Package Editor

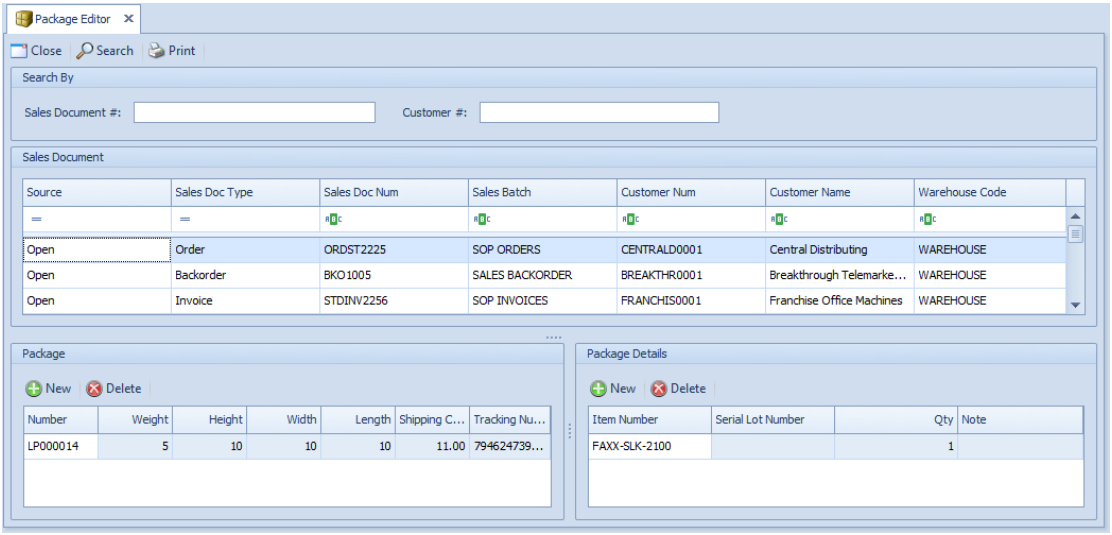
Cavallo Support - 2024-12-03 - Miscellaneous

Overview

The Package Editor module allows users to pack previously fulfilled sales line items using the DataCollection Console.

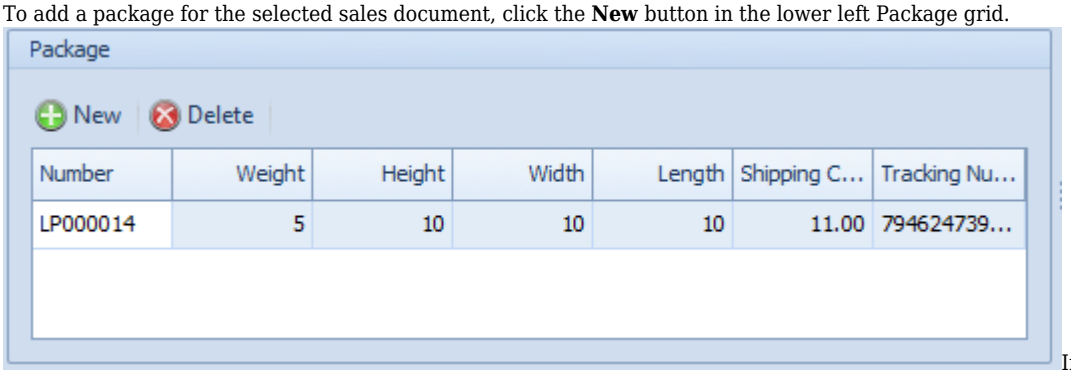
Usage

Search for a sales document using a document number or a customer number. Click the **Search** button to display the results in the grid below the search fields. Click on a sales document on the grid to highlight it. The bottom two grids display package information – the left grid shows packages, and the right grid shows package items, or details, that were created for the selected sales document.



Add Package

To add a package for the selected sales document, click the **New** button in the lower left Package grid.



In the New Package window, enter the desired package information, such as package number, type (added on Package Type screen), description, shipping cost, tracking number, etc., and click **OK** to add the package. Users can add as many packages as needed for each sales document.

