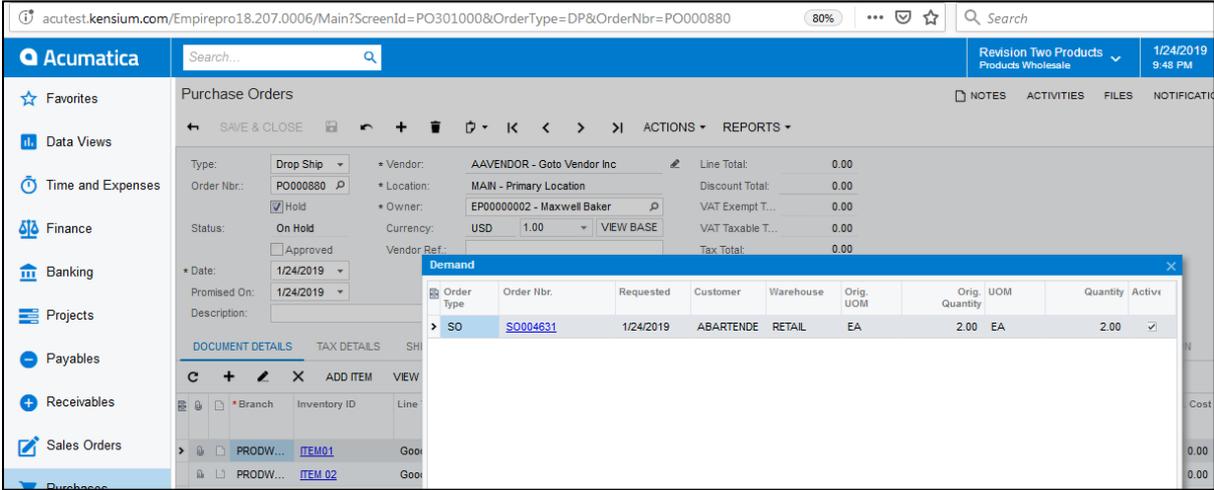
- Click on Process All



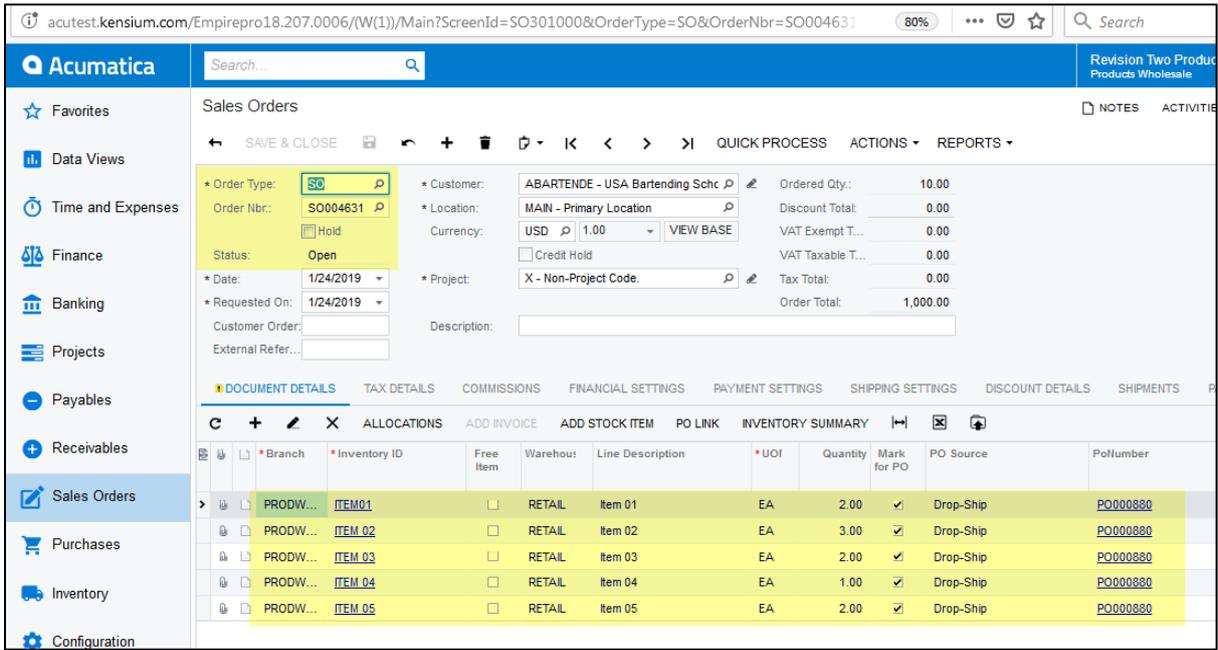
- Purchase Order is created and the Sales order number is displayed in the Sales Order number column



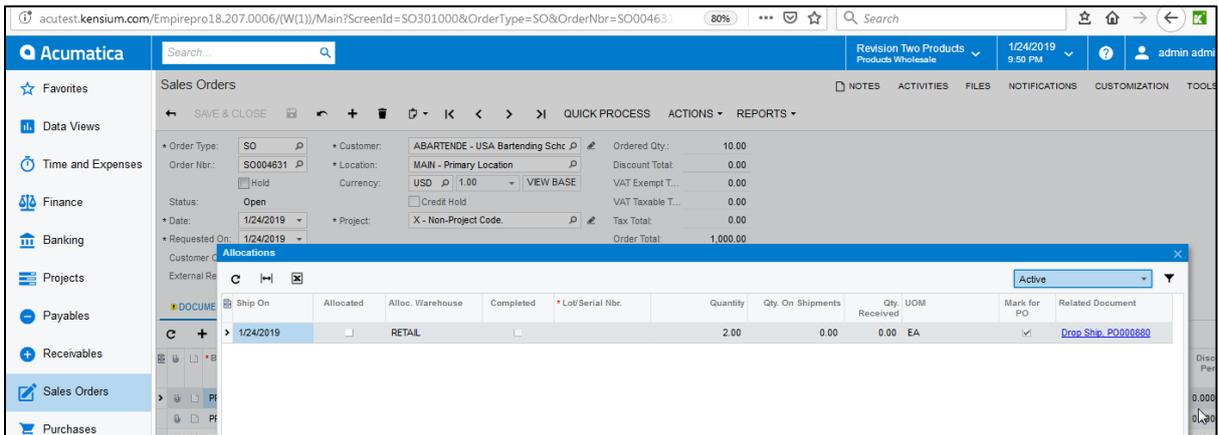
- Click on "View SO Demand". Sales Order number is displayed for all the products



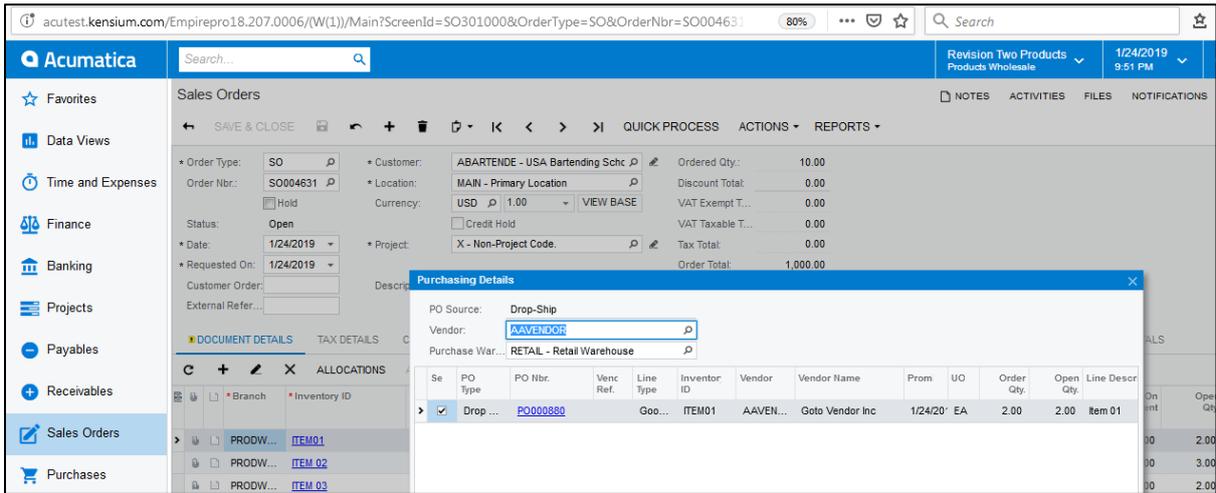
- Navigate to the Sales Orders screen and select the above Sales Order
- Purchase order Number is displayed in the Po Number column for all the line items



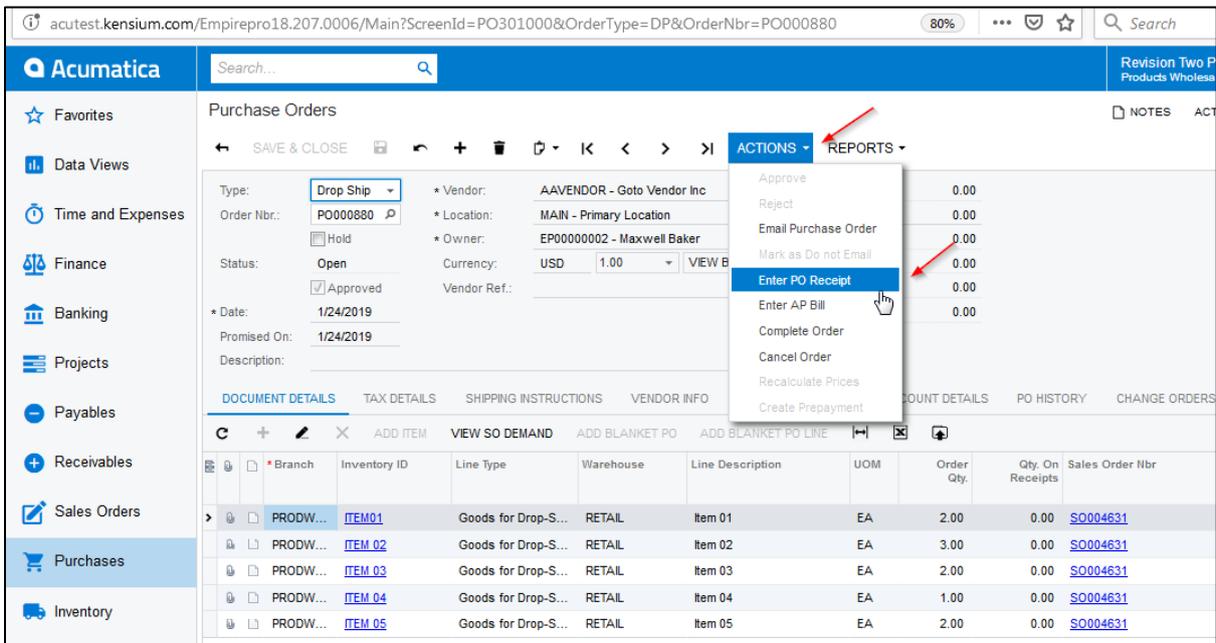
- Click on Allocations. Purchase Order number is displayed for all the products



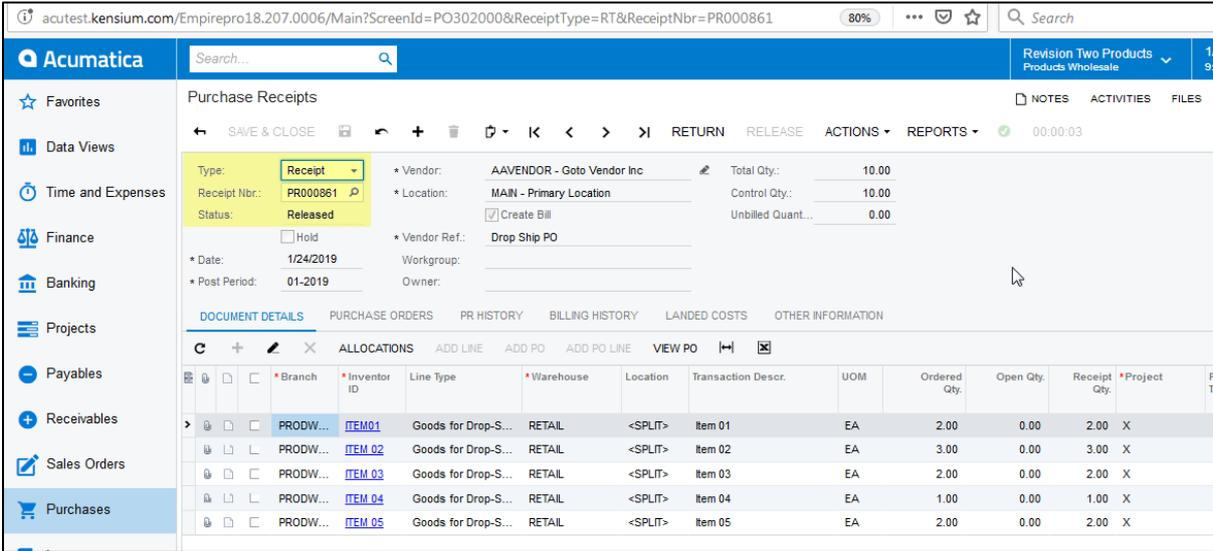
- Click on PO Link. Purchase Order number is displayed for all the products



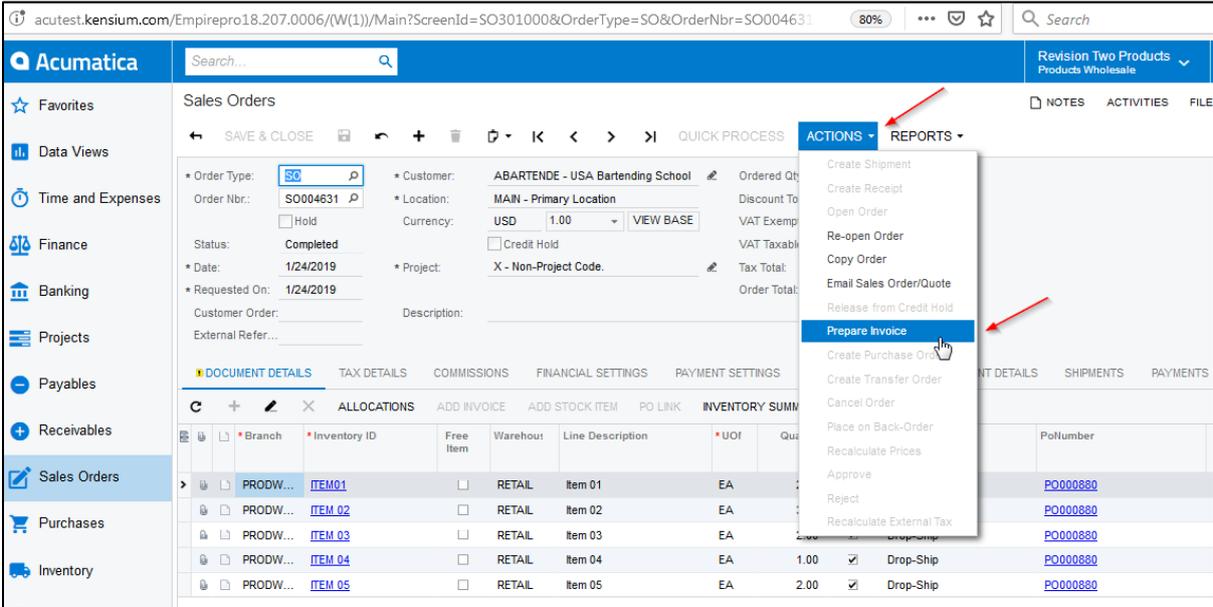
- Navigate to Purchase Orders screen
- Click on Actions ->Enter PO Receipt



- Save the Receipt
- Release the Receipt



- Navigate to the Sales Order
- Click on Actions->Prepare Invoice



- Click on Actions->Release

The screenshot shows the Acumatica Invoices screen. The 'Type' is set to 'Invoice' and the status is 'Balanced'. The 'ACTIONS' menu is open, with 'Release' selected. The 'Release' menu includes options like 'Release from Credit Memo', 'Email Invoice', 'Recalculate Prices', 'Write-Off', 'Reclassify GL Batch', and 'Enter Payment/Apply Memo'. The table below shows five items (Item 01 to Item 05) with quantities ranging from 1.00 to 3.00.

Branch	Shipment Nbr.	Order Type	Order Nbr.	Inventory ID	Transaction Descr.	Warehouse	Location	Quantity	UOM	Lot/Serial Nbr
PROD...	PR000861	SO	SO004631	ITEM01	Item 01	RETAIL	<SPLIT>	2.00	EA	
PROD...	PR000861	SO	SO004631	ITEM 02	Item 02	RETAIL	<SPLIT>	3.00	EA	
PROD...	PR000861	SO	SO004631	ITEM 03	Item 03	RETAIL	<SPLIT>	2.00	EA	
PROD...	PR000861	SO	SO004631	ITEM 04	Item 04	RETAIL	<SPLIT>	1.00	EA	
PROD...	PR000861	SO	SO004631	ITEM 05	Item 05	RETAIL	<SPLIT>	2.00	EA	

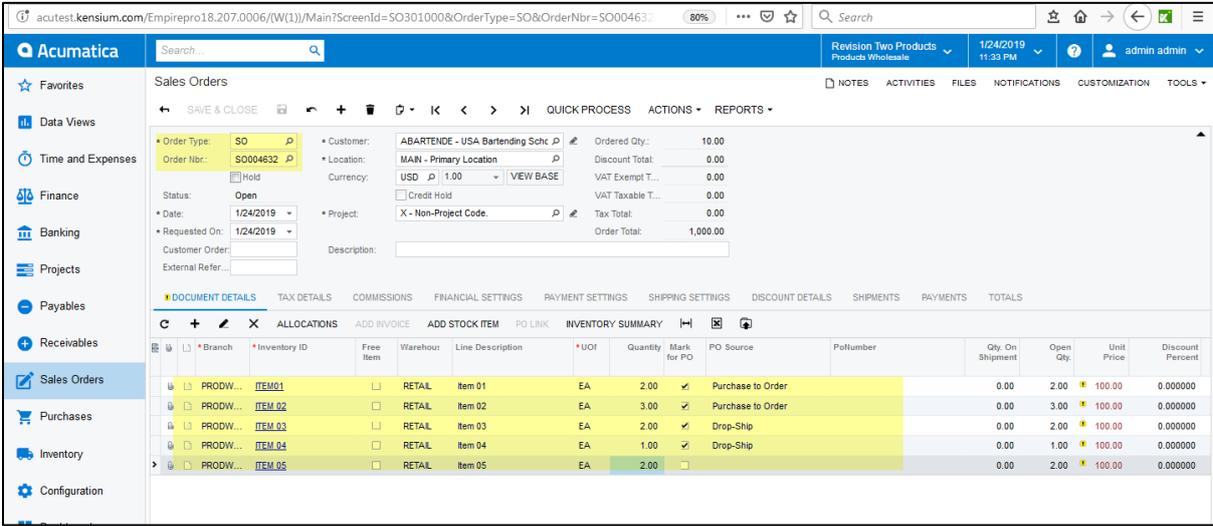
The screenshot shows the Acumatica Invoices screen with the 'Status' set to 'Open'. The 'ACTIONS' menu is now closed. The 'FINANCIAL DETAILS' tab is active, showing a balance of 1,000.00 and an amount of 1,000.00. The table below is identical to the one in the previous screenshot.

Branch	Shipment Nbr.	Order Type	Order Nbr.	Inventory ID	Transaction Descr.	Warehouse	Location	Quantity	UOM	Lot/Serial Nbr
PROD...	PR000861	SO	SO004631	ITEM01	Item 01	RETAIL	<SPLIT>	2.00	EA	
PROD...	PR000861	SO	SO004631	ITEM 02	Item 02	RETAIL	<SPLIT>	3.00	EA	
PROD...	PR000861	SO	SO004631	ITEM 03	Item 03	RETAIL	<SPLIT>	2.00	EA	
PROD...	PR000861	SO	SO004631	ITEM 04	Item 04	RETAIL	<SPLIT>	1.00	EA	
PROD...	PR000861	SO	SO004631	ITEM 05	Item 05	RETAIL	<SPLIT>	2.00	EA	

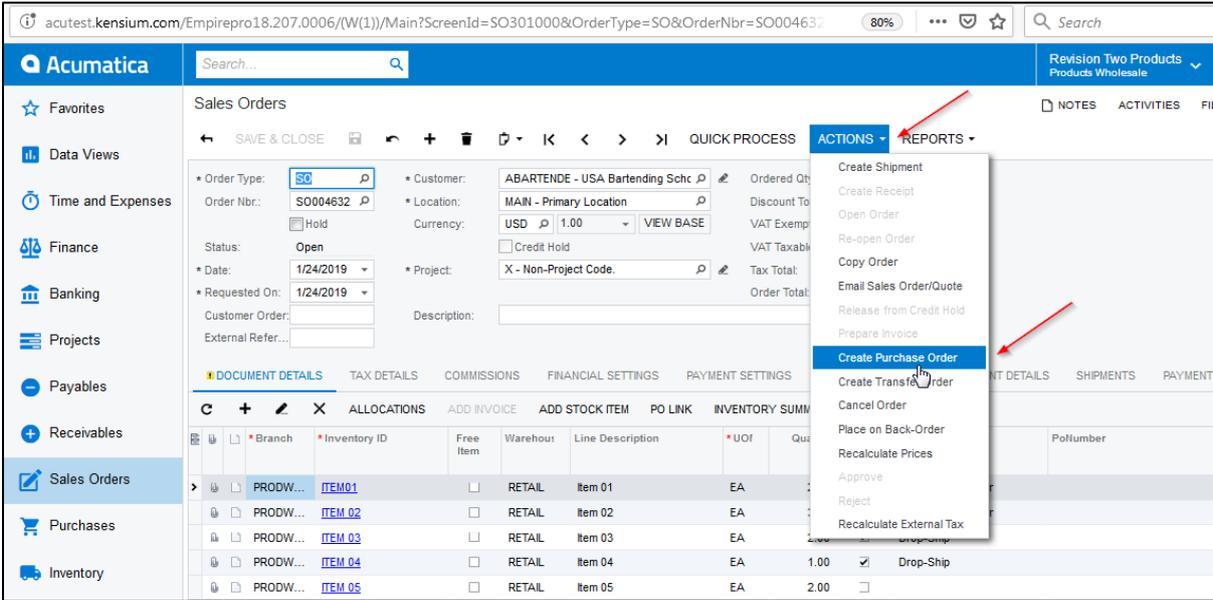
### 1.3. SO-PO link with Po Source as “Purchase to Order” and “Dropship”

- Click on Distribution -> Sales Orders -> Work Area -> Sales Orders
- Create a Sales Order with “Item01”, “Item02”, “Item03”, “Item04” and “Item05”

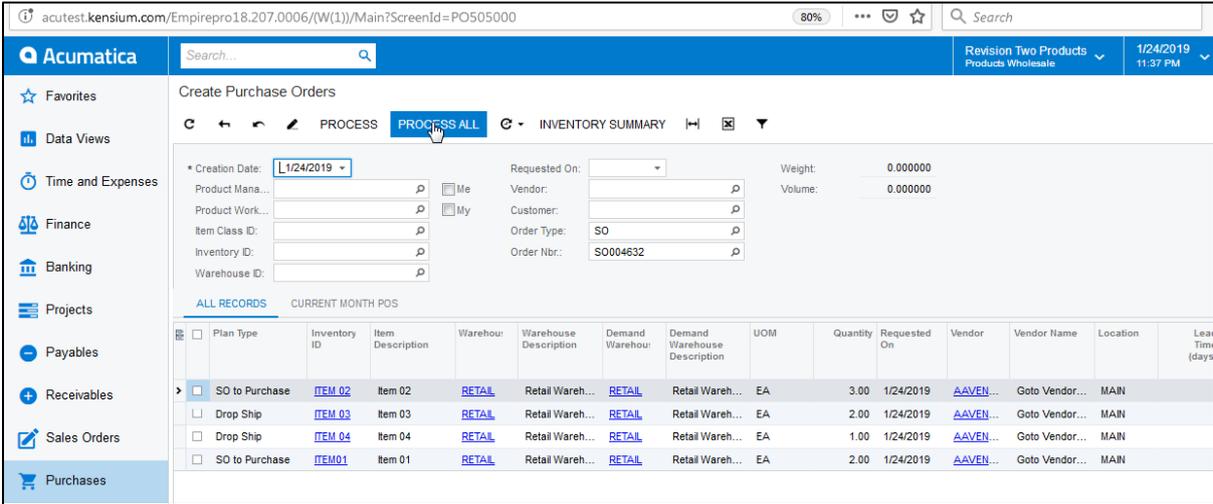
- The products “Item01” and “Item02” are marked as “Purchase to order”, “Item 03” and “Item 04” are marked as “Dropship” and “Item 05” already has quantity.
- Select the “Mark for PO” checkbox and select PO Source as “Purchase to Order” for Item01, Item04 and Item02.



