

Viewing Related Transactions

Available in All Versions of Sage 50 Accounting

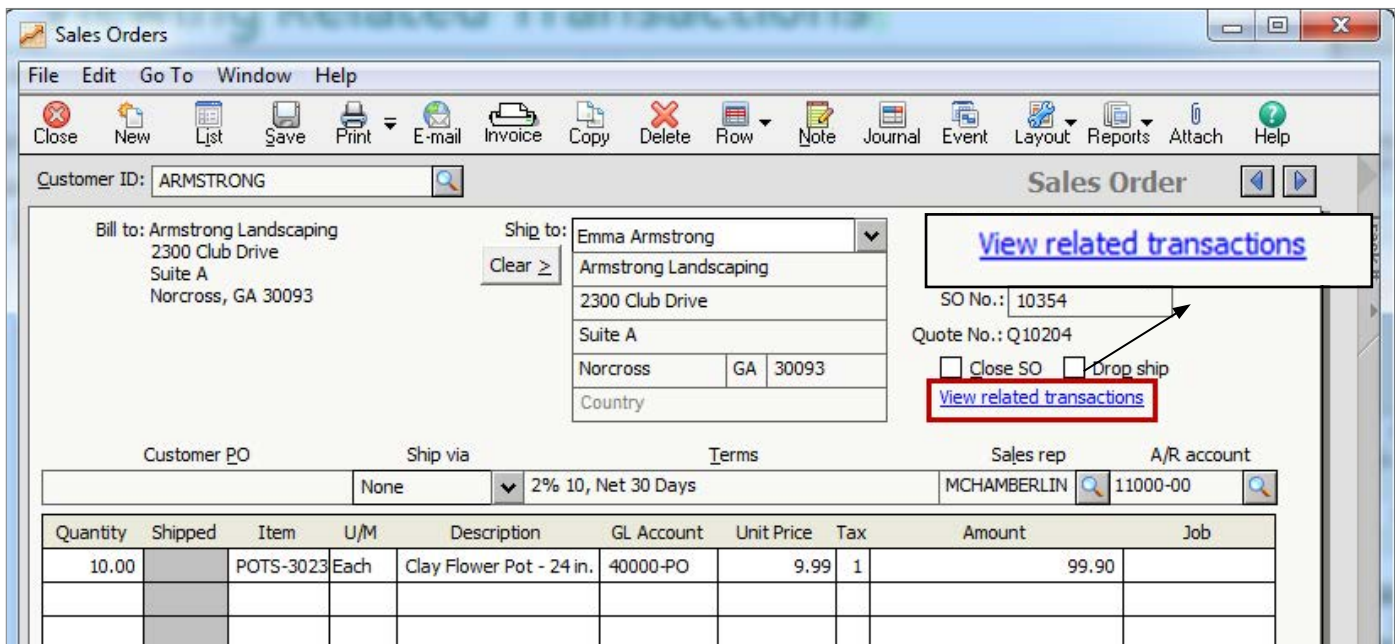
Quick Reference Guide

What are related transactions?

Related transactions are sales or purchase transactions that are linked or connected. For example, a customer calls you and asks for a price quote. You generate a quote in Sage 50 and once they decide to order, you convert the quote to a sales order. After the order has been filled, you send an invoice to the customer. When they pay the invoice, you record the receipt. The quote, sales order, invoice and receipt are related to each other.

How do I view related transactions?

If a sales or purchase transaction has related transactions, the **'View Related Transactions'** link appears on that transaction. Click this link to see transactions that are directly related to the one you're viewing.



RMSTRONG		Status: Both		Related to Sales Order		
Transaction Type	Reference No.	Date	Period	Amount	Links	Security
Quote	Q10204	3/15/2015	3	\$105.89	1	
Sales Invoice	SI-7859	3/15/2015	3	\$105.89	2	

View the transactions directly related to the one you were just viewing.

Select the number in the Links column to see additional transactions that are related to that particular transaction.

Did you know?

- Viewing related transactions is a great way to help resolve issues with customer orders.
- If you do not have access to a transaction, "No Access" will appear in the Security column.

Related to Sales Order		
Amount	Links	Security
\$105.95	1	
	2	No Access

For more info, visit: Sage.com
or contact us at 866-996-7243