



Package Editor

Megan De Freitas - 2024-11-22 - Sales

Overview

The SalesPad Package Editor is a Sales Line Item plugin that is designed to make it easy for clients to create packages on the fly while using any inventory item.

Setup

Go into the User Field Editor click on Sales Line Item.

The Sales Line Item UDF needs to be setup as a decimal with at least 2 decimal places.

Bus. Object	Seq	Disabled	Field
Assembly	0	<input type="checkbox"/>	xHTSCode
Assembly Line	0	<input type="checkbox"/>	xHuntonHide
BOM	0	<input type="checkbox"/>	xInnerPackQty
BOM Line	0	<input type="checkbox"/>	xItem_Image
Cash Receipt	0	<input type="checkbox"/>	xLastPrice
Customer	0	<input type="checkbox"/>	xLead_Time
Customer Addr	0	<input type="checkbox"/>	xLine_Num
Inventory Lot Num	0	<input type="checkbox"/>	xLineNum
Inventory Serial Num	0	<input type="checkbox"/>	xLinkedPO
Item Master	0	<input type="checkbox"/>	xMasterPackQty
Purchase Line Item	0	<input type="checkbox"/>	xMichaelCost
Purchase Order	0	<input type="checkbox"/>	xNotes
Purchase Receipt	0	<input type="checkbox"/>	xOrdered
Purchase Receipt Line Item	0	<input type="checkbox"/>	xOrderPolcy
Sales Document	0	<input type="checkbox"/>	xOverride
Sales Document Payment	0	<input type="checkbox"/>	xOverrideSet
Sales Line Item	0	<input type="checkbox"/>	xPackage
Vendor	0	<input type="checkbox"/>	xPackageQty
Vendor Addr	0	<input checked="" type="checkbox"/>	xPRGLVL1
	0	<input checked="" type="checkbox"/>	xPRGLVL2
	0	<input checked="" type="checkbox"/>	xPRGLVL3
	0	<input type="checkbox"/>	xPriceLevel
	0	<input type="checkbox"/>	xPurchaseCost
	0	<input type="checkbox"/>	xRencor
	0	<input type="checkbox"/>	xRencorLineNum
	0	<input type="checkbox"/>	xRencorTest
	0	<input type="checkbox"/>	xRetailItem

Field Properties:

Table Name: Sales Line Item
Field Name: xPackageQty
Map To: [Dropdown]
Screen Label: Package QTY
Field Type: Decimal Decimal: 2
Blank Value: [Dropdown]
Value Options: [Dropdown]

The UDF needs to be specified in Settings under *Package Editor Qty Per UDF*

Customer Search [X] Settings [X]

