



Purchased Line Editor

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Overview

The Purchased Line Editor allows users to look at any sales document with an attached PO and edit quantity ordered, unit price, requested ship date, and ship to address on both the sales order and the purchase order without breaking the link.

Security

Purchased Line Editor must be enabled in Modules > Security.

Note: You must log out and back in for security changes to take effect.

Usage

To adjust quantities,

1. Go to Modules > Purchased Line Editor
2. Key in any search criteria (or leave blank to return all sales orders with an attached PO) and click **Search**. Results appearing in the grid include both Standard and Drop Ship POs:

Search Criteria												
Sales Document:		Sales Batch:		Vendor:		PO#:						
Sales Batch	Sales Doc Num	Item Number	Item Description	NE	Quantity	Qty Recvd	Unit Price	Req Date	Ship To	Comment	PO	Cost
ON PO	D6310	HD-40	40 Gig hard dr...	<input type="checkbox"/>	12	0	14.50	6/28/2011	PRIMARY		D6310-1	11.50
READY TO PICK	D6311	HD-40	40 Gig hard dr...	<input type="checkbox"/>	15	0	14.50	6/28/2011	PRIMARY		D6311-2	12.00
READY TO PICK	D6477	GSP26C-EXT	26.4 cu. ft. St...	<input type="checkbox"/>	5	0	1,115.00	3/30/2013	PRIMARY		D6475-1	967.00
BACKORDER	D6351	FBC	Fare Box Ped...	<input type="checkbox"/>	10	0	0.00	7/22/2011			D6351-1	0.00
BACKORDER	D6351	FBC	Fare Box Ped...	<input type="checkbox"/>	10	0	0.00	7/22/2011			D6351-1	145.00
BACKORDER	D6351	FBC	Fare Box Ped...	<input type="checkbox"/>	10	0	0.00	7/22/2011			D6351-1	55.00
BACKORDER	D6351	FBC	Fare Box Ped...	<input type="checkbox"/>	10	0	0.00	7/22/2011			D6351-1	145.00
READY TO PICK	D5992	A100	Audio System	<input checked="" type="checkbox"/>	12	12	23.65	3/8/2010	PRIMARY		P02214	22.00
BACKORDER	D6351	FBM	Coin Validator	<input type="checkbox"/>	10	0	0.00	7/22/2011			D6351-1	0.00
BACKORDER	D6351	FBM	Coin Validator	<input type="checkbox"/>	10	0	0.00	7/22/2011			D6351-1	145.00
BACKORDER	D6351	FBM	Coin Validator	<input type="checkbox"/>	10	0	0.00	7/22/2011			D6351-1	55.00
BACKORDER	D6351	FBM	Coin Validator	<input type="checkbox"/>	10	0	0.00	7/22/2011			D6351-1	145.00
BACKORDER	D6611	HD-30	30 Gig Hard D...	<input type="checkbox"/>	1	0	39.00	9/7/2012	PRIMARY		D6611-1	12.00
BACKORDER	D6267.2	A100	Audio System	<input type="checkbox"/>	41	0	39.00	4/1/2011	BILLING		D6267.2-1	21.00
READY TO PICK	D6665	A100	Audio System	<input checked="" type="checkbox"/>	1	1	39.00	3/13/2013	PRIMARY		D6665-1	20.00
ON PO	D6625	00105	Redlien Quick ...	<input type="checkbox"/>	12	0	15.00	9/13/2012	TOM GEORGE		D6625-4	4.50
ON PO	D5499	A100	Audio System	<input type="checkbox"/>	10	5	34.00	4/17/2009	PRIMARY		P02160	22.00
BACKORDER	D6351	FBR	Fare Box	<input type="checkbox"/>	10	0	0.00	7/22/2011			D6351-1	0.00
BACKORDER	D6351	FBR	Fare Box	<input type="checkbox"/>	10	0	0.00	7/22/2011			D6351-1	145.00
BACKORDER	D6351	FBR	Fare Box	<input type="checkbox"/>	10	0	0.00	7/22/2011			D6351-1	55.00
BACKORDER	D6351	FBR	Fare Box	<input type="checkbox"/>	10	0	0.00	7/22/2011			D6351-1	145.00
BACKORDER	D6351	FBR	CBID Receiver	<input type="checkbox"/>	10	0	0.00	7/22/2011			D6351-1	0.00
BACKORDER	D6351	FBR	CBID Receiver	<input type="checkbox"/>	10	0	0.00	7/22/2011			D6351-1	145.00
BACKORDER	D6351	FBR	CBID Receiver	<input type="checkbox"/>	10	0	0.00	7/22/2011			D6351-1	55.00

3. Find the order you need to adjust, highlight the number in the quantity grid, and change the amount:

PENDING ORDER	D5795.2	HD-40	40 Gig hard...	<input type="checkbox"/>	50
SHIPPED	D5305	A100	Audio System	<input checked="" type="checkbox"/>	1
PENDING ORDER	D5795.2	128 SDRAM	128 meg S...	<input type="checkbox"/>	25

The field will turn yellow when you tab off:


SHIPPED	D5305	A100	Audio System	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	1	12.50	12/9/2008	PRIMARY		D5305-1
PENDING ORDER	D5795.2	HD-40	40 Gig hard...	<input type="checkbox"/>		100		75.00	2/24/2010	D SMITH		D5795-1
SHIPPED	D5305	A100	Audio System	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	1	44.00	12/9/2008	PRIMARY		D5305-1
PENDING ORDER	D5795.2	128 SDRAM	128 meg S...	<input type="checkbox"/>		25	0	22.50	2/24/2010	D SMITH		D5795-2
BACKORDERS	D5590.2	A100	Audio System	<input type="checkbox"/>		15	0	47.00	9/30/2009	WAREHOUSE		D5590-3

4. Edit as many lines as needed. When finished modifying, click **Save**.

Each modified line will display a confirmation or error message. If the adjustment was successful, a confirmation will appear below the line. If there was an error, a message will appear below the line:

SHIPPED	D5305	A100	Audio System	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	1	12.50				
PENDING ORDER	D5795.2	HD-40	40 Gig hard...	<input type="checkbox"/>		100	0	75.00				
Cannot update a Sales Line Item that is not completely Backordered.												
SHIPPED	D5305	A100	Audio System	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	1	44.00				

Note: A green check: next to the quantity indicates the quantity ordered and quantity received are the same.

A yellow triangle:  means quantity received was more than quantity ordered.

Note: If you click the document number, the sales document opens. You can see quantity changes on the sales line, and on the PO accessible from the purchases tab. You can then resubmit the PO to the vendor, indicating that the quantity needed has changed.