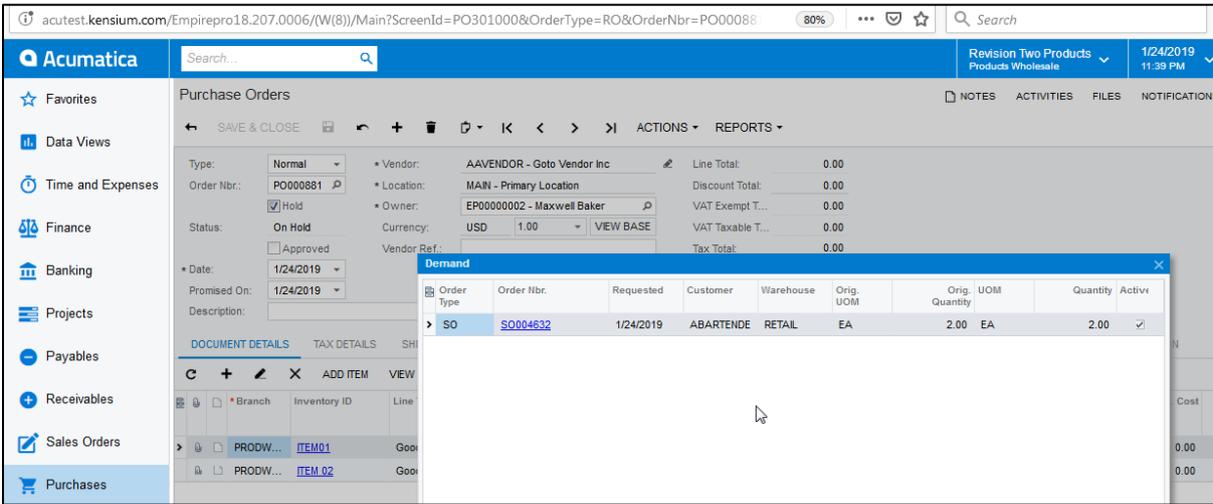
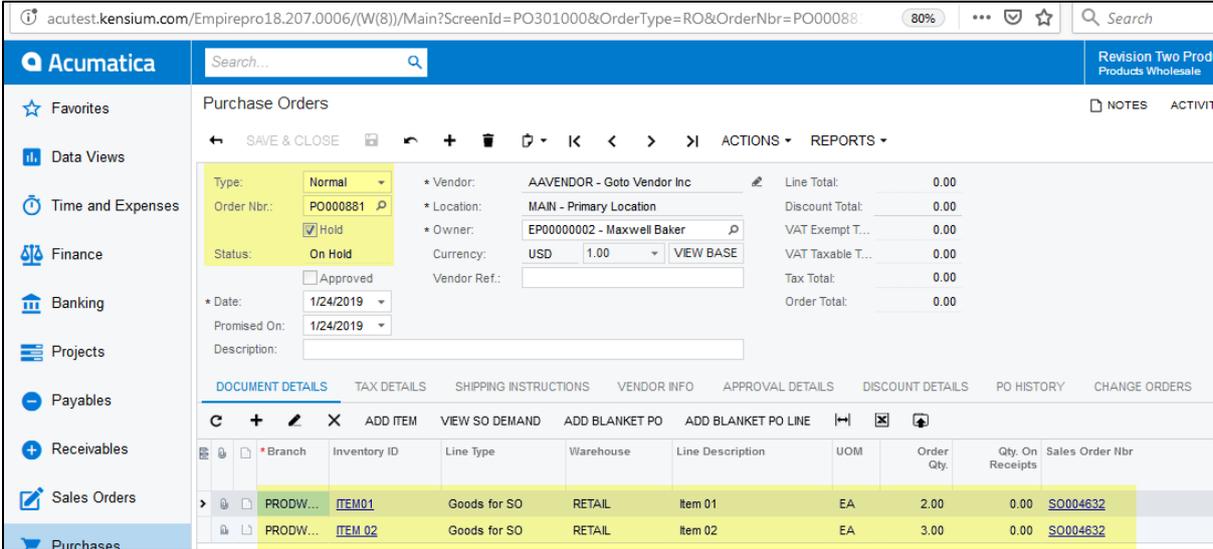
- Click on Actions -> Create Purchase Orders.



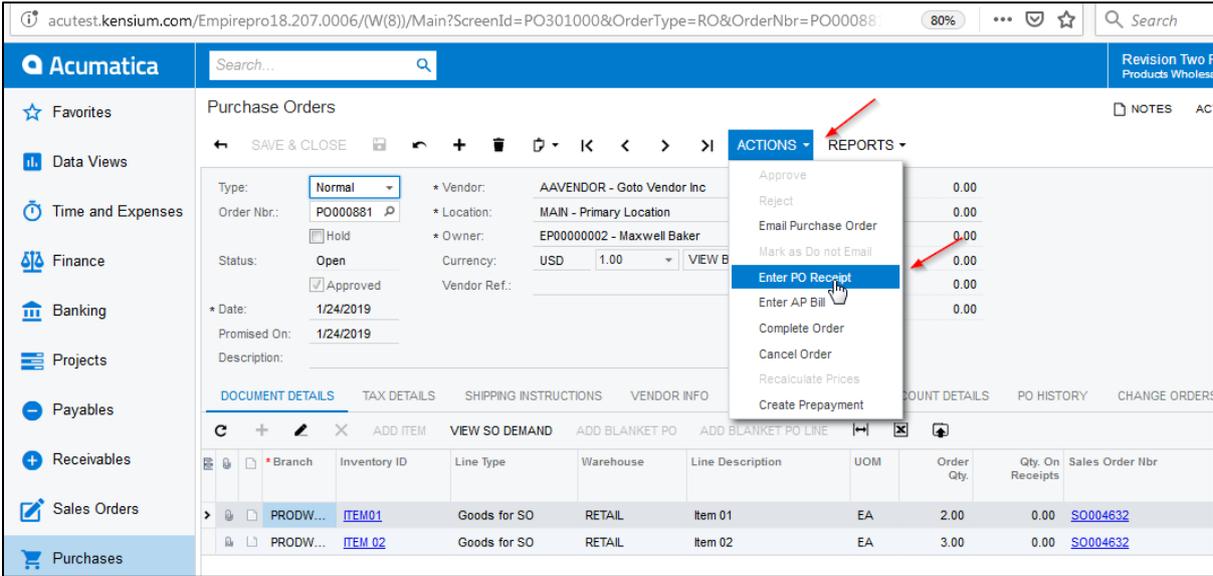
- Click on Process All



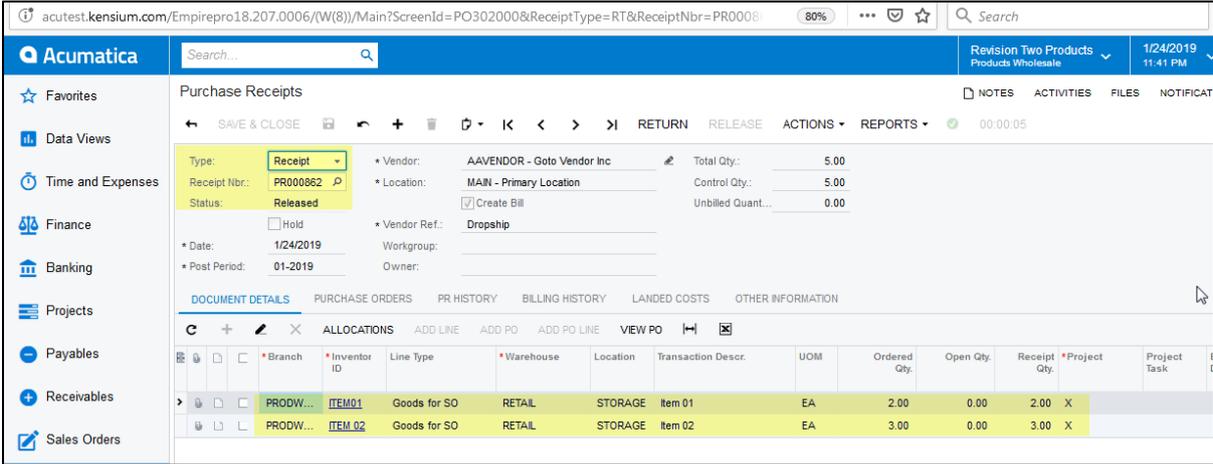
- For the Products which are marked as “Purchase to Order” Normal Type PO is created
- SO link should be displayed for all the items in SO Number column and View SO Demand popup



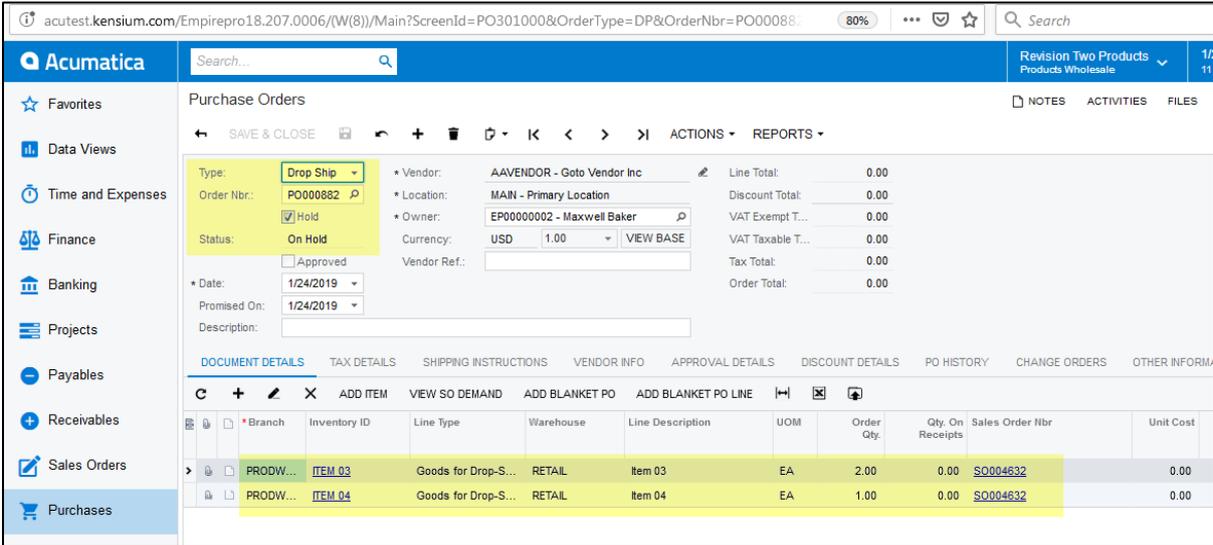
- Click on Actions -> Enter PO receipt



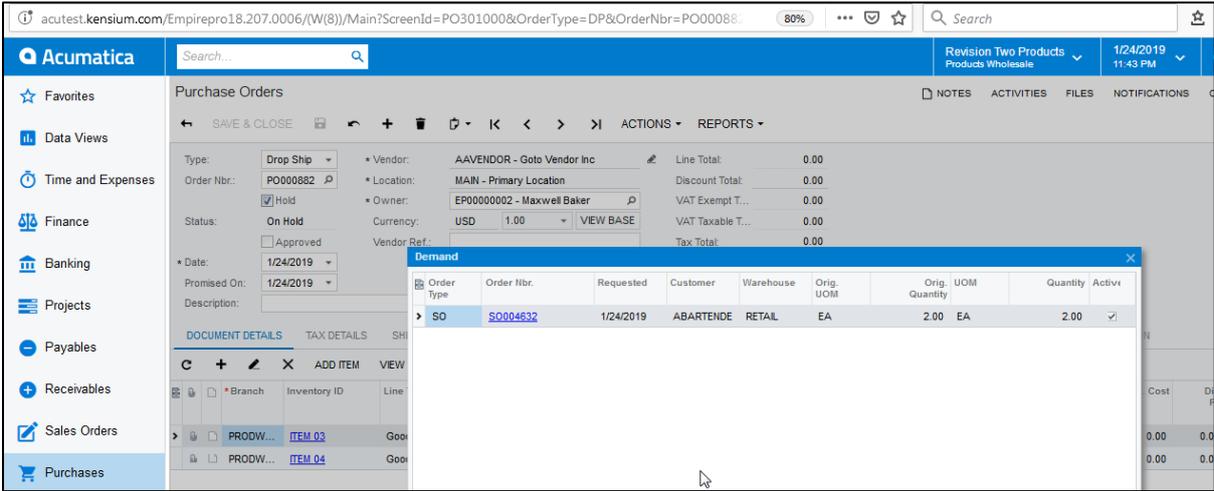
- Click on save and Release



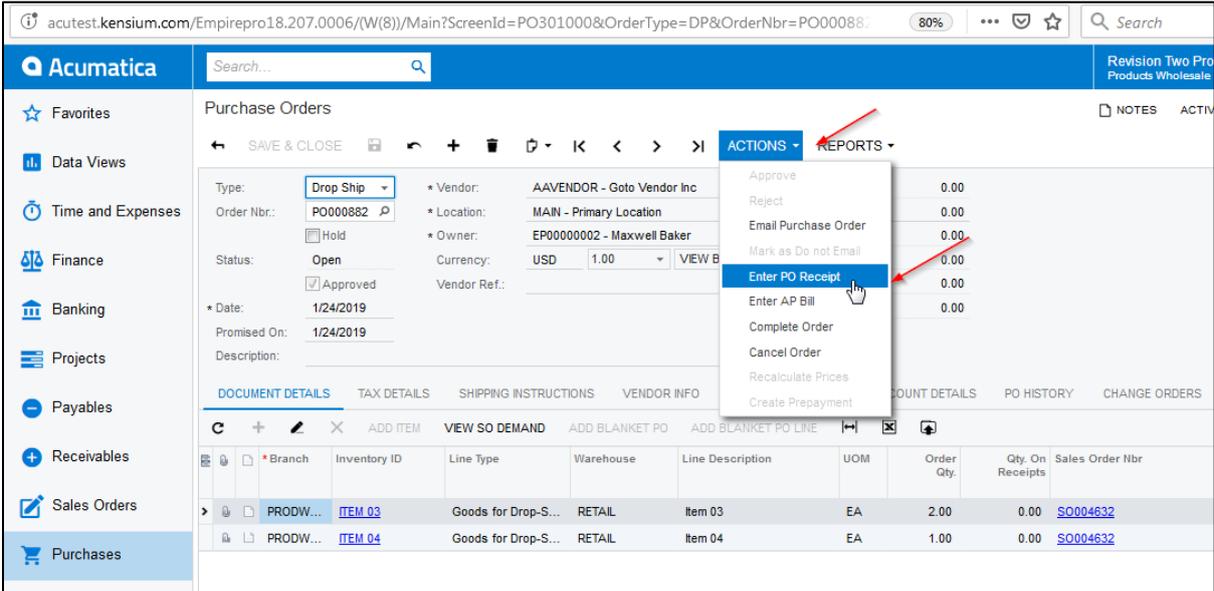
- For the items which are marked for Dropship, Dropship PO is created



- SO link is displayed for both the products if we click on "View SO Demand"



- Click on Actions->Enter PO Receipt



- Save the receipt and Release

acutest.kensium.com/Empirepro18.207.0006/(W(8))/Main?ScreenId=PO302000&ReceiptType=RT&ReceiptNbr=PR000863

Acumatica Search... Revision Two Products Products Wholesale

Purchase Receipts NOTES ACTIVITIES

SAVE & CLOSE RETURN RELEASE ACTIONS REPORTS 00:00:03

Type: Receipt \* Vendor: AAVENDOR - Goto Vendor Inc Total Qty: 3.00  
 Receipt Nbr.: PR000863 \* Location: MAIN - Primary Location Control Qty: 3.00  
 Status: Released \* Create Bill Unbilled Quant... 0.00  
 Hold \* Vendor Ref.: Dropship  
 \* Date: 1/25/2019 Workgroup:  
 \* Post Period: 01-2019 Owner:

DOCUMENT DETAILS PURCHASE ORDERS PR HISTORY BILLING HISTORY LANDED COSTS OTHER INFORMATION

Branch	Inventor ID	Line Type	Warehouse	Location	Transaction Descr.	UOM	Ordered Qty.	Open Qty.	Receipt Qty.	Project
PRODW...	ITEM_03	Goods for Drop-S...	RETAIL	<SPLIT>	Item 03	EA	2.00	0.00	2.00	X
PRODW...	ITEM_04	Goods for Drop-S...	RETAIL	<SPLIT>	Item 04	EA	1.00	0.00	1.00	X

- For the Sales Order created the respective Purchase Order number is displayed in PO Number column.

acutest.kensium.com/Empirepro18.207.0006/(W(8))/Main?ScreenId=SO301000&OrderType=SO&OrderNbr=SO004632

Acumatica Search... Revision Two Products Products Wholesale

Sales Orders NOTES ACTIVITIES FILES

SAVE & CLOSE QUICK PROCESS ACTIONS REPORTS

\* Order Type: SO \* Customer: ABARTENDE - USA Bartending Schc Ordered Qty.: 10.00  
 Order Nbr.: SO004632 \* Location: MAIN - Primary Location Discount Total: 0.00  
 Hold Currency: USD 1.00 VIEW BASE VAT Exempt T... 0.00  
 Status: Open \* Project: X - Non-Project Code. Tax Total: 0.00  
 \* Date: 1/24/2019 \* Requested On: 1/24/2019 Order Total: 1,000.00  
 Customer Order: Description:  
 External Refer...:

DOCUMENT DETAILS TAX DETAILS COMMISSIONS FINANCIAL SETTINGS PAYMENT SETTINGS SHIPPING SETTINGS DISCOUNT DETAILS SHIPMENTS PAYMENTS

Branch	Inventory ID	Free Item	Warehouse	Line Description	UOI	Quantity	Mark for PO	PO Source	PoNumber
PRODW...	ITEM_01		RETAIL	Item 01	EA	2.00	✓	Purchase to Order	PO000881
PRODW...	ITEM_02		RETAIL	Item 02	EA	3.00	✓	Purchase to Order	PO000881
PRODW...	ITEM_03		RETAIL	Item 03	EA	2.00	✓	Drop-Ship	PO000882
PRODW...	ITEM_04		RETAIL	Item 04	EA	1.00	✓	Drop-Ship	PO000882
PRODW...	ITEM_05		RETAIL	Item 05	EA	2.00			

- Click on PO link for all the products

The screenshot shows the Acumatica Sales Order screen. The main window displays order details for Order Type SO, Order Nbr SO004632, Customer ABARTENDE - USA Bartending Schc, Location MAIN - Primary Location, and Date 1/24/2019. The Order Total is 1,000.00. A 'Purchasing Details' dialog box is open, showing PO Source 'Purchase to Order', Vendor 'AAVENDOR', and Purchase War 'RETAIL - Retail Warehouse'. The dialog contains a table with the following data:

Se	PO Type	PO Nbr.	Ven Ref.	Line Type	Invento ID	Vendor	Vendor Name	Pron	Uo	Order Qty.	Open Qty.	Line Description
>	Normal	PO000881	Go...	ITEM01	AAVEN...	Goto Vendor Inc	1/24/20	EA	2.00	0.00		

This screenshot is similar to the previous one, but the 'Purchasing Details' dialog box shows a different PO Source: 'Drop-Ship'. The Vendor is 'AAVENDOR - Goto Vendor Inc' and the Purchase War is 'RETAIL - Retail Warehouse'. The dialog table contains the following data:

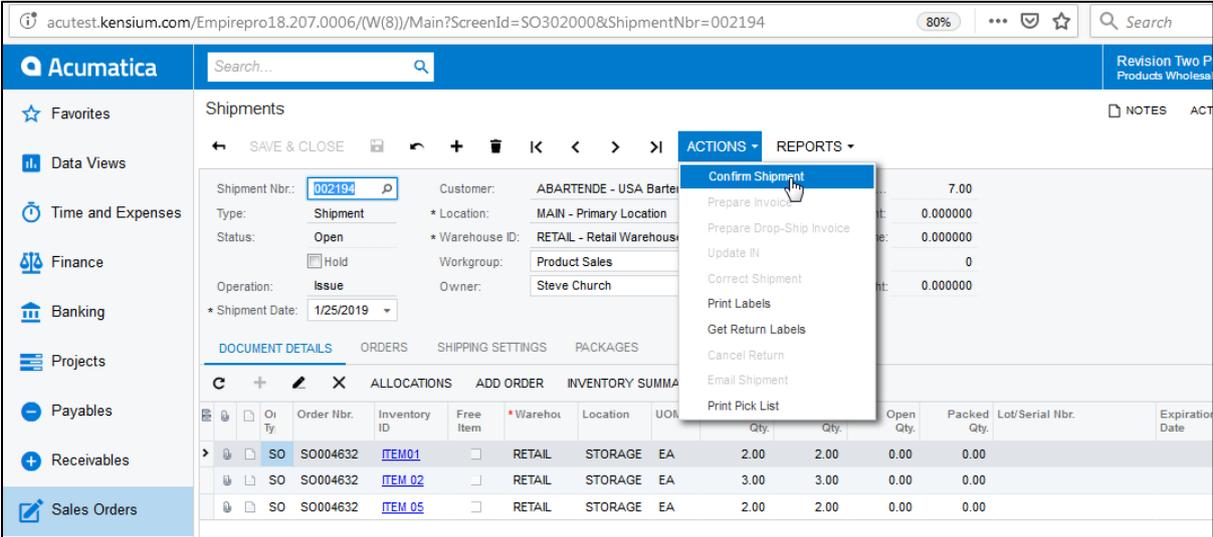
Se	PO Type	PO Nbr.	Ven Ref.	Line Type	Invento ID	Vendor	Vendor Name	Pron	Uo	Order Qty.	Open Qty.	Line Description
>	Drop Ship	PO000882	Go...	ITEM 03	AAVE...	Goto Vendor Inc	1/24/20	EA	2.00	0.00		Item 03

- Click on Allocations

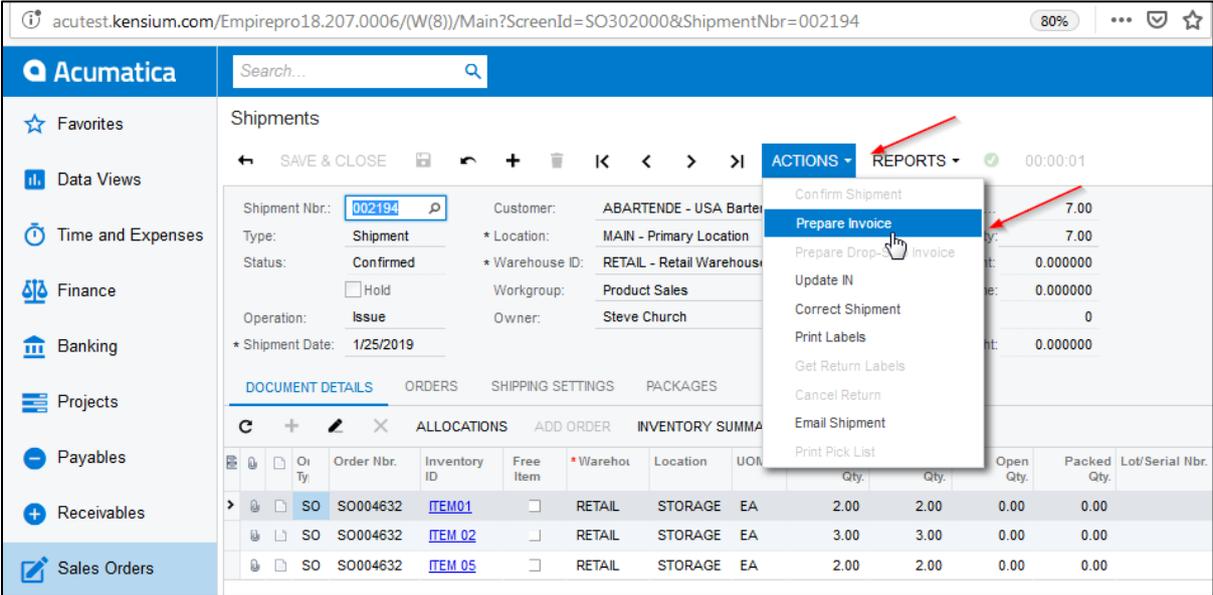
The screenshot shows the Acumatica Sales Order screen with the 'Allocations' dialog box open. The dialog displays a table of allocation records for the selected order. The table has the following data:

Ship On	Allocated	Alloc. Warehouse	Completed	Lot/Serial Nbr.	Quantity	Qty. On Shipments	Qty. Received	UOM	Mark for PO	Related Document
1/24/2019	✓	RETAIL			2.00	0.00	0.00	EA		Receipt_PR000882

- Click on Actions -> Create Shipments
- Shipment is created for the orders which are marked for “Purchase to Order” and the product which is not selected as “Mark for PO”
- Click on Actions -> Confirm Shipment



- Click on Actions -> Prepare Invoice



- Click on Actions -> Release

The screenshot shows the Acumatica interface for an invoice. The 'ACTIONS' dropdown menu is open, and the 'Release' option is highlighted. The invoice details are as follows:

Type:	Invoice	* Customer:	ABARTENDE - USA Bartending School	Discount Total:	0.00
Reference Nbr.:	AR006565	* Location:	MAIN - Primary Location	VAT Exempt T...:	0.00
Status:	Balanced	* Currency:	USD 1.00	VAT Taxable T...:	0.00
	<input type="checkbox"/> Hold	* Terms:	30D - 30 Days	Balance:	700.00
	<input type="checkbox"/> Credit Hold	* Due Date:	2/24/2019	Amount:	700.00
* Date:	1/25/2019	* Cash Discoun...:	2/24/2019	Cash Discount:	0.00
* Post Period:	01-2019	* Project:	X - Non-Project Code.		
Customer Order:		Description:			

The table below the invoice details shows the following items:

Branch	Shipment Nbr.	Order Type	Order Nbr.	Inventory ID	Transaction Descr.	Warehou	Location	Quantity	UOM	Lot/Serial Nbr.
PROD...	002194	SO	SO004632	ITEM01	Item 01	RETAIL	STORAGE	2.00	EA	
PROD...	002194	SO	SO004632	ITEM 02	Item 02	RETAIL	STORAGE	3.00	EA	
PROD...	002194	SO	SO004632	ITEM 05	Item 05	RETAIL	STORAGE	2.00	EA	

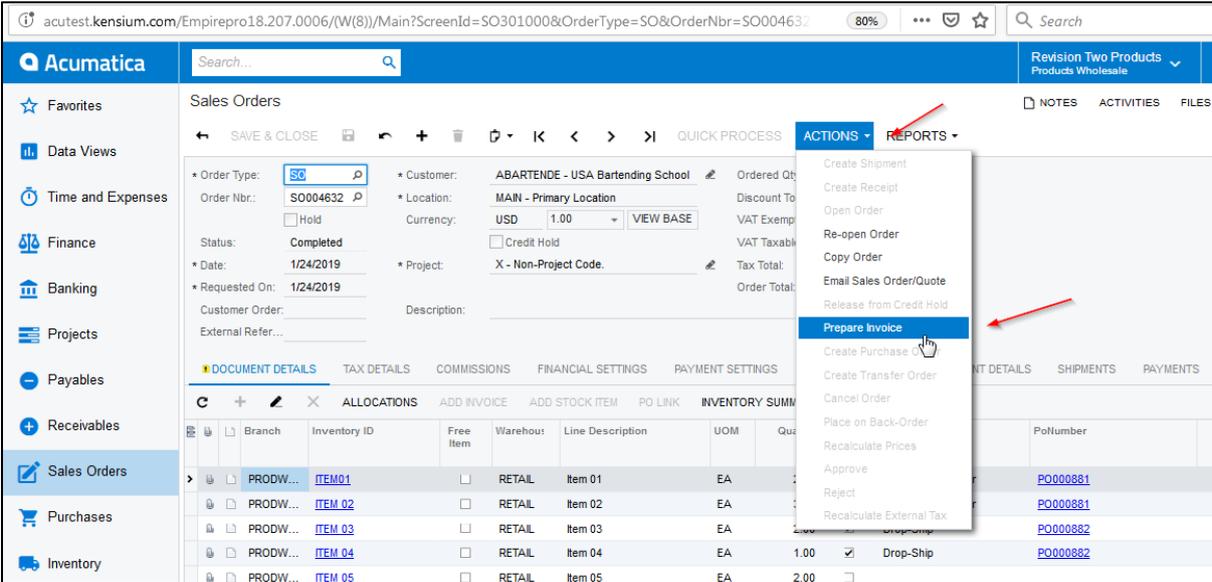
The screenshot shows the same Acumatica interface, but the invoice status is now 'Open'. The 'ACTIONS' dropdown menu is no longer open. The invoice details are as follows:

Type:	Invoice	* Customer:	ABARTENDE - USA Bartending School	Discount Total:	0.00
Reference Nbr.:	AR006565	* Location:	MAIN - Primary Location	VAT Exempt T...:	0.00
Status:	Open	* Currency:	USD 1.00	VAT Taxable T...:	0.00
	<input type="checkbox"/> Hold	* Terms:	30D - 30 Days	Balance:	700.00
	<input type="checkbox"/> Credit Hold	* Due Date:	2/24/2019	Amount:	700.00
* Date:	1/25/2019	* Cash Discoun...:	2/24/2019	Cash Discount:	0.00
* Post Period:	01-2019	* Project:	X - Non-Project Code.		
Customer Order:		Description:			

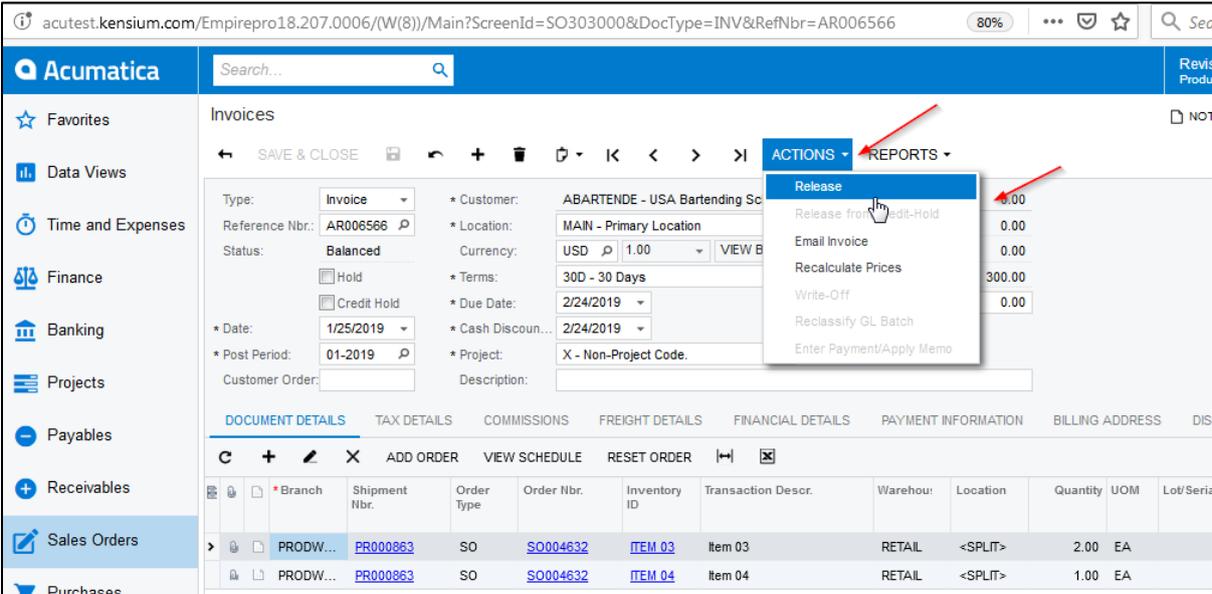
The table below the invoice details shows the following items:

Branch	Shipment Nbr.	Order Type	Order Nbr.	Inventory ID	Transaction Descr.	Warehou	Location	Quantity	UOM	Lot/Serial Nbr.
PROD...	002194	SO	SO004632	ITEM01	Item 01	RETAIL	STORAGE	2.00	EA	
PROD...	002194	SO	SO004632	ITEM 02	Item 02	RETAIL	STORAGE	3.00	EA	
PROD...	002194	SO	SO004632	ITEM 05	Item 05	RETAIL	STORAGE	2.00	EA	

- Prepare Invoice for the products which are marked for Dropship in Sales Order



- Invoice is prepared for Dropship items
- Click on Actions->Release



The screenshot shows the Acumatica interface for an invoice. The top navigation bar includes the Acumatica logo, a search bar, and a revision dropdown set to 'Revision 1 Products Wholesale'. The left sidebar contains various navigation options like Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders, and Purchases. The main content area is titled 'Invoices' and displays the following details:

- Type: Invoice
- Reference Nbr.: AR006566
- Status: Open
- Customer: ABARTENDE - USA Bartending School
- Location: MAIN - Primary Location
- Currency: USD 1.00
- Terms: 30D - 30 Days
- Due Date: 2/24/2019
- Date: 1/25/2019
- Post Period: 01-2019
- Project: X - Non-Project Code.
- Discount Total: 0.00
- VAT Exempt T...: 0.00
- VAT Taxable T...: 0.00
- Balance: 300.00
- Amount: 300.00
- Cash Discount: 0.00

Below the details are tabs for DOCUMENT DETAILS, TAX DETAILS, COMMISSIONS, FREIGHT DETAILS, FINANCIAL DETAILS, PAYMENT INFORMATION, BILLING ADDRESS, and DISCOUNTS. A table below shows the invoice items:

Branch	Shipment Nbr.	Order Type	Order Nbr.	Inventory ID	Transaction Descr.	Warehouse	Location	Quantity	UOM	Lot/Serial Nbr
PRODW...	PR000863	SO	SO004632	ITEM 03	Item 03	RETAIL	<SPLIT>	2.00	EA	
PRODW...	PR000863	SO	SO004632	ITEM 04	Item 04	RETAIL	<SPLIT>	1.00	EA	

### 1.4. Update the SO Line (Unlock) when it's corresponding PO Line is deleted

- Create a Sales order with multiple line items
- Select Mark for PO and PO Source as Purchase to Order for 5 items and Drop ship for 5 items

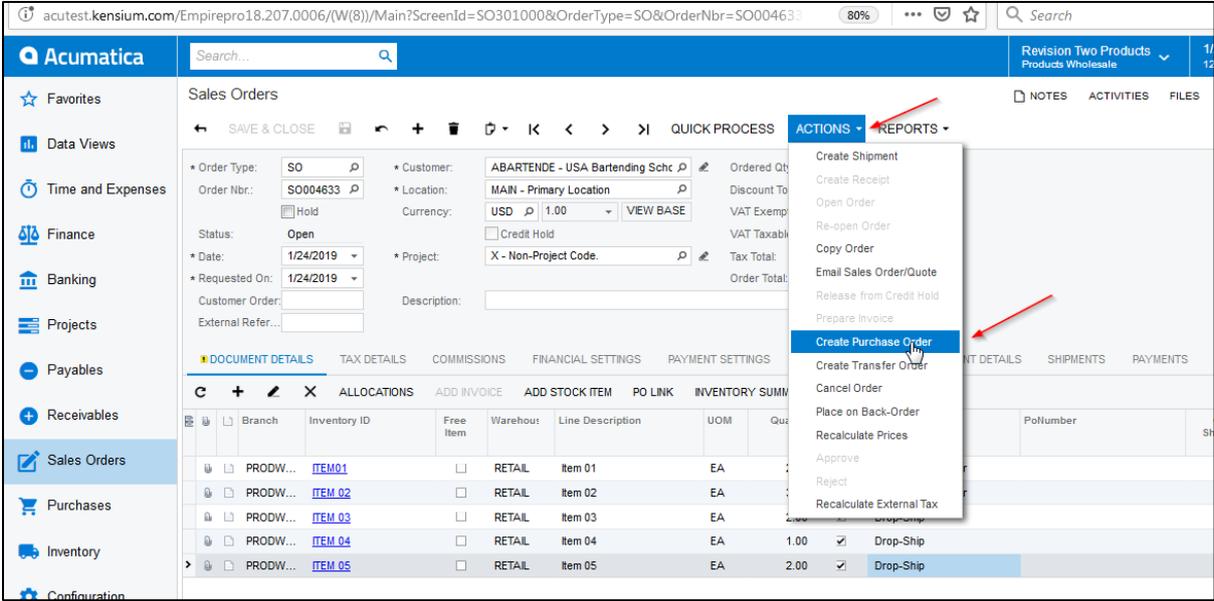
The screenshot shows the Acumatica interface for a sales order. The top navigation bar includes the Acumatica logo, a search bar, and a revision dropdown set to 'Revision Two Products Wholesale'. The left sidebar contains various navigation options. The main content area is titled 'Sales Orders' and displays the following details:

- Order Type: SO
- Order Nbr.: SO004633
- Status: Open
- Customer: ABARTENDE - USA Bartending Schc
- Location: MAIN - Primary Location
- Currency: USD 1.00
- Project: X - Non-Project Code.
- Date: 1/24/2019
- Requested On: 1/24/2019
- Order Total: 1,000.00

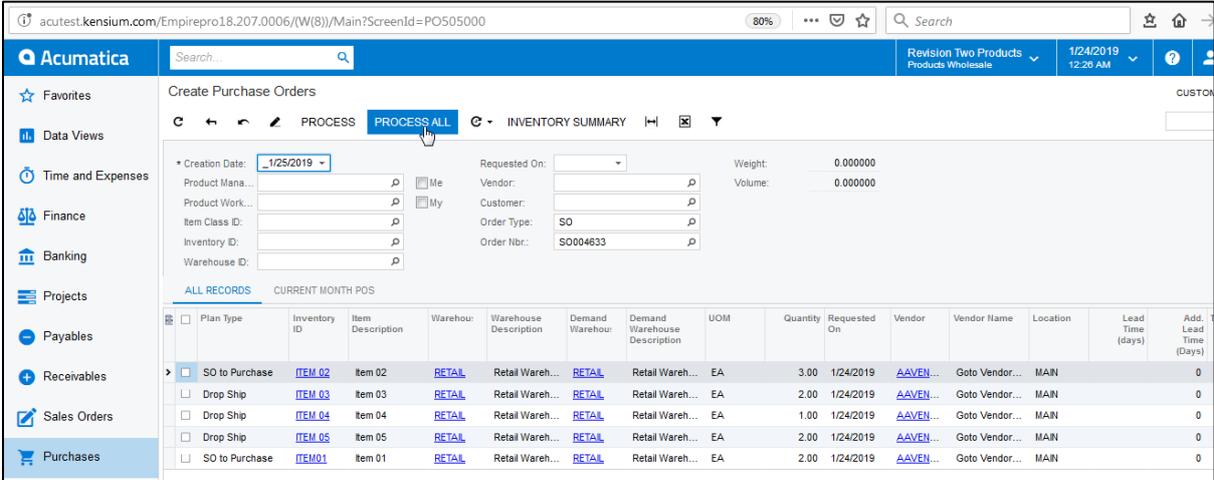
Below the details are tabs for DOCUMENT DETAILS, TAX DETAILS, COMMISSIONS, FINANCIAL SETTINGS, PAYMENT SETTINGS, SHIPPING SETTINGS, DISCOUNT DETAILS, SHIPMENTS, and PAYMENTS. A table below shows the sales order items:

Branch	Inventory ID	Free Item	Warehouse	Line Description	UOM	Quantity	Mark for PO	PO Source	PolNumber
PRODW...	ITEM01		RETAIL	Item 01	EA	2.00	✓	Purchase to Order	
PRODW...	ITEM 02		RETAIL	Item 02	EA	3.00	✓	Purchase to Order	
PRODW...	ITEM 03		RETAIL	Item 03	EA	2.00	✓	Drop-Ship	
PRODW...	ITEM 04		RETAIL	Item 04	EA	1.00	✓	Drop-Ship	
PRODW...	ITEM 05		RETAIL	Item 05	EA	2.00	✓	Drop-Ship	

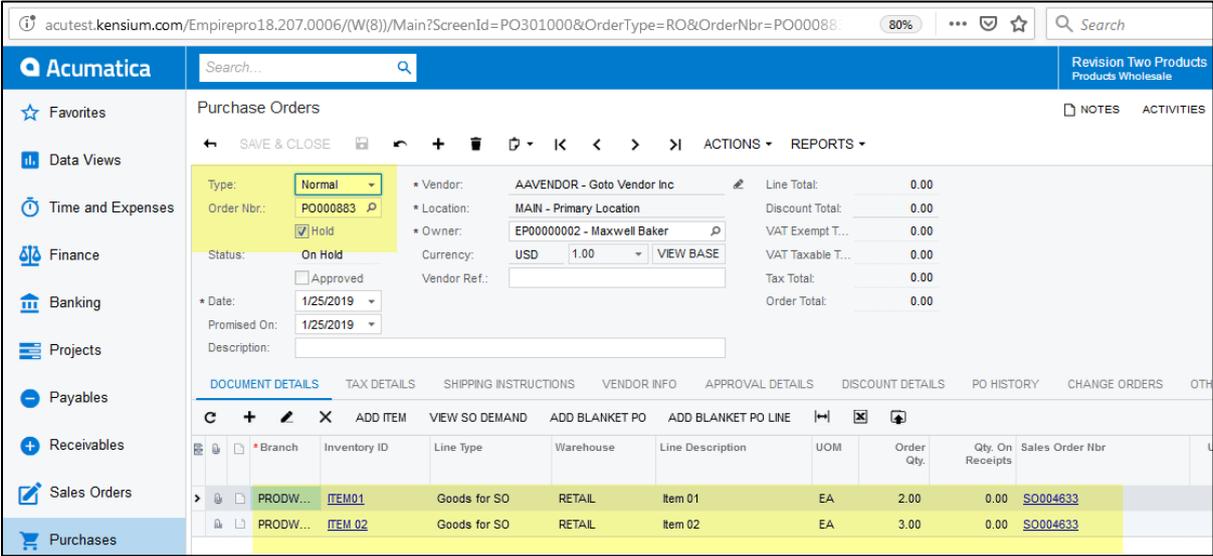
- Click on Actions-> Create Purchase Order
- 2 purchase orders are created one for drop ship and other for Normal type



