

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.

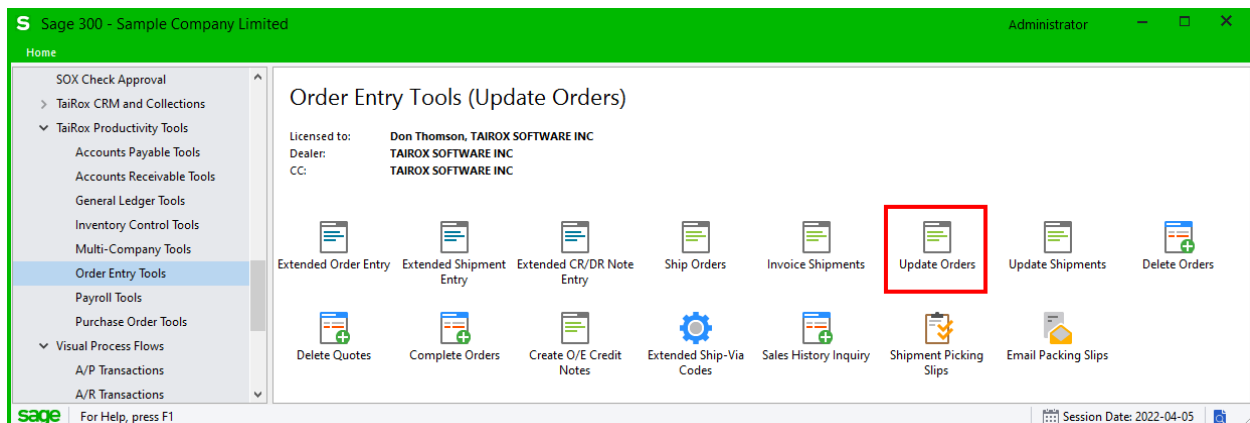
The Update Orders screen lets you select the update action that you want to perform, the items you want to update, and then specify the ranges of orders that need to be updated – or import a list of the orders that you need to process.

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 update selected orders to:

- Change the components of a kit.
- Change a bill-of-material.
- Change the expected ship date of an item or list of items or all items.
- Change the deliver-by date of an item or list of items or all items.*
* Only available on Sage 300 2012 and higher versions.
- Update prices from a price list or change the price list for an item, list of items, or all items.
- Substitute one or more items for other items in multiple orders.
- Change customer addresses, affecting many orders, including standing orders.
- Put on hold a large number of orders (e.g. for one customer).
- Remove holds from a large number of orders (e.g. for one customer).
- Take completed orders off hold.
- Commit an item or list of items or all items on a set of orders.
- Uncommit an item or list of items or all items on a set of orders.
- Change the salesperson code on a set of orders.
- Reduce the quantity on order to zero for items that are not in stock.
- Update the ship via code or ship via description for a set of orders.
- Update the order reference for a set of orders.

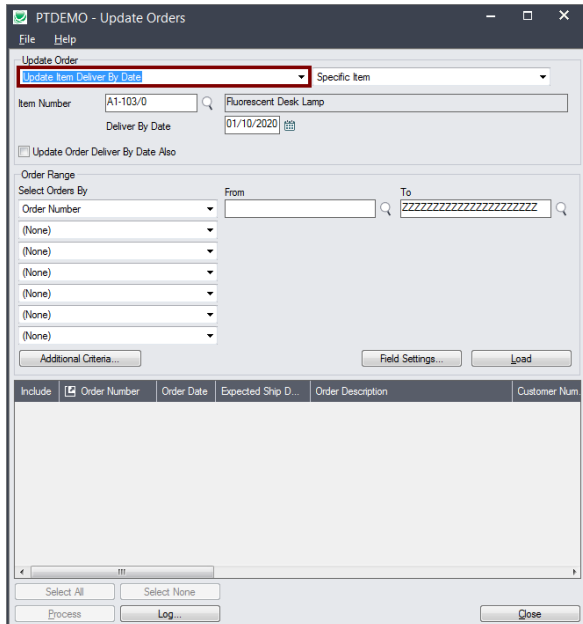
The Update Orders icon appears under **TaiRox Productivity Tools > Order Entry Tools** on the Sage 300 desktop and can be copied to other menu locations.



