**Job Aids**

Sales Operations Manager 2021 R2

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# Managing Product Catalog

This chapter contains instructions related to managing inventory items in Acumatica ERP.

## To Create an Item Class for Stock Items

1. Open the [*Item Classes*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=80a3301b-4eb2-4ce2-94c5-0407c786a0f1) (IN201000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Class ID** box, type the unique identifier to be used for the item class.
3. In the **Description** box, type a description of the item class that will help users to identify it.
4. In the **General Settings** section on the **General** tab, do the following:
   1. Select the **Stock Item** check box to indicate that the item class is intended for stock items.
   2. In the **Tax Category** box, select the tax category that the system will apply to all items of this class.
   3. In the **Posting Class** box, select the posting class that will determine the posting settings for items of this class.
   4. In the **Availability Calculation Rule** box, select the availability calculation rule to be used for calculating the availability of stock items of this item class.
5. In the **Unit of Measure** section of the **General** tab, specify the following:
   1. In the **Base Unit** box, specify the unit of measure (UOM) to be used as the base unit for items of this class. You can select a globally defined UOM or type a new UOM on the fly.
   2. In the **Sales Unit** box, specify the default sales unit for items of the class.
   3. In the **Purchase Unit** box, specify the default purchase unit for items of the class.
6. On the form toolbar, click **Save** to save your changes.
7. If needed, you can specify this item class as the default item class for stock item classes as follows:
   1. Open the [*Inventory Preferences*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=f2eb4e55-f802-4259-a41f-609965c856f1) (IN101000) form.
   2. In the **Default Stock Item Class** box of the **Data Entry Settings** section on the **General**

tab, select the created item class from the list.

* 1. On the form toolbar, click **Save**.

## To Create a Stock Item

1. Open the [*Stock Items*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=77786a70-1f1e-4d63-ad98-96f98e4fcb0e) (IN202500) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Inventory ID** box, specify the unique identifier for the stock item.
3. In the **Description** box, type a description of the stock item that will help users identify it.
4. On the **General** tab, in the **Item Class** box, select the item class that will provide default settings for the stock item.

Make sure, that the default settings copied from the item class are applicable to the stock item. If not, specify new values for settings, as needed.

1. If needed, on the **Price/Cost** tab, specify the settings to calculate the cost and price for the stock item.
2. If needed, on the **Vendors** tab, add vendors that supply the stock item to you.
3. If needed, on the **Packaging** tab, specify the weight and volume dimensions for the stock item to be used by third-party carriers.
4. On the form toolbar, click **Save** to save your changes.

## To Create an Item Class for Non-Stock Items

1. Open the [*Item Classes*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=80a3301b-4eb2-4ce2-94c5-0407c786a0f1) (IN201000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Class ID** box, type the unique identifier to be used for the item class.
3. In the **Description** box, type a description of the item class that will help users to identify it.
4. In the **General Settings** section of the **General** tab, specify the following:
   1. Clear the **Stock Item** check box to indicate that the item class is intended for non-stock items.
   2. In the **Tax Category** box, select the tax category to be applied to all items of this class.
   3. In the **Posting Class** box, select the posting class that will determine the posting settings for items of this class.
5. In the **Unit of Measure** section of the **General** tab, specify the following:
   1. In the **Base Unit** box, specify the unit of measure (UOM) to be used as the base unit for items of this class. You can select a globally defined UOM or type a new UOM on the fly.
   2. In the **Sales Unit** box, specify the default sales unit for items of the class.
   3. In the **Purchase Unit** box, specify the default purchase unit for items of the class.
6. On the form toolbar, click **Save** to save your changes.
7. If needed, you can specify this item class as the default item class for non-stock item classes as follows:
   1. Open the [*Inventory Preferences*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=f2eb4e55-f802-4259-a41f-609965c856f1) (IN101000) form.
   2. In the **Default Non-Stock Item Class** box of the **Data Entry Settings** section on the

**General** tab, select the created item class from the list.

* 1. On the form toolbar, click **Save**.

## To Create a Non-Stock Item

1. Open the [*Non-Stock Items*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=bf68dd4f-63d4-460d-8dc0-9152f2bd6bf1) (IN202000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Inventory ID** box, type the unique identifier of the item.
3. In the **Description** box, type a description of the item that will help users identify it.
4. In the **Item Class** box of the **Item Defaults** section on the **General** tab, select the item class to be used to provide default settings.

Make sure that the default settings copied from the item class are applicable to the non-stock item. If not, specify new values for settings.