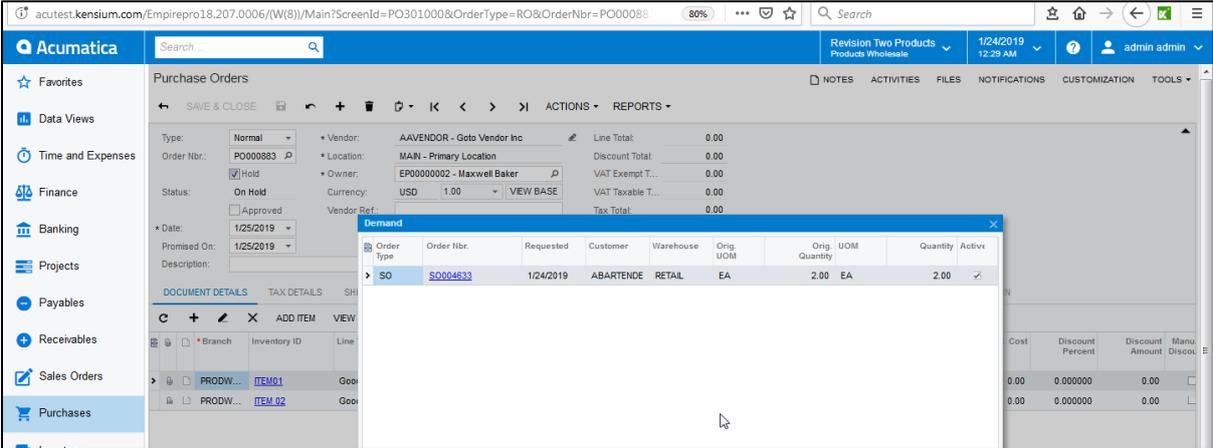
- Click on Process All



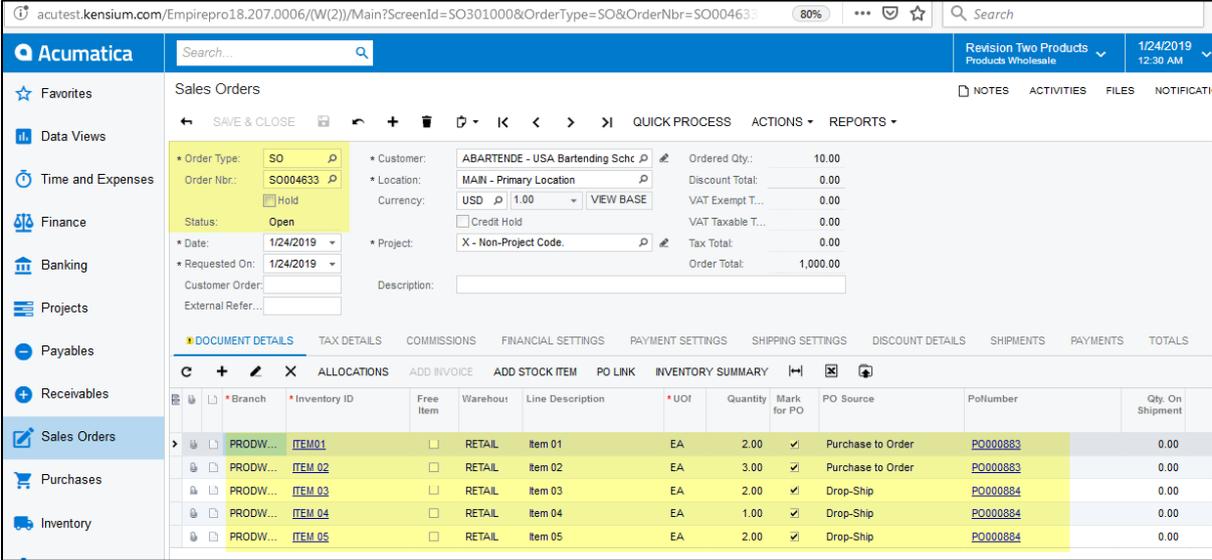
- Navigate to Purchase Orders screen
- Select the Purchase Order of Normal Type
- Sales Order number is displayed in Sales Order Nbr column



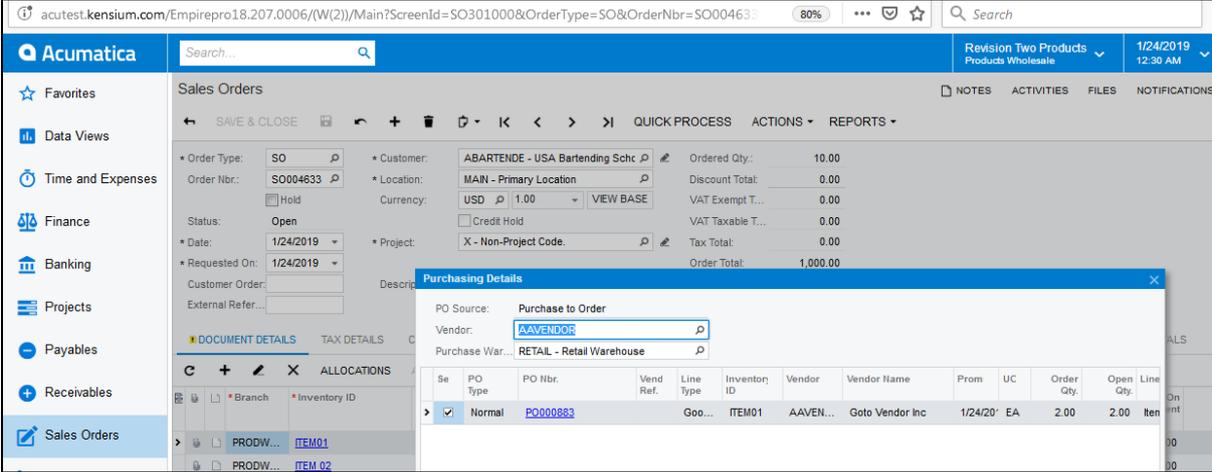
- SO Link is displayed if we click on View SO Demand for all the products



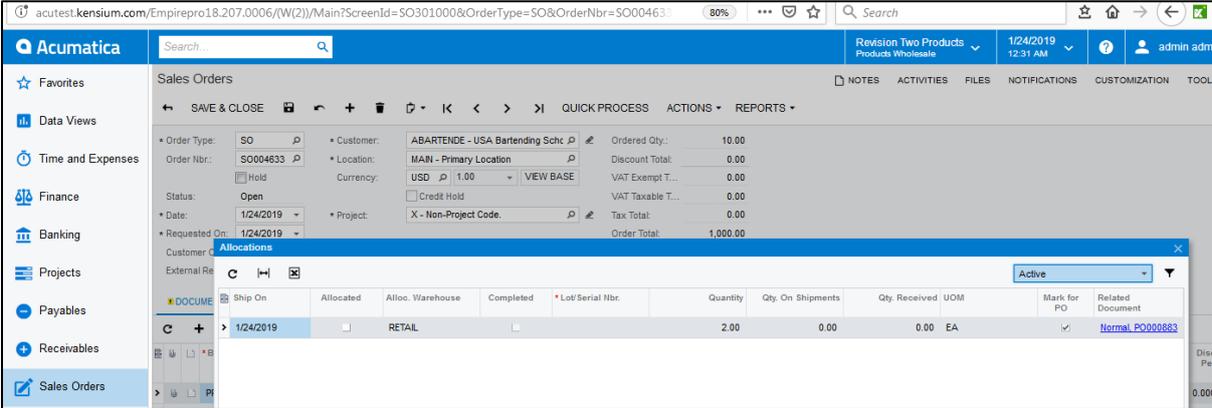
- A link is displayed with PO Number for its SO



- Click on PO Link



- Click on Allocations

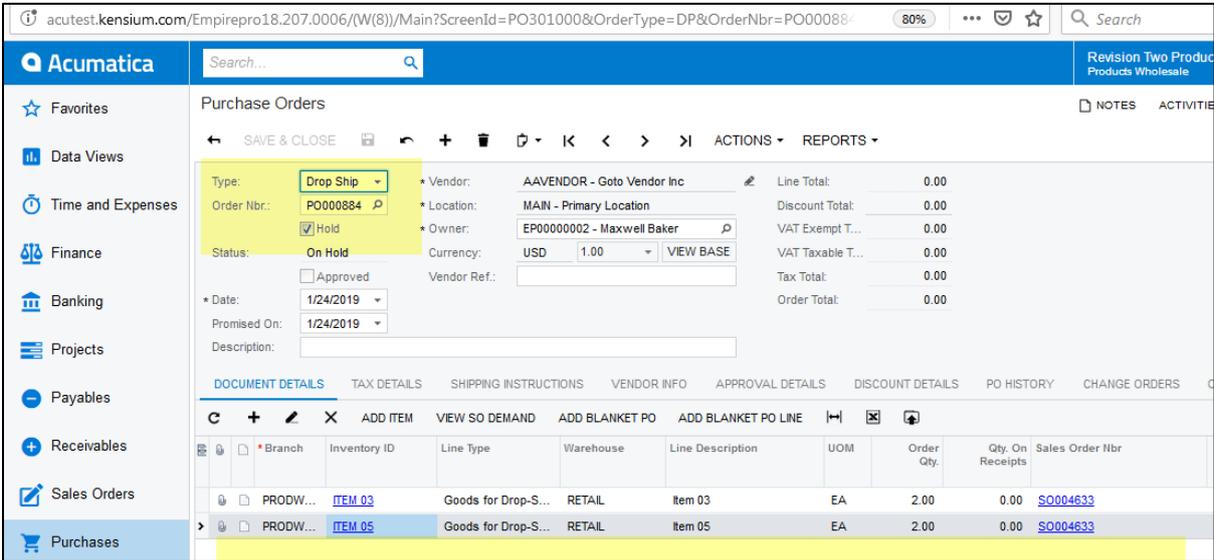
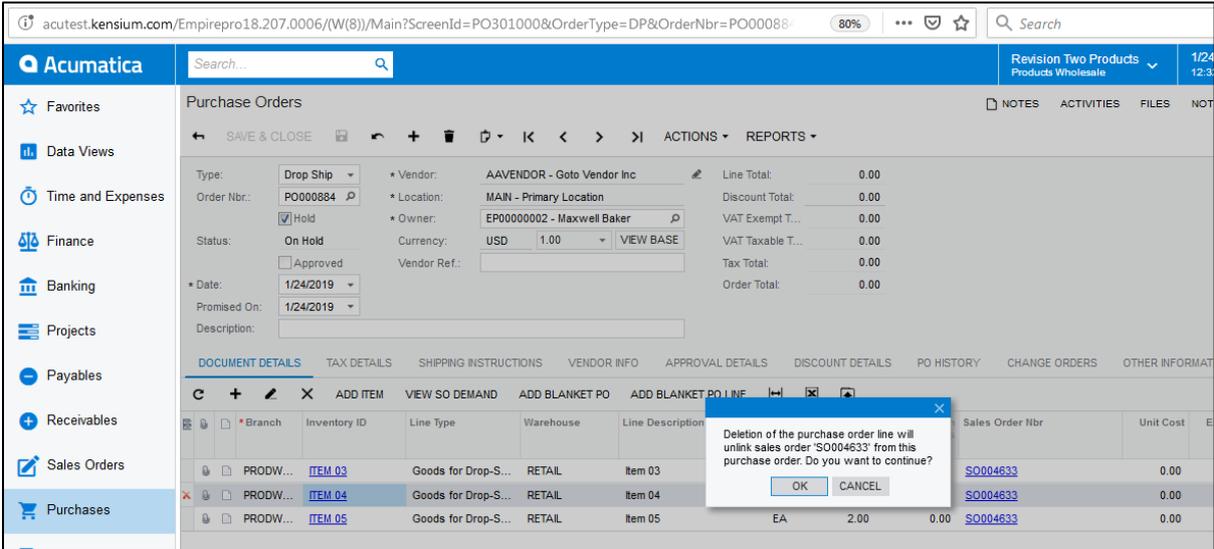


- Delete Item02 from Normal type PO

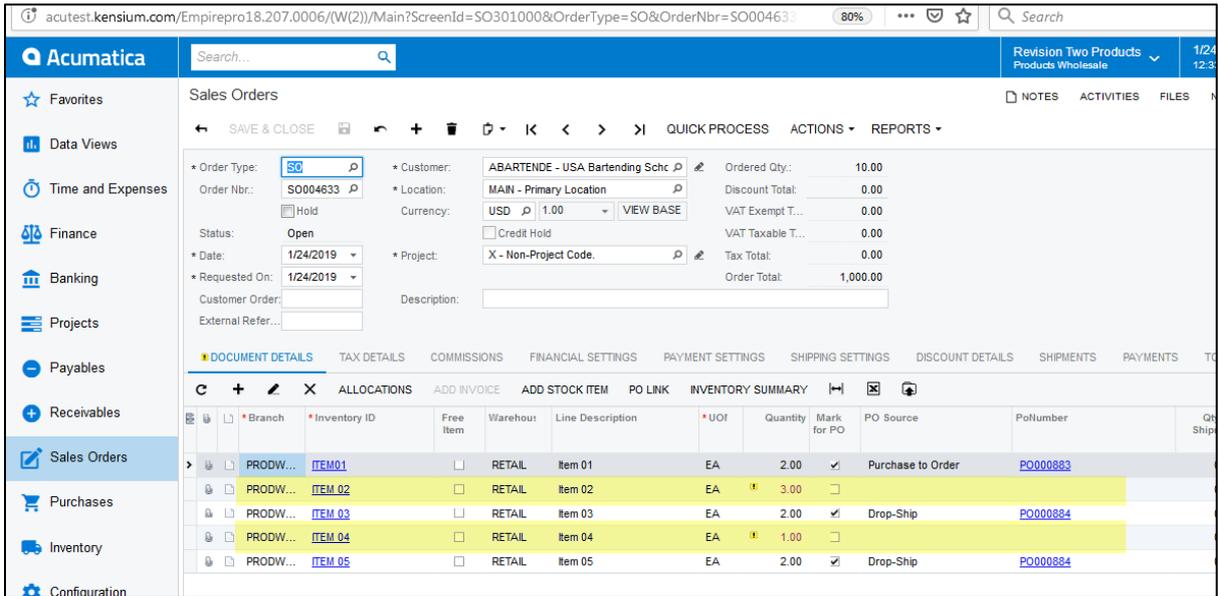
The screenshot shows the Acumatica Purchase Orders interface. A confirmation dialog box is displayed over the table, asking for confirmation to delete a purchase order line. The dialog text reads: "Deletion of the purchase order line will unlink sales order 'SO004633' from this purchase order. Do you want to continue?". The dialog has "OK" and "CANCEL" buttons. The background table shows two items: ITEM01 and ITEM02, both with a quantity of 2.00 and linked to sales order SO004633.

This screenshot shows the same Acumatica Purchase Orders interface as the previous one, but with the confirmation dialog removed. The table now shows only one item, ITEM01, with a quantity of 2.00 and linked to sales order SO004633. The 'Type' field is set to 'Normal' and the 'Status' is 'On Hold'.

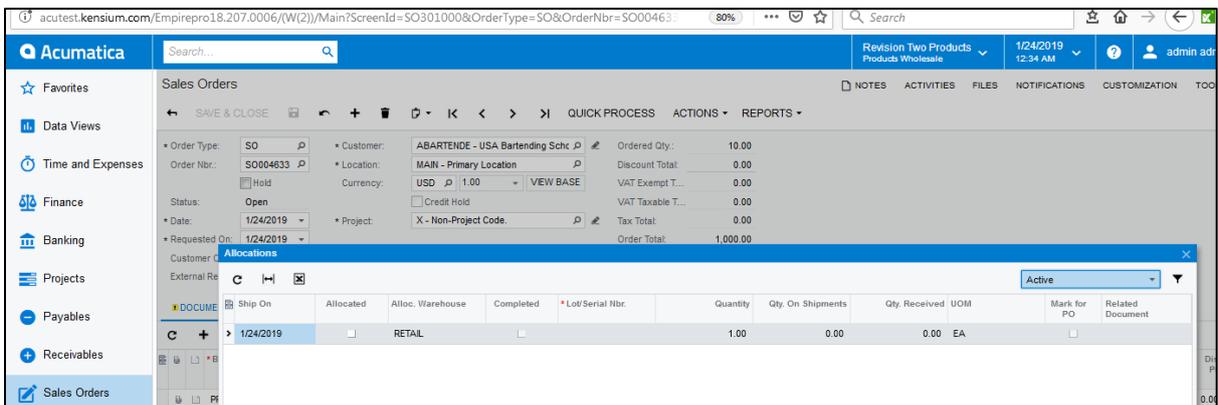
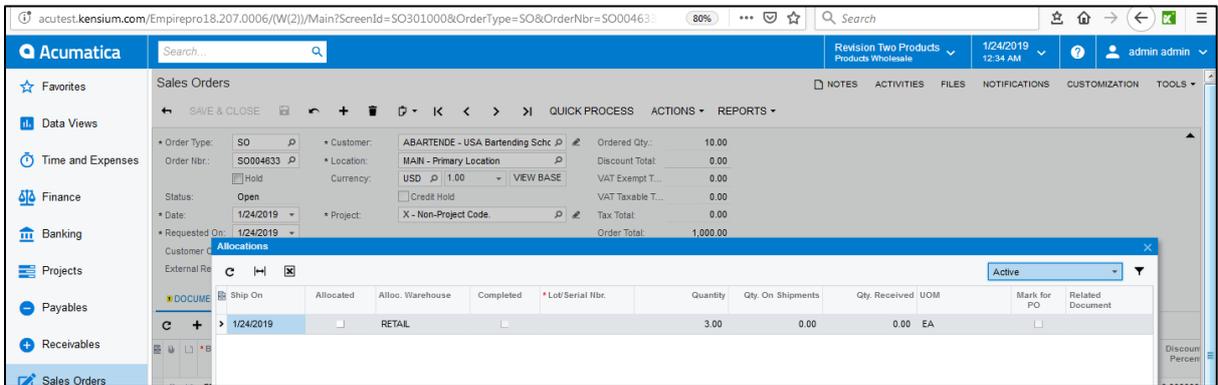
- Delete Item04 from Dropship type PO



- SO-PO link is removed for the deleted item in SO screen



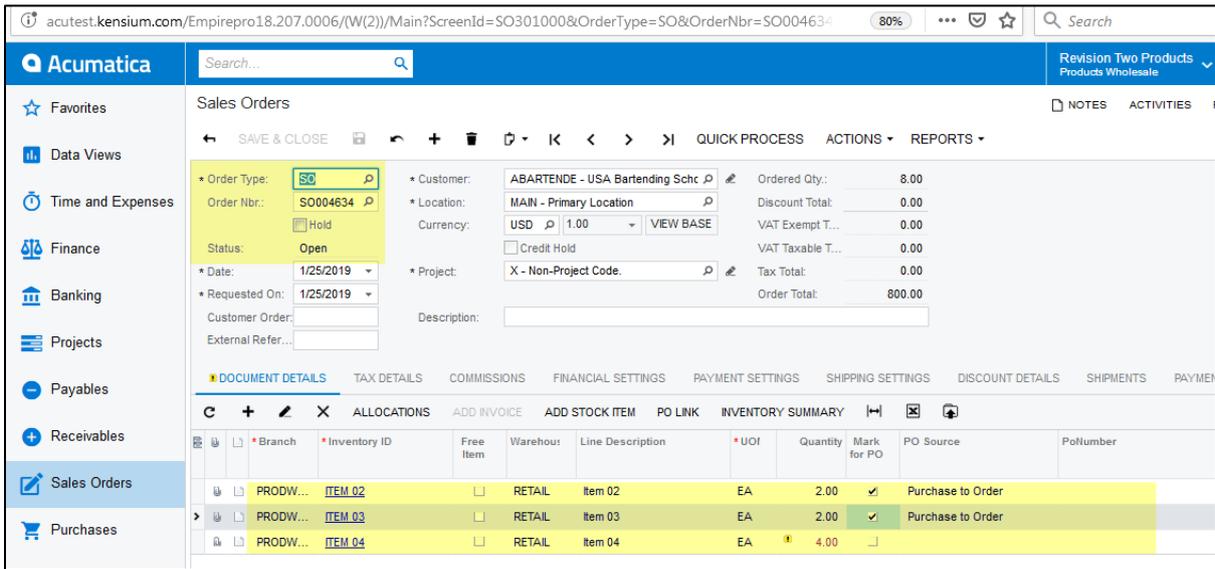
- Click on Allocations



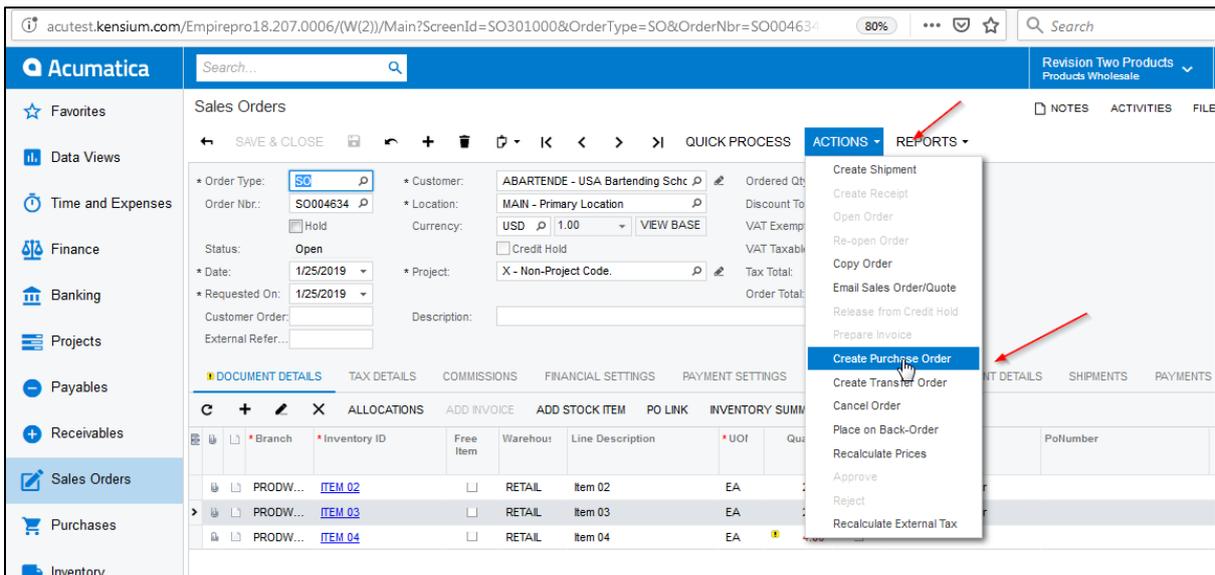
## 1.5. Avoid Sales Order Line Deletions After Purchase Order is created

- Create a Sales Order with checkbox Mark for PO Purchase to Order

- Select PO Source as ‘Purchase to Order’ as save



- Click on action “Create Purchase Order” and process the order redirect the User to Purchase Orders screen.



