

# 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.

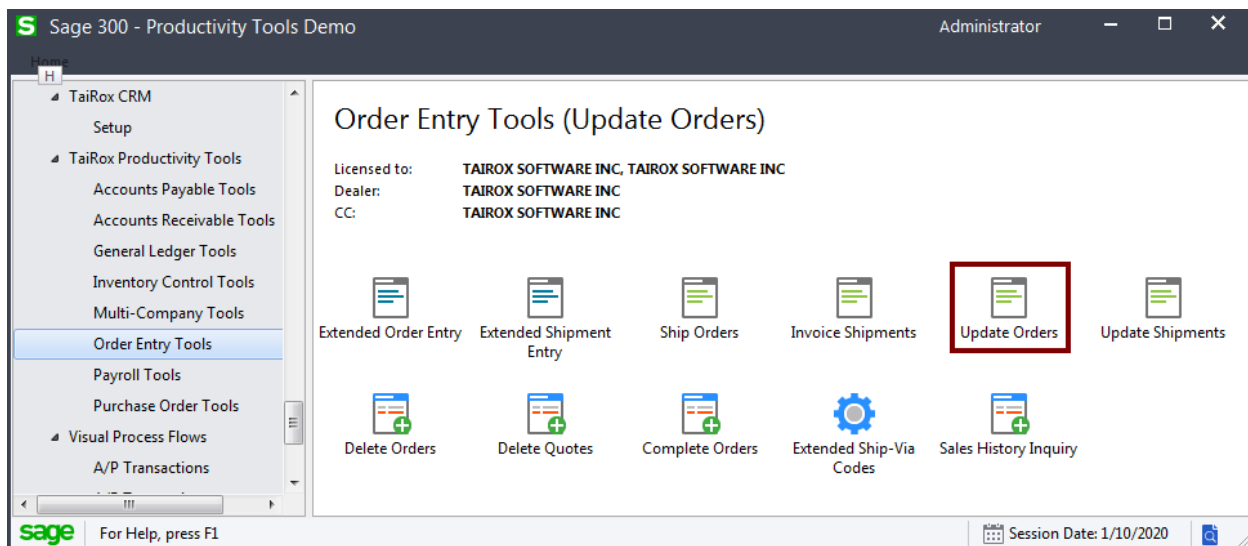
The Update Orders screen lets you select the update action that you want to perform, the items you want to update, and then specify the ranges of orders that need to be updated. You can view and cherry-pick the list of orders, and then click the Process button to complete the operation in a single step. You can display a log of all changes when processing is complete.

## Update Orders lets you change 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 the deliver-by 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 needs 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.