1. If you have not specified an item class, do the following:
   1. In the **Item Defaults** section of the **General** tab, specify the following:
      1. In the **Posting Class** box, specify the posting class to provide posting settings for the item.
      2. In the **Tax Category** box, specify the tax category to be applied to the item.
   2. In the **Unit of Measure** section of the **General** tab, specify the following:
      1. In the **Base Unit** box, specify the base unit of measure for the item.
      2. In the **Sales Unit** box, specify the sales unit for the item.
      3. In the **Purchase Unit** box, specify the purchase unit for the item.
2. If needed, on the **Price/Cost** tab, specify the settings to calculate cost and price for the non- stock item.
3. On the form toolbar, click **Save** to save your changes.

## To Create a Stock Kit

1. Open the [*Stock Items*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=77786a70-1f1e-4d63-ad98-96f98e4fcb0e) (IN202500) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Inventory ID** box, type a unique identifier of the kit.
3. In the **Description** box, type an extended description of the kit that will help users to identify it.
4. In the **Item Class** box of the **Item Defaults** section on the **General** tab, select the item class to provide the default settings for the kit.

Make sure that default settings copied from the item class are applicable to the stock kit. If not, specify new values for the settings.

1. In the **Item Defaults** section on the **General** tab, select the **Is a Kit** check box to indicate that the stock item you are creating is a stock kit.
2. If needed, on the **Price/Cost** tab, specify the settings to calculate the cost and price for the stock kit.
3. If needed, on the **Packaging** tab, specify the weight and volume dimensions for the stock kit to be used by third-party carriers.
4. On the form toolbar, click **Save** to save your changes.

## To Create a Specification for a Stock Kit

1. Open the [*Kit Specifications*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=c4a1e276-bcdb-4995-9522-c7b6dcb5f6c7) (IN209500) form.
2. In the **Kit Inventory ID** box of the Summary area, select the stock kit for which you want to create a specification.
3. In the **Revision** box, type the identifier of the kit revision, which is unique for the kit.
4. In the **Description** box, type a description of the kit specification that will help users to identify it.
5. Make sure that the **Active** check box is selected.
6. If you want to allow users to add components to the kit during assembly or shipping, select the

**Allow Component Addition** check box.

1. On the **Stock Components** tab, do the following for each stock item you want to add to the kit:
   1. On the table toolbar, click **Add Row** to add a new stock component.
   2. In the **Component ID** column, select a stock item to be added to the kit.
   3. In the **UOM** column, make sure that a correct unit of measure for the item is selected.
   4. In the **Component Qty.** column, specify the quantity of the stock item to be assembled to the kit.
   5. If you want to allow the quantity of the stock item to vary in the kit, select the **Allow Component Qty. Variance** check box and specify the minimum and maximum quantity in the **Min. Component Qty.** and **Max. Component Qty.** columns correspondingly.
   6. If needed, in the **Disassembly Coeff.** column, specify a decimal value between 0 and 1 that will indicate to what extent the component can be returned to the inventory during disassembly.
   7. If needed, select the **Allow Component Substitution** check box to indicate that the stock item can be substituted in the kit.
2. If needed, on the **Non-Stock Components** tab, do the following for each non-stock item to add a non-stock item to the kit:
   1. On the table toolbar, click **Add Row** to add a new non-stock component.
   2. In the **Component ID** column, select the non-stock item to be added to the kit.
   3. In the **UOM** column, make sure that the correct unit of measure for the item is selected.
   4. In the **Component Qty.** column, specify the quantity of the non-stock item to be added to the kit.
   5. If you want to allow the quantity of the non-stock item to vary in the kit, select the **Allow Component Qty. Variance** check box, and specify the minimum and maximum quantity in the **Min. Component Qty.** and **Max. Component Qty.** columns, respectively.
3. On the form toolbar, click **Save**.

