

Creating Revisions for Orders and Purchase Orders

Last Modified on 08/06/2026 12:25 pm EDT

This guide explains revisions and creating them for orders and purchase orders. It is intended for general users.

Order and purchase order (PO) revisions are different from editing a record. A revision maintains a copy of the original order or PO, while an edit changes the original. Revisions for orders or POs can be used for change requests. For example, if you send an order estimate to a customer and they approve it, but later request some changes, you can create a revision of the order.

Your organization policies and procedures should determine when an order is revised rather than edited.

Creating an Order Revision

When creating an order revision, always make necessary adjustments to the order's related records (e.g. purchase orders, shipments, and invoices). Additionally, add comments for historical reference when you make adjustments. You can [enter notes on the order](https://aace6.knowledgeowl.com/help/adding-and-using-notes) (<https://aace6.knowledgeowl.com/help/adding-and-using-notes>) itself or [add comments on the order log](https://aace6.knowledgeowl.com/help/adding-activities-support-or-next-steps) (<https://aace6.knowledgeowl.com/help/adding-activities-support-or-next-steps>).

To create a revision for an order:

1. From the Main Menu, go to **Order Management > Orders**.
2. Use the Quick Search bar to locate your order, then select the **Go-To icon** (>).
3. Select **Actions > Create Revision**.

Orders

Record: 1 of 1

New + Edit Delete Print Actions

Order: 60118 | Chisholm High School **08/06/26** **OPEN**

Sales Order Management Job Costs & Approvals

Notices Tasks Emails Docs

Bill To **Ship To** **End Customer**

Bill To > Chisholm High School
Dorian Sanford
60 Valley Farms Street
Schaumburg, IL 60193

Customer PO #

Rate Card > HSCT Disc % 0%

Billing Terms Net 30

Ship To > Chisholm High School
Dorian Sanford
60 Valley Farms Street
Schaumburg, IL 60193

Blind ☐ Ship Type Complete Ship Date 08/10/26

Inventory Bin WH-1A

Shipping Terms

Comments & Next Steps Signed

Next Step Next Step Date

Description **Additional Info**

Order Items

Code	Description	Quantity	BO	DS	SO	Unit Cost	Markup	Unit Price	Total	Margin
1 > TB-FRNCH3	J'Apprends: I Learn French 3rd Edition	60	☐	☐	☐	29.99	20%	35.99	2,159.40	17%
2 > TB-HIST	The History of the World, 4th Edition	60	☒	☐	☐	89.99	25%	112.49	6,749.40	20%
3 > TB-SCI4	Astronomy for Beginners, 4th Edition	60	☒	☐	☐	44.99	25%	56.24	3,374.40	20%

Subtotal 12,283.20 19%

Adjustment 0.00

Total 12,283.20 19%

Shipping 359.40 0.00

Tax OUT 0.00

Grand Total 12,283.20 16%

Payment Due 12,283.20

Sales Billing Fulfillment Shipping

Order Type Sales Payment Account Recurring Transaction > Currency USD Exchange Rate 1

Dept AI Asgn By AH Asgn To AH Tracking Status

4. Select **Revise**.

aACE creates a new order with the -R1 at the end of the order ID.

Orders - 2

Record: 1 of 1

New + Edit Delete Print Actions

Order: 60118-R1 | Chisholm High School **08/06/26** **PENDING**

Sales Order Management Job Costs & Approvals

Notices Tasks Emails Docs

Bill To **Ship To** **End Customer**

Bill To > Chisholm High School
Dorian Sanford
60 Valley Farms Street
Schaumburg, IL 60193

Customer PO #

Rate Card > HSCT Disc % 0%

Billing Terms Net 30

Ship To > Chisholm High School
Dorian Sanford
60 Valley Farms Street
Schaumburg, IL 60193

Blind ☐ Ship Type Complete Ship Date 08/10/26

Inventory Bin WH-1A

Shipping Terms

Comments & Next Steps Signed

Next Step Next Step Date

Description **Additional Info**

Order Items

Code	Description	Invtry	Alts	Upps	Opts	Quantity	BO	DS	SO	Unit Cost	Markup	Unit Price	Total	Margin
1 > TB-FRNCH3	J'Apprends: I Learn French	24	0	2	+	60	☒	☐	☐	29.99	20%	35.99	2,159.40	17%
2 > TB-HIST	The History of the World, 4th	-60	0	0	+	60	☒	☐	☐	89.99	25%	112.49	6,749.40	20%
3 > TB-SCI4	Astronomy for Beginners,	-60	0	0	+	60	☒	☐	☐	44.99	25%	56.24	3,374.40	20%

Subtotal 12,283.20 19%

Adjustment 0.00

Total 12,283.20 19%

Shipping 359.40 0.00

Tax OUT 0.00

Grand Total 12,283.20 16%

Sales Billing Fulfillment Shipping

Order Type Sales Payment Account Recurring Transaction > Currency USD Exchange Rate 1

Dept AI Asgn By AH Asgn To AH Tracking Status

Cancel Save

5. Edit the new order version.

6. Select **Save**.

When you open an order revision, aACE voids the original order.

