

Sorting Line Items

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In most cases line items on documents are sorted by Line No.

However you may want to change the sort for your screen views and your form templates.

On any document screen you can change the sort by clicking the List Layout Edit gear icon. Then click the other tab, change your sort column as required and click Save. This setting is stored by browser and documents type.

The screenshot shows a 'Purchase Order - 10001313' form. The 'List Options' dialog box is open, and the 'Other' tab is selected. The 'Sort By' dropdown is set to 'Line No.'. The background shows the Purchase Order form with fields for Vendor, Bill Address, Ship Address, and a table of line items.

ITEM	DESCRIPTION	OPEN QUANTITY	LINE NO.	ACTIONS
111		8.0	1	☑ ☺ ☻
100	Sushi Mari Moulds no plus	1.0	2	☑ ☺ ☻

Similarly, you can set a completely different item sort within form templates. After Saving the sort, make sure to also click Save for the form template as a whole. This setting is set per form template.

The screenshot shows the 'Edit Template for Purchase Order' form. The 'List Options' dialog box is open, and the 'Other' tab is selected. The 'Sort By' dropdown is set to 'Item'. The background shows the 'Edit Template for Purchase Order' form with fields for Name, Description, and Vendor/Ship To information.

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