

# Update Purchase Orders

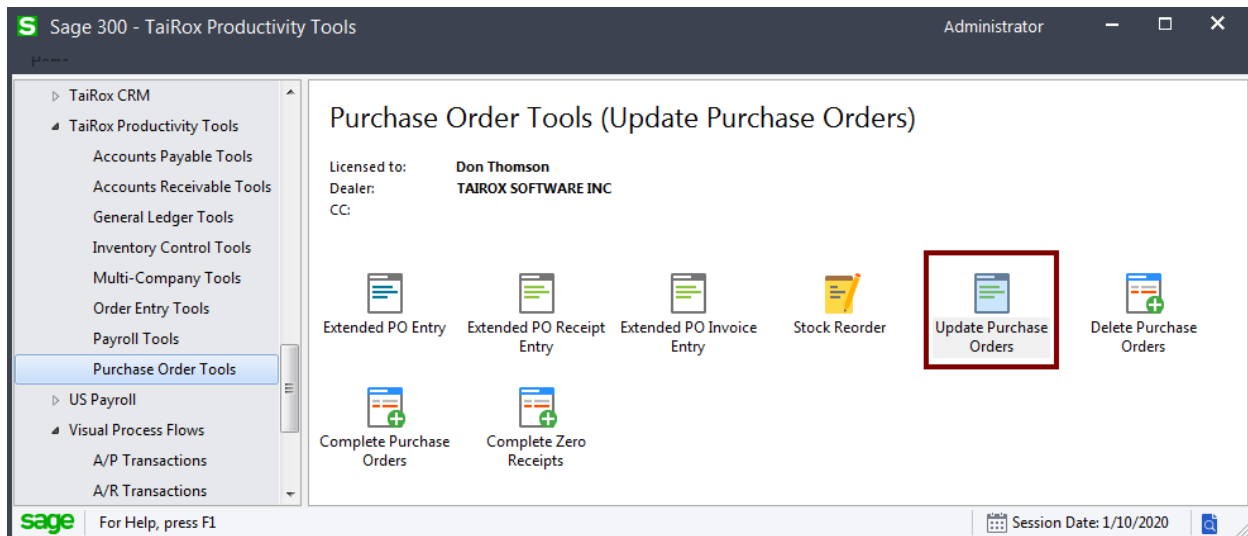
Update Purchase Orders eliminates the time-consuming steps involved in changing item arrival details and vendor cost details for dozens or hundreds of purchase orders in the