Close Save Export Settings Import Settings

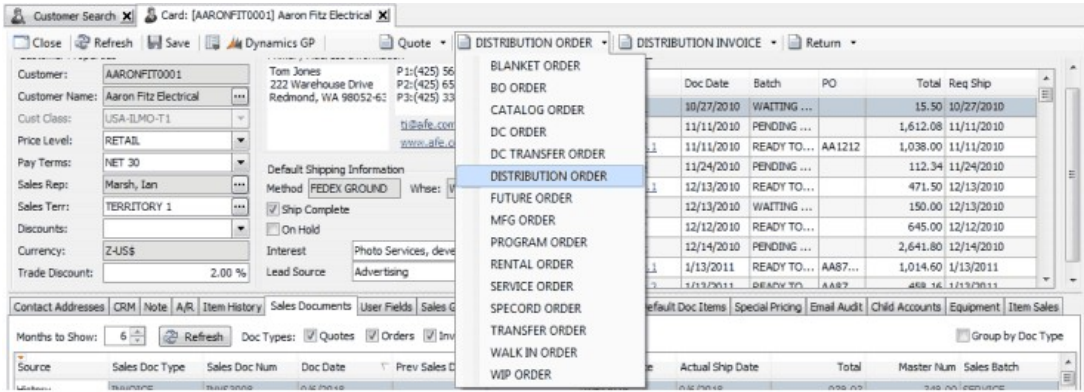
Filter:
Package Editor Qty

Sales
Package Editor Qty Per UDF xPackageQTY

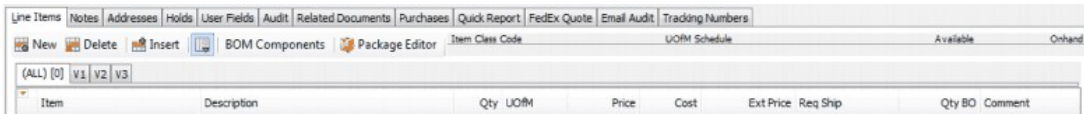
Usage

Open a Customer Card and create a new sales document for that customer. For this

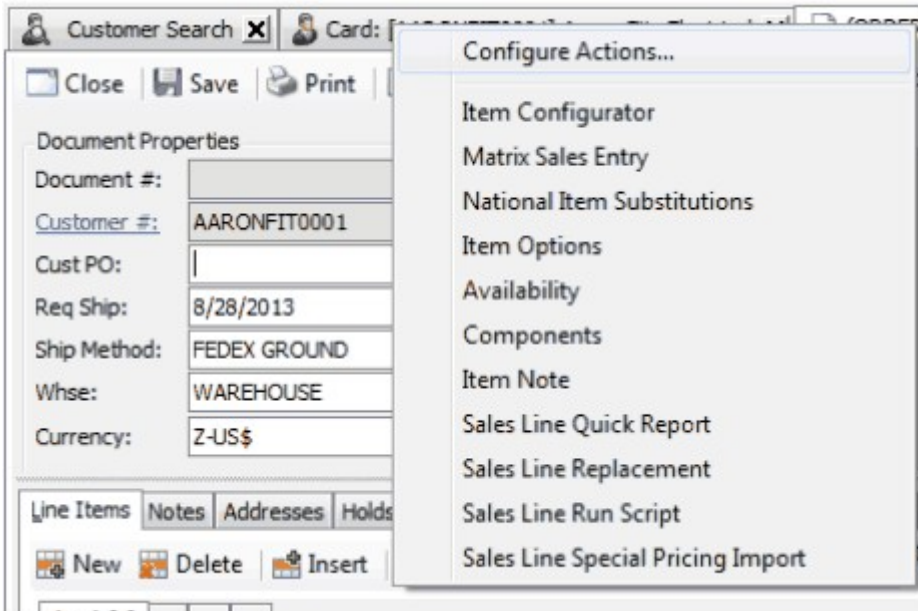
example, create a distribution order.



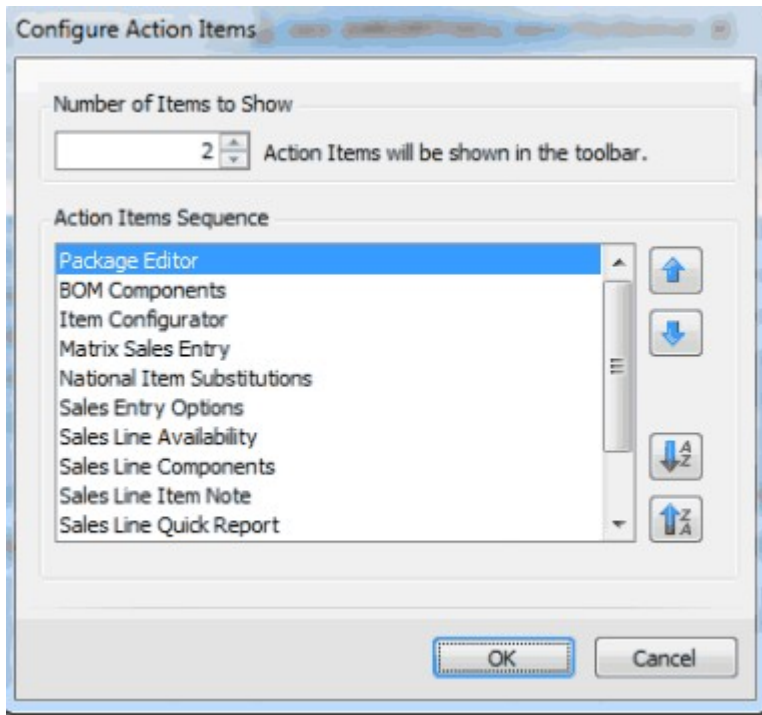
Open the **Actions** dropdown in the distribution order header.



