

Update Customers

Update Customers lets you change the salesperson or hold status for dozens or hundreds of customers at a time.

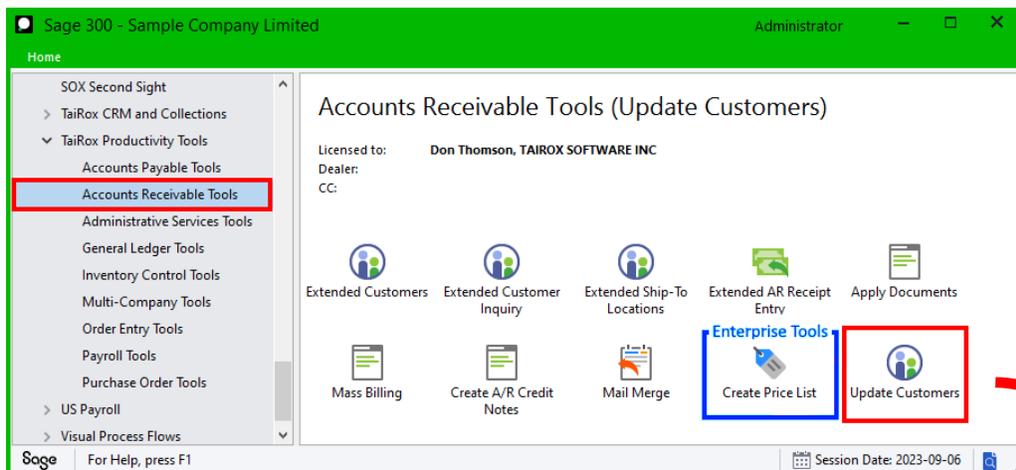
The Update Customers screen lets you select the update action that you want to perform and the range of customers you want to update. You can select customers using ranges of up to 7 customer record fields and customer optional fields – for example, letting you narrow in on customers with a particular “Salesperson 2”.

You can view and cherry-pick the list of customers, and then click the Process button to complete the operation in a single step. You can then display a log of all changes when processing is complete.

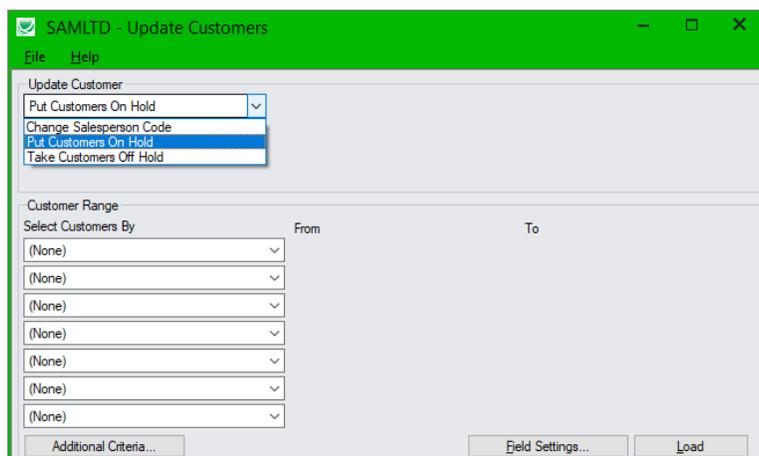
Update Customers lets you:

- Change the salesperson code for a set of customers.
- Put one or more customers on-hold.
- Remove holds for one or more customers.

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



Note that Enterprise Productivity Tools appear only if you have an Enterprise license from TaiRox Software.



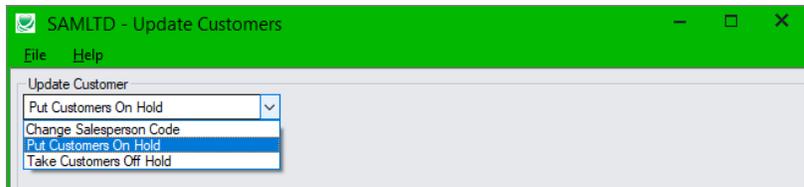
Selecting and Updating Customers

Choose what to update for each customer

First, you specify what needs to be updated in customer records.