- Add item 04 manually in the Purchase Order by selecting the Sales Order number

The screenshot shows the Acumatica interface for a Purchase Order. The top navigation bar includes the Acumatica logo, a search bar, and a revision dropdown. The left sidebar contains various menu items like Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders, and Purchases. The main content area is titled 'Purchase Orders' and contains a form with fields for Type (Normal), Order Nbr (PO000885), Status (On Hold), Date (1/25/2019), and Vendor (AAVENDOR - Goto Vendor Inc). Below the form are tabs for DOCUMENT DETAILS, TAX DETAILS, SHIPPING INSTRUCTIONS, VENDOR INFO, APPROVAL DETAILS, DISCOUNT DETAILS, PO HISTORY, and CHANGE ORD. A table below the tabs lists items with columns for Branch, Inventory ID, Line Type, Warehouse, Line Description, UOM, Order Qty, Qty. On Receipts, and Sales Order Nbr.

Branch	Inventory ID	Line Type	Warehouse	Line Description	UOM	Order Qty	Qty. On Receipts	Sales Order Nbr
	PRODW... ITEM 02	Goods for SO	RETAIL	Item 02	EA	2.00	0.00	SO004634
	PRODW... ITEM 03	Goods for SO	RETAIL	Item 03	EA	2.00	0.00	SO004634
	PRODW... ITEM 04	Goods for IN	RETAIL	Item 04	EA	4.00	0.00	SO004634

- In Sales order try to delete the Line item will display error message

The screenshot shows the Acumatica interface for a Sales Order. The top navigation bar includes the Acumatica logo, a search bar, and a revision dropdown. The left sidebar contains various menu items like Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders, Purchases, Inventory, and Configuration. The main content area is titled 'Sales Orders' and contains a form with fields for Order Type (SO), Order Nbr (SO004634), Status (Open), Date (1/25/2019), and Customer (ABARTENDE - USA Bartending Schc). Below the form are tabs for DOCUMENT DETAILS, TAX DETAILS, COMMISSIONS, FINANCIAL SETTINGS, PAYMENT SETTINGS, SHIPPING SETTINGS, DISCOUNT DETAILS, SHIPMENTS, and PAYMENTS. A table below the tabs lists items with columns for Free Item, Warehouse, Line Description, UOI, Quantity, Mark for PO, PO Source, and PoNumber. A red error message is displayed over the table: 'SO Line associated with a PO, line cannot be deleted. Please review'.

Free Item	Warehouse	Line Description	UOI	Quantity	Mark for PO	PO Source	PoNumber		
		PRODW... ITEM 02	RETAIL	Item 02	EA	2.00	✓	Purchase to Order	PO000885
		PRODW... ITEM 03	RETAIL	Item 03	EA	2.00	✓	Purchase to Order	PO000885
		PRODW... ITEM 04	RETAIL	Item 04	EA	4.00	✓	Purchase to Order	PO000885

The screenshot shows the Acumatica Sales Orders interface. The top navigation bar includes the Acumatica logo, a search bar, and the user's name 'Revision Two Products Wholesale'. The left sidebar contains various navigation options like Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders, Purchases, Inventory, and Configuration. The main content area is titled 'Sales Orders' and displays a purchase order for 'ABARTENDE - USA Bartending Schc'. The order details include Order Type (SO), Order Nbr (SO004634), Location (MAIN - Primary Location), Currency (USD), and Date (1/25/2019). The order total is 800.00. Below the order details is a table of items:

Branch	Inventory ID	Free Item	Warehouse	Line Description	UOI	Quantity	Mark for PO	PO Source	PO Number
	PRODW... ITEM 02		RETAIL	Item 02	EA	2.00	✓	Purchase to Order	PO000885
	PRODW... ITEM 03		RETAIL	Item 03	EA	2.00	✓	Purchase to Order	PO000885
	PRODW... ITEM 04		RETAIL	Item 04	EA	4.00	✓	Purchase to Order	PO000885

A red error message is displayed at the bottom of the items table: 'SO Line associated with a PO, line cannot be deleted. Please review'.

● Now delete the Purchase Order

The screenshot shows the Acumatica Purchase Orders interface. The top navigation bar includes the Acumatica logo, a search bar, and the user's name 'Revision Two Pro Products Wholesale'. The left sidebar contains various navigation options like Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders, and Purchases. The main content area is titled 'Purchase Orders' and displays a purchase order for 'VENDOR - Goto Vendor Inc'. The order details include Type (Normal), Order Nbr (PO000885), Location (MAIN - Primary Location), Owner (EP00000002 - Maxwell Baker), Currency (USD), and Date (1/25/2019). The order total is 0.00. Below the order details is a table of items:

Branch	Inventory ID	Line Type	Warehouse	Line Description	UOM	Order Qty	Qty. On Receipts	Sales Order Nbr
	PRODW... ITEM 02	Goods for SO	RETAIL	Item 02	EA	2.00	0.00	SO004634
	PRODW... ITEM 03	Goods for SO	RETAIL	Item 03	EA	2.00	0.00	SO004634
	PRODW... ITEM 04	Goods for IN	RETAIL	Item 04	EA	4.00	0.00	SO004634

A blue tooltip with the text 'Delete (Ctrl+Del)' is shown over the trash icon in the top toolbar.

The screenshot shows the Acumatica Sales Order form. The top navigation bar includes the Acumatica logo, a search bar, and the text "Revision Two Products Products Wholesale". The left sidebar contains navigation icons for Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders (highlighted), Purchases, and Inventory. The main form area is titled "Sales Orders" and includes a toolbar with "SAVE & CLOSE", "QUICK PROCESS", "ACTIONS", and "REPORTS". The form fields are organized into sections: Order Type (SO), Order Nbr. (SO004634), Customer (ABARTENDE - USA Bartending Schc), Location (MAIN - Primary Location), Currency (USD 1.00), Status (Open), Date (1/25/2019), Project (X - Non-Project Code), and Order Total (800.00). Below the form fields are tabs for DOCUMENT DETAILS, TAX DETAILS, COMMISSIONS, FINANCIAL SETTINGS, PAYMENT SETTINGS, SHIPPING SETTINGS, DISCOUNT DETAILS, and SHIPMENTS. A table below the tabs shows the following data:

Branch	Inventory ID	Free Item	Warehouse	Line Description	UOI	Quantity	Mark for PO	PO Source	PoNumber
	PRODW...	ITEM 02		RETAIL Item 02	EA	2.00			
	PRODW...	ITEM 03		RETAIL Item 03	EA	2.00			
	PRODW...	ITEM 04		RETAIL Item 04	EA	4.00			

- In Sales Order now User can delete the Line item successfully

This screenshot shows the same Acumatica Sales Order form as above, but the table below the tabs is empty, indicating that the line items have been successfully deleted. The form fields and navigation elements remain the same.

- Create a Sales Order with checkbox Mark for PO
- Select PO Source as "Dropship" as save

The screenshot shows the Acumatica Sales Orders interface. The top navigation bar includes the Acumatica logo, a search bar, and user information for 'Revision Two Products' on '1/24/2019 1:03 AM'. The left sidebar contains navigation icons for Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders (highlighted), Purchases, and Inventory. The main content area is titled 'Sales Orders' and displays details for order SO004635. Key fields include Order Type (SO), Customer (ABARTENDE - USA Bartending Schc), Location (MAIN - Primary Location), Currency (USD), and Status (Open). A summary table shows: Ordered Qty: 7.00, Discount Total: 0.00, VAT Exempt Total: 0.00, VAT Taxable Total: 0.00, Tax Total: 0.00, and Order Total: 700.00. Below this are tabs for DOCUMENT DETAILS, TAX DETAILS, COMMISSIONS, FINANCIAL SETTINGS, PAYMENT SETTINGS, SHIPPING SETTINGS, DISCOUNT DETAILS, SHIPMENTS, PAYMENTS, and TOTALS. A table below shows line items:

Branch	Inventory ID	Free Item	Warehouse	Line Description	UOF	Quantity	Mark for PO	PO Source	PoNumber	Qty. On Shipment	Open Qty.
	PROD... ITEM 02		RETAIL	Item 02	EA	2.00	✓	Drop-Ship	PO000886	0.00	2.00
	PROD... ITEM 03		RETAIL	Item 03	EA	3.00	✓	Drop-Ship	PO000886	0.00	3.00
	PROD... ITEM 04		RETAIL	Item 04	EA	2.00	✓	Drop-Ship	PO000886	0.00	2.00

- Click on action “Create Purchase Order” and process the order redirect the User to Purchase Orders screen.
- Manually add Item 04 in same PO and provide same sales order number

The screenshot shows the Acumatica Purchase Orders interface. The top navigation bar includes the Acumatica logo, a search bar, and user information for 'Revision Two Products' on '1/24/2019 1:03 AM'. The left sidebar contains navigation icons for Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders, Purchases (highlighted), and Inventory. The main content area is titled 'Purchase Orders' and displays details for order PO000886. Key fields include Type (Drop Ship), Vendor (AAVENDOR - Goto Vendor Inc), Location (MAIN - Primary Location), Owner (EP00000002 - Maxwell Baker), Currency (USD), and Status (On Hold). A summary table shows: Line Total: 0.00, Discount Total: 0.00, VAT Exempt Total: 0.00, VAT Taxable Total: 0.00, Tax Total: 0.00, and Order Total: 0.00. Below this are tabs for DOCUMENT DETAILS, TAX DETAILS, SHIPPING INSTRUCTIONS, VENDOR INFO, APPROVAL DETAILS, DISCOUNT DETAILS, PO HISTORY, CHANGE ORDERS, and OTHER. A table below shows line items:

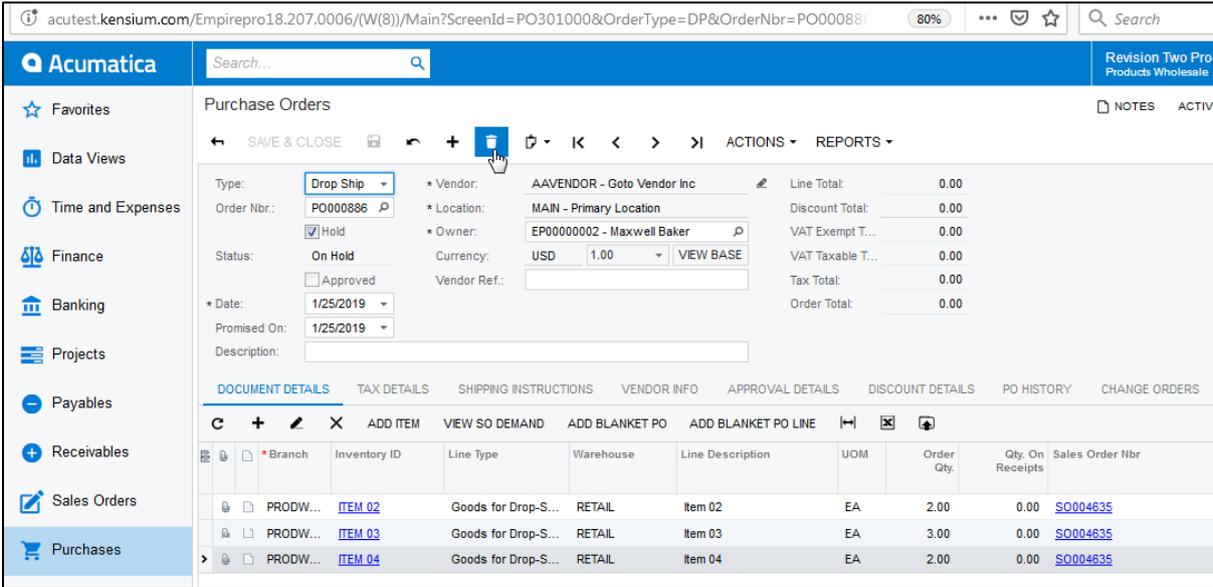
Branch	Inventory ID	Line Type	Warehouse	Line Description	UOM	Order Qty.	Qty. On Receipts	Sales Order Nbr	Unit C
	PROD... ITEM 02	Goods for Drop-S...	RETAIL	Item 02	EA	2.00	0.00	SO004635	
	PROD... ITEM 03	Goods for Drop-S...	RETAIL	Item 03	EA	3.00	0.00	SO004635	
	PROD... ITEM 04	Goods for Drop-S...	RETAIL	Item 04	EA	2.00	0.00	SO004635	

- In Sales order try to delete the Line item will display error message

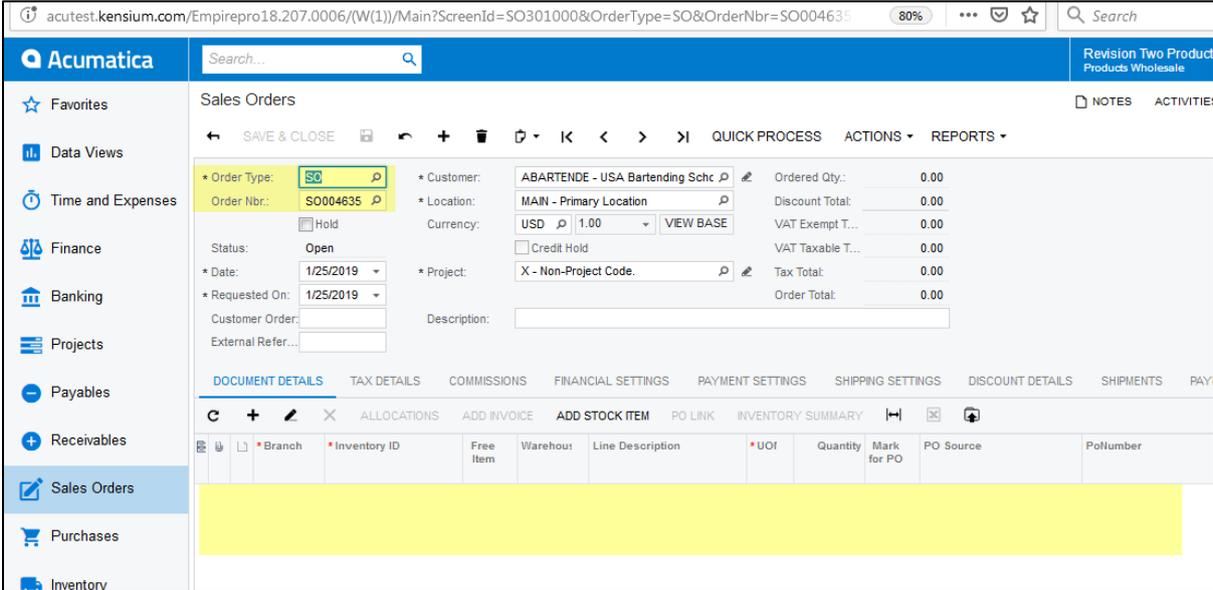
The screenshot shows the Acumatica Sales Orders interface. The top navigation bar includes the Acumatica logo, a search bar, and the user profile 'Revision Two Products Products Wholesale'. The left sidebar contains various navigation options like Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders, Purchases, and Inventory. The main content area displays the 'Sales Orders' form for order SO004635. The form includes fields for Order Type (SO), Order Nbr (SO004635), Customer (ABARTENDE - USA Bartending Schc), Location (MAIN - Primary Location), Currency (USD), Status (Open), Date (1/25/2019), Requested On (1/25/2019), Project (X - Non-Project Code), and various totals (Ordered Qty: 7.00, Discount Total: 0.00, VAT Exempt T...: 0.00, VAT Taxable T...: 0.00, Tax Total: 0.00, Order Total: 700.00). Below the form is a table with columns: Branch, Inventory ID, Free Item, Warehouse, Line Description, UOI, Quantity, Mark for PO, PO Source, and PoNumber. The table contains three rows for Item 02, Item 03, and Item 04. A red error message is overlaid on the table, pointing to the first row: 'SO Line associated with a PO, line cannot be deleted. Please review'.

This screenshot is similar to the one above, showing the Acumatica Sales Orders interface. The top navigation bar includes the Acumatica logo, a search bar, and the user profile 'Revision Two Products Products Wholesale' with a timestamp of 1/24/2019 1:05 AM. The left sidebar is the same. The main content area displays the 'Sales Orders' form for order SO004635. The form fields are identical to the previous screenshot. Below the form is a table with columns: Branch, Inventory ID, Free Item, Warehouse, Line Description, UOI, Quantity, Mark for PO, PO Source, PoNumber, and Qty. On Shipment. The table contains three rows for Item 02, Item 03, and Item 04. A red error message is overlaid on the table, pointing to the first row: 'SO Line associated with a PO, line cannot be deleted. Please review'.

- Now delete the Purchase Order



- In Sales Order now User can delete the Line item successfully



### 1.6. Validation on Dropship PO line Qty not to exceed SO line Qty

- Create a Sales Order and link it to Dropship Purchase Order

- The provided Quantity for the product in Sales Order is 3.00

The screenshot shows the Acumatica Sales Orders interface. The main header displays 'Sales Orders' and navigation options like 'SAVE & CLOSE', 'QUICK PROCESS', 'ACTIONS', and 'REPORTS'. The order details section shows:

- Order Type: SO
- Order Nbr: SO004636
- Customer: ABARTENDE - USA Bartending Schc
- Location: MAIN - Primary Location
- Currency: USD 1.00
- Status: Open
- Date: 1/25/2019
- Requested On: 1/25/2019
- Project: X - Non-Project Code

Summary statistics on the right show:

- Ordered Qty: 3.00
- Discount Total: 0.00
- VAT Exempt T...: 0.00
- VAT Taxable T...: 0.00
- Tax Total: 0.00
- Order Total: 300.00

The 'DOCUMENT DETAILS' section contains a table with the following data:

Branch	Inventory ID	Free Item	Warehouse	Line Description	UOF	Quantity	Mark for PO	PO Source	PoNumber
	PROD... ITEM 02		RETAIL	Item 02	EA	3.00	✓	Drop-Ship	PO000887

- Now modify the Quantity in Po to 4.00. Validation message is displayed.

The screenshot shows the Acumatica Purchase Orders interface. The main header displays 'Purchase Orders' and navigation options like 'SAVE & CLOSE', 'ACTIONS', and 'REPORTS'. The order details section shows:

- Type: Drop Ship
- Order Nbr: PO000887
- Vendor: AAVENDOR - Goto Vendor Inc
- Location: MAIN - Primary Location
- Owner: EP00000002 - Maxwell Baker
- Currency: USD 1.00
- Status: On Hold
- Date: 1/25/2019
- Promised On: 1/25/2019

Summary statistics on the right show:

- Line Total: 0.00
- Discount Total: 0.00
- VAT Exempt T...: 0.00
- VAT Taxable T...: 0.00
- Tax Total: 0.00
- Order Total: 0.00

The 'DOCUMENT DETAILS' section contains a table with the following data:

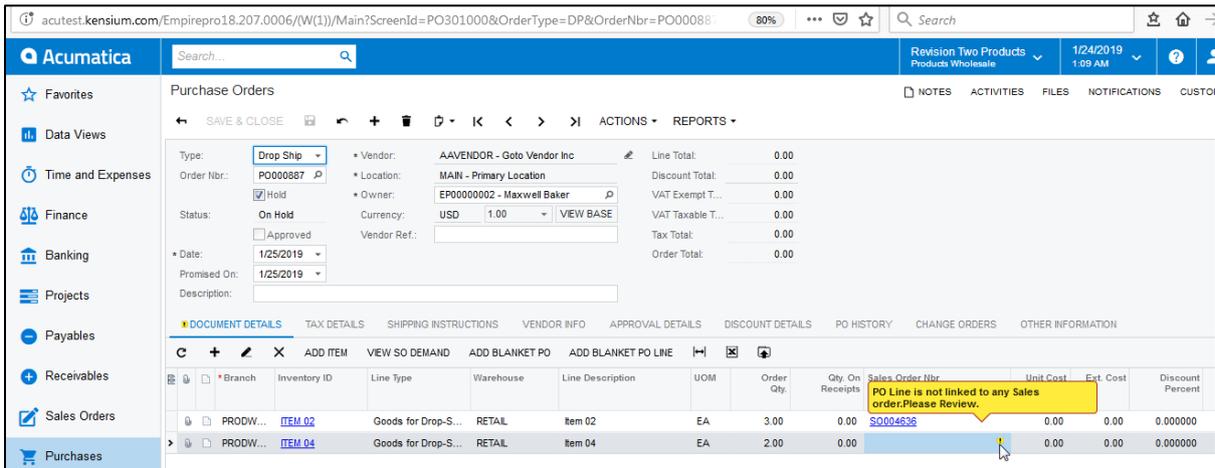
Branch	Inventory ID	Line Type	Warehouse	Line Description	UOM	Order Qty	Qty. On Receipts	Sales Order Nbr	Unit Cost
	PROD... ITEM 02	Goods for Drop-S...	RETAIL	Item 02	EA	4.00	0.00	SO004636	0.00

A red validation message box is displayed at the bottom right of the table, stating: "PO Line Qty cannot be greater than the Qty ordered in SO. Please Review."