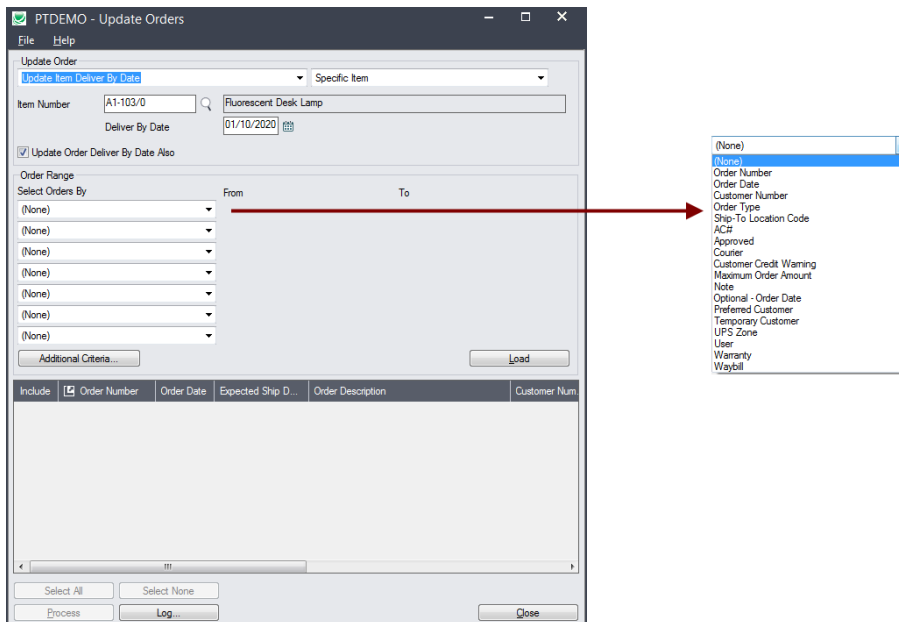
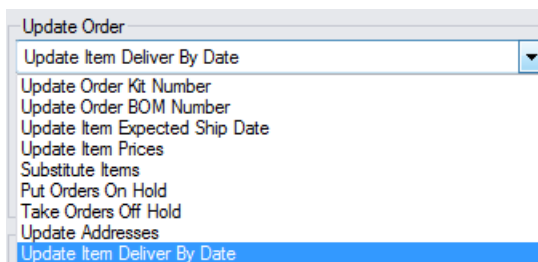
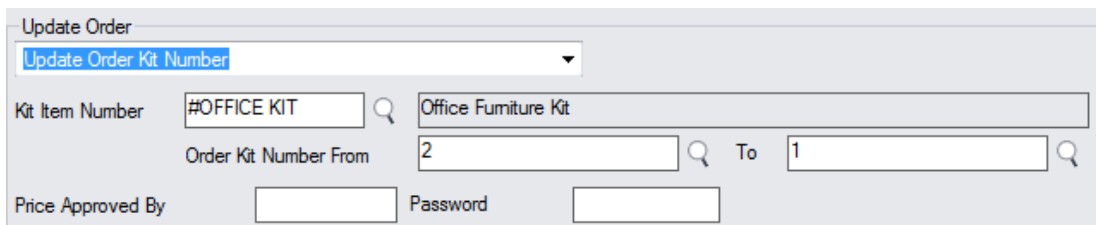
\* Only available on Sage 300 2012 and higher versions.

The Update Orders icon appears under **TaiRox Productivity Tools > Order Entry Tools** on the Sage 300 desktop and can be copied to other menu locations.



**The Update Orders screen appears below:**

In this example, the program will update the Deliver By date for a specific order. You can select orders by Order number, order date, customer number, order type, ship-to location, or any optional fields used in orders.

**Selecting and updating orders****Choose what to update:****Update Order Kit Number**

- Select “Update Order Kit Number”, then:
  - Select the Kit Item Number.
  - Specify the old Order Kit Number and new Item Kit Number.
  - Enter the ID and Password for the person approving price changes resulting from the different kit number.

**Note:** When updating Kit numbers, it's possible to have a price change. If this happens, authentication will be required and the user should provide this before proceeding.

### Update Order BOM Number

The screenshot shows the 'Update Order' dialog box with the following fields:

- Update Order BOM Number (dropdown menu)
- Master Item Number (text input with search icon)
- Order BOM Number From (text input with search icon) To (text input with search icon)
- Price Approved By (text input) Password (text input)

- Select “Update Order BOM Number”, then:
  - Select the Master Item Number for the BOM.
  - Specify the old Order BOM Number and new Item BOM Number.
  - Enter the ID and Password for the person approving price changes resulting from the different BOM number.

**Note:** When updating BOM numbers, it's possible to have a price change. If this happens, authentication will be required and the user should provide this before proceeding.

### Update Item Expected Ship Date

The screenshot shows the 'Update Order' dialog box with the following fields:

- Update Item Expected Ship Date (dropdown menu)
- Specific Item (dropdown menu)
- Item Number (text input) A1-103/0 (text input) Fluorescent Desk Lamp (text input)
- Expected Ship Date (text input) 01/10/2020 (calendar icon)
- Update Order Expected Ship Date Also

- Select “Update Item Expected Ship Date”, then:
  - Choose a specific item, list of items, or all items.

Click the Drill-Down button to specify a list of items. See the section below on choosing items.

The screenshot shows a dropdown menu with the text 'List Of Items' and a red square icon with a magnifying glass (Drill-Down button) to its right.

