

# Editors

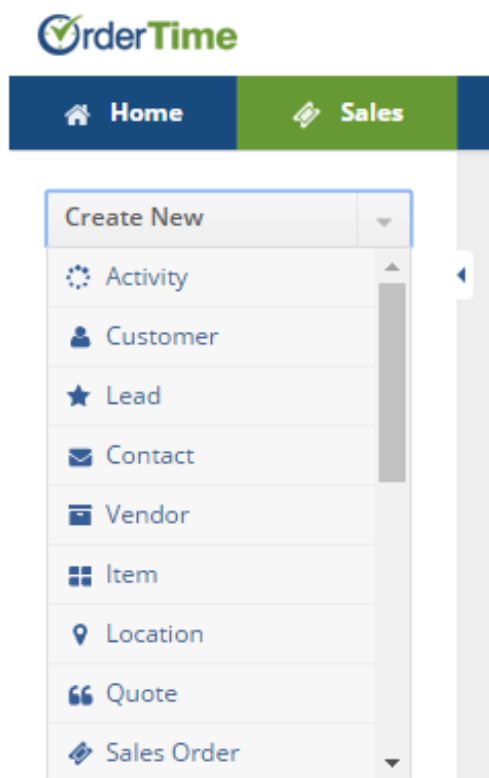
Last Modified on 08/30/2019 11:53 am EDT

## Overview

In order to add new or edit existing records we use *Editors*. The major Entities and Transactions have their own Editors while "Child" entities have Pop-Up editors, accessed from its "Parent's" Details page.

### Create New Records

To create a new record you can use the *Side List **Create New*** drop-down menu and select the required record.



- Once you have selected a record to generate, complete the information requested on the page. Click on **Save**.

Sales > Customers > Customer

**Save** **Reset**

**Customer -**

**General**      **Other**      **Primary Contact**

Name

Company

Active

Price Level

Mr./Ms./...

First Name

M.I.

Last Name

Address    Defaults    Payment    Notes    Custom

**Primary Billing Address**      **Primary Shipping Address** copy billing address

Name/Company

Street

Floor/Suite

Care of

City

State/Prov./Reg.

Zip/Postal code

Country

Contact

Alt. Contact

Phone

Alt. Phone

Fax

Email

To *edit* an existing record, click on the **Open Full List** drop-down menu and select the record that requires editing.

- Once the records are opened, find the record that needs editing and click on the Notepad icon on the right side of your screen (Under ACTIONS) or open the specific record and click Edit.
- The selected record will open, edit the corresponding record as needed.
  - Complete the changes to your record and click on **Save** when completed.

OrderTime All Orders Demo

Home Sales Purchasing Production Warehouse Reports

Create New

**Open Full List**

Sales > Sales Orders

Sales Orders

No.  Search Sales Order

**New Sales Order**

NO.	CUSTOMER	DATE	PROMISE DATE	CUSTOMER PO	TOTAL AMOUNT	STATUS	ACTIONS
3950	The Fab Foundation	7/31/2017	7/31/2017		0.00	Processing	<input checked="" type="checkbox"/> <input type="checkbox"/>
3949	21st Century	7/27/2017	7/27/2017		30.00	Processing	<input checked="" type="checkbox"/> <input type="checkbox"/>
3947	Decker Sports	7/26/2017	7/26/2017		806.58	Processing	<input checked="" type="checkbox"/> <input type="checkbox"/>
3948	MIAMI DOLPHIN	7/26/2017	7/26/2017		83.54	Approved	<input checked="" type="checkbox"/> <input type="checkbox"/>
3946	Accounting	7/9/2017	7/9/2017		335.31	Approved	<input checked="" type="checkbox"/> <input type="checkbox"/>
3944	Baby Gourmet 44	6/30/2017	6/30/2017		3,422.50	Approved	<input checked="" type="checkbox"/> <input type="checkbox"/>
3945	Atalou:HE	6/30/2017	6/30/2017		227.28	Approved	<input checked="" type="checkbox"/> <input type="checkbox"/>
3941	Adam Cole	6/29/2017	6/29/2017	PO #	70.99	Approved	<input checked="" type="checkbox"/> <input type="checkbox"/>
3942	21st Century	6/29/2017	6/29/2017		107.00	Processing	<input checked="" type="checkbox"/> <input type="checkbox"/>
3943	21st Century	6/29/2017	6/29/2017		107.00	Approved	<input checked="" type="checkbox"/> <input type="checkbox"/>

< Prev 1 of 106 Next >

A record can also be edited when the existing record is opened. Simply click on the **Edit** on the details page, and change the information as needed.

- Child listing tab can also be edited by clicking on the editing pad

## icon under ACTIONS.

Sales > Sales Orders > Sale Order

Sales Order - 3949 Create PDF EDIT

Created By Ian Benoliel 7/27/2017 8:40 PM Modified By Ian Benoliel 7/27/2017 8:40 PM

Status Processing

**General**

No. 3949  
Customer 21st Century  
Date 7/27/2017  
Promise Date 7/27/2017  
Customer PO  
Contact

**Bill Address**

FARMERS  
4720 N 36 CT  
COLUMBIA, MD 21045

**Ship Address**

FARMERS  
4720 N 36 CT  
COLUMBIA, MD 21045

**Summary** Revision : 2

Subtotal	25.00
UPS	5.00Tax
Discount \$	-0.00
Out of State (0 %)	0.00
Total Amount	30.00
Paid Amount	-0.00
BalanceAmount	30.00

Items Details Memo & Instructions Custom Payment Ship Docs Dependency Attachments Open Activities Activity History

Name/Number Search Items

IMAGE	LINE NO.	ITEM	DESCRIPTION	QUANTITY	FILLED	UOM	PRICE	EXT.	TAX CODE	CLEARED	ACTIONS
	1	FF2604	This is the decriptopn for my product	1.000	0.000	EA	25.00	25.00		<input type="radio"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>
	2	FLOWER123	Box of 24 Roses	1.000	0.000	Box	0.00	0.00	Tax	<input type="radio"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>

To *delete an existing record*, click the X icon located under the ACTIONS column. A Pop-Up window will confirm if you want to deleted the record. Click on OK, if you are ready to delete record.