

Sales

How to Edit a Direct Ship Purchase Order

Prerequisite

A Direct Purchase Order Station must already exist. You should already have a Sales Order with Direct Ship Purchase Order created in Shipped Status.

Where to find a PO Direct Ship Receipt

- **Purchasing > Find > PO Receipt Detail**

Where to edit a PO Direct Ship Receipt

- **Dock > Find > Sales Order Loads**

Why & When to Edit a PO Direct Ship Receipt

Edit a Direct Ship Purchase Order when it must be modified or a substitution is needed after it has arrived at the customer site.

How to Edit a Direct Ship Purchase Order

1. Find the purchase order or sales order item that requires editing.
2. **Purchasing > Find > PO Receipt Detail > "PO # you want to edit"**
3. Double-click the Purchase Order
 - Tip: Right click on the grid header and select **Column Chooser** to drag the **Direct Ship** column onto the grid. You can then sort or filter by this column.
4. In this order, locate the load and document the load number. **Save and Close.**
5. Go to **Sales > Find > Sales Order Shipments**. Double-click the load number from step 4.
6. Identify the Direct Ship PO tags. Look for the tag numbers with a unique letter code to locate the correct tag. You may not edit inventory tags in this screen.
 - Tip: To identify the correct tags, add the **Supplier** or **Source** heading using the **Column Chooser**.
7. Right click the product link if you need to unship all the tags OR edit the required details as needed.
 - If the tags are not yet shipped, it is better to create a new Sales Order Shipment rather than editing the existing one.
8. Click **Direct Ship**.
9. **Save and Close.**

Unique solution ID: #1061

Author: Melanie Jones

Last update: 2017-05-08 22:34