

Update Shipments

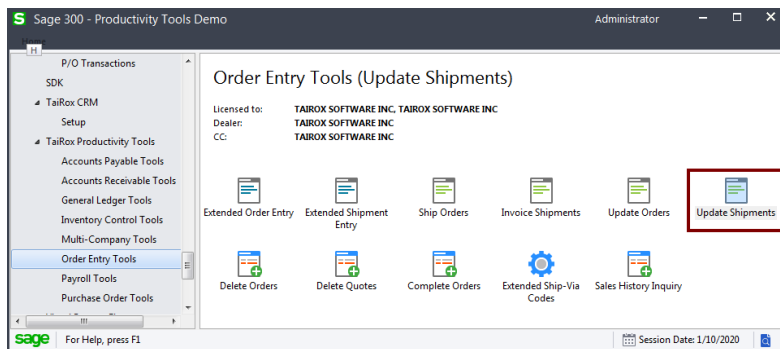
Update Shipments eliminates the time-consuming steps involved in changing details for dozens or hundreds of shipments orders in the Sage 300 Order Entry module.

The Update Shipments screen lets you select the update action that you want to perform, the items you want to update, and then specify the ranges of shipments that need to be updated. You can view and cherry-pick the list of shipments, 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 Shipments lets you change selected shipments:

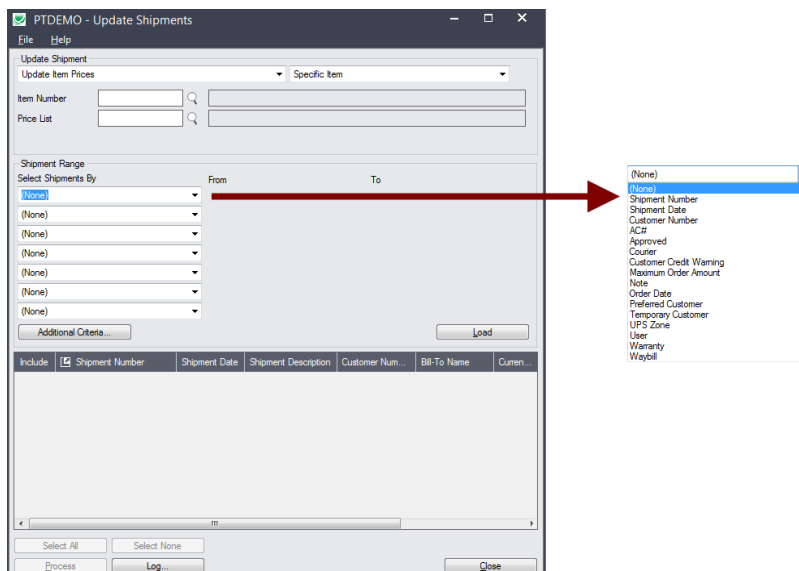
- When a price list has changed for an item or list of items or all items.
- When a ship date has changed for an item or list of items or all items.

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



The Update Shipments screen appears below:

The program lets you update item prices or item shipment dates. You can select shipments by shipment number, shipment date, customer number, or any optional fields used in shipments.



Selecting and updating shipments

Choose what to update:

Update Shipment

Update Item Prices

Update Item Prices

Update Item Shipment Date

Note: Once shipments have been invoiced, the price can no longer change.

Update Item Prices

- Once shipments have been invoiced, the price cannot be changed.

Update Shipment

Update Item Prices

Specific Item

Item Number

Price List

- Select “Update 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.

List Of Items

- Select the Price List for updating pricing.

Update Item Shipment Date

Update Shipment

Update Item Shipment Date

Specific Item

Item Number

Shipment Date 01/10/2020

Update Shipment Header Shipment Date Also

- Select “Update Item Shipment 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.

