

Purchased Line Editor

Megan De Freitas - 2024-11-24 - Purchasing

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

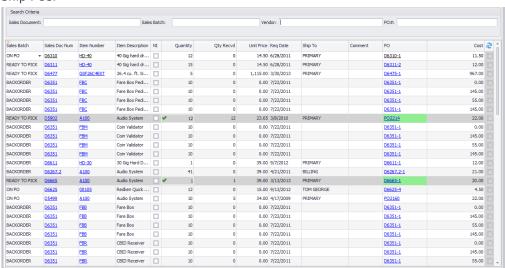
Purchased Line Editor must be enabled in Modules > Security.

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

Usage

To adjust quantities,

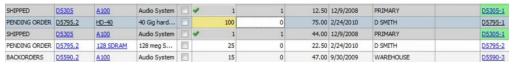
- 1. Go to Modules > Purchased Line Editor
- Key in any search criteria (or leave blank to return all sales orders with an attached PO) and click **Search**. Results appearing in the grid include both Standard and Drop Ship POs:



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

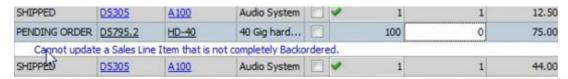
PENDING ORDER	D5795.2	HD-40	40 Gig hard	γ 50
SHIPPED	D5305	A100	Audio System	→ 1
PENDING ORDER	D5795.2	128 SDRAM	128 meg S	25

The field will turn yellow when you tab off:



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:



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.