

Update Purchase Orders for Sage 300cloud

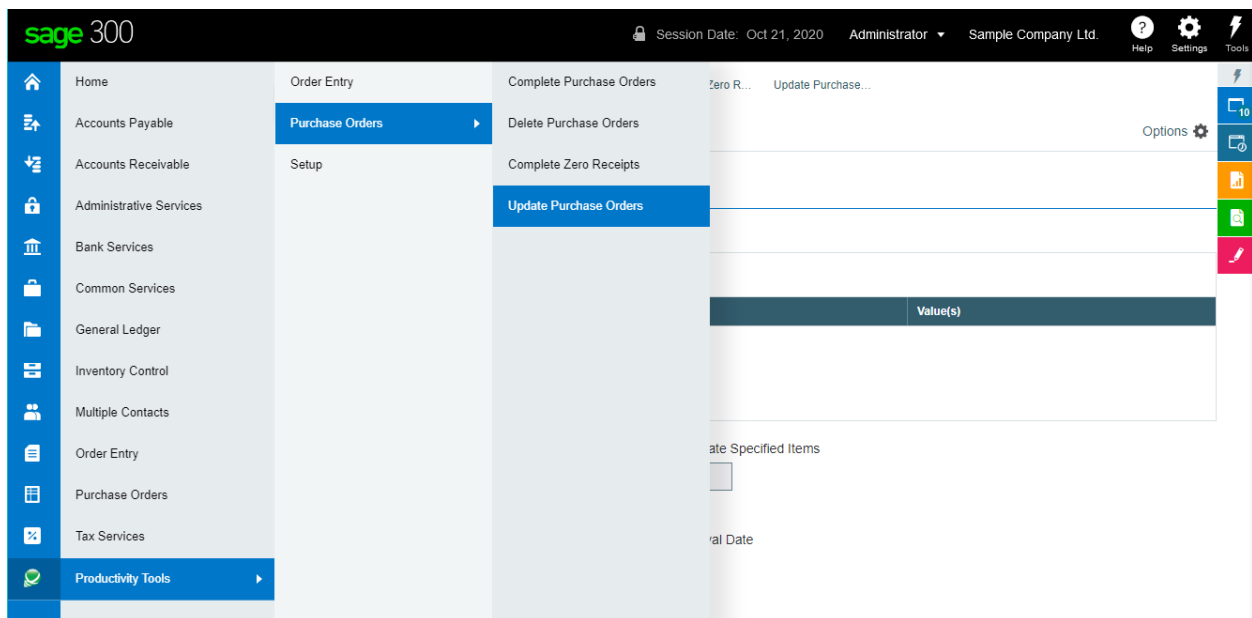
Update Purchase Orders eliminates the time-consuming steps involved in changing item arrival details and vendor cost details for dozens or hundreds of purchase orders in the Sage 300 Purchase Orders module.

Update Purchase Orders lets you:

- Change the expected arrival date of an item or list of items.
- Change the vendor cost for an item or list of items.
- Select ranges of purchase orders for updating by PO number, date, vendor, terms, currency, arrival date, locations, PO type, and completion status, then load the resulting list of POs to further “cherry-pick” ones for updating.
- Confirm PO details while finalizing the update list.
- Press a Process button to complete the operation for all selected POs in one step.
- View a log of all updates after processing.

Running Update Purchase Orders

The Update Purchase Orders icon appears under **Productivity Tools > Purchase Orders** on the Sage 300c desktop.



The Update Purchase Orders screen (below) lets you update item expected arrival dates and item vendor costs for a range of purchase orders that you select by specifying ranges or values of PO fields such as PO Number, PO Dates, Vendor, PO Types, and any optional fields that you use with purchase orders.

Selecting purchase orders for updating

Choose field values and field ranges for selecting purchase orders:

- Click the “Add Line” button to specify a new field value or range of values.

Selection Criteria

- Choose the field for selecting purchase orders.

Field

Purchase Order Date

Select...

Purchase Order Number

Purchase Order Date

Vendor

Name

Purchase Order Type

On Hold

Order Date

- Choose the Operator for the field value – for example, purchase orders with a date that is **less than or equal to** July 2, 2021. The choices are “Equal To,” “Not Equal To,” “Contains,” “Greater Than or Equal To,” “Less Than or Equal To” (shown below), or “Is One Of.”

Operator

Select...

Select...

=

!=

>=

<=

- **The “Contains” operator appears for text fields.** The program scans the field you selected for the text in the Value field.

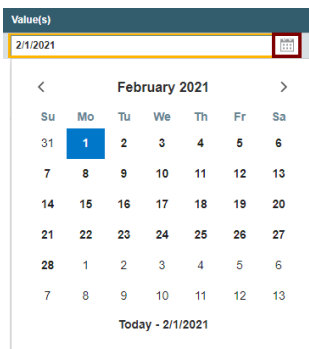
The following example selects POs with ship-to locations that include the letters “US”.