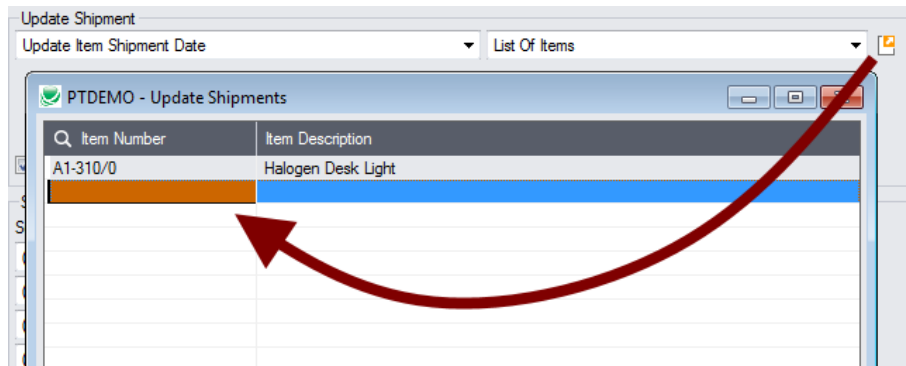
List Of Items

- Specify the new Shipment Date for the items.
- Click the Update Shipment Header Shipment Date Also to change the shipment date for the entire order at the same time.

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 “List of Items” choice.

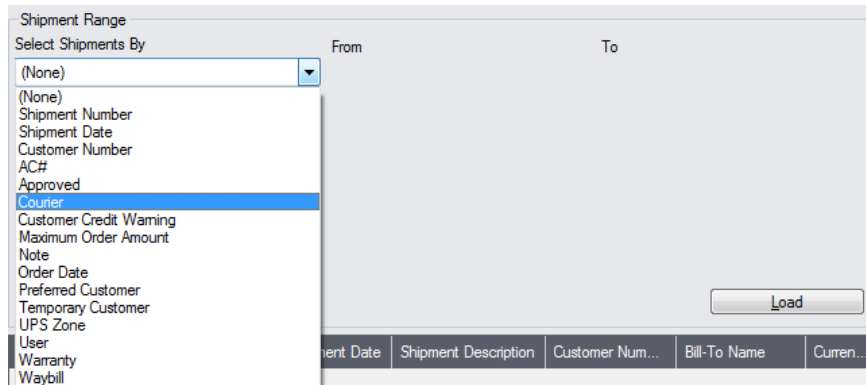


- Press the insert key, then select an item number from the Finder in the Item Number field to add an item to the list.

The list will be remembered from the previous Load.

Specify ranges of shipments for selection:

You can specify up to seven fields to use for shipment selection – including the shipment number, shipment date, customer number, and any optional fields.

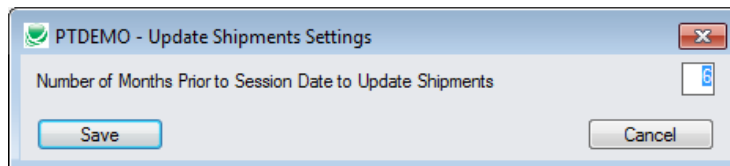


Notes:

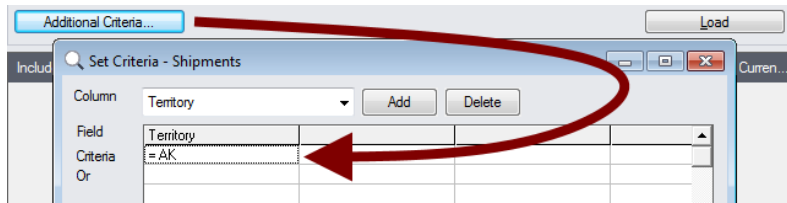
- You can specify ranges of shipments date, number, customer, or optional order fields (if added). The screen above shows a number of optional fields.