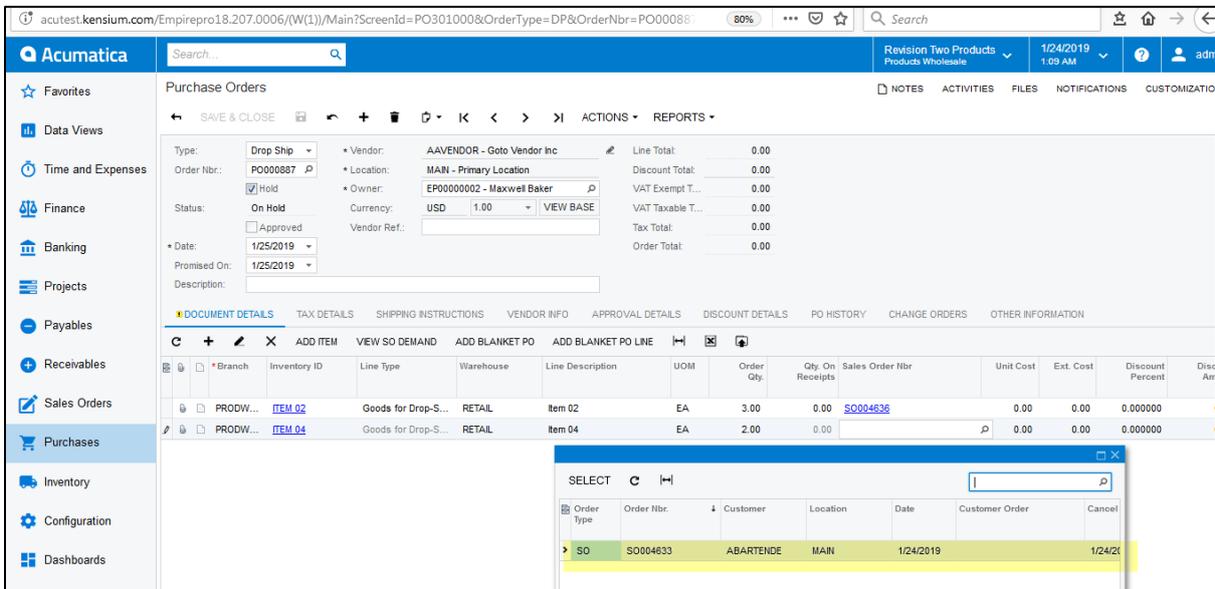
### 1.7. Update the SO Line when a PO Line is manually assigned to Purchase Order

- Navigate to Purchase Orders screen
- Select any PO which is already created.
- Added Item04 in Dropship order manually
- Provide the appropriate quantity and save.

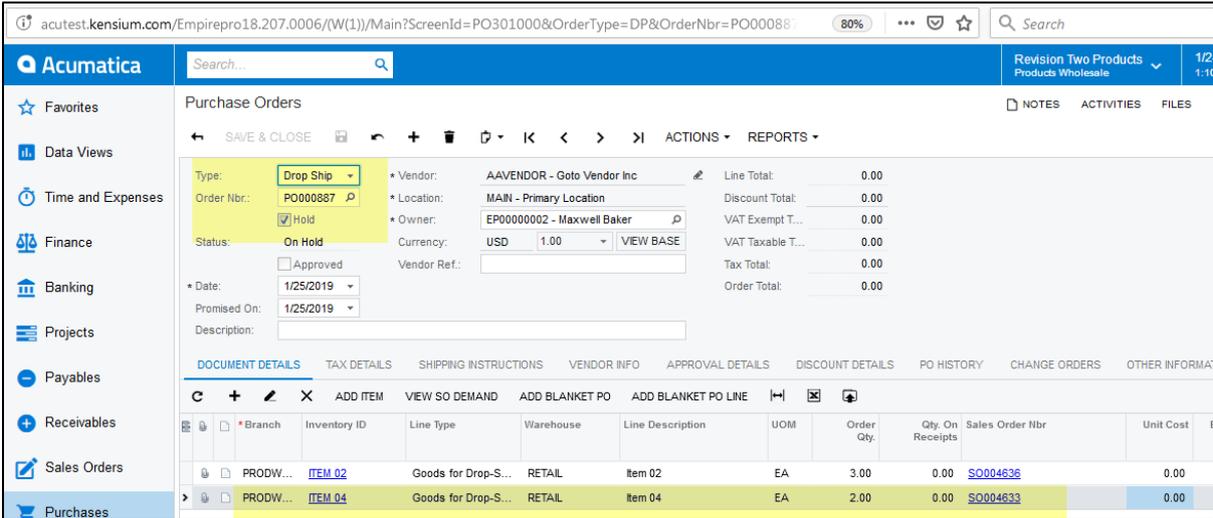
- A warning message is displayed that no SO is linked to that item



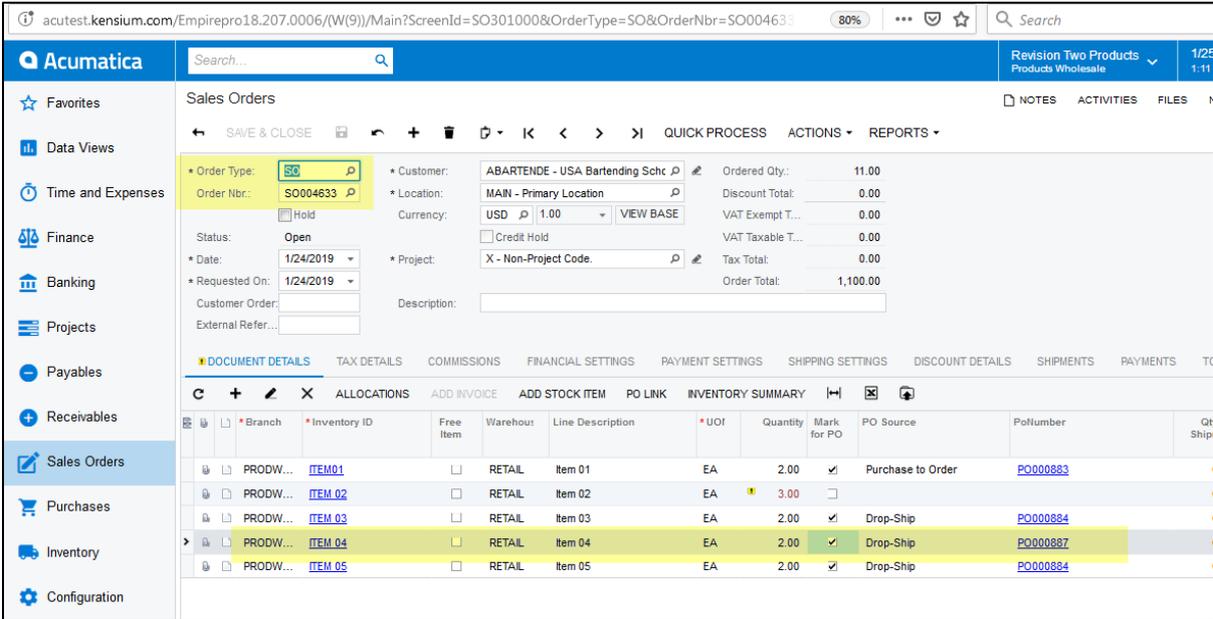
- Only the Sales Order in which the item is present are displayed in the selector and also the Order Status which are of Completed and Cancelled status are not displayed.



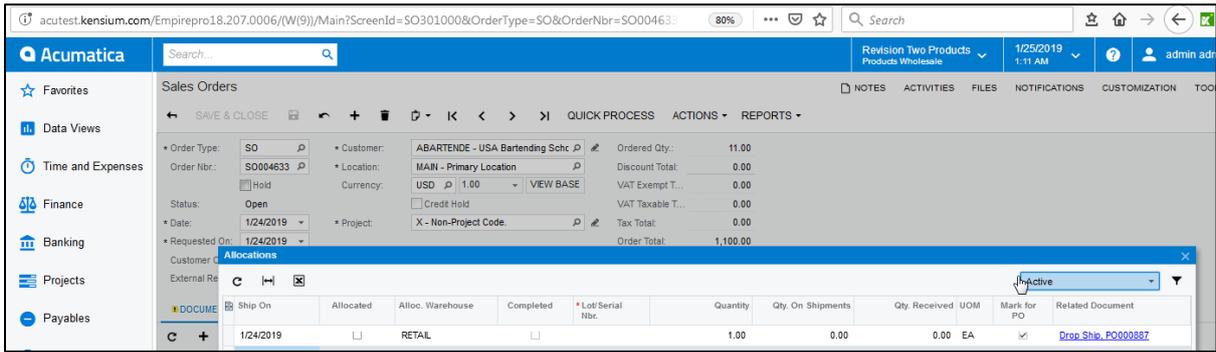
- Select any Sales Order and save.



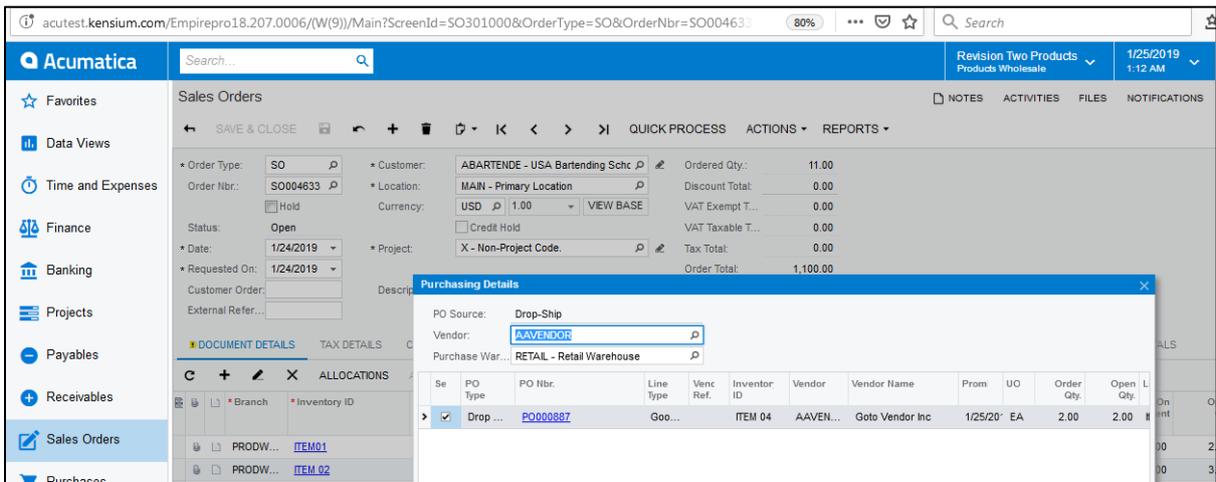
- The PO link is displayed for the item in the selected Sales Order in PO number column, PO link and allocations.



- Click on Allocations



- Click on PO Link



## 1.8. Multiple Purchase Orders linked to one Sales Order and Multiple Sales Orders linked to one Purchase Order.

### Purchase to Order:

- Select any Sales Order which is already created.
- Change the PO Source of the Item02 to “Purchase to Order” in the same Sales Order

The screenshot shows the Acumatica Sales Order form for Order Type SO and Order Nbr SO004638. The form is for customer ABARTENDE - USA Bartending Schc. The status is Open, and the date is 1/25/2019. The PO Source for Item 02 is set to Purchase to Order.

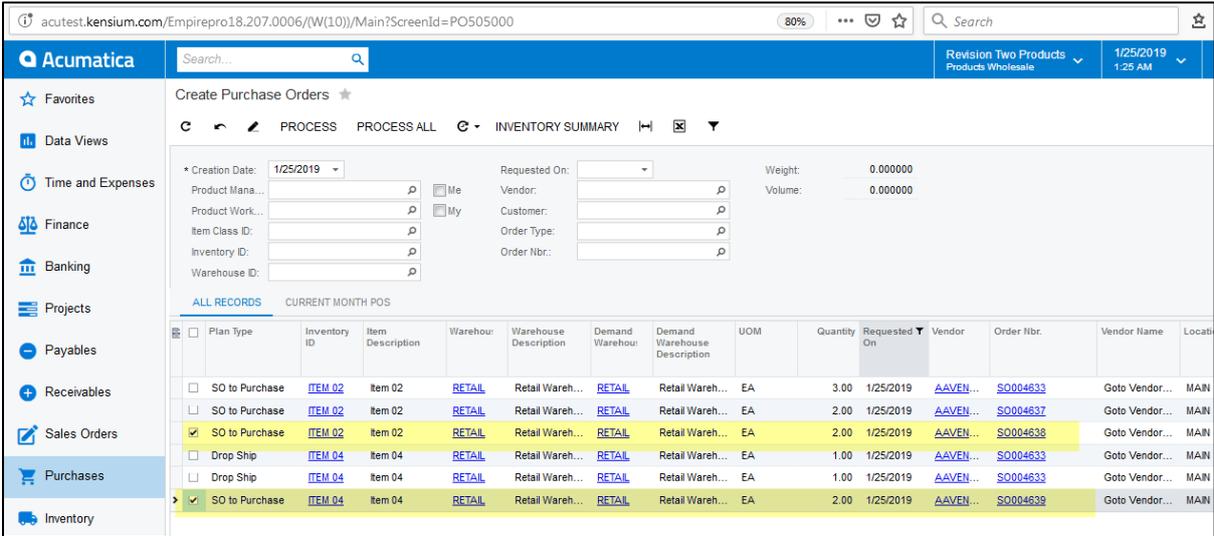
Branch	Inventory ID	Free Item	Warehouse	Line Description	UOF	Quantity	Mark for PO	PO Source	PolNumber
	PRODW... ITEM 02		RETAIL	Item 02	EA	2.00	<input checked="" type="checkbox"/>	Purchase to Order	
	PRODW... ITEM 03		RETAIL	Item 03	EA	3.00	<input type="checkbox"/>		

- Create another Sales Order.

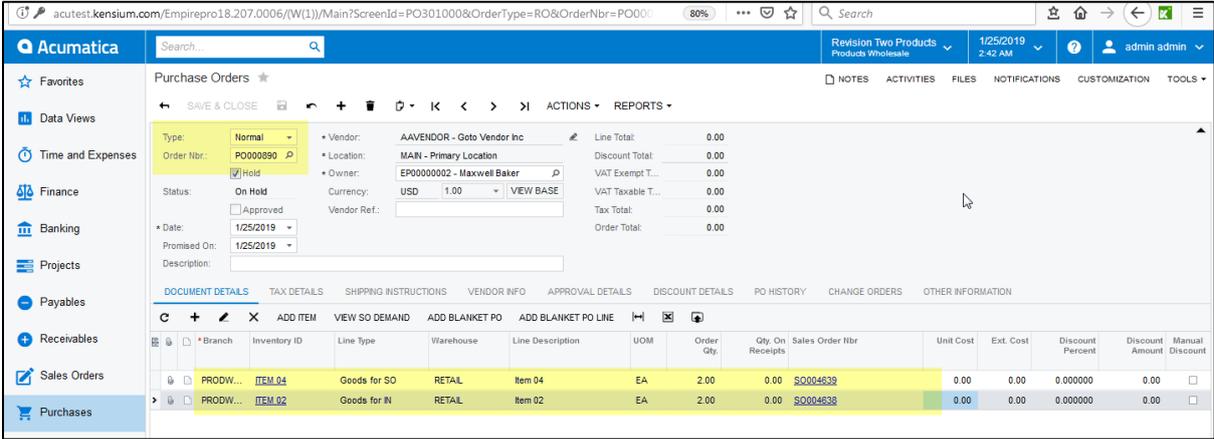
The screenshot shows the Acumatica Sales Order form for Order Type SO and Order Nbr SO004639. The form is for customer ABARTENDE - USA Bartending Schc. The status is Open, and the date is 1/25/2019. The PO Source for Item 04 is set to Purchase to Order.

Branch	Inventory ID	Free Item	Warehouse	Line Description	UOF	Quantity	Mark for PO	PO Source	PolNumber	Qty. On Shipment	Open Qty.	Unit Price	Discount Percent
	PRODW... ITEM 04		RETAIL	Item 04	EA	2.00	<input checked="" type="checkbox"/>	Purchase to Order		0.00	2.00	100.00	0.000000

- Navigate to Create Purchase Orders screen, Select all the orders and create one PO.



- All SO links should be displayed for the PO in all SO Order number column and View SO Demand popup



- PO link should be displayed in all sales orders for PO Number column, PO link popup and also allocations popup

The screenshot shows the Acumatica Sales Order form for Order Type SO and Order Number SO004639. The customer is ABARTENDE - USA Bartending Schc. The location is MAIN - Primary Location. The date is 1/25/2019. The status is Open. The ordered quantity is 2.00. The order total is 200.00. The table below shows one line item:

Branch	Inventory ID	Free Item	Warehouse	Line Description	UOI	Quantity	Mark for PO	PO Source	PoNumber	Qty. On Shipment
	PRODW... ITEM 04		RETAIL	Item 04	EA	2.00	✓	Purchase to Order	PO000890	0.00

The screenshot shows the Acumatica Sales Order form for Order Type SO and Order Number SO004638. The customer is ABARTENDE - USA Bartending Schc. The location is MAIN - Primary Location. The date is 1/25/2019. The status is Open. The ordered quantity is 5.00. The order total is 500.00. The table below shows two line items:

Branch	Inventory ID	Free Item	Warehouse	Line Description	UOI	Quantity	Mark for PO	PO Source	PoNumber	Qty. On Shipment
	PRODW... ITEM 02		RETAIL	Item 02	EA	2.00	✓	Purchase to Order	PO000890	
	PRODW... ITEM 03		RETAIL	Item 03	EA	3.00				

**DropShip:**

- Select any Sales Order which is already created.
- Select PO Source as Dropship for Item 01

The screenshot shows the Acumatica Sales Orders interface. The top navigation bar includes the Acumatica logo, a search bar, and the user's name 'Revision Two Products' with a dropdown arrow and the date '1/25/2019 1:28 AM'. The left sidebar contains various navigation options: Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders (highlighted), and Purchases. The main content area is titled 'Sales Orders' and features a toolbar with 'SAVE & CLOSE', 'QUICK PROCESS', 'ACTIONS', and 'REPORTS'. Below the toolbar, order details are displayed in a grid format. The 'Order Type' is 'SO', 'Order Nbr.' is 'SO004640', 'Customer' is 'ABARTENDE - USA Bartending Schc', and 'Location' is 'MAIN - Primary Location'. The 'Status' is 'Open', 'Date' is '1/25/2019', and 'Requested On' is '1/25/2019'. The 'Project' is 'X - Non-Project Code'. The 'Order Total' is '500.00'. Below the details, there are tabs for 'DOCUMENT DETAILS', 'TAX DETAILS', 'COMMISSIONS', 'FINANCIAL SETTINGS', 'PAYMENT SETTINGS', 'SHIPPING SETTINGS', 'DISCOUNT DETAILS', 'SHIPMENTS', 'PAYMENTS', and 'TOTALS'. A table below the tabs shows the order items:

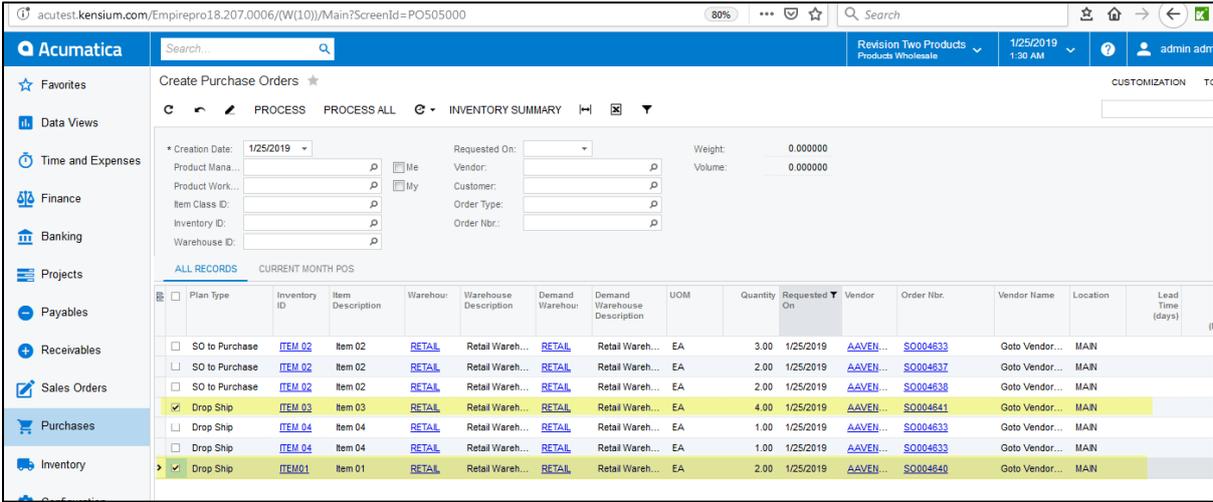
Branch	Inventory ID	Free Item	Warehou	Line Description	UOI	Quantity	Mark for PO	PO Source	PolNumber	Qty. On Shipment
	PROD... ITEM01		RETAIL	Item 01	EA	2.00	✓	Drop-Ship		0.00
	PROD... ITEM 05		RETAIL	Item 05	EA	3.00				0.00

- Create another Sales Order.