The Update Orders screen appears below:

In this example, the program will update the “Deliver By Date” for a range of orders that include a specific item.

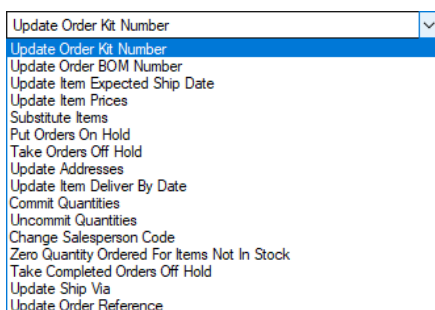
The range fields let you select orders by specifying a range of values for up to seven fields, including order numbers, order dates, customer numbers, order types, and any optional fields that you use for orders.



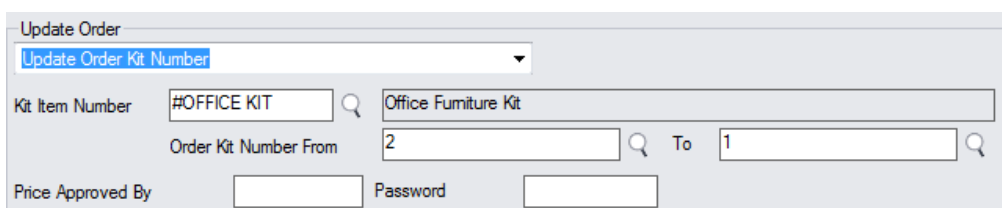
Selecting and updating orders

Choose what to update in each order

First, you have to specify what needs to be updated in the orders. Update Orders provides the following choices:



Update Order Kit Number



- Select “Update Order Kit Number”, then:
 - Select the Kit Item Number.
 - Specify the old Order Kit Number and new Order 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' form with the following fields:

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

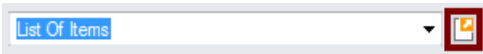
- Select “Update Order BOM Number”, then:
 - Select the Master Item Number for the BOM.
 - Specify the old Order BOM Number and new Order BOM Number.
 - Enter the ID and Password for the person approving price changes resulting from the different BOM number.

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' form with the following fields:

- Update Order: Update Item Expected Ship Date (dropdown)
- Specific Item: Specific Item (dropdown)
- Item Number: A1-103/0 [search icon] Fluorescent Desk Lamp
- Expected Ship Date: 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 or to import an item list. See the section below on [choosing items](#).
- 
- 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.

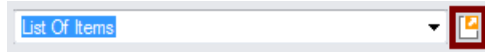
Update Item Prices

The screenshot shows the 'Update Order' form with the following fields:

- Update Order: Update Item Prices (dropdown)
- Specific Item: Specific Item (dropdown)
- Item Number: A1-103/0 [search icon] Fluorescent Desk Lamp
- Price List: USA [search icon] US Price List

- 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 or to import an item list. See the section below on [choosing items](#).



- Select the Price List for updating pricing.

Substitute Items

 A screenshot of the "Update Order" dialog box. The "Update Order" dropdown is set to "Substitute Items". The "List Of Items" dropdown is also visible. There are three checkboxes: "Only Substitute Items On Orders That Have Never Been Shipped" (checked), "Retain Existing Line Item Unit Price" (checked), and "Retain Line, Set Quantity Ordered to 0" (unchecked). Below these are two input fields labeled "Price Approved By" and "Password".

You can substitute multiple items on multiple orders in one operation – entering items directly in the program or importing an item substitution list from a spreadsheet.

