Using Entry Forms & Editors

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Entry forms and editors are where you add or modify information in All Orders. For example, the entry forms for a Sales Order or an Item's Editor. The fields (i.e. boxes) in yellow are required and cannot be left blank. For example, when creating a new vendor, the vendor's name cannot be blank.

On the top of entry forms and editors you will see a toolbar. The most common icons are:

	Previous and Next. Proceeds from one record in the current table to the next (or previous). Used in numerous forms and Profile Lists.

Save. Saves off any changes that have been made to the current screen. Also sports a drop-down list with the options Save & Close (which subsequently closes out the current screen) and Save & New (which starts a new record after saving the current one). Used on any screen where you're allowed to make changes.

Reset. Cancels all changes made to the current record and reloads the record from the database.

Cancel. Undoes any changes made to the current screen and exits the screen. Available on every screen where you can make changes.

Print. This will print preview the selected template. Depending on the screen, you could have numerous possibilities of different reports to print that relate to the current screen. These can all be accessed via the accompanying drop-down list. Select the appropriate printout and then click the Print button.

Email. Opens the default email client with a message to the current Customer or Vendor, automatically attaching the appropriate document in PDF format (Purchase Orders, Ship Docs, etc.).

Custom Fields. Clicking this button will bring up a dialog that will let you enter information for the current record into any custom fields you've established for this form in the Custom Fields dialog.

Record Info. Provides basic information about the current record, such as when it was created (and by whom) and when it was last modified (and by whom). Available from most transaction forms.

Delete. Removes the currently selected record. Available from all Profile Lists.

Delete Selected. Deletes all checked records from the current list.

Deselect All. Unchecks any records you have checked in the current list.

Details. This is a special drop-down menu for the Work Order and Disassembly forms that lets you execute such production-related tasks as tracking lot/serial numbers, adding special instructions, keeping track of bins, and checking any inventory dependencies.

Edit. Opens a list record for editing in the corresponding transaction form.

Edit Notes. Opens a special text box that allows you to jot down any info related to the current record. Available when creating a new Item, Customer, Vendor, or Location.

Email. Opens the default email client with a message to the current Customer or Vendor, automatically attaching the appropriate document in PDF format (Purchase Orders, Ship Docs, etc.). Available from numerous forms within All Orders where you might want to communicate form information to a Customer, a Vendor, or a member of your own staff.

Fill. Automatically creates a Ship Doc from a current open Sales Order. Available exclusively on the Sales Order form.

Find. Executes the command to search all records in a chosen transaction type based on filters that you specify. Available exclusively from the Find tool.

Flat View. Shows nested list records without indent, using the parent record name as part of its name. Example: Cabinets:Cabinet Pulls.

Get Next #. Creates a new Lot/Serial number by auto-incrementing the current one.

Help. Launches this help file, launching the exact help page that corresponds contextually to the current screen. Pressing F1 accomplishes the same thing. Available universally.

Hierarchical View. Shows nested list records in an indented, hierarchical format.

Instructions. Allows you to type out a set of text instructions to accompany a Bill of Materials. Available exclusively from the Bill of Materials dialog.

Invoice. When issuing a Ship Doc, this command creates an invoice in QuickBooks so that the appropriate quantities will be deducted in the QB database. Available exclusively on the **Ship Doc** form.

List. From any List screen, use this drop-down menu to add, edit, and delete records, choose how to view hierarchical information, add checked records to open documents, and select which columns to view.

New Customer Return. Creates a new return from the currently selected record in the Customer List.

New Quote. Creates a new quote from the currently selected record in the Customer List.

New Purchase Order. Creates a new purchase order from the currently selected record in the Vendor List.

New Receive Items. Creates a new receiving doc from the currently selected record in the Vendor List.

New Sales Order. Creates a new sales order from the currently selected record in the Customer List.

New Ship Doc. Creates a new ship doc from the currently selected record in the Customer List.

New Vendor Return. Creates a new return from the currently selected record in the Vendor List.

Next Seq #. Provided All Orders can extrapolate a number from the current Item name, it will create a new Item by auto-incrementing the current Item.

Previous and Next. Proceeds from one record in the current table to the next (or previous). Used in numerous forms and Profile Lists.

Print. This will print the current screen. Depending on the screen, you could have numerous possibilities of different reports to print that relate to the current screen. These can all be accessed via the accompanying drop-down list. Select the appropriate printout and then click the Print button. Available universally.

Process. After specifying your shipping criteria, clicking this button will process your ship docs. Available exclusively from the Batch Shipping form.

Receive. Automatically creates a Receiving Doc from the details of the current Purchase Order. Available exclusively on the Purchase Order form.

Record (into QuickBooks). This creates a special transaction in QuickBooks that corresponds to the current Work Order or Disassembly.

Record Info. Provides basic information about the current record, such as when it was created (and by whom) and when it was last modified (and by whom). Available from most transaction forms.