TaiRox Productivity Tools User Guide

Summary - Update Orders

Update Orders eliminates the time-consuming steps involved in changing details for dozens or hundreds of quotes or incomplete orders in the Sage 300 Order Entry module. Update Orders will make changes to selected orders:

- When the components of a kit have changed
- When a bill-of-material has changed
- When the expected ship date of an item or list of items or all items has changed
- When a price list has changed for an item or list of items or all items
- When one item is to be substituted for another
- When a customer address changes, affecting many orders, including standing orders
- When a large number of orders (e.g. for one customer) are to be put on hold
- When a large number of orders (e.g. for one customer) are to be taken off hold

Overview - Update Orders

Update Orders prompts for the action to be taken across many different quotes and orders. The actions are varied and comprehensive. Filtering mechanisms are selected and a Load button is pressed. All those quotes or orders for which the action can apply will be displayed. After selection, the selected orders can be "cherry-picked". Pressing a Process button completes the operation in one-step. A log is kept and can be displayed by clicking on the Log button.
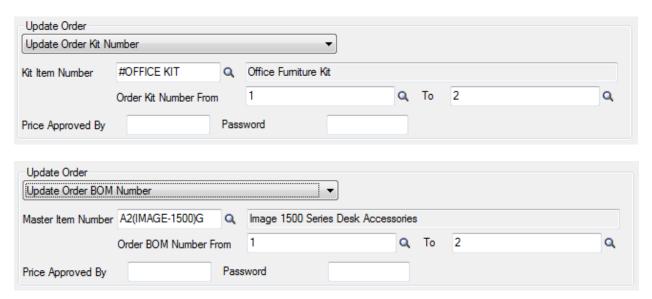
Running Update Orders

Once the TaiRox Productivity Tools are installed and activated, the Update Orders icon will be shown from the TaiRox Productivity Tools menu on the Sage 300 desktop (and can be copied to other menu locations).
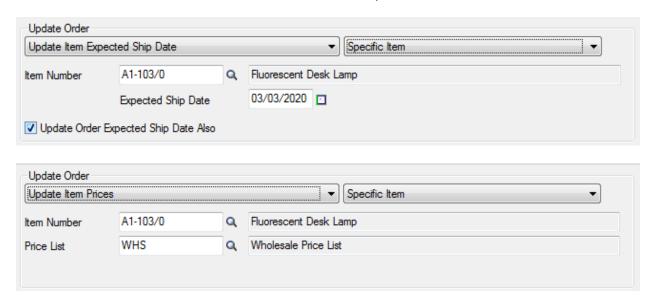
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Running Update Orders (continued)

Launching Update Orders will present a screen that allows you to select which operation you wish to perform across a range or quotes or orders. The choices are shown below.

Note: When updating Kit and BOM numbers, it is possible that there will be a price change. If this is possible, authentication will be required and the user should provide this before proceeding.

Update Order				
Update Order Kit Number ▼				
Kit Item Number	#OFFICE KIT 🔍	Office Furniture Kit		
	Order Kit Number From	1 🔍	To	2 🔍
Price Approved By		Password		

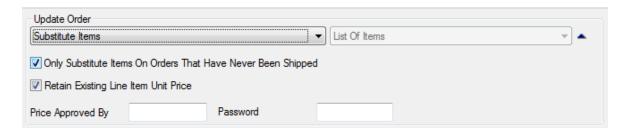| Update Order				
Update Order BOM Number ▼				
Master Item Number	A2(IMAGE-1500)G 🔍	Image 1500 Series Desk Accessories		
	Order BOM Number From	1 🔍	To	2 🔍
Price Approved By		Password		

Note: Suppose a supplier has been delayed and an expected ship date for an item needs to be pushed further into the future. If the date for that item is further into the future than the whole order and the checkbox is selected, then the order's ship date will also be set to the new date.

Update Order		
Update Item Expected Ship Date ▼	Specific Item ▼	
Item Number	A1-103/0 🔍	Fluorescent Desk Lamp
	Expected Ship Date	03/03/2020 📅
☑ Update Order Expected Ship Date Also		

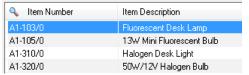| Update Order		
Update Item Prices ▼	Specific Item ▼	
Item Number	A1-103/0 🔍	Fluorescent Desk Lamp
Price List	WHS 🔍	Wholesale Price List

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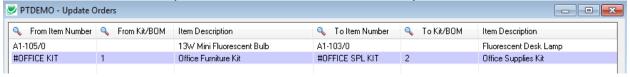
Running Update Orders (continued)