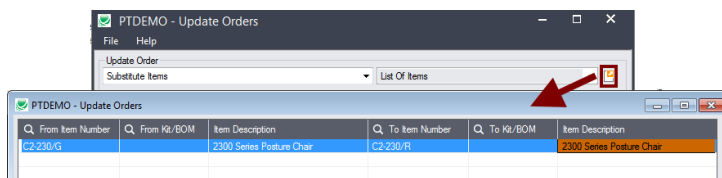
You can substitute a non-kit item for a kit and vice-versa. You can also choose to ignore orders if ANY items on the orders are shipped.

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".

Normally, order lines with items being substituted are deleted. Choose “Retain Line . . .” to keep the original line but set its quantity ordered to “0”.

- Select “Substitute items”, then:
 - Click the Drill-Down button to specify one or more items that you are substituting or to import a substitution list. See [Choosing a single item, list of items, or all items](#) for more information.



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

- Select “Only Substitute Items On Orders That Have Never Been Shipped” to skip partially shipped orders. (Ignore ALL orders where ANY items on the orders have been shipped.)
- Select “Retain Existing Line Item Unit Price” to keep the order prices the same – even with item substitution.
- Select “Retain Line, Set Quantity Ordered to 0” to keep the original order line but set its quantity ordered to “0”. The new line will have a comment indicating which item it replaced.
- 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 a window titled 'Update Order' with a dropdown menu. The selected option is '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 a window titled 'Update Order' with a dropdown menu. The selected option is 'Take Orders Off Hold'.

- Select “Take Orders Off Hold”, then continue to choose the ranges for order selection.
 - Enter the ID and Password for a credit approver if taking an order off hold requires credit approval.

Note: This selection processes only incomplete orders that are on hold. To process completed orders, select “Take Completed Orders Off Hold”.

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.

The screenshot shows a window titled 'Update Order' with a dropdown menu. The selected option is 'Update Addresses'. Below the dropdown, there are three checked checkboxes: 'Update Customer Bill-To Address', 'Update Customer Ship-To Address', and 'Recalculate Tax if Address Changed'.

- Select “Update Addresses”, then:
 - 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.

Note that the program will only select and update an order if the address in the order is different from the address in the customer record or ship-to address record.

Update Item Deliver By Date

The screenshot shows a window titled 'Update Order' with a dropdown menu. The selected option is 'Update Item Deliver By Date'. To the right of the dropdown is another dropdown menu with 'Specific Item' selected. Below these are two input fields: 'Item Number' with the value 'A1-103/0' and a search icon, and 'Deliver By Date' with the value '01/10/2020' and a calendar icon. At the bottom, there is a checked checkbox labeled 'Update Order Deliver By Date Also'.

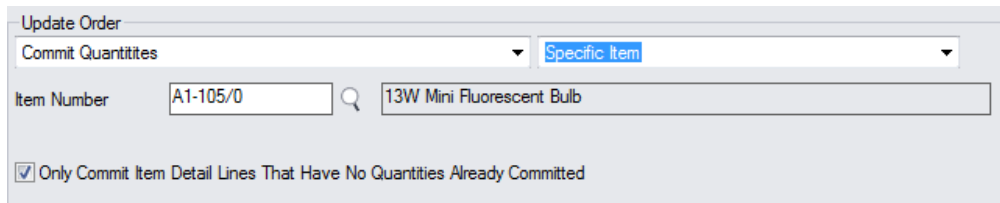
- Select “Update Item Deliver By Date”, then
 - Choose a specific item, list of items, or all items.

Click the Drill-Down button to specify a list of items or to import an item list. See the section below on [choosing items](#).



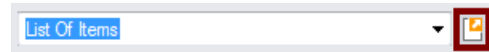
- Enter the new Deliver By date.
- Select “Update Order Deliver By Date Also” to change the order date to match the item Deliver By date.