## To Add a Revision to a Stock Kit

1. Open the [*Kit Specifications*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=c4a1e276-bcdb-4995-9522-c7b6dcb5f6c7) (IN209500) form.
2. In the **Kit Inventory ID** box of the Summary area, select the stock kit for which you want to add a new revision.
3. In the **Revision** box of the Summary area, type the revision identifier, which is unique for the stock kit.
4. If needed, in the **Description** box, type a description of the revision that will help users to identify it.
5. Make sure that the **Active** check box is selected.
6. Select the **Allow Component Addition** check box to allow users to add components to the kit during assembly or shipping.
7. On the **Stock Components** tab, do the following for each stock item you want to add to the kit:
   1. On the table toolbar, click **Add Row**.
   2. In the **Component ID** column, select the stock item to be added to the kit.
   3. In the **UOM** column, make sure that the correct unit of measure for the item is selected.
   4. In the **Component Qty.** column, specify the quantity of the stock item to be added to the kit.
   5. If needed, select the **Allow Component Qty. Variance** check box, and specify the minimum and maximum quantity in the **Min. Component Qty.** and **Max. Component Qty.** columns, respectively, to allow the quantity of the stock item to vary in the kit.
   6. If needed, in the **Disassembly Coeff.** column, specify a decimal value between 0 and 1.
   7. If needed, select the **Allow Component Substitution** check box to indicate that the stock item can be replaced in the kit.
8. If needed, on the **Non-Stock Components** tab, do the following for each non-stock item to add a non-stock item to the kit:
   1. On the table toolbar, click **Add Row**.
   2. In the **Component ID** column, select the non-stock item to be added to the kit.
   3. In the **UOM** column, make sure that the correct unit of measure for the item is selected.
   4. In the **Component Qty.** column, specify the quantity of the non-stock item to be added to the kit.
   5. If needed, select the **Allow Component Qty. Variance** check box and specify the minimum and maximum quantity in the **Min. Component Qty.** and **Max. Component Qty.** columns, respectively, to allow the quantity of the non-stock item to vary in the kit.
9. On the form toolbar, click **Save**.

## To Assemble a Stock Kit

1. Open the [*Kit Assembly*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=dbeb6a3a-153e-4731-bb21-850cd124bfa4) (IN307000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the Summary area, do the following:
   1. In the **Type** box, select *Production*.
   2. In the **Date** box, make sure that the correct business date is specified.
   3. In the **Post Period** box, make sure that the correct period for posting the transaction is specified.
   4. In the **Inventory ID** box, select the stock kit you want to assemble.
   5. In the **Revision** box, select the revision of the kit specification that you want to use to assemble the kit. The system will insert information about the stock and non-stock components on the corresponding tabs of the form.
   6. In the **Warehouse** box, select warehouse where the assembly is performed.
   7. In the **Quantity** box, type the quantity of kit units you want to assemble.
   8. If needed, in the **Description** box, type a description of the assembly that will help users to identify it.
3. On the form toolbar, click **Save** to save your changes.
4. On the form toolbar, click **Release** to release the assembly document.
5. On the **Financial** tab, make sure that the system has added the number of the general ledger batch with the appropriate transactions.

## To Disassemble a Stock Kit

1. Open the [*Kit Assembly*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=dbeb6a3a-153e-4731-bb21-850cd124bfa4) (IN307000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the Summary area, do the following:
   1. In the **Type** box, select *Disassembly*.
   2. In the **Date** box, make sure that the correct business date is specified.
   3. In the **Post Period** box, make sure that the correct period for posting the transaction is specified.
   4. In the **Inventory ID** box, select the stock kit you want to disassemble.
   5. In the **Revision** box, select the revision of the kit specification that you want to use to disassemble the kit. The system will insert information about stock and non-stock components on the corresponding tabs of the form.
   6. In the **Reason Code** box, select reason code used to record costs for the kit disassembling operation.
   7. In the **Warehouse** box, select warehouse where the disassembly is performed.
   8. In the **Quantity** box, type the quantity of kit units you want to disassemble.

j. If needed, in the **Description** box, type a brief description of the disassembly.

1. On the form toolbar, click **Save** to save your changes.
2. On the form toolbar, click **Release** to release the disassembly document.
3. On the **Financial** tab, make sure that the system has added the number of the general ledger batch with transactions.

## To Create a Non-Stock Kit

1. Open the [*Non-Stock Items*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=bf68dd4f-63d4-460d-8dc0-9152f2bd6bf1) (IN202000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Inventory ID** box, type a unique identifier of the kit.
3. In the **Description** box, type an extended description of the kit.
4. If needed, in the **Item Class** box of the **Item Defaults** section on the **General** tab, select the item class to provide default settings for the kit.

Make sure that default settings copied from the item class are applicable to the non-stock kit. If not, specify new values for the settings.

1. In the **Item Defaults** section on the **General** tab, select the **Is a Kit** check box to indicate that the non-stock item you are creating is a kit.
2. If needed, on the **Price/Cost** tab, specify the settings to calculate the cost and price for the non- stock kit.
3. On the form toolbar, click **Save** to save your changes.