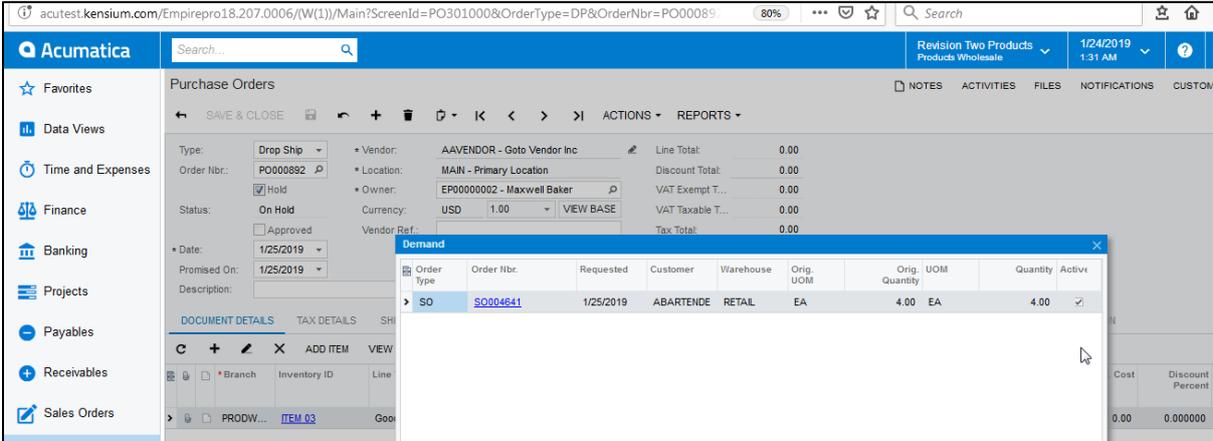
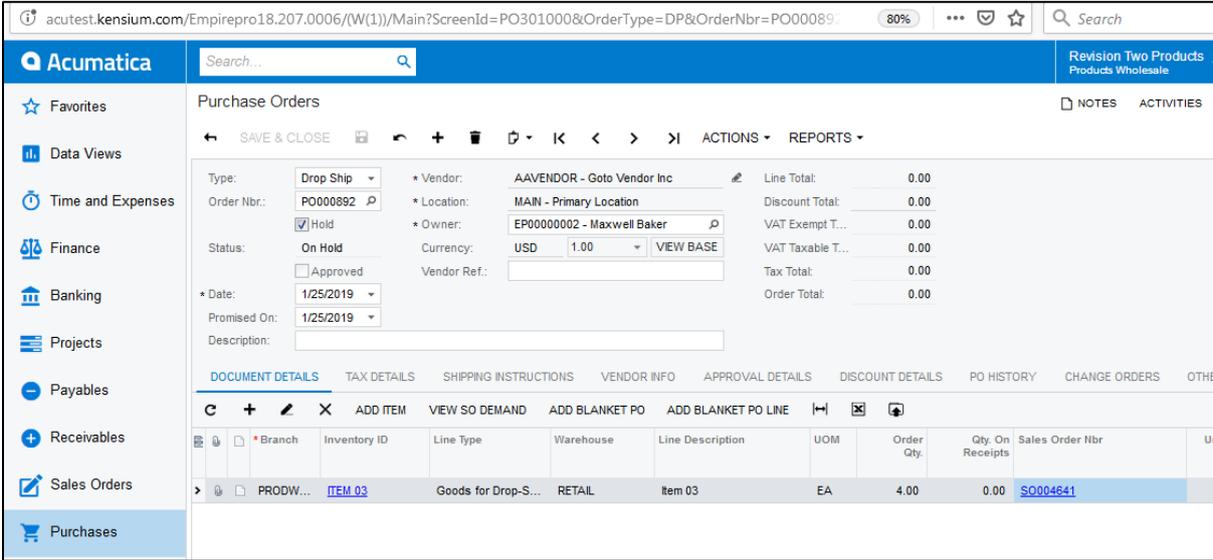
The screenshot shows the Acumatica Sales Orders interface for a new order. The top navigation bar is identical to the previous screenshot. The left sidebar is also the same. The main content area is titled 'Sales Orders'. The 'Order Type' is 'SO', 'Order Nbr.' is 'SO004641', 'Customer' is 'ABARTENDE - USA Bartending Schc', and 'Location' is 'MAIN - Primary Location'. The 'Status' is 'Open', 'Date' is '1/25/2019', and 'Requested On' is '1/25/2019'. The 'Project' is 'X - Non-Project Code'. The 'Order Total' is '400.00'. Below the details, there are tabs for 'DOCUMENT DETAILS', 'TAX DETAILS', 'COMMISSIONS', 'FINANCIAL SETTINGS', 'PAYMENT SETTINGS', 'SHIPPING SETTINGS', 'DISCOUNT DETAILS', 'SHIPMENTS', and 'PAYMENTS'. A table below the tabs shows the order items:

Branch	Inventory ID	Free Item	Warehou	Line Description	UOI	Quantity	Mark for PO	PO Source	PolNumber	Qty. On Shipment
	PROD... ITEM 03		RETAIL	Item 03	EA	4.00	✓	Drop-Ship		0.00

- Navigate to Create Purchase Orders screen, Select all the orders and create one PO.



- Two different PO's are created and SO Links should be displayed for the PO in all SO Order number column and View SO Demand popup



The screenshot shows the Acumatica interface for a Purchase Order. The top navigation bar includes the Acumatica logo, a search bar, and user information. The left sidebar contains navigation icons for Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, and Sales Orders. The main content area is titled 'Purchase Orders' and displays details for PO000891. The details include: Type: Drop Ship, Order Nbr: PO000891, Status: On Hold, Date: 1/25/2019, Promised On: 1/25/2019, Vendor: AAVENDOR - Goto Vendor Inc, Location: MAIN - Primary Location, Owner: EP00000002 - Maxwell Baker, Currency: USD 1.00, and Vendor Ref. A summary table on the right shows: Line Total: 0.00, Discount Total: 0.00, VAT Exempt T...: 0.00, VAT Taxable T...: 0.00, Tax Total: 0.00, and Order Total: 0.00. Below the details are tabs for DOCUMENT DETAILS, TAX DETAILS, SHIPPING INSTRUCTIONS, VENDOR INFO, APPROVAL DETAILS, DISCOUNT DETAILS, PO HISTORY, and CHANGE ORDERS. A table at the bottom lists items with columns: Branch, Inventory ID, Line Type, Warehouse, Line Description, UOM, Order Qty, Qty. On Receipts, and Sales Order Nbr. One item is visible: PRODW... ITEM01, Goods for Drop-S..., RETAIL, Item 01, EA, 2.00, 0.00, SO004640.

This screenshot is similar to the previous one but includes a 'Demand' popup window. The popup window has columns: Order Type, Order Nbr., Requested, Customer, Warehouse, Orig. UOM, Orig. Quantity, UOM, Quantity, and Active. One entry is shown: Order Type: SO, Order Nbr.: SO004640, Requested: 1/25/2019, Customer: ABARTENDE, Warehouse: RETAIL, Orig. UOM: EA, Orig. Quantity: 2.00, UOM: EA, Quantity: 2.00, and Active: checked.

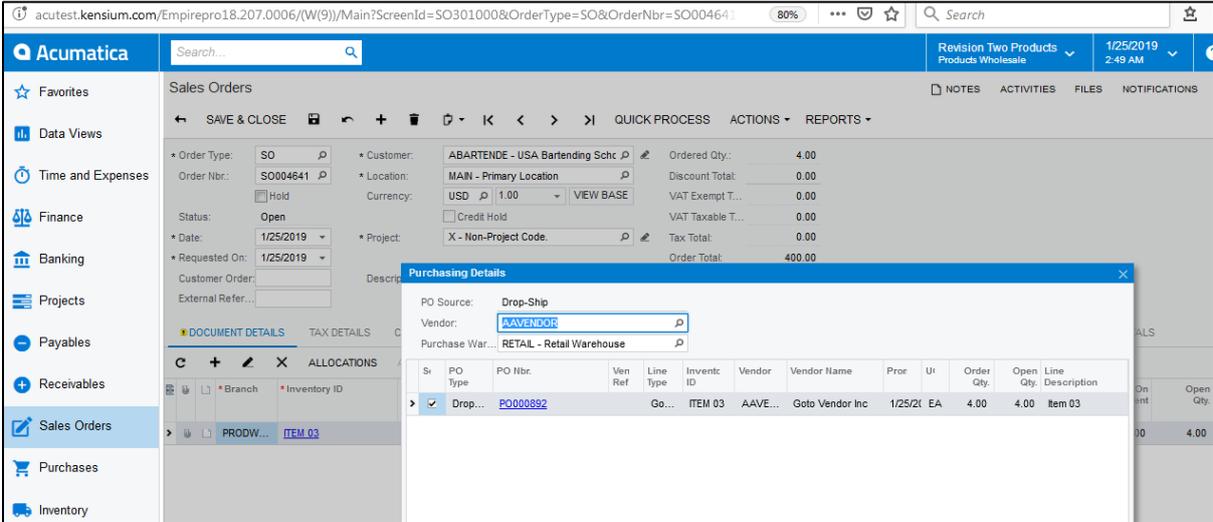
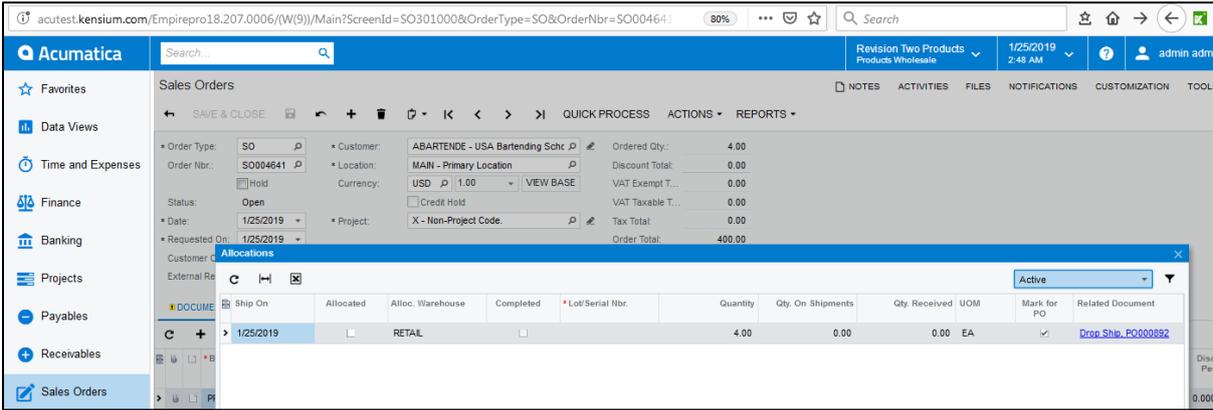
- PO link should be displayed in all sales orders for PO Number column, PO link popup and also allocations popup

The screenshot shows the Acumatica interface for a Sales Order. The top navigation bar includes the Acumatica logo, a search bar, and user information. The left sidebar contains navigation icons for Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders, and Purchases. The main content area is titled 'Sales Orders' and displays details for SO004640. The details include: Order Type: SO, Order Nbr.: SO004640, Status: Open, Date: 1/25/2019, Requested On: 1/25/2019, Customer: ABARTENDE - USA Bartending Schc, Location: MAIN - Primary Location, Currency: USD 1.00, Project: X - Non-Project Code, and Vendor Ref. A summary table on the right shows: Ordered Qty.: 5.00, Discount Total: 0.00, VAT Exempt T...: 0.00, VAT Taxable T...: 0.00, Tax Total: 0.00, and Order Total: 500.00. Below the details are tabs for DOCUMENT DETAILS, TAX DETAILS, COMMISSIONS, FINANCIAL SETTINGS, PAYMENT SETTINGS, SHIPPING SETTINGS, DISCOUNT DETAILS, SHIPMENTS, and PAYMENTS. A table at the bottom lists items with columns: Branch, Inventory ID, Free Item, Warehouse, Line Description, UOI, Quantity, Mark for PO, PO Source, and PoNumber. Two items are visible: PRODW... ITEM01, RETAIL, Item 01, EA, 2.00, checked, Drop-Ship, PO000891; and PRODW... ITEM05, RETAIL, Item 05, EA, 3.00, unchecked.

The screenshot shows the Acumatica Sales Order screen for order SO004640. The order is for customer ABARTENDE - USA Bartending Schc, located at MAIN - Primary Location. The status is Open, and the date is 1/25/2019. The order total is 500.00. An Allocations dialog box is open, showing a table with columns: Ship On, Allocated, Alloc. Warehouse, Completed, Lot/Serial Hbr., Quantity, Qty. On Shipments, Qty. Received, UOM, Mark for PO, and Related Document. A single row is visible with Ship On 1/25/2019, Allocated 2.00, Alloc. Warehouse RETAIL, and Related Document Drop Ship, P0000891.

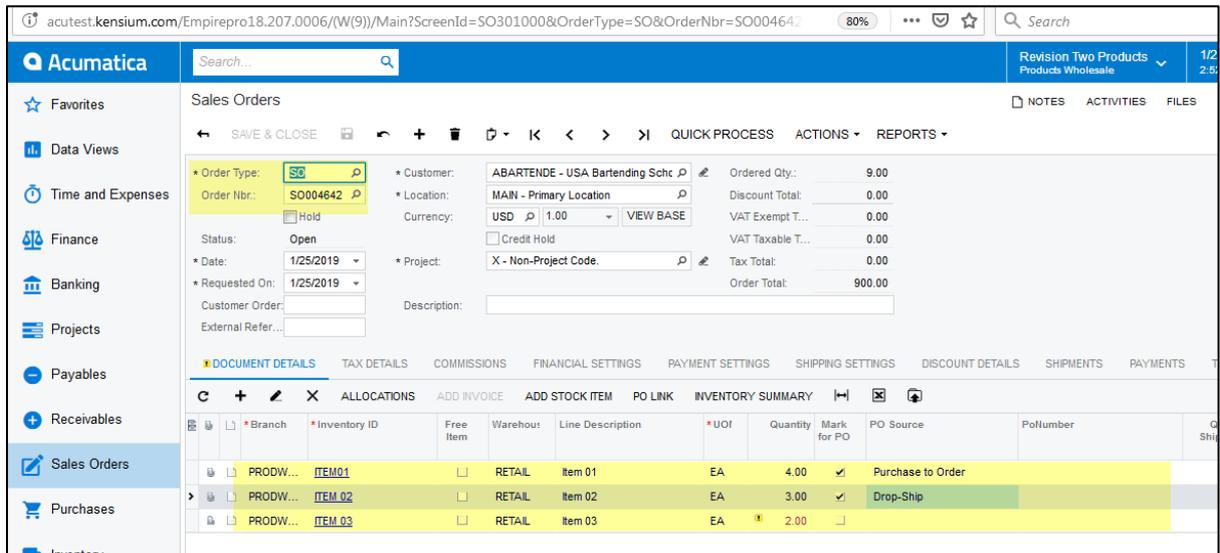
The screenshot shows the Acumatica Sales Order screen for order SO004640. A Purchasing Details dialog box is open, showing PO Source: Drop-Ship, Vendor: AAVENDOR, and Purchase Warehouse: RETAIL - Retail Warehouse. Below the dialog, there is a table with columns: Se, PO Type, PO Nbr., Venc Ref., Line Type, Inventor ID, Vendor, Vendor Name, Prom, UO, Order Qty, and Open Qty. A row is visible with Se checked, PO Type Drop, PO Nbr. P0000891, Vendor AAVEN..., Vendor Name Goto Vendor Inc, UO EA, Order Qty 2.00, and Open Qty 2.00.

The screenshot shows the Acumatica Sales Order screen for order SO004641. The order is for customer ABARTENDE - USA Bartending Schc, located at MAIN - Primary Location. The status is Open, and the date is 1/25/2019. The order total is 400.00. Below the order details, there is a table with columns: Branch, Inventory ID, Free Item, Warehouse, Line Description, UOI, Quantity, Mark for PO, PO Source, and PoNumber. A row is visible with Branch PRODW..., Inventory ID ITEM\_03, Warehouse RETAIL, Line Description Item 03, UOI EA, Quantity 4.00, Mark for PO checked, PO Source Drop-Ship, and PoNumber P0000892.

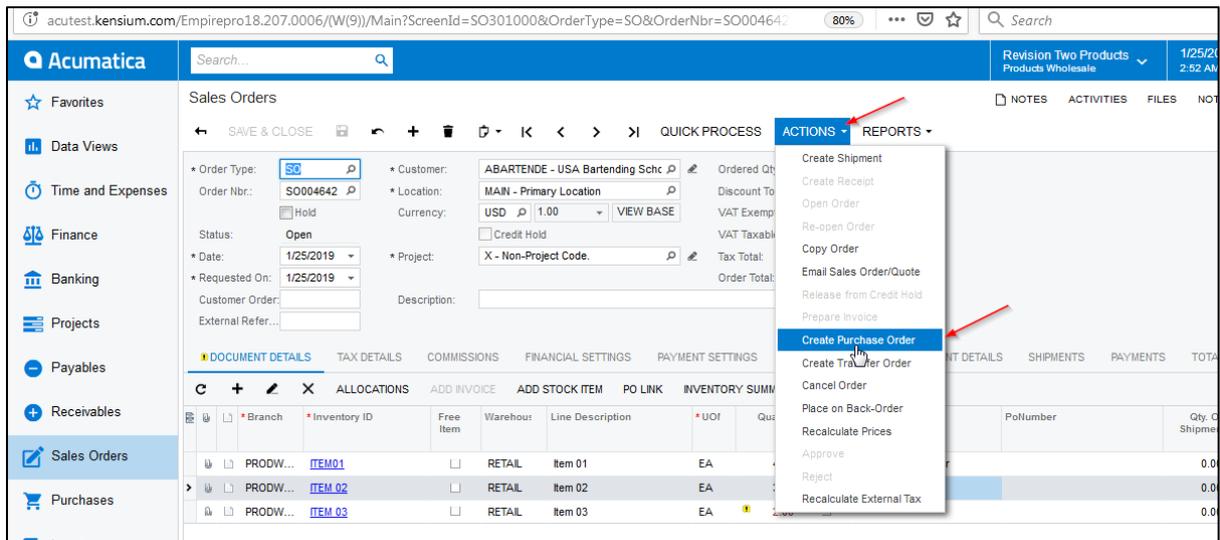


Combination of Dropship, Purchase to Order and normal items

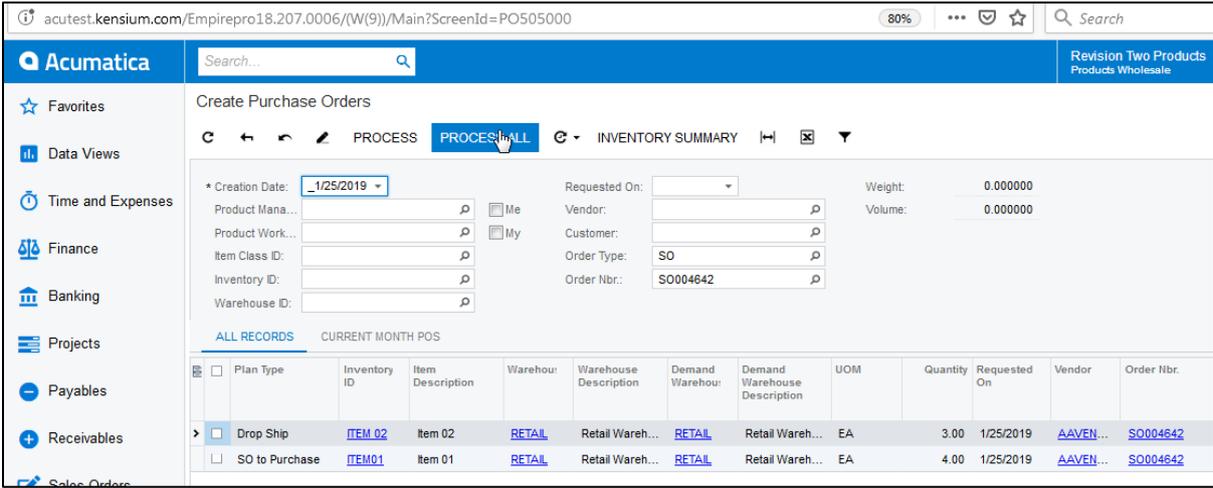
- Create a Sales Order with 3 products.
- Mark one product as Purchase to Order, one as Dropship and do not check Mark for PO for other product



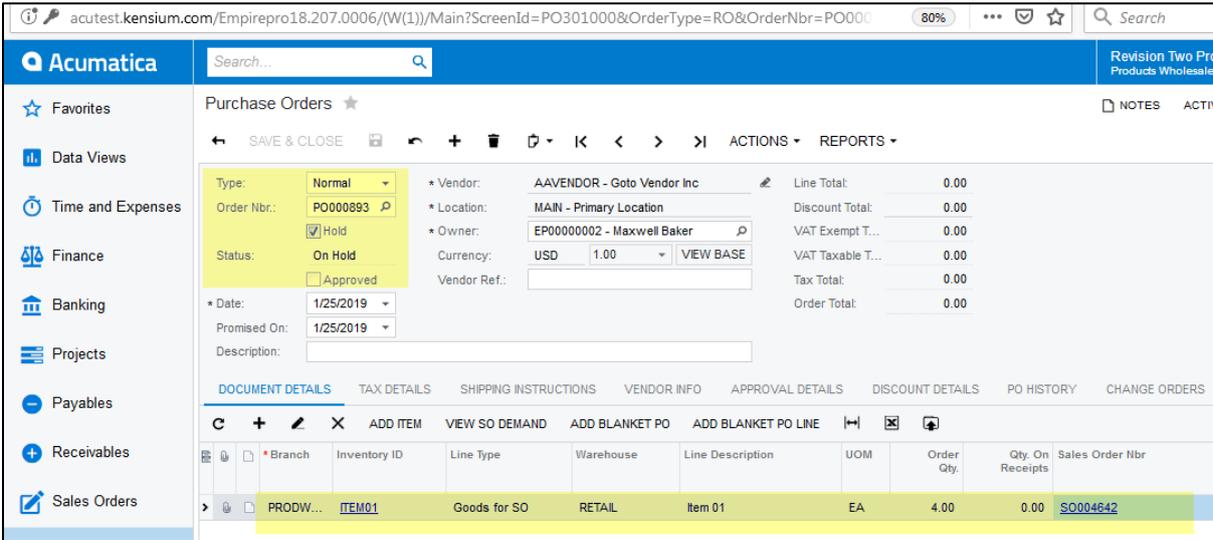
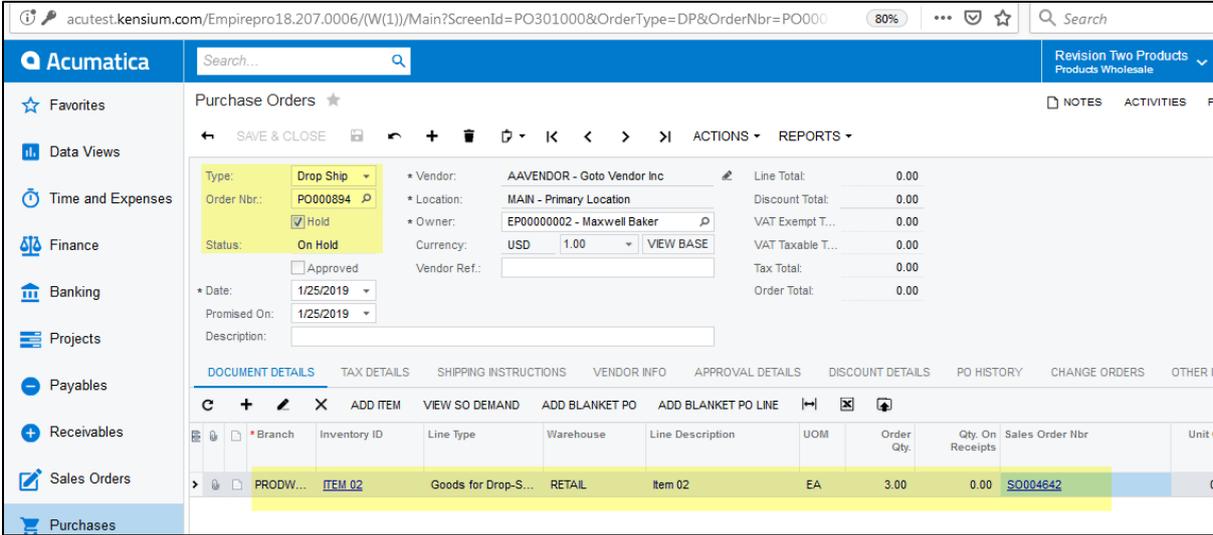
- Click on Actions->Create Purchase Order



- Click on Process All



- Two different PO's are created for the same order one with Normal Type and one with Dropship Type



- Respective Purchase Orders numbers are displayed in the Sales Orders screen.