Commit Quantities



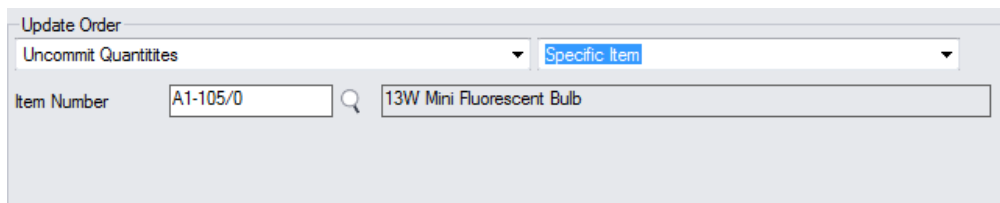
- Select “Commit Quantites”, then
 - Choose a specific item, list of items, or all items.

Click the Drill-Down button to specify a list of items or to import an item list. See the section below on [choosing items](#).




- You can choose to “Only Commit Item Detail Lines That Have No Quantities Already Committed”.

Uncommit Quantities

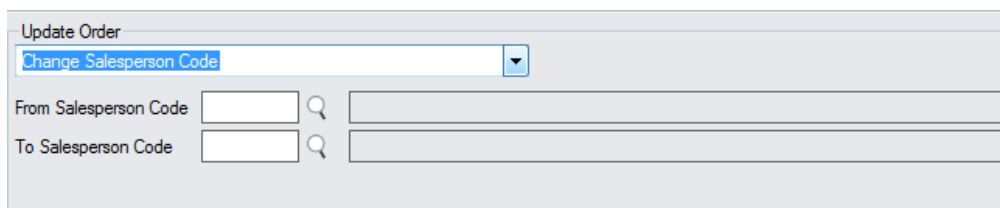


- Select “Uncommit Quantites”, then
 - Choose a specific item, list of items, or all items.

Click the Drill-Down button to specify a list of items or to import an item list. See the section below on [choosing items](#).



Change Salesperson Code



- Select “Change Saleperson Code”, then

- Specify the From and To salesperson codes.

From Salesperson Code	BB	Q	Bill Bhaissou
To Salesperson Code	SP	Q	Susan Prommer

Use the Finder to look up salespeople.

Zero Quantity Ordered For Items Not In Stock

Update Order	
Zero Quantity Ordered For Items Not In Stock	Specific Item
Item Number	F2-102/0
	File Folder Labels

- Select “Zero Quantity Ordered For Items Not In Stock”, then
 - Choose a specific item, list of items, or all items.
Click the Drill-Down button to specify a list of items or to import an item list. See the section below on [choosing items](#).

List Of Items	
---------------	---

Note: This choice reduces quantities to zero on orders where the items have zero quantity on hand at the location specified on the detail line.

Take Completed Orders Off Hold

Update Order
Take Completed Orders Off Hold

- Select “Take Completed Orders Off Hold”, then continue to choose the ranges for order selection.
 - Enter the ID and Password for a credit approver if taking an order off hold requires credit approval.

Note: This selection processes only completed orders that are on hold. To process incomplete orders, select “Take Orders Off Hold”.

Update Ship Via

This choice lets you update the ship via code on orders, or update only the ship via description.

Update Order	
Update Ship Via	
From Ship Via	
To Ship Via	

- Select “Update Ship Via Code”, then
 - Specify the From and To ship via codes. You can also update the ship via description.

From Ship Via	CCT	Q	Cross-Country Trucking Lines
To Ship Via	EPS	Q	Express Parcel Service

Use the Finder to look up ship via codes.

Note: The program selects orders that display the From ship via code on the Order tab, and updates order detail lines that have the same ship via code.

- **To change only the ship via description**, select “Update Ship Via Code”, then
 - Specify the same From and To ship via codes, and enter the new description.

From Ship Via	CCT	Q	Cross-Country Trucking Lines
To Ship Via	CCT	Q	Check with customer -- some switching to EPS

Update Order Reference

This choice lets you update the reference field on orders.

Update Order	
Update Order Reference	
From Order Reference	
To Order Reference	

- Select “Update Order Reference”, then
 - Specify the order reference text that you want to replace, and the new order reference text.

