SFA USER GUIDE

Creating Multiple Records from One Purchase Order
The first step to create your records is to enter the PO number in the PO Interface Identifier field. Click enter to populate the capital line items.

This PO is showing three pieces of exercise equipment, lines 1, 2, and 6. To start allocating your lines, click the Show List button at the bottom of the form.
This box will pop up, it is called the allocation box. To add a line item, click the small box on the far left.

Clicking the box will populate that line item in the allocation box to the right. When you have all line items you need to include on your asset record, click the Allocate button. You can also click the double right arrows if all lines are required for the record.
This will take you to the record entry form. You can reduce the allocation box by clicking the arrow in the blue header. Now you have full view of your form. Fill out the form as usual.
When your record is complete, click the blue disc icon at the top left of the ribbon to save.

Notice that the line item from your created record is still in the allocation box. Click OK and minimize the allocation box and close the record form to return to the PO Interface.
When you return to the PO Interface. Note that the line item 1 box is still checked, and that there is a 1 in the Assets column. This means that you have created an asset with that line. If you double-click on the 1 in the Assets column a pop up will show you the SUID tag number and if the record processed correctly.

To create another record from this PO, click the Show List button again to bring up your Allocation Box.
The Allocation Box will pop-up and it is very important to remove the selected line item by unclicking the checked box or use the double back arrows to clear the Box.
With an empty Allocation Box, select another line item and continue the record creation(s).
In another example, this PO has 5 identical systems that will need 5 records.

Below, lines 1, 3 and 4 have been selected for the first record. Click Allocate and complete the record.
Here lines 1, 3 and 4 will remain in the Allocation Box, click OK and return to the PO interface. You have the same 3 lines allocated and you can just click Allocate and complete the next record because the line items on the records are the same. Continue until you have created all 5 records.