Creating a Purchase Order Revision

When creating a purchase order revision, always make necessary adjustments to the purchase order's related records (e.g. orders, shipments, and purchases). Additionally, add comments for historical reference when you make adjustments. You can [enter notes on the purchase order](https://aace6.knowledgeowl.com/help/adding-and-using-notes) (https://aace6.knowledgeowl.com/help/adding-and-using-notes) itself or [add comments on the purchase order log](https://aace6.knowledgeowl.com/help/adding-activities-support-or-next-steps) (https://aace6.knowledgeowl.com/help/adding-activities-support-or-next-steps).

To create a revision for a purchase order:

1. From the Main Menu, go to Accts Payable > Purchase Orders.
2. Use the Quick Search bar to locate your order, then select the **Go-To icon** (>).
3. Select **Actions > Create Revision**.

Purchase Order: 60065 | China Brushworks International 08/06/26 OPEN

Vendor: China Brushworks International, Ming Xieou, Flat D, 6/F, Golden Industrial Center, Block 4, 182-190 Tai Lin Pai Road, Wan Chai, Hong Kong. Payment Terms: Net 30.

Ship To: aACME Education Solutions, Inc., Mark Jennings, 1238 Broadway, New York, NY 10001. Ship Type: Complete, Expected Date: TBD, Inventory Bin: WH-1B.

Code	Description	Order	Job	Dept	Cases	Quantity	Unit Cost	Total
1 > SE-B-WB2	White bristle bamboo brush size 2			AI		200	2.00	400.00
2 > SE-B-R1	Rabbit hair bamboo brush size 1			AI		200	1.00	200.00
3 > SE-B-H	1/2" Hake Brush			AI		150	5.00	750.00

Summary: Subtotal: 1,350.00, Shipping: 0.00, Tax: 0%, Total: 1,350.00. Payment Due: 1,350.00.

4. Select **Revise**.
aACE creates a new purchase order with the -R1 at the end of the purchase order ID.

The screenshot displays the 'Purchase Orders - 2' window. At the top, the header bar includes 'Record: 1 of 1' and action buttons: 'New', 'Edit', 'Delete', 'Print', and 'Actions'. Below the header, the main form is titled 'Purchase Order: 60065-R1' (circled in green) for 'China Brushworks International' with a date of '08/06/26' and status 'PENDING'. The form is divided into several sections: 'Vendor' (China Brushworks International), 'Ship To' (aACME Education Solutions, Inc.), 'Comments & Next Steps', 'Description', 'Additional Info', 'PO Items', and 'Purchasing/Receiving'. The 'PO Items' section contains a table with three items: 'White bristle bamboo brush size 2', 'Rabbit hair bamboo brush size 1', and '1/2" Hake Brush'. The 'Purchasing' section includes fields for 'Purchase Order Type', 'Priority', 'Payment Date' (09/05/26), 'Recurring Transaction', 'Currency', and 'Exchange Rate'. The 'Receiving' section shows 'Subtotal' (1,350.00), 'Shipping' (0.00), 'Tax' (0.00), and 'Total' (1,350.00). At the bottom, there are fields for 'Dept' (AI), 'Asgn By' (AH), 'Asgn To' (DJ), and 'Tracking Status', along with 'Cancel' and 'Save' buttons.

5. Edit the new purchase order version.

6. Select **Save**.

When you open a purchase order revision, aACE voids the original purchase order.

Searching for Revised Orders and Purchase Orders

When you need to locate a revised order, search for the initial order or purchase order number. Do not reference the revision suffix numbers or job numbers.

The practical reason for not basing records off the job number is because the original numbered assignments might have been distributed among your employees to work on. They might not know when the order is revised. For example, if a job is released to the floor as 12345.1 and barcodes have been printed, updating the number to 12345.1-1R would invalidate those first barcodes. Employees would not be able to submit time and materials until a new barcode is printed.