From Order Reference	Supplier Ref 1002-1900
To Order Reference	Supplier Ref 1002-2188

The program selects orders that display the From order reference on the Order tab.

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

List Of Items	▼	📄
Specific Item		
List Of Items		
All Items		

If you are substituting items, you must create or import a list. Click the Drill Down button to proceed.

Specific Item

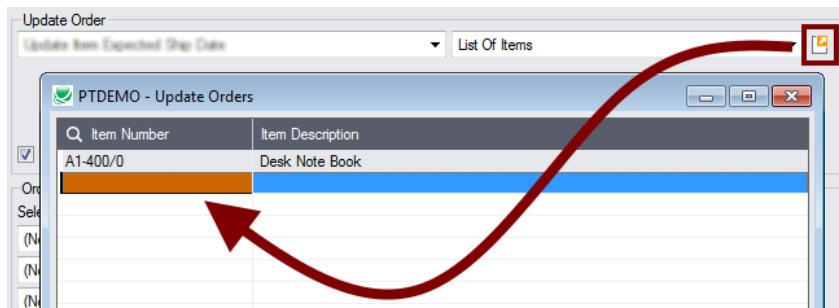
- Choose this option to update orders that contain a specific item. You can exclude orders from the range selection after you click the Load button.

All Items

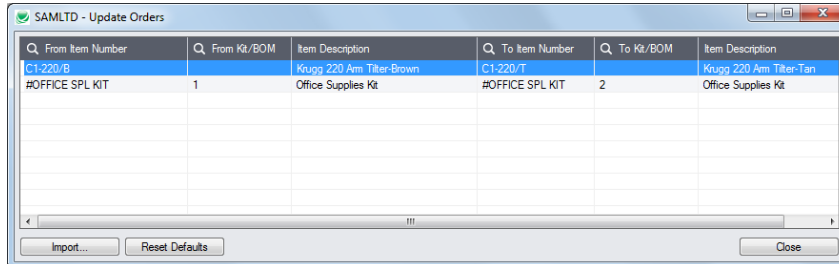
- Choose this option if you do not want to restrict the update by item number. You can exclude orders from the selection after you click the Load button.

List of 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 or import an item list, click on the Drill Down icon on the right side of the dropdown field.



The Substitute Items list has additional columns for From and To items and Kit numbers.



To insert items:

- Use the Insert key to add more items to the list.
- Use the Delete key to remove items.
- The list will be remembered from the previous time you used it to update orders.
- Click the Reset Defaults button to delete all items from the list.

To import a list of items or item substitutions:

- Click the Import button at the bottom of the popup form and select the spreadsheet containing the item list.
 - The imported list will replace the current list of items.
- Use the Insert key to add more rows to the list.
- Use the Delete key to remove items from the imported list.
- Click the Reset Defaults button to delete all items from the list.

Import format:

You can find sample import files in directory \Sage300\XL61A\Documentation.

Note: The Excel Spreadsheet for an item list (Items.xlsx) is a single column with "ITEMNO" as the column heading in the first row.

	A
1	ITEMNO
2	A11030
3	A11050

The Excel Spreadsheet for an item substitution list (ItemSubstitutes.xlsx) must have at least these four columns. The program will ignore any other column names.

	A	B	C	D
1	ITEMNOFROM	DTLNFROM	ITEMNOTO	DTLNOTO
2	C1220B		C1220T	
3	#OFFICE SPL KIT	1 #OFFICE SPL KIT		2

- Item numbers can be formatted or unformatted.
- All other columns are ignored. This means that you can add item descriptions and notes to your spreadsheet without affecting the file import.

Specify ranges of orders for updating

You can select orders by providing order ranges and specifying additional criteria – or you can import a list of the orders that you need to process.

For details on importing a list of orders, see [Import a list of orders for processing](#).

You can specify up to seven order fields to use for primary order selection – such as the date, order number, customer number, order type, ship-to location code or optional order fields (if added). The screen below shows a number of optional fields.

