Linking Customer POs to Schedules and Plan Lines

Linking a Customer PO allows MEplan to track budget usage and remaining balances.

To link a PO to a schedule listed on the plan:

1. Select the **options menu (⋮)** on the schedule line
2. Choose **Edit Schedule**
3. Select the appropriate PO from the **Customer PO** drop-down

To link a PO to a single schedule lines:

1. Navigate to the **Schedule's line**
2. Double click the **Customer PO** field on the line
3. Select the relevant Customer PO number in the field's look-up
4. Select the plan line's **Save icon ( )**

To link a PO to multiple schedule lines:

1. Navigate to the **Schedule**
2. Select the checkbox next to the relevant plan lines (selecting the top checkbox allows a user to select all lines once a filter is applied)
3. Select the schedule's **options menu ( )**
4. Select **Update Selected**

In the **Bulk Update** window:

1. Select the appropriate PO number
2. Select **Update All** to save

Once linked, the PO number will appear on the schedule line items and a budget breakdown will be visible on the **Budgets** tab.

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