

TaiRox Productivity Tools User Guide

Summary - Update Shipments

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

- When a price list has changed for an item or list of items or all items
- When a ship date has changed for an item or list of items or all items

Overview - Update Shipments

Update Shipments prompts for the action to be taken across many different shipments. Filtering mechanisms are selected and a Load button is pressed. All those shipments for which the action can apply will be displayed. After selection, the selected shipments 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 Shipments

Once the TaiRox Productivity Tools are installed and activated, the Update Shipments 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 Shipments (continued)

Launching Update Shipments will present a screen that allows you to select which operation you wish to perform across a range of shipments. The choices are shown here:

The screenshot shows the 'Update Shipment' dialog box. The 'Update Item Prices' dropdown is selected. The 'Specific Item' dropdown is also selected. The 'Item Number' field contains 'A1-103/0' and the 'Price List' field contains 'USA'. The search results for 'Item Number' are 'Fluorescent Desk Lamp' and for 'Price List' are 'US Price List'.

The screenshot shows the 'Update Shipment' dialog box. The 'Update Item Shipment Date' dropdown is selected. The 'Specific Item' dropdown is also selected. The 'Item Number' field contains 'A1-103/0' and the search results are 'Fluorescent Desk Lamp'. The 'Shipment Date' field contains '04/23/2020'. There is a checkbox labeled 'Update Shipment Header Shipment Date Also' which is checked.

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

The screenshot shows the 'Update Shipment' dialog box with the 'Specific Item' dropdown menu open. The menu options are 'Specific Item', 'List Of Items', and 'All Items'. The 'Specific Item' option is currently selected.

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 |

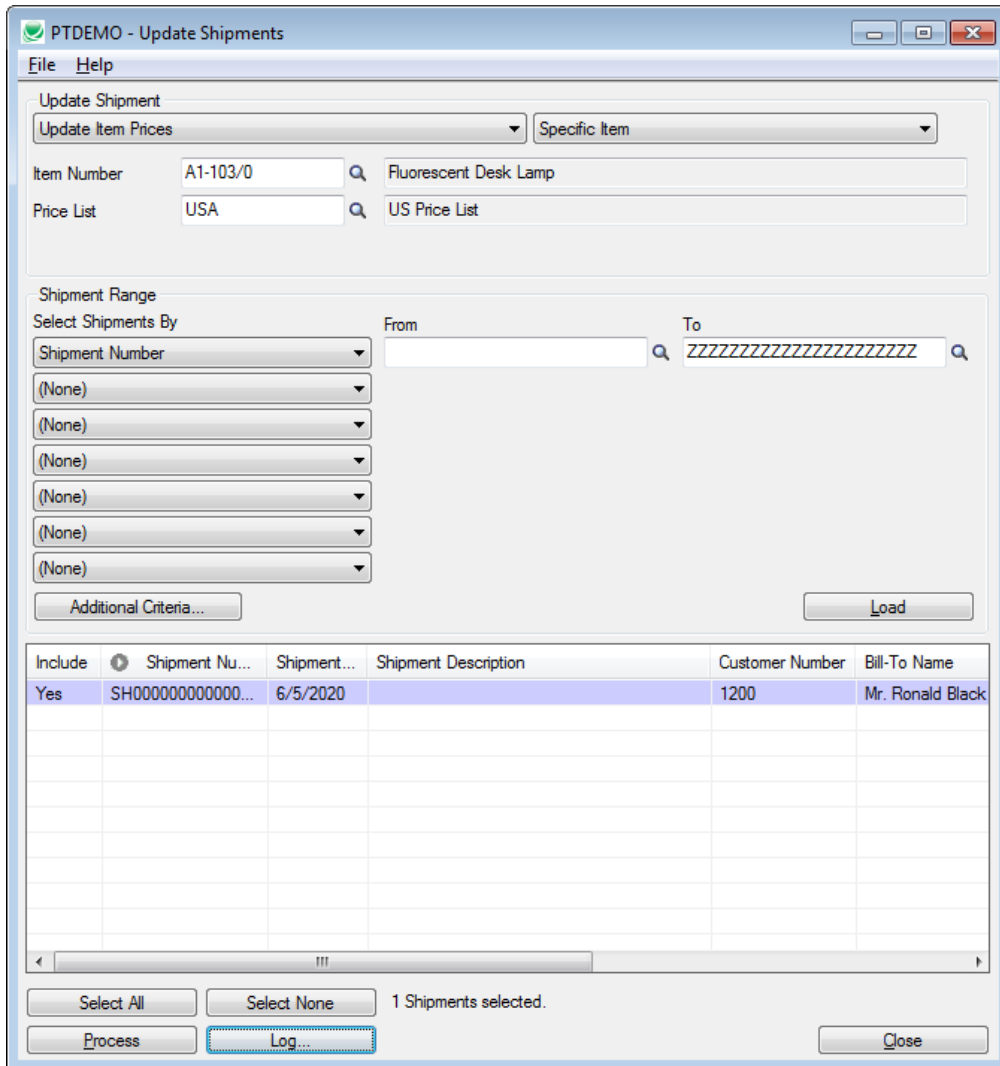
After selecting the operation, the shipments to which the operation will apply can be filtered further. One of the filter choices is to select a range of shipments, with the default values controlled by settings accessed through the File menu:

The screenshot shows the 'Update Shipments Settings' dialog box. The title bar reads 'TaiRox Software Inc. - Update Shipments Settings'. The text inside says 'Number of Months Prior to Session Date to Update Shipments' with a numeric input field containing the value '6'. There are 'Save' and 'Cancel' buttons at the bottom.

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Running Update Shipments (continued)

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



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

Important Notes:

- Once shipments have been invoiced, the price can no longer change.
- There may be data-integrity errors that prevent some updates, in which case an error window will appear.