- The dropdown field list shown above includes a number of standard order fields and optional fields, and you can add or remove fields from the dropdown list.

Use the “Field Settings” button to customize the list of fields for selecting orders:

Click the **Field Settings** button to change the fields that appear in the “Select Orders By” dropdown field list.

- The list of fields on the right are the fields that will appear in the Select Orders By dropdown.
- To add a field to the dropdown list, select it in the list on the left, and click the Include button.

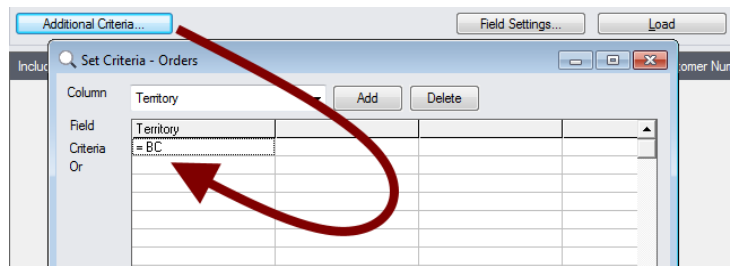
Note regarding order dates:

- 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.

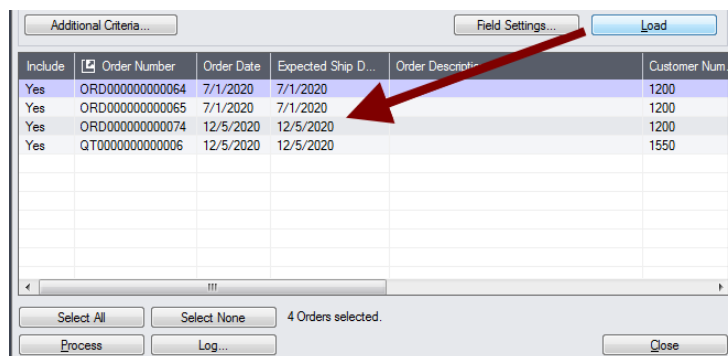
Choose additional criteria if necessary

If you want to select orders from a field that is NOT available on the Field Settings form, use Additional Criteria.



- Click the Additional Criteria button to further restrict the orders retrieved for updating.
- Select a field in the dropdown and click the Add button.
- Double-click the Criteria field to enter a relationship and value.
- 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.

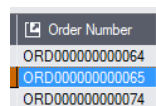
- You can adjust the ranges or additional criteria if necessary, then click Load again.
- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the orders loaded in the grid.



- 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:



Import a list of orders for processing

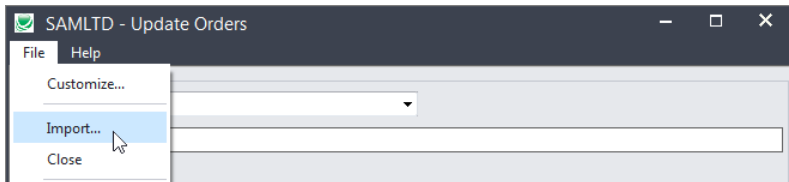
You can import a list of the orders that you need to process – or you can select orders by providing order ranges and specifying additional criteria.

Note that you must specify what you are updating in the “Update Order” section at the top of the form before you import the order list.

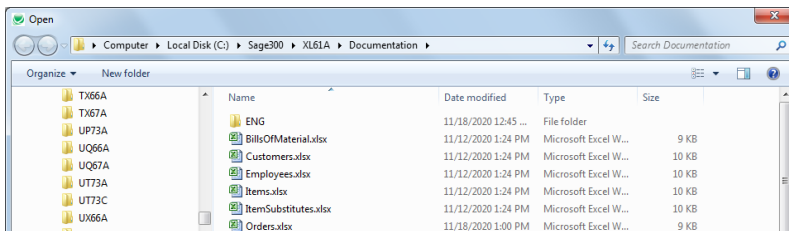
For details on specifying and loading ranges of orders, see [Specify ranges of orders for updating](#).