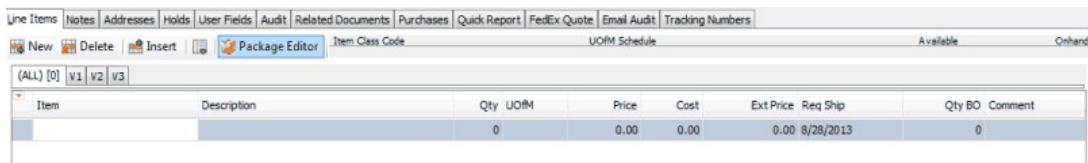
Select Configure Actions.



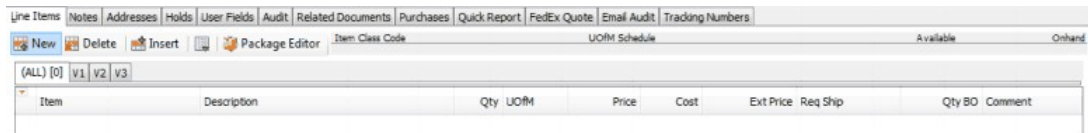
In the "Configure Action Items" popup window, select Package Editor. In this menu, other desired items to be displayed in the sales document header can be selected here. The order in which the items appear can be selected as well.



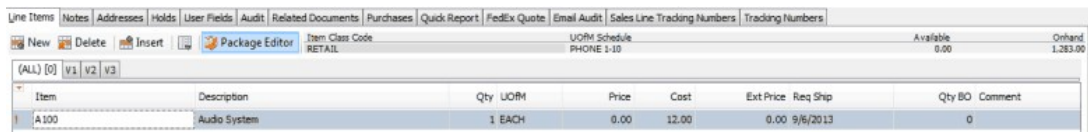
In the distribution order header under the Line Items tab, you will now see the **Package Editor** button (to the right of the **Actions** button.)



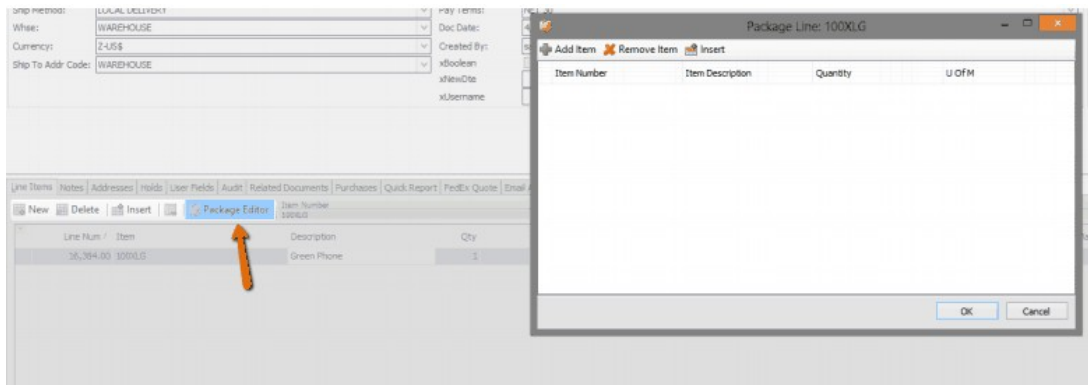
Click **New** to add a New Sales Line Item to the document.



Choose an item from your inventory (in this case, A100) to add to the order.



Click the **Package Editor** button. A new Package Line window pops up. In this window, you can build your package by selecting Add Item. You can also remove items if desired by clicking **Remove Item**.



Once you have selected the inventory items you want to be in the package, as well as their quantity and unit of measure, click **OK** to create the package and add it to the order. You can also use the **Insert** button to insert a line before or after a component in the package.

Security

Package Editor - Allows users to open the Package Editor Sales Line Action.