You can select:

- Change Salesperson Code
- Put Customers On Hold
- Take Customers Off Hold



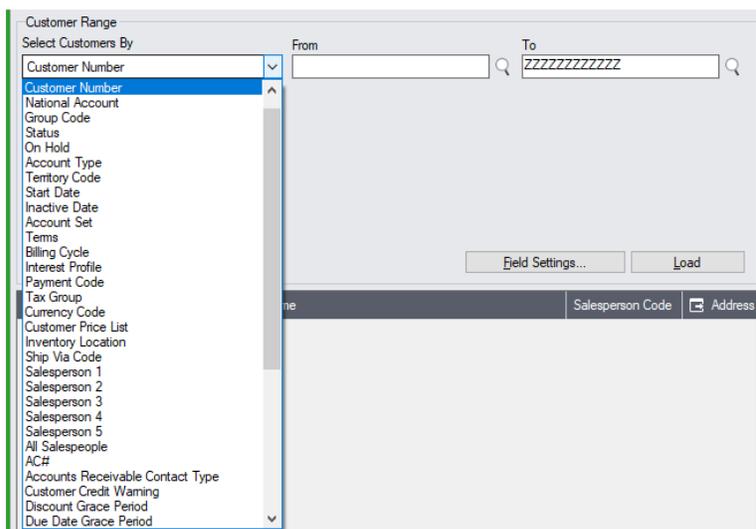
If you select Change Salesperson Code, you must then specify the “From” and “To” salesperson codes, as below. Note that the program will only select customers that have the From salesperson code you specify when you click the Load button to see results.



- Use the Finder to look up salespeople.

Specify the range of customers for updating

You can select customers by specifying ranges of up to seven customer fields or customer option fields and by specifying additional criteria.



- The dropdown field list shown above includes a large number of customer fields and optional fields, and you can use the Field Settings button to add or remove fields from the dropdown list.

Load the list of selected customers

- Click the Load button to display the selected list of customers.

The screenshot shows the 'SAMLTD - Update Customers' dialog box. The 'Update Customer' section has a 'Change Salesperson Code' dropdown. Below it are 'From Salesperson Code' (SP) and 'To Salesperson Code' (BB) fields, each with a search icon. The 'Customer Range' section has 'Select Customers By' dropdowns for 'Customer Number' (1500 to 1599), 'Salesperson 2' (SP), and three '(None)' options. There are also 'Additional Criteria...' and 'Field Settings...' buttons. The 'Load' button is highlighted with a red box. Below the form is a table with the following data:

Include	Customer Num...	Customer Name	Salesperson Code	Address Lin...
No	1500	Custom Comfort	RW, SP	3741 Main Street
No	1520	Mr. Stephen Kershaw	RW, SP	4730 112h Street

At the bottom of the dialog, there are 'Select All', 'Select None', and '0 Customers selected.' buttons, along with 'Process', 'Log...', and 'Close' buttons.

When the Load button is pressed, the active customers that match the selection criteria will be displayed. You can drill down on customers to confirm your selections.

- You can adjust the customer ranges or additional criteria if necessary, then click Load again.

Note:

- In the above example* we specified a range of customers where “Susan Prommer” was “Salesperson 2”. The list of loaded records shows “SP” as the second salesperson – which you can confirm by drilling down on the records. The substitution will use the existing salesperson percentage for the new salesperson.
- In the above example, if you changed Salesperson 2 “SP” to salesperson “RW” (where salesperson 1 was already “RW”), the program keep a single entry showing that Salesperson 1, “RW”, was allotted 100% of the sale. (Sage does not allow two entries for the same salesperson code.)

Important Note: Customers are selected for inclusion **based on the moment that the Load button is pressed**. The customer may be changed before processing is completed. Make sure that you consult the log to see the actual processing that has taken place.

Choose the records you want to update

- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the customers loaded in the grid.

The screenshot shows two buttons: 'Select All' and 'Select None'.

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

Include	Customer Num...	Customer Name	Salesperson Code	Address Lin...
Yes	1500	Custom Comfort	RW, SP	3741 Main Street
No	1520	Mr. Stephen Kershaw	RW, SP	4730 112th Street

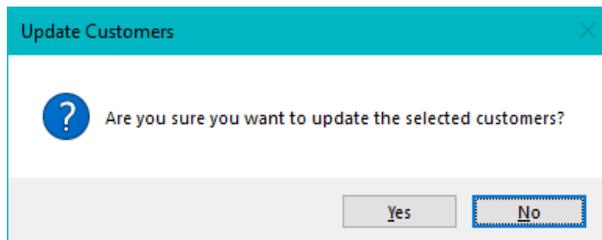
- Click the Customer Number column heading or double-click the customer number to drill down to the selected customer record:

Include	Customer Num...	Customer Name	Salesperson Code	Address Lin...
Yes	1500	Custom Comfort	RW, SP	3741 Main Street
No	1520	Mr. Stephen Kershaw	RW, SP	4730 112th Street

You can also click the Address column heading to check the address on Google Maps.