Note regarding shipment dates:

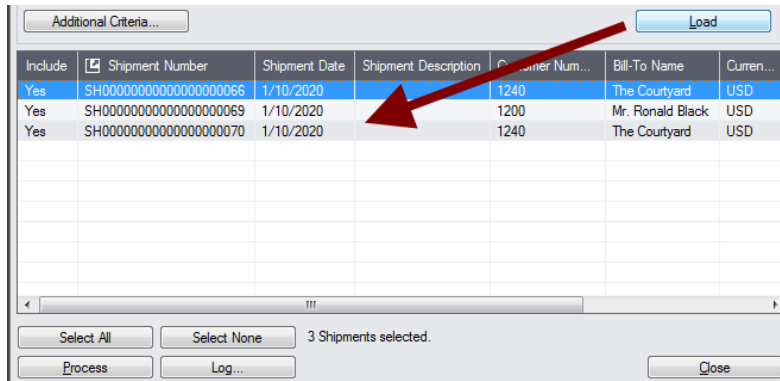
- If you choose a range of Shipment Dates, the default “To” date is set by a screen accessed through the **Update Shipments > File > Settings** menu choice:



You can override the default in the Range fields.

Choose additional criteria:

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

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

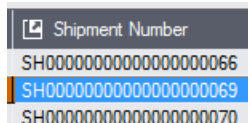
- Click the Load button to display the selected list of shipments.
When the Load button is pressed, the active shipments that match the selection criteria will be displayed, allowing you to drill down on shipments to confirm your selections.
Important Note: Shipments are selected for inclusion **based on the moment that the Load button is pressed**. The shipment may be changed before processing is completed. Make sure that you consult the log to see the actual processing that takes 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 shipments loaded in the grid.



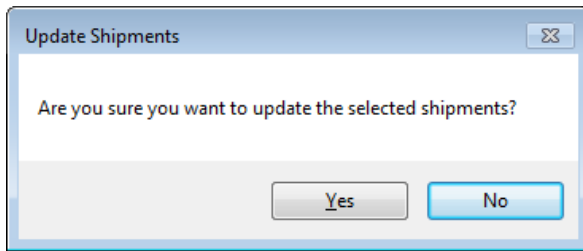
- Double-click in the Include column to “cherry-pick” shipments:

Include	Shipment Number	Shipment Date	Shipment Description	Customer Num...	Bill-To Name	Curren...
Yes	SH00000000000000000066	1/10/2020		1240	The Courtyard	USD
No	SH00000000000000000069	1/10/2020		1200	Mr. Ronald Black	USD
Yes	SH00000000000000000070	1/10/2020		1240	The Courtyard	USD

- Click the Shipment Number column heading to drill down to the selected shipment:

**Click the Process button to update the included shipments:**

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

**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.

Click the Log button to confirm which orders were processed:

```

7/16/2020 3:11:55 PM Update Shipments started.
7/16/2020 3:11:55 PM
7/16/2020 3:11:55 PM Performed by user: ADMIN
7/16/2020 3:11:55 PM
7/16/2020 3:11:55 PM Update Item Shipment Date
7/16/2020 3:11:55 PM All Items
7/16/2020 3:11:55 PM All Items
7/16/2020 3:11:55 PM Shipment Date [1/10/2020]
7/16/2020 3:11:55 PM Update Shipment Header Shipment Date Also [Yes]
7/16/2020 3:11:55 PM
7/16/2020 3:11:55 PM Shipment Range
7/16/2020 3:11:55 PM Customer Number From [1200] To [1240]
7/16/2020 3:11:55 PM
7/16/2020 3:11:55 PM Updating expected ship dates for Shipment Number SH00000000000000066...
7/16/2020 3:11:55 PM Shipment Number SH00000000000000066 updated.
7/16/2020 3:11:55 PM Updating expected ship dates for Shipment Number SH00000000000000070...
7/16/2020 3:11:55 PM Shipment Number SH00000000000000070 updated.
7/16/2020 3:11:55 PM
7/16/2020 3:11:55 PM Update Shipments complete.
7/16/2020 3:11:55 PM
=====

```

The Log lists:

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