Delete Package

To delete a package, select it on the left Package grid and click the **Delete** button. Click **Yes** on the resulting

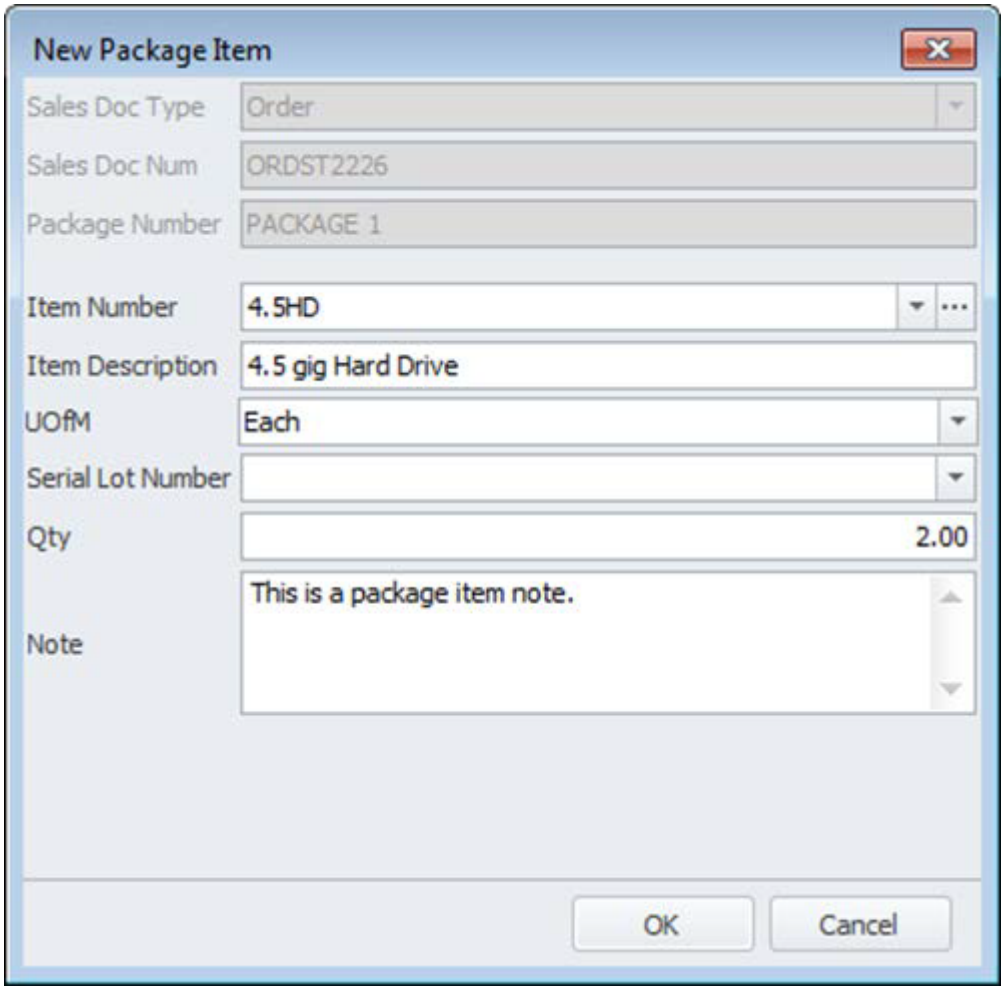
confirmation prompt to permanently delete the package.

Edit Package

To edit an existing package, simply click the cell on the grid you wish to edit and enter a new value. Tab off and the new value is instantly saved.

Add Package Detail

To add a package item, or detail, select the package on the left Package grid first. Click the **New** button, and the New Package Item window will display.



Click the ellipsis (**...**) button next to the item number, and the Sales Line Lookup window will open. Select the desired item number and click **OK**. Item Number and Description are automatically populated. Selected the Unit of Measure, Serial Lot Number (if the item is serial or lot tracked), and the Quantity to be packed. Click **OK** to add the package item to the package.

Delete Package Detail

To delete a package item, select it on the right Package Detail grid and click the **Delete** button. Click **Yes** on the resulting confirmation prompt to permanently delete the package item.

Edit Package Detail

To edit an existing package item, simply click the cell on the grid you wish to edit and enter a new value. Tab off and the new value is instantly saved. Note that not all package item values are editable. To change a non-editable value, such as quantity, you will need to delete the package item first and then add it with desired values.

Security

Package Editor - Grants access to the Package Editor module.