Field	Operator	Value(s)
Ship-To Location	Contains	US

- **The “Is One Of” operator appears for fields with a specific list of values** – such as Purchase Order Type or optional fields with a list of values. It lets you specify more than one value – as below.

Field	Operator	Value(s)
Purchase Order Type	Is One Of	Active x <input type="text"/>
		Active
		Standing
		Future
		Blanket

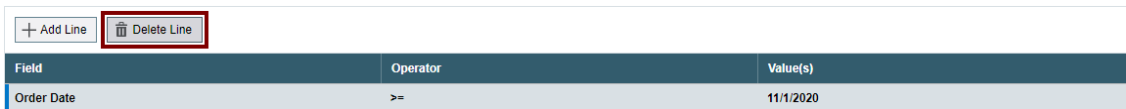
- Enter or choose the Value. For example, a date field provides a calendar, and other fields will provide a Finder button.



- To specify a range of dates – for example, greater than November 1, 2020 and less than January 31, 2021 – you would add two lines for the Date field – as shown below:

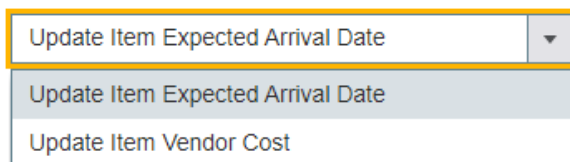
Field	Operator	Value(s)
Order Date	>=	11/1/2020
Order Date	<=	1/31/2021

- **To remove a line**, highlight it, then click the “Delete Line” button:



Choose what to update – expected item arrival date or item vendor cost:

Specify what needs to be updated on purchase orders – either the expected arrival date or item costs.



- Select “Update Item Expected Arrival Date” or “Update Item Vendor Cost”.
- Add items to the “Items” list (*to update only specified items*).

- Then
 - Enter the new Expected Arrival Date – *if changing the date.*
 - Enter the Vendor Number for items – *if changing the vendor cost.*

Add items to the “Items list” to update specific items only:

Only Update Specified Items

Items (1)...

Items

+ Add Line Delete Line

Item	Description
A1-105/0	13W Mini Fluorescent Bulb

Search:

- Select “Only Update Specified Items.”
 - Do not check this box if you want to update all items that have changed.
- Click the Items button. The button shows you how many items are already in the list.
- Click the Add Line button to add an item, then click the new line and select from the Finder.

Note:

- The list will be remembered from the previous time you used it to load POs for updating.
- Uncheck “Only Update Specified Items” to ignore the list.

Enter the new Expected Arrival Date:

Expected Arrival Date

Update Purchase Order Expected Arrival Date

- This date will update ALL items on selected POs unless you specify an item list.
- Click “Update Purchase Order Expected Arrival Date” to also update the date in the PO header.

Enter the Vendor Number if updating costs:

Vendor Number

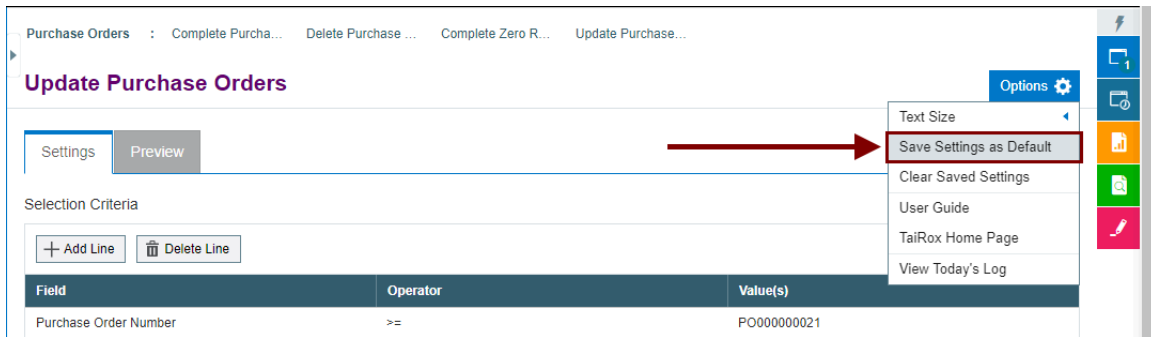
- **The program will update ALL items from this vendor using costs in I/C Vendor Details** unless you specify an item list.

Do not update all items unless you know that ALL your vendor costs are correct.

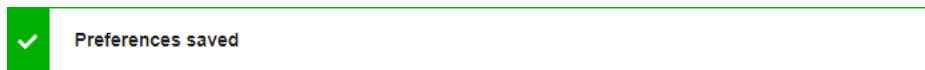
Note: No action will be taken if there is no Item Vendor Cost or if the cost is zero.