- Specify the new Expected Ship date for the items.
- Click the Update Order Expected Ship Date Also to change the order date at the same time.

### Update Item Prices

The screenshot shows the 'Update Order' dialog box with the following fields:

- Update Item Prices (dropdown menu)
- Specific Item (dropdown menu)
- Item Number (text input) A1-103/0 (text input) Fluorescent Desk Lamp (text input)
- Price List (text input) USA (text input) US Price List (text input)

- Select “Item Prices”, then:
  - Choose a specific item, list of items, or all items.

Click the Drill-Down button to specify a list of items. See the section below on choosing items.

The screenshot shows a dropdown menu with the text 'List Of Items' and a red square icon with a magnifying glass (Drill-Down button) to its right.

- Select the Price List for updating pricing.

### Substitute Items

The screenshot shows the 'Update Order' dialog box. The 'Update Order' dropdown menu is set to 'Substitute Items'. To its right is a 'List Of Items' dropdown menu with a small icon to its right. Below these are two checkboxes: 'Only Substitute Items On Orders That Have Never Been Shipped' and 'Retain Existing Line Item Unit Price', both of which are currently unchecked. At the bottom, there are two input fields labeled 'Price Approved By' and 'Password'.

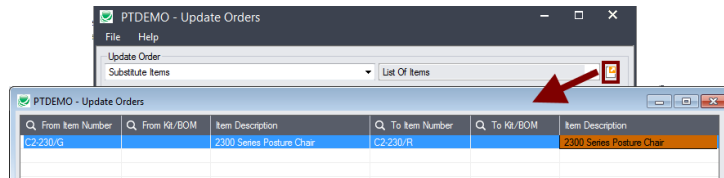
You can substitute multiple items in one operation.

A non-kit item can be substituted for a kit and vice-versa.

In some situations, the price on an order should not be changed by substituting items; in other situations, the price should change. Use the “Retain Existing Line Item Unit Price” checkbox to choose the behavior you need.

**Important:** If retaining the prices for orders, authentication may be required, as O/E interprets this as a "price override".

- Select “Substitute items”, then:
  - Click the Drill-Down button to specify one or more items that you are substituting.



Specify the “From” and “To” item numbers in the pop-up grid.

- Select “Only Substitute Items On Orders That Have Never Been Shipped” if you do not want to substitute shipped items.
- Select “Retain Existing Line Item Unit Price” to keep the order prices the same – even with item substitution.
- Enter the ID and Password for the person approving price changes if you are not keeping original prices.

### Put Orders On Hold

The screenshot shows the 'Update Order' dialog box with the 'Update Order' dropdown menu set to 'Put Orders On Hold'.

- Select “Put Orders On Hold”, then continue to choose the ranges for order selection.

### Take Orders Off Hold

The screenshot shows the 'Update Order' dialog box with the 'Update Order' dropdown menu set to 'Take Orders Off Hold'.

- Select “Take Orders Off Hold”, then continue to choose the ranges for order selection.

### Update Addresses

This choice lets you update addresses for customers with many orders in process or many standing orders.

- You can select Bill-To Addresses or Ship-To Addresses.
- You can recalculate taxes for orders with address changes.

Update Order

Update Addresses

Update Customer Bill-To Address

Update Customer Ship-To Address

Recalculate Tax if Address Changed

- Select “Update Addresses”, then:
  - Choose a specific item, list of items, or all items.

Click the Drill-Down button to specify a list of items. See the section below on choosing items.

List Of Items

- Select “Update Customer Bill-To Addresses” to update the bill-to address on orders.
- Select “Update Customer Ship-To Addresses” to update the ship-to address on orders.
- Select “Recalculate Tax If Address Changed” to recalculate all taxes using the new jurisdictions, if changed.

### Update Item Deliver By Date

Update Order

Update Item Deliver By Date

Specific Item

Item Number: A1-103/0

Fluorescent Desk Lamp

Deliver By Date: 01/10/2020

Update Order Deliver By Date Also

- Select “Update Item Deliver By Date”, then
  - Choose a specific item, list of items, or all items.