Notes: It is often the case that once some part - any part - of an order has been shipped, then any kind of automated process can increase the effort required to sort out an order. A checkbox is provided to control this behavior. In some situations, the price on an order should not be changed (not be over-ridden with the new item's price). In other situations, the price should change with the substitution. A checkbox is provided to control this behavior. Important: If retaining the price from the order, authentication may be required, as O/E interprets this as a "price override". A non-kit item can be substituted for a kit and vice-versa.
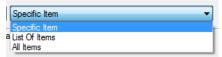
Update Order		
Substitute Items ▾	List Of Items ▾	▲

☑ Only Substitute Items On Orders That Have Never Been Shipped

☑ Retain Existing Line Item Unit Price

Price Approved By [　　　　]　　Password [　　　　]

When updating a List of Items (where applicable), click on the up icon to edit a list. The list will be remembered from the previous Load.

🔍 Item Number	Item Description
A1-103/0	Fluorescent Desk Lamp
A1-105/0	13W Mini Fluorescent Bulb
A1-310/0	Halogen Desk Light
A1-320/0	50W/12V Halogen Bulb

For item substitution, multiple items can be substituted in one operation:

PTDEMO - Update Orders

🔍 From Item Number	🔍 From Kit/BOM	Item Description	🔍 To Item Number	🔍 To Kit/BOM	Item Description
A1-105/0		13W Mini Fluorescent Bulb	A1-103/0		Fluorescent Desk Lamp
#OFFICE KIT	1	Office Furniture Kit	#OFFICE SPL KIT	2	Office Supplies Kit

For the chosen operation, you can select which items the operation will be applied to:

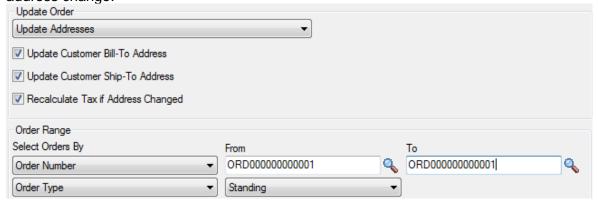| Specific Item ▾ |
|---|
| Specific Item |
| List Of Items |
| All Items |

After selecting the operation, the orders to which the operation will apply can be filtered further. One of the filter choices is to select a range of orders, with the default values controlled by settings accessed through the File menu:
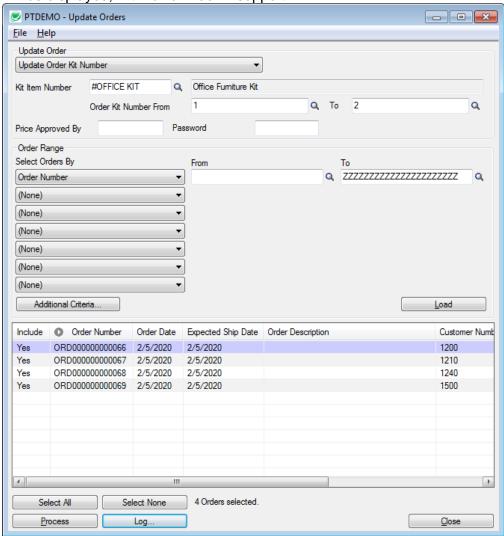
TaiRox Software Inc. - TaiRox Update Orders Settings

Number of Months Prior to Session Date to Update Kit Items [6]

[Save]　　　　　　　　[Cancel]

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Running Update Orders (continued)

Notes: What to do when a large customer who has many orders in process or very many standing orders and changes their address? Further, what if the address change affects tax jurisdictions? A drop-down choice is provided to effect these changes. You can select to change Bill-To Addresses or Ship-To Addresses. You can select to recalculate taxes for orders with an address change.

Update Order

Update Addresses ▼

☑ Update Customer Bill-To Address

☑ Update Customer Ship-To Address

☑ Recalculate Tax if Address Changed

Order Range

Select Orders By

| Order Number ▼ | From ORD000000000001 🔍 | To ORD000000000001 🔍 |
| Order Type ▼ | Standing ▼ | |

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Running Update Orders (continued)

When the Load button is pressed, the active quotes and orders that match the selection criteria will be displayed, with full drill-down support:

The selected orders can be selected / de-selected on an individual basis ("cherry-picked"). The Process button will now complete the operation.

Important Notes:
- Update Orders will not change line items that have serial or lot numbers (which may be unusual for unshipped orders or quotes in any case).
- There may be data-integrity errors that prevent some updates, in which case an error window will appear and the log file should be reviewed.