## To Create a Specification for a Non-Stock Kit

1. Open the [*Kit Specifications*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=c4a1e276-bcdb-4995-9522-c7b6dcb5f6c7) (IN209500) form.
2. In the **Kit Inventory ID** box of the Summary area, select the non-stock kit for which you want to create a specification.
3. In the **Revision** box, type the identifier of the specification revision, which is unique within this kit.

When creating a specification you also are creating the first revision of this specification.

1. In the **Description** box, type a description of the kit specification that will help users to identify it.
2. Make sure that the **Active** check box is selected.
3. Select the **Allow Component Addition** check box if you want to allow users to add components to the kit during assembly or shipping.
4. On the **Stock Components** tab, do the following for each stock item you want to add to the kit:
   1. On the table toolbar, click **Add Row** to add a new stock component.
   2. In the **Component ID** column, select the stock item to be added to the kit.

Any lot- and serial-tracked stock items can be added to the specification of a non-stock kit, except for the items with the *When Used* assignment method or with the *User-Enterable* issue method specified for their lot/serial classes on the [*Lot/Serial Classes*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=9806d94b-097e-4082-9f01-9ca66d031ab7) (IN207000) form.

* 1. In the **UOM** column, make sure that the correct unit of measure for the item is selected.
  2. In the **Component Qty.** column, specify the quantity of the stock item to be added to the kit.
  3. Select the **Allow Component Qty. Variance** check box and specify the minimum and maximum quantity in the **Min. Component Qty.** and **Max. Component Qty.** columns correspondingly to allow the quantity of the stock item to vary in the kit.
  4. If needed, in the **Disassembly Coeff.** column, specify a decimal value between 0 and 1 that will indicate to what extent the component can be returned to the inventory during disassembly.
  5. If needed, select the **Allow Component Substitution** check box to indicate that the stock item can be substituted in the kit.

1. On the **Non-Stock Components** tab, do the following for each non-stock item you want to add to the kit:
   1. On the table toolbar, click **Add Row** to add a new non-stock component.
   2. In the **Component ID** column, select the non-stock item to be added to the kit.
   3. In the **UOM** column, make sure that the correct unit of measure for the item is selected.
   4. In the **Component Qty.** column, specify the quantity of the non-stock item to be added to the kit.
   5. Select the **Allow Component Qty. Variance** check box, and specify the minimum and maximum quantity in the **Min. Component Qty.** and **Max. Component Qty.** columns, respectively, to allow the quantity of the non-stock item to vary in the kit.
2. On the form toolbar, click **Save**.

# Approving Sales Orders

This chapter contains instructions related to approving sales orders in Acumatica ERP.

## To Approve a Sales Order

1. Open the [*Sales Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=19e4021c-1b84-49fd-be12-0320c5f1c7e5) (SO301000) form.
2. In the **Order Type** box, select the order type.
3. In the **Order Nbr.** box, select the reference number of the order to be approved.
4. On the More menu, click **Approve**.

## To Approve Multiple Orders

1. Open the [*Approvals*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=1fe1afcc-e676-466e-8c3f-cbf64857e32a) (EP503010) form.
2. On the **My Approvals** tab, select the unlabeled check boxes in the rows of the documents that require your approval.
3. On the form toolbar, click **Approve** to approve the selected documents.

# Processing Payments

This chapter contains instructions related to reserving payments and prepayments for sales orders in Acumatica ERP.

## To Enter a New Payment for an Order

1. Open the [*Sales Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=19e4021c-1b84-49fd-be12-0320c5f1c7e5) (SO301000) form.
2. In the **Order Type** box, select the order type.
3. In the **Order Nbr.** box, select the reference number of the order.
4. On the table toolbar of the **Payments** tab, click **Create Payment**.
5. In the **Create Payment** dialog box, which opens, do the following:
   1. In the **Payment Amount** box, specify the total of the payment.
   2. In the **Description** box, specify the description of the payment.
   3. Make sure that in the **Payment Method** box, the appropriate payment method is selected.
   4. Make sure that in the **Cash Account** box, the appropriate cash account is selected.
   5. Click **OK**.
6. While you are still on the **Payments** tab, click the link in the **Reference Nbr.** column.
7. The [*Payments and Applications*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ae844bf4-1aef-42cd-9e2f-49b3ee1bc8d7) (AR302000) form opens in a pop-up window with the created document of the *Payment* type.
8. On the form toolbar, click **Release** to release the payment.