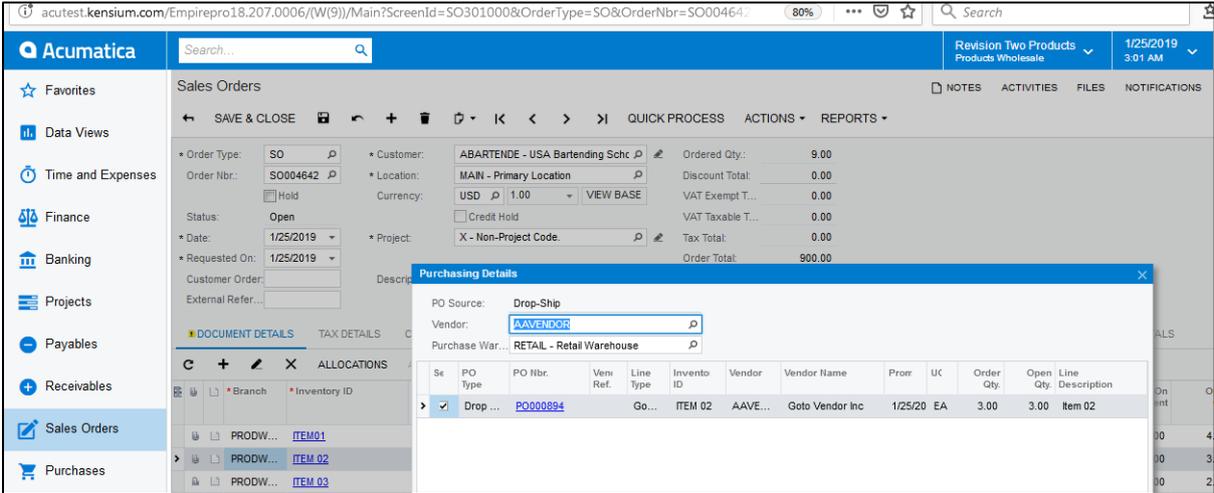
The screenshot shows the Acumatica Sales Orders interface. The top navigation bar includes the Acumatica logo, a search bar, and user information: 'Revision Two Products', 'Products Wholesale', and '1/25/2019 2:55 AM'. The left sidebar contains a navigation menu with icons for Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders (highlighted), Purchases, and Inventory. The main content area is titled 'Sales Orders' and features a toolbar with 'SAVE & CLOSE', '+', '-', and navigation arrows. Below the toolbar, order details are displayed in a form: Order Type: SO, Order Nbr.: SO004642, Customer: ABARTENDE - USA Bartending Schc, Location: MAIN - Primary Location, Currency: USD 1.00, Status: Open, Date: 1/25/2019, Project: X - Non-Project Code. Summary statistics include: Ordered Qty.: 9.00, Discount Total: 0.00, VAT Exempt T...: 0.00, VAT Taxable T...: 0.00, Tax Total: 0.00, and Order Total: 900.00. A tabbed interface below the form shows 'DOCUMENT DETAILS' selected. A table lists the order items:

Branch	Inventory ID	Free Item	Warehouse	Line Description	UOI	Quantity	Mark for PO	PO Source	PolNumber	Qty. On Shipment
	PROD... ITEM01		RETAIL	Item 01	EA	4.00	✓	Purchase to Order	PO000893	0.00
	PROD... ITEM02		RETAIL	Item 02	EA	3.00	✓	Drop-Ship	PO000894	0.00
	PROD... ITEM03		RETAIL	Item 03	EA	2.00				0.00

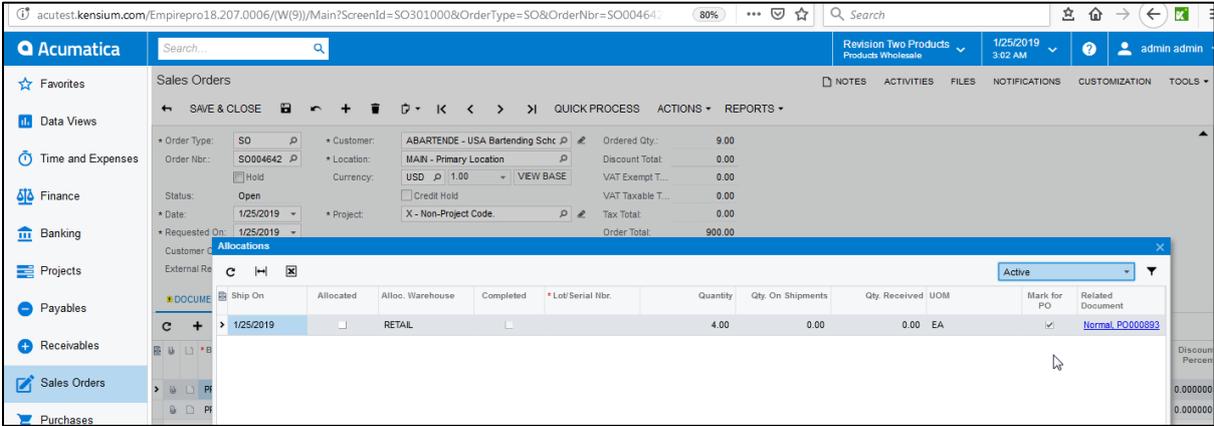
- Click on PO Link for all the products

This screenshot is similar to the first one but includes a 'Purchasing Details' dialog box. The dialog box has a title bar and a close button. It contains the following information: PO Source: Purchase to Order, Vendor: AAVENDOR, and Purchase War...: RETAIL - Retail Warehouse. Below this information is a table with columns: Se, PO Type, PO Nbr., Venc Ref., Line Type, Inventor ID, Vendor, Vendor Name, Prom, UC, Order Qty., Open Qty., and Line Descr. The table contains one row:

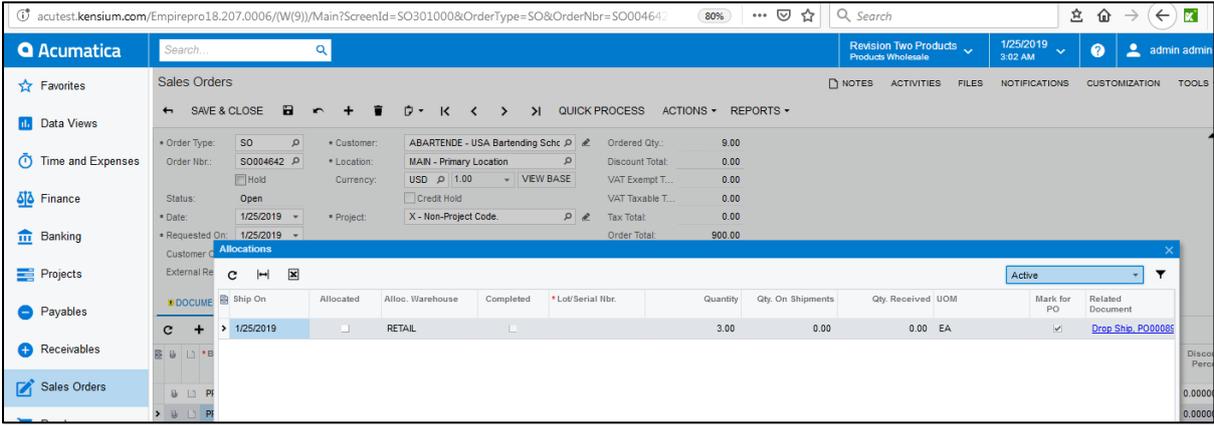
Se	PO Type	PO Nbr.	Venc Ref.	Line Type	Inventor ID	Vendor	Vendor Name	Prom	UC	Order Qty.	Open Qty.	Line Descr
✓	Normal	PO000893		Go...	ITEM01	AAVEN...	Goto Vendor Inc	1/25/20'	EA	4.00	4.00	Item 01



- Click on Allocations for the all the products



- Release the Receipts for all the PO's



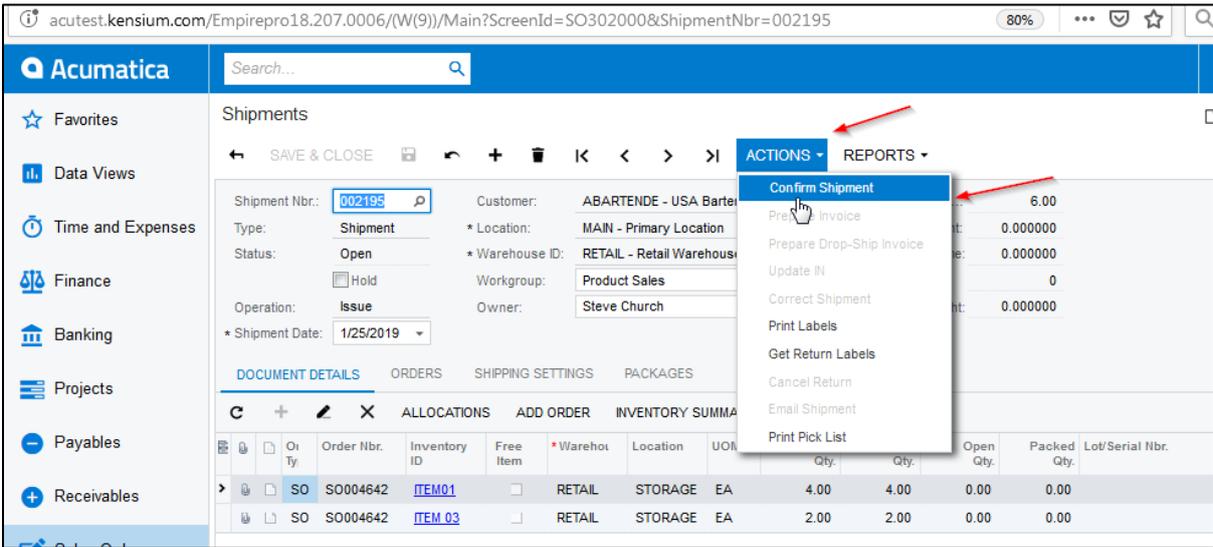
The screenshot shows the Acumatica interface for a Purchase Receipt. The header includes the Acumatica logo, a search bar, and the document title "Revision Two Products Wholesale". The main content area displays receipt details for PR000864, including Vendor (AAVENDOR - Goto Vendor Inc), Location (MAIN - Primary Location), Date (1/25/2019), and Status (Released). A table below shows the receipt line items, with the first item (ITEM01) having a quantity of 4.00. The interface includes navigation tabs for DOCUMENT DETAILS, PURCHASE ORDERS, PR HISTORY, BILLING HISTORY, LANDED COSTS, and OTHER INFORMATION.

This screenshot shows the Acumatica interface for a Purchase Receipt with receipt number PR000865. The details are similar to the previous receipt, but the quantity for the first item (ITEM02) is 3.00. The interface structure, including the navigation tabs and table, is consistent with the previous screenshot.

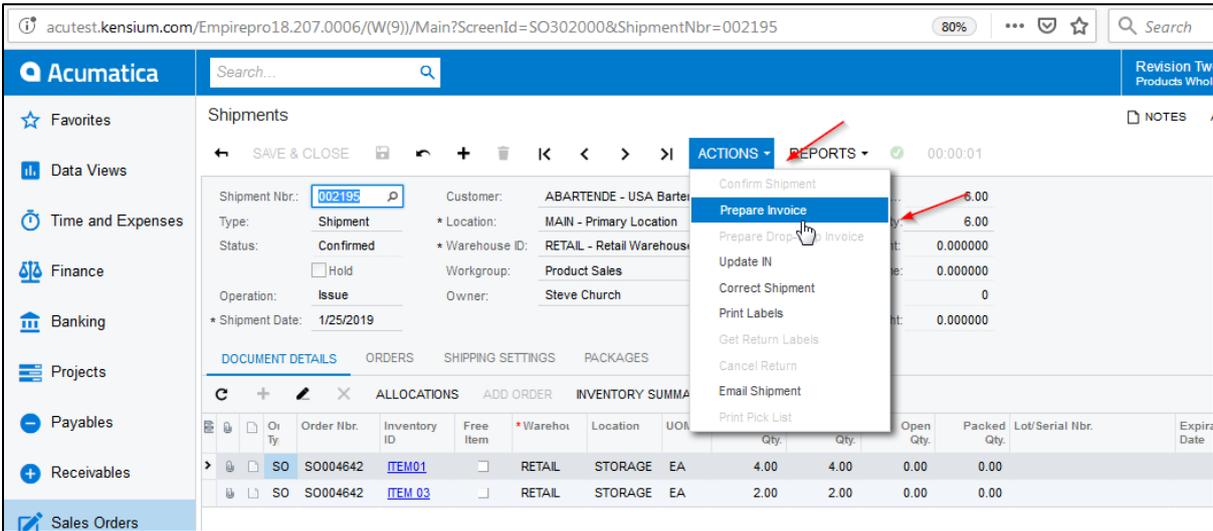
- Click on Actions->Create Shipment

The screenshot displays the Acumatica Sales Orders screen. The header shows the document title "Revision Two Products Wholesale" and the date "1/25/2019 3:04 AM". The main area shows sales order details for SO004642, including Customer (ABARTENDE - USA Bartending Schc), Location (MAIN - Primary Location), and Status (Open). A table lists three items (ITEM01, ITEM02, ITEM03). The "ACTIONS" menu is open, showing options such as "Create Shipment", "Create Receipt", "Open Order", "Re-open Order", "Copy Order", "Email Sales Order/Quote", "Release from Credit Hold", "Prepare Invoice", "Create Purchase Order", "Create Transfer Order", "Cancel Order", "Place on Back-Order", "Recalculate Prices", "Approve", "Reject", and "Recalculate External Tax". Red arrows point to the "ACTIONS" menu and the "Create Shipment" option.

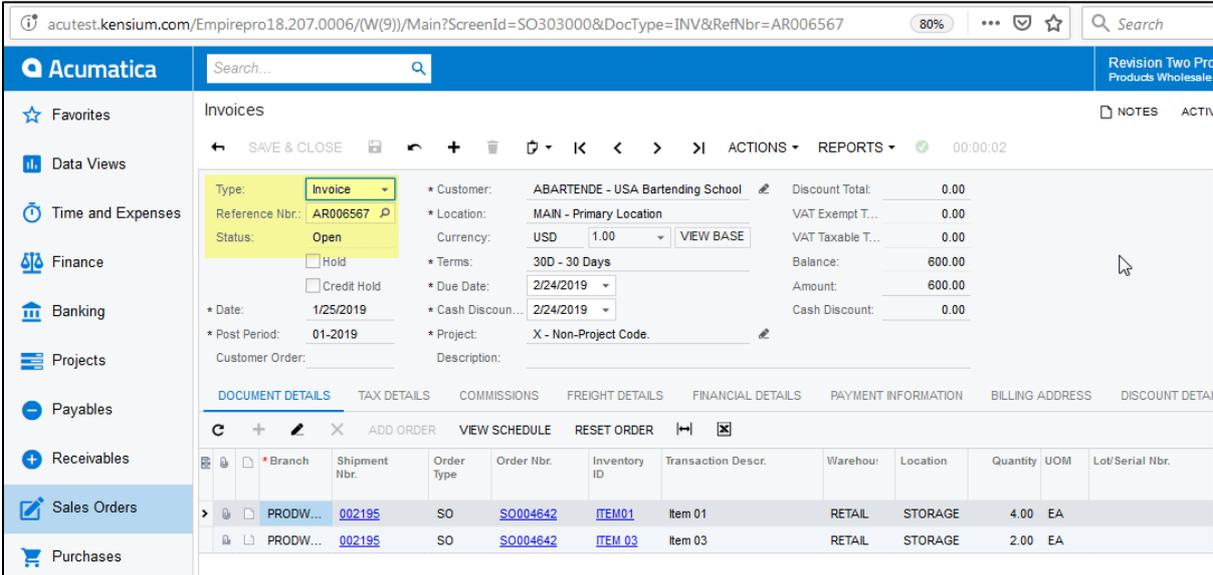
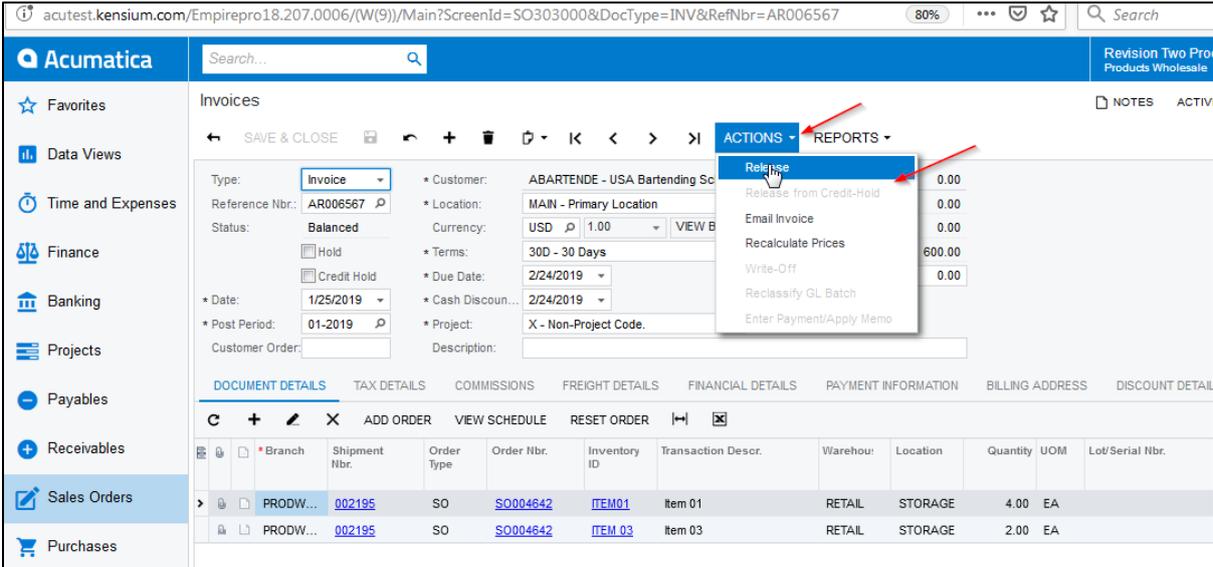
- Click on Actions->Confirm Shipment



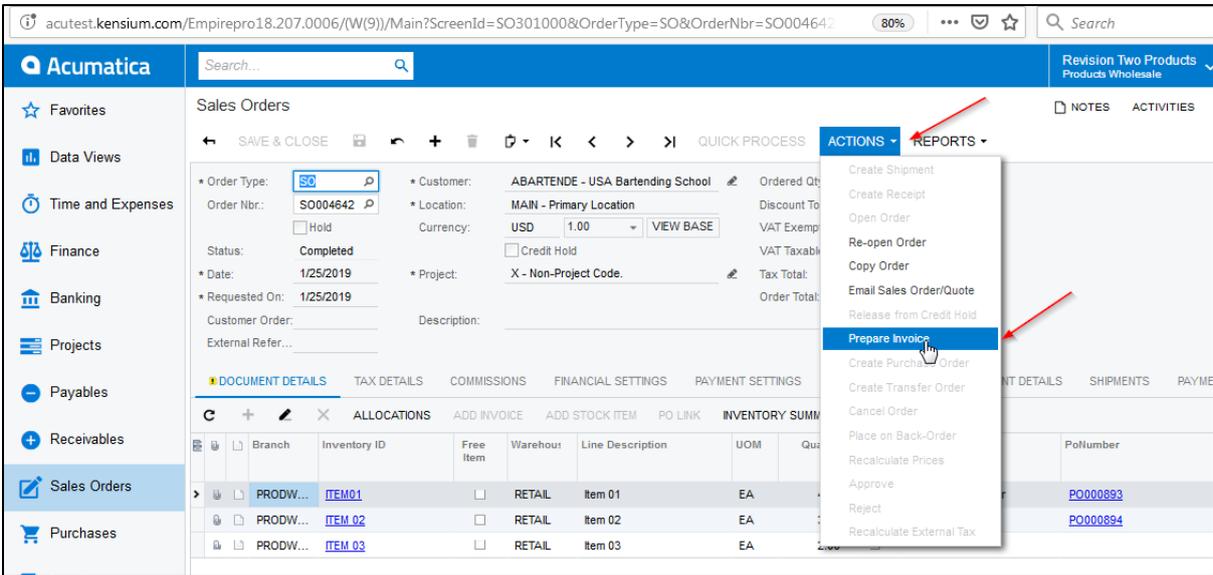
- Click on Actions->Prepare Invoice



- Click on Actions->Release



- Prepare Invoice and Release for Dropship item from Sales Order screen



acutest.kensium.com/Empirepro18.207.0006/(W(9))/Main?ScreenId=SO303000&DocType=INV&RefNbr=AR006568 80% Search

Acumatica Search... Revision Two Products Products Wholesale 1/25 3:08

Invoices NOTES ACTIVITIES FILES

SAVE & CLOSE ACTIONS REPORTS 00:00:02

Type: Invoice Customer: ABARTENDE - USA Bartending School Discount Total: 0.00  
Reference Nbr: AR006568 Location: MAIN - Primary Location VAT Exempt T...: 0.00  
Status: Open Currency: USD 1.00 VIEW BASE VAT Taxable T...: 0.00  
 Hold Terms: 30D - 30 Days Balance: 300.00  
 Credit Hold \* Due Date: 2/24/2019 Amount: 300.00  
\* Date: 1/25/2019 \* Cash Discoun...: 2/24/2019 Cash Discount: 0.00  
\* Post Period: 01-2019 \* Project: X - Non-Project Code.  
Customer Order: Description:

DOCUMENT DETAILS TAX DETAILS COMMISSIONS FREIGHT DETAILS FINANCIAL DETAILS PAYMENT INFORMATION BILLING ADDRESS DISCOUNT DETAILS APPLICATION

ADD ORDER VIEW SCHEDULE RESET ORDER

Branch	Shipment Nbr.	Order Type	Order Nbr.	Inventory ID	Transaction Descr.	Warehouse	Location	Quantity	UOM	Lot/Serial Nbr.	Expiration Date
PROD...	PR000865	SO	SO004642	ITEM 02	Item 02	RETAIL	<SPLIT>	3.00	EA		