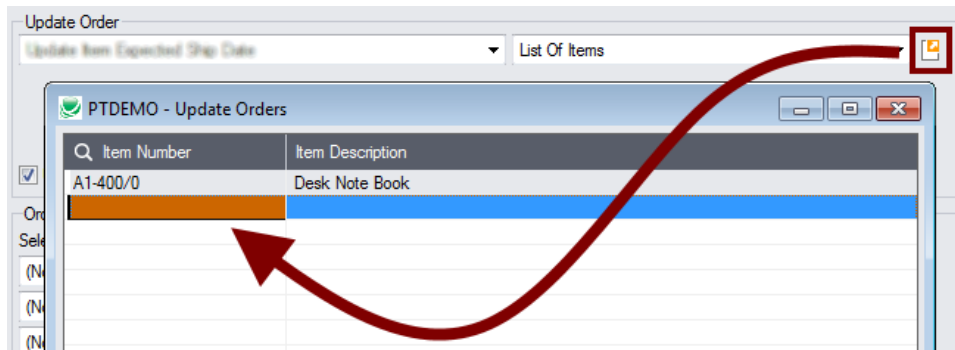
Click the Drill-Down button to specify a list of items. See the section below on choosing items.

List Of Items

- Enter the new Deliver By date.
- Select “Update Order Deliver By Date Also” to change the order date to match the item Deliver By date.

### Choosing a single item, list of items, or all items:

- If you choose a list of items, the list will be remembered from the previous time you used it to load orders.
- To create/edit an item list. click on the Drill Down icon on the right side of the dropdown field.

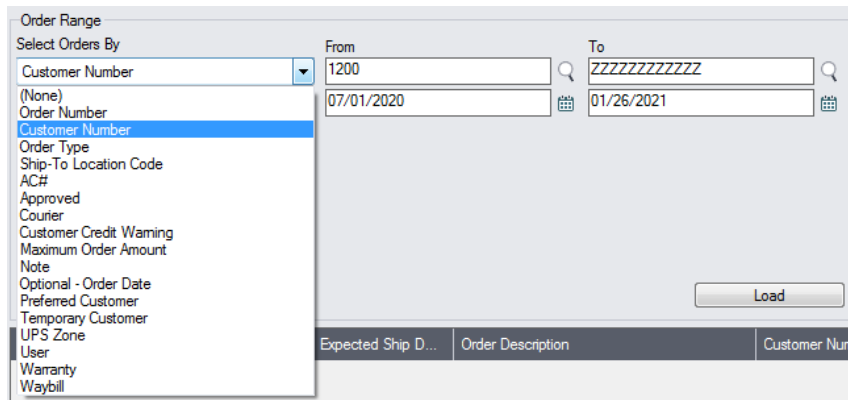


- Press the insert key, then select an item number from the Finder in the Item Number field to add an item to the list.

The list will be remembered from the previous Load.

### Specify ranges of orders for selection:

You can specify up to seven order fields to use for primary order selection – such as the Customer number and expected order date.

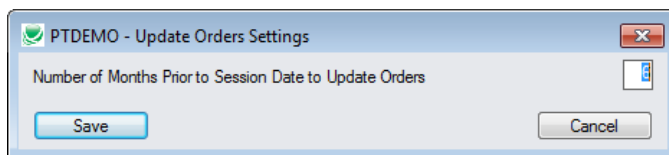


### Notes:

- You can specify ranges of orders to restrict them by date, number, customer, order type, ship-to location code or optional order fields (if added). The screen above shows a number of optional fields.