To import a list of orders for updating:

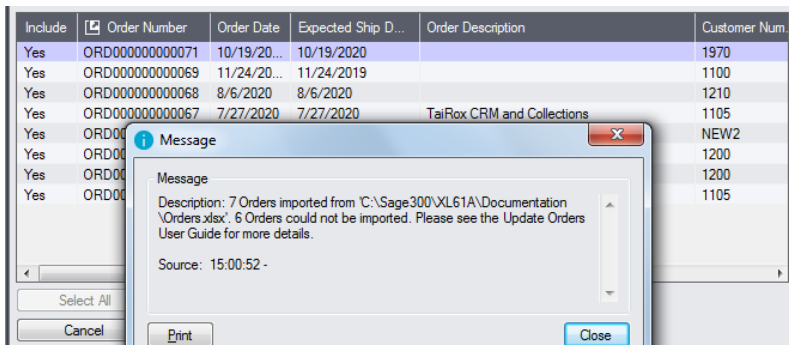
- Choose **File > Import** from the Update Orders menu.



- Select the list of orders that you want to process.



- The program will import the list and load all relevant orders into the grid – setting all orders to “Include” – and display a message stating the number of orders that were successfully loaded, and the number of orders that could not be imported.



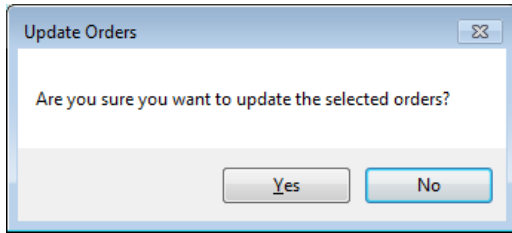
The program will reject orders that cannot be processed.

For example

- If you specified a list of items for updating prices, the program will reject orders that do not include the items you specified.
- The program will reject completed orders.
- You can double-click the “Include” column to remove orders from the update.

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.
- Error messages will list any orders in a list that could not be updated, along with the reasons.

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.

File Formats for Imported Order, Item and Item Substitution Lists

Update Orders has several functions that let you update groups of orders and substitute items on orders using an imported order list and imported lists of item numbers and item substitution lists.

Import files – orders, item lists and item substitution lists – are Excel files.

You can find examples of import lists in directory “...\Sage300\XL61A\Documentation”.

Order List

Instead of specifying a range of orders and clicking the Load button, you can directly import a list of orders.

The Excel Spreadsheet order list is a single column with “ORDNUMBER” as the column heading in the first row.

	A
1	ORDNUMBER
2	ORD000000000071

- All other columns are ignored. This means that you can add item descriptions and notes to your spreadsheet without affecting the file import.

Item Lists

You can import item lists to perform the following updates:

- Update Item Expected Ship Date
- Update Item Prices
- Update Item Deliver By Date
- Commit Quantities
- Uncommit Quantities
- Zero Quantities for Items not In Stock

The Excel Spreadsheet item list is a single column with “ITEMNO” as the column heading in the first row.

	A
1	ITEMNO
2	A11030
3	A11050

Notes:

- Item numbers can be formatted or unformatted.
- All other columns are ignored. This means that you can add item descriptions and notes to your spreadsheet without affecting the file import.

Item Substitution Lists

The Import file for substituting items is more than an item list because you have to provide the original item/kit number information as well as the information for the substituted item/kit.

The Excel Spreadsheet item list must have at least these four columns. It will ignore any other column names.

	A	B	C	D
1	ITEMNOFROM	DTLNOFROM	ITEMNOTO	DTLNOTO
2	C1220B		C1220T	
3	#OFFICE SPL KIT	1	#OFFICE SPL KIT	2

Notes:

- Item numbers can be formatted or unformatted.
- All other columns are ignored, so you can add item descriptions and notes to your spreadsheet without affecting the file import.