Click the Process button to update the included customers

- Click the Process button when ready to update the included customers in the list.
- The program asks you to confirm your choices. Click Yes to continue.



Important Notes:

- There may be data-integrity errors that prevent some updates, in which case an error message will appear.
- Error messages will list any customers in a list that could not be updated, along with the reasons.

Click the Log button to confirm which customers were processed

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2023-09-07 2:14:29 PM Update Customers started.
2023-09-07 2:14:29 PM
2023-09-07 2:14:29 PM Performed by user: ADMIN
2023-09-07 2:14:29 PM
2023-09-07 2:14:29 PM Change Salesperson Code
2023-09-07 2:14:29 PM From Salesperson Code [SP]
2023-09-07 2:14:29 PM To Salesperson Code [BB]
2023-09-07 2:14:29 PM
2023-09-07 2:14:29 PM Customer Range
2023-09-07 2:14:29 PM Customer Number From [1500] To [1599]
2023-09-07 2:14:29 PM Salesperson 2 From [SP] To [SP]
2023-09-07 2:14:29 PM
2023-09-07 2:14:30 PM Updating salesperson codes for Customer Number 1500...
2023-09-07 2:14:30 PM
2023-09-07 2:14:30 PM Update Customers complete.
2023-09-07 2:14:30 PM
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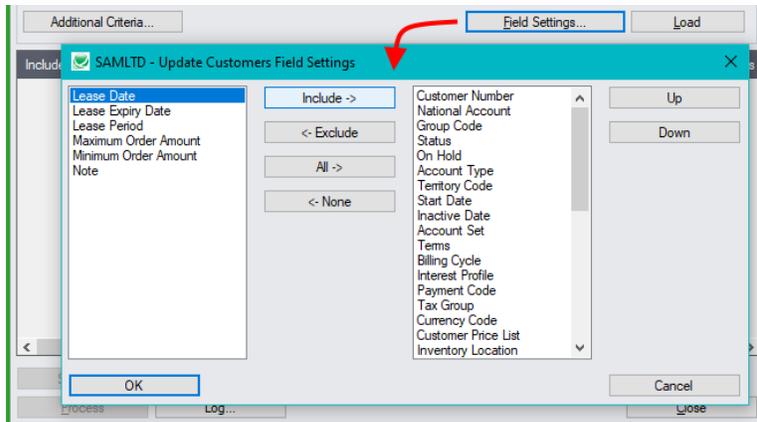
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The Log lists:

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

Using the “Field Settings” Button to Customize the List of Fields for Selecting Customers:

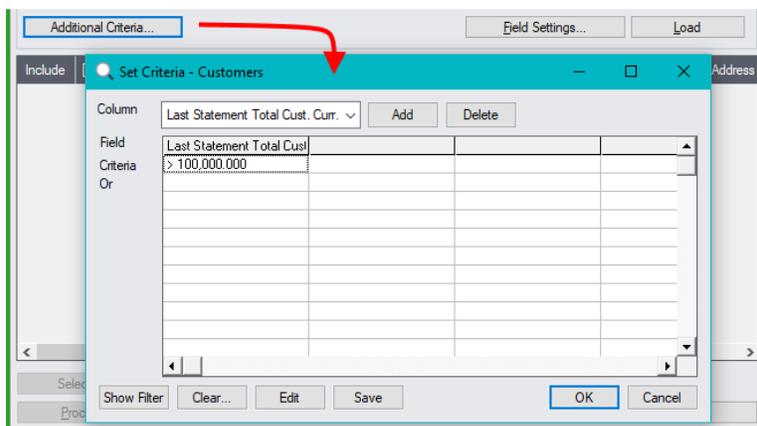
Click the **Field Settings** button to change the fields that appear in the “Select Customers By” dropdown field list.



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

Using Additional Criteria for Record Selection

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



- Click the Additional Criteria button to further restrict the customers 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.