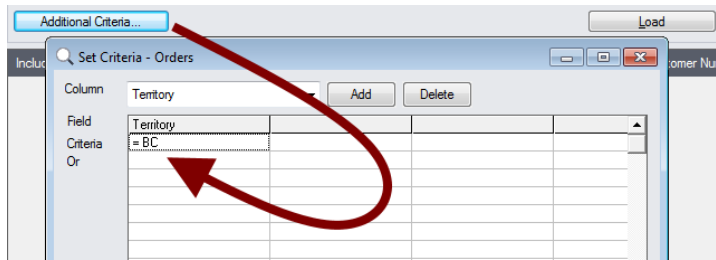
### Note regarding order dates:

- If you choose a range of Order Dates, the default “To” date is set by a screen accessed through the **Update Orders > File > Settings** menu choice:



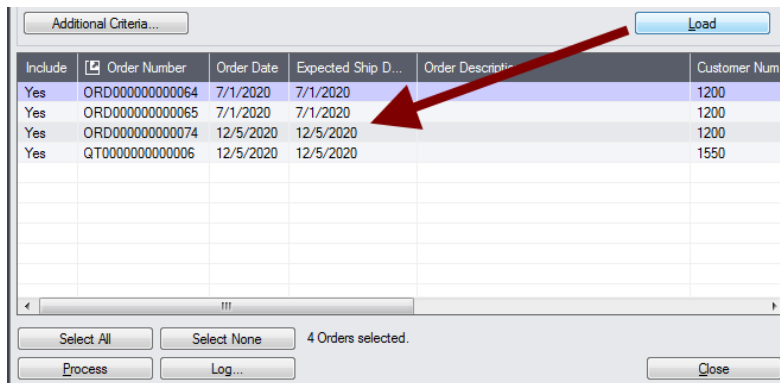
You can override the default in the Range fields.

### Choose additional criteria:



- Click Additional Criteria to further restrict the orders retrieved for updating. Click OK to save.

### Load the list of selected orders and choose which ones to update:



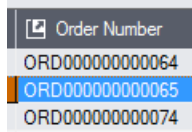
- Click the Load button to display the selected list of orders.  
When the Load button is pressed, the active orders that match the selection criteria will be displayed, allowing you to drill down on orders to confirm your selections.  
**Important Note:** Orders are selected for inclusion **based on the moment that the Load button is pressed**. The order 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 adjust the ranges or additional criteria if necessary, then click Load again.
- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the orders loaded in the grid.



- Double-click in the Include column to “cherry-pick” orders:

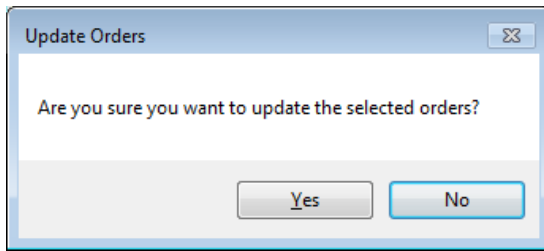
Include	Order Number	Order Date	Expected Ship D...	Order Description	Customer Num.
No	ORD0000000000064	7/1/2020	7/1/2020		1200
Yes	ORD0000000000065	7/1/2020	7/1/2020		1200
No	ORD0000000000074	12/5/2020	12/5/2020		1200
Yes	QT0000000000006	12/5/2020	12/5/2020		1550

- Click the Order Number column heading to drill down to the selected order:



### Click the Process button to update the included orders:

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

**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 message will appear.

**Click the Log button to confirm which orders were processed:**

```

7/16/2020 11:12:19 AM Update Orders started.
7/16/2020 11:12:19 AM
7/16/2020 11:12:19 AM Performed by user: ADMIN
7/16/2020 11:12:19 AM
7/16/2020 11:12:19 AM Put Orders On Hold
7/16/2020 11:12:19 AM
7/16/2020 11:12:19 AM Order Range
7/16/2020 11:12:19 AM     Customer Number From [1200] To [1200]
7/16/2020 11:12:19 AM     Order Date From [7/1/2020] To [7/04/2020]
7/16/2020 11:12:19 AM
7/16/2020 11:12:19 AM Putting order on hold for Order Number ORD0000000000065...
7/16/2020 11:12:19 AM Putting order on hold for Order Number QT0000000000006...
7/16/2020 11:12:19 AM
7/16/2020 11:12:19 AM Update Orders complete.
7/16/2020 11:12:19 AM
=====

```

**The Log lists:**

- The user, the type of update performed, and the full range settings.
- Each order that was processed.