

Knowledgebase > SalesPad > Purchasing > Purchased Line Editor

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
- 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:				s Bato	h:	Vendor:					PO#:		
Sales Batch	Sales Doc Num	Item Number	Item Description	NI	Quantity	Qty Recvd	Unit Price	Reg Date	Ship To	Comment	PO	Cost 🚑	
ON PO 👻	D6310	HD-40	40 Gig hard dr		12	0	14.50	6/28/2011	PRIMARY		D6310-1	11.50	
READY TO PICK	D6311	HD-40	40 Gig hard dr		15	0	14.50	6/28/2011	PRIMARY		D6311-2	12.00	
READY TO PICK	D6477	GSF26C4EXT	26.4 cu. ft. Si		5	0	1,115.00	3/30/2013	PRIMARY		<u>D6475-1</u>	967.00	
BACKORDER	D6351	FBC	Fare Box Pedi		10	0	0.00	7/22/2011			<u>D6351-1</u>	0.00	
BACKORDER	D6351	FBC	Fare Box Pedi		10	0	0.00	7/22/2011			D6351-1	145.00	
BACKORDER	D6351	FBC	Fare Box Pedi		10	0	0.00	7/22/2011			D6351-1	55.00	
BACKORDER	D6351	FBC	Fare Box Pedi		10	0	0.00	7/22/2011			D6351-1	145.00	
READY TO PICK	D5902	A100	Audio System		✓ 12	12	23.65	3/8/2010	PRIMARY		PO2214	22.00	
BACKORDER	D6351	FBM	Coin Validator		10	0	0.00	7/22/2011			<u>D6351-1</u>	0.00	
BACKORDER	D6351	FBM	Coin Validator		10	0	0.00	7/22/2011			<u>D6351-1</u>	145.00	
BACKORDER	D6351	FBM	Coin Validator		10	0	0.00	7/22/2011			D6351-1	55.00	
BACKORDER	D6351	EBM	Coin Validator		10	0	0.00	7/22/2011			D6351-1	145.00	
BACKORDER	D6611	HD-30	30 Gig Hard D		1	0	39.00	9/7/2012	PRIMARY		D6611-1	12.00	
BACKORDER	D6267.2	A100	Audio System		41	0	39.00	4/21/2011	BILLING		D6267.2-1	21.00	
READY TO PICK	<u>D6665</u>	<u>A100</u>	Audio System		✓ 1	1	39.00	3/13/2013	PRIMARY		<u>D6665-1</u>	20.00	
ON PO	D6625	00105	Redken Quick		12	0	15.00	9/13/2012	TOM GEORGE		<u>D6625-4</u>	4.50	
ON PO	D5499	A100	Audio System		10	5	34.00	4/17/2009	PRIMARY		PO2160	22.00	
BACKORDER	D6351	FBB	Fare Box		10	0	0.00	7/22/2011			D6351-1	0.00	
BACKORDER	D6351	FBB	Fare Box		10	0	0.00	7/22/2011			D6351-1	145.00	
BACKORDER	D6351	FBB	Fare Box		10	0	0.00	7/22/2011			D6351-1	55.00	
BACKORDER	D6351	FBB	Fare Box		10	0	0.00	7/22/2011			<u>D6351-1</u>	145.00	
BACKORDER	<u>D6351</u>	FBR	CBID Receiver		10	0	0.00	7/22/2011			<u>D6351-1</u>	0.00	
BACKORDER	D6351	FBR	CBID Receiver		10	0	0.00	7/22/2011			<u>D6351-1</u>	145.00	
BACKORDER	D6351	FBR	CBID Receiver		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	Ţ 🖸
SHIPPED	D5305	<u>A100</u>	Audio System	✓ 1
PENDING ORDER	D5795.2	128 SDRAM	128 meg S	25

The field will turn yellow when you tab off:

SHIPPED	D5305	A100	Audio System	✓ 1	1	12.50	12/9/2008	PRIMARY	D5305-1
PENDING ORDER	D5795.2	HD-40	40 Gig hard	100	0	75.00	2/24/2010	D SMITH	D5795-1
SHIPPED	D5305	A100	Audio System	1	1	44.00	12/9/2008	PRIMARY	D5305-1
PENDING ORDER	D5795.2	128 SDRAM	128 meg S	25	0	22.50	2/24/2010	D SMITH	D5795-2
BACKORDERS	D5590.2	A100	Audio System	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	<u>A100</u>	Audio System	0	1	1	1	12.50
PENDING ORDER	D5795.2	HD-40	40 Gig hard			100	0	75.00
Cagnot updat	e a Sales Line	e Item that is n	ot completely Back	ordere	d.			
SHIPPED	<u>D5305</u>	<u>A100</u>	Audio System	0	-	1	1	44.00

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

A yellow triangle: A 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.