Save or clear the selection criteria:

You can save your selection criteria so it appears by default the next time you use the program.



- Click the Options button to display the list of options.
- Select “Save Settings as Default.” The program displays the following message:



To clear the default settings:

- Select “Clear Saved Settings” from the Options menu.

View selected POs on the Preview tab and choose which ones to update:

Click the Preview tab to view the list of purchase orders that meet the range and selection criteria that you specified on the Settings tab.

Note: If you do not specify any selection criteria, the program will list all POs when you go to the Preview tab. You can then pick the POs that you want to update.

- **Click the Preview tab to display the selected list of purchase orders.**

	PO Number	Vendor Number	Vendor Name	PO Date	PO Type	Total
<input type="checkbox"/>	PO000000021	1500	Gould Manufacturing Ltd.	6/23/2020	Active	3945.52
<input type="checkbox"/>	PO000000022	1200	Chloride Systems	6/23/2020	Standing	397.12
<input type="checkbox"/>	PO000000023	7100	Stewart Office Supplies	6/23/2020	Blanket	21.19
<input type="checkbox"/>	PO000000024	1540	Hart Batteries	7/10/2020	Future	687.66
<input type="checkbox"/>	PO000000025	3050	M & P Sales Ltd.	6/22/2020	Active	4102.68
<input type="checkbox"/>	PO000000026	1580	Grant Office Supplies	6/24/2020	Active	216.5

When you click the Preview tab, the active purchase orders that match the selection criteria will be displayed, allowing you to drill down on POs to confirm your selections.

Important Note: POs are selected for inclusion *at the moment you click Preview*; however, purchase orders may be changed before processing is completed. Make sure that you consult the log to see the actual processing that has taken place.

- You can go back to the Settings tab to adjust ranges and other settings, if necessary, and then click Preview again.

- Click the checkbox in the column heading to select all or select none of the POs loaded in the grid.
- Click the checkboxes on each row to cherry-pick orders for updating.

Matching Purchase Orders				Matching Purchase Orders			
<input checked="" type="checkbox"/>	PO Number	Vendor Number	Vendor Name	<input type="checkbox"/>	PO Number	Vendor Number	Vendor Name
<input checked="" type="checkbox"/>	PO00000004	6010	J. D. Garner Enterprises	<input checked="" type="checkbox"/>	PO00000004	6010	J. D. Garner Enterprises
<input checked="" type="checkbox"/>	PO00000013	1500	Gould Manufacturing Ltd.	<input type="checkbox"/>	PO00000013	1500	Gould Manufacturing Ltd.
<input checked="" type="checkbox"/>	PO00000017	1540	Hart Batteries	<input checked="" type="checkbox"/>	PO00000017	1540	Hart Batteries
<input checked="" type="checkbox"/>	PO00000018	6010	J. D. Garner Enterprises	<input type="checkbox"/>	PO00000018	6010	J. D. Garner Enterprises
<input checked="" type="checkbox"/>	PO00000019	7100	Stewart Office Supplies	<input checked="" type="checkbox"/>	PO00000019	7100	Stewart Office Supplies
<input checked="" type="checkbox"/>	PO00000020	7936	Sentry Supplies	<input type="checkbox"/>	PO00000020	7936	Sentry Supplies

Click the Process button to update the selected purchase orders:

The program asks you to confirm your choices. Click Yes to continue.

Confirmation ✕

Are you sure you want to update the selected purchase orders?

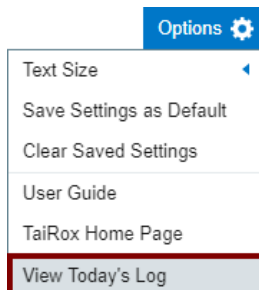
Important Notes:

- When updating Item Vendor Cost, no action will be taken if there is no Item Vendor Cost or if the cost is zero.
- There may be data-integrity errors that prevent some updates, in which case an error message will appear.
- If the process was successful, the following message will appear, stating the number of POs that were updated:



Select “View Today’s Log” to confirm which purchase orders were updated:

- Click the Options button and select View Today’s Log to see the purchase orders selection criteria and the POs that were updated.



- The log looks like this:

```
TPTUpdatePurchaseOrders-PTDEMO-20190710.log
Processing started (7/10/2020 10:26:07 AM)
Performed by user: ADMIN
Selection Criteria:
  Vendor = [1200]
Update Item Expected Arrival Date
Items:
  A1-105/0: 13W Mini Fluorescent Bulb
Expected Arrival Date: 6/24/2020
Update Purchase Order Expected Arrival Date: Yes
Updating purchase order P000000015...
  Purchase order updated.
Updating purchase order P000000022...
  Purchase order updated.
Processing completed (7/10/2020 10:26:08 AM)
*****
```

The Log lists:

- The user, selection criteria and update options.
- Each purchase order that was updated.