Links

Adding Links

- Click the   Links from the screen menu.
- Click   to add a link.
- Select the type of link from the dropdown menu:
  - SGA Window: A shortcut to the selected SGA window
  - Purchase Order: A PO number to which the current entry should be associated
  - Add links to many POs: Allows the user to select multiple PO numbers at once. A link to each selected PO will be added to the entry being edited
  - Journal Entry: A Journal Entry to which the current entry should be associated
  - Add links to many Journals: Allows the user to select multiple Journal entries at once. A link to each selected JE will be added to the entry being edited
  - Invoice: A Invoice to which the current entry should be associated
  - Add links to many Invoices: Allows the user to select multiple Invoices at once. A link to each selected Invoice will be added to the entry being edited
  - AP Payment Batch: A shortcut to the selected payment batch's Process Payment screen
  - Object: A shortcut to the selected Object's detail screen
  - Actuals/Budget Account: A shortcut to the selected GL account's Actuals/Budget entry screen
  - Custom URL: A shortcut to the specified web address
  - Task: A shortcut to the selected Task ID (available in future software release)
  - SGA Sales options (available in future software release)
- Name the link.
- Click "Save" to store the link.
- Click "Save" to close the Links menu and retain all changes.
- If a Link is added to a purchase order, journal entry, payment batch, or invoice the linked entry will have an inverse link created for two-way access.

Editing Links

- Click the   Links from the screen menu.
- Highlight the desired link.
- Click   .
- Make desired changes.
- Click "Save" to store the link.
- Click "Save" to close the Links menu and retain all changes.

Accessing Links

- Click the   Links from the screen menu.
- Highlight the desired link.

- Click [⟷ View Link] .
  - A new browser window will open displaying the linked item (purchase order detail, invoice detail, journal entry detail, payment batch payment processing screen, Object detail, Actuals/Budget entry, or Custom URL).