## To Enter a New Prepayment for an Order

1. Open the [*Sales Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=19e4021c-1b84-49fd-be12-0320c5f1c7e5) (SO301000) form.
2. In the **Order Type** box, select the order type.
3. In the **Order Nbr.** box, select the reference number of the order.
4. On the table toolbar of the **Payments** tab, click **Create Prepayment**.
5. In the **Create Prepayment** dialog box, which opens, specify the following:
   1. In the **Payment Amount** box, specify the total of the prepayment.
   2. In the **Description** box, specify the description of the prepayment.
   3. Make sure that in the **Payment Method** box, the appropriate payment method is selected.
   4. Make sure that in the **Cash Account** box, the appropriate cash account is selected.
   5. Click **OK**.
6. While you are still on the **Payment** tab, click the link in the **Reference Nbr.** column.
7. The [*Payments and Applications*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ae844bf4-1aef-42cd-9e2f-49b3ee1bc8d7) (AR302000) form opens in a pop-up window with created document of the *Prepayment* type.
8. On the form toolbar, click **Release** to release the payment.

## To Link an Existing Payment to an Order

1. Open the [*Sales Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=19e4021c-1b84-49fd-be12-0320c5f1c7e5) (SO301000) form.
2. In the **Order Type** box, select the order type.
3. In the **Order Nbr.** box, select the reference number of the order.
4. On the **Payments** tab, add a new row to the table. In the **Doc. Type** column, select *Payment*, and in the **Reference Nbr.** column, select the reference number of the payment to be linked to the order.
5. On the form toolbar, click **Save** to save your changes.

## To Link an Existing Prepayment to an Order

1. Open the [*Sales Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=19e4021c-1b84-49fd-be12-0320c5f1c7e5) (SO301000) form.
2. In the **Order Type** box, select the order type.
3. In the **Order Nbr.** box, select the reference number of the order.
4. On the **Payments** tab, add a new row to the table. In the **Doc. Type** column, select *Prepayment*, and in the **Reference Nbr.** column, select the reference number of the prepayment to be linked to the order.
5. On the form toolbar, click **Save** to save your changes.

# Processing Orders for Drop-Shipment

This chapter contains instructions related to creating sales orders for drop-shipping and preparing purchase orders for these sales orders in Acumatica ERP.

## To Create a Sales Order for Drop-Shipping

1. Open the [*Sales Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=19e4021c-1b84-49fd-be12-0320c5f1c7e5) (SO301000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the Summary area, select *SO* as the order type.
3. In the **Customer** box, select the customer.
4. On the **Details** tab, for each line you want to add to the sales order and mark for drop-shipping, click **Add Row** on the table toolbar, and do the following:
   1. Specify the branch.
   2. Specify the inventory ID of the requested stock item.
   3. Select a warehouse.
   4. Specify the quantity. Make sure the unit of measure selected by default is correct.
   5. Type the price if the system has not inserted it by default.
   6. Select the **Mark for PO** check box.
   7. Specify *Drop-Ship* as the **PO Source**.
5. On the form toolbar, click **Save** to save the order.

## To Link a Sales Order to Existing Drop-Ship Purchase Order

1. Open the [*Sales Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=19e4021c-1b84-49fd-be12-0320c5f1c7e5) (SO301000) form.
2. In the **Order Type** box, select the order type.
3. In the **Order Nbr.** box, select the reference number of the order.
4. On the **Details** tab, for each line that requires drop-shipping, do the following:
   1. Click the line, and on the table toolbar, click **PO Link**.
   2. In the **Purchasing Details** dialog box, which opens, select *Drop-Ship* in the **PO Source** box.
   3. In the **Vendor** box, select the vendor from which the items have been ordered.
   4. In the table, select the unlabeled check box in the row of the drop-ship order to be linked to the sales order line.
   5. Click **Save** to link the orders and close the dialog box.

Review the **Drop-Ship PO Nbr.** column, which shows the reference number of the drop-ship purchase order to which this sales order line has been linked.

1. On the form toolbar, click **Save** to save your changes to the sales order.

## To Create Drop-Ship Purchase Order for a Particular Sales Order

1. Open the [*Sales Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=19e4021c-1b84-49fd-be12-0320c5f1c7e5) (SO301000) form.
2. In the **Order Type** box, select the order type.
3. In the **Order Nbr.** box, select the reference number of the order.
4. On the More menu, click **Create Purchase Order**. This opens the [*Create Purchase Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=dc527541-a18a-44c9-8d51-6d2d77a37443)

(PO505000) form with the list of purchase requests filtered for this particular sales order.

