

Adding Links

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Adding Links

Daily > Account Transactions

Three general ledger options in the daily menu support the ability to create links:

1. Account Transactions
2. Journal Entry
3. Journal Entry Batches

After navigating to the appropriate option, follow the instructions below to add links. An account must be selected if you are working with account transactions.

- Click the links icon 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: This allows users to select multiple PO numbers simultaneously. The entry being edited will include a link to each selected PO entry.
 - Journal Entry: A Journal Entry to which the current entry should be associated.
 - Add links to many Journals: This allows the user to select multiple Journal entries simultaneously. The entry being edited will include a link to each selected JE entry.
 - Invoice: An invoice to which the current entry should be associated.
 - Add links to many Invoices: This allows users to select multiple Invoices simultaneously. A link to each selected invoice will be added to the edit of the entry.
 - 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 releases).
 - SGA Sales options (available in future software releases).
- 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 icon 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.
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Accessing Links

- Click the link icon from the screen menu.



- Highlight the desired link.
 - Click  .
 - 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).
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