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Optimize Fleet Productivity

Modifying Purchase Orders in CFAWin8

Each method for modifying purchase order detail lines depends on the Record Posted status!

I. Modifying Un-Posted Purchase Order detail lines:

- Un-posted entries have not updated the Inventory Table and will only reflect in the Inventory Transaction Table.
- Un-posted detail lines may be modified **OR** deleted.

1. *Enter the Purchase Order Entry screen*
2. *Select the Purchase Order # to modify*
3. *Select the detail line to modify or highlight the line in black and hit the Delete button (red X)*
4. *Modify the field(s) as needed*
5. *Finish processing the order using standard procedures*

II. Modifying Posted Purchase Order detail lines:

- Posted entries update both the Inventory Table and the Inventory Transaction Table.
- Posted detail transaction lines will not be removed even if the Purchase Order header is purged.
- Mistakes keyed in a previous period will cause period reports to be off by the value of the mistake. The period in which the credit is keyed will be off by the amount of that credit. Life-to-Date totals will reflect the amount of both the mistake and the credit.
- Using the credit button to populate entries will reduce additional manual entry mistakes, reflect the unit price from the original entry, and show a stronger audit trail.
- Editing the Receive Date of the credits to match the Receive Date of the original entry is important when users want to report by Receive Date or sort the records by Receive Date.

1. *Enter the Purchase Order Entry screen*
2. *Select the Purchase Order # to modify*
    i. Use Find if the Purchase Order # is available
    ii. Switch Data View (F9) to see all Purchase Orders if Purchase Order # is unknown
3. *Select the detail line to modify*
4. *Click the Credit button (green minus sign)*
    i. A new row will appear with inverse cost and quantity values
5. *Edit Receive Date to match the Receive Date of the original entry*
6. *Click the Save and Post button (diskette)*
7. *With the new credit detail line still highlighted, click the Credit button again*
    i. A new row will appear with the inverse cost and quantity values of the credit line
8. *Modify this new line's fields as needed*
9. *Edit Receive Date to match the Receive Date of the original entry*
10. *Click the Save and Post button (diskette)*

III. Deleting Purchase Orders:

- Aged Purchase Orders can be deleted and the transaction history can still be viewed through reporting.
- Deleted status Purchase Orders will remain in the PO list until purged via Data Table Utilities.

1. *Enter the Purchase Order Entry screen*
2. *Highlight the Purchase Order # to delete in black*
3. *Click the Delete button (red X)*
    i. The Purchase Order now shows "Deleted" status