1. If needed, change the **Creation Date**, which is the date on which the purchase order or orders will be generated.
2. In the table, select the unlabeled check boxes in the rows of the needed lines with the *Drop-Ship* type, and make sure each of the selected lines has the proper vendor specified in the **Vendor** box.
3. Click **Process** on the form toolbar, or click **Process All** to generate purchase orders for all listed lines. The system generates the drop-ship purchase orders.

## To Create Drop-Ship Purchase Orders for Multiple Sales Orders

1. Open the [*Create Purchase Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=dc527541-a18a-44c9-8d51-6d2d77a37443) (PO505000) form.
2. In the **Order Type** box of the Selection area of the form, select *SO* (or a custom order type used in your organization for drop shipping).
3. If needed, change the **Creation Date**, which is the date on which the purchase order will be generated.
4. In the table, select the unlabeled check boxes in the rows of the needed lines with the *Drop-Ship*

type, and make sure each of the selected lines has the proper vendor specified.

1. Click **Process** on the form toolbar, or click **Process All** to generate purchase orders for all listed sales orders. The system generates the drop-ship purchase orders.

# Processing Purchase for Sale

This chapter contains instructions related to creating sales orders marked for purchase and preparing purchase orders for these sales orders in Acumatica ERP.

## To Create a Sales Order Intended for Purchase

1. Open the [*Sales Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=19e4021c-1b84-49fd-be12-0320c5f1c7e5) (SO301000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the Summary area, select *SO* as the order type.
3. In the **Customer** box, select the customer.
4. On the **Details** tab, for each line you want to add to the sales order and mark purchasing, click

**Add Row** on the table toolbar, and do the following:

* 1. Specify the branch.
  2. Specify the inventory ID of the requested stock item.
  3. Specify the quantity. Make sure the unit of measure selected by default is correct.
  4. Select the **Mark for PO** check box.
  5. Specify *Purchase to Order* as the **PO Source**.

1. On the form toolbar, click **Save**.

## To Create a Purchase Order for a Particular Sales Order

1. Open the [*Sales Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=19e4021c-1b84-49fd-be12-0320c5f1c7e5) (SO301000) form.
2. In the **Order Type** box, select the order type.
3. In the **Order Nbr.** box, select the reference number of the order.
4. On the More menu (under **Replenishment**), click **Create Purchase Order**. This opens the [*Create Purchase Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=dc527541-a18a-44c9-8d51-6d2d77a37443) (PO505000) form with the list of purchase requests filtered for this particular sales order.
5. If needed, change the **Creation Date**, which is the date on which the purchase order or orders will be generated.
6. In the table, select the unlabeled check boxes next to the needed lines with the *SO to Purchase* type, and make sure each of the selected lines has the proper vendor specified in the **Vendor** box.
7. Click **Process** on the form toolbar, or click **Process All** to generate purchase orders for all listed lines. The system generates the purchase orders.

## To Create a Purchase Order for Multiple Sales Order

1. Open the [*Create Purchase Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=dc527541-a18a-44c9-8d51-6d2d77a37443) (PO505000) form.
2. If needed, change the **Creation Date**, which is the date that the system will insert for the generated purchase order.
3. In the table, select the unlabeled check boxes next to the needed lines with the *SO to Purchase*

type, and make sure that each of the selected lines has the proper vendor specified.

1. Click **Process** on the form toolbar, or click **Process All** to generate purchase orders for all listed sales orders. The system generates the purchase orders.

## To Link a Sales Order to Existing Purchase Order

1. Open the [*Sales Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=19e4021c-1b84-49fd-be12-0320c5f1c7e5) (SO301000) form.
2. In the **Order Type** box, select the order type.
3. In the **Order Nbr.** box, select the reference number of the order to be linked.
4. On the **Details** tab, for each line that is marked for purchasing, do the following:
   1. Click the line, and on the table toolbar, click **PO Link**.
   2. In the **Purchasing Details** dialog box, which opens, select *Purchase to Order* in the **PO Source** box.
   3. In the **Vendor** box, select the vendor from which the items have to be purchased.
   4. In the **Purchase Warehouse** box, specify the destination warehouse.
   5. In the table of the dialog box, select the unlabeled check boxes in the row of a purchase order line to be linked to the sales order line.
   6. Click **Save** to link the orders and close the dialog box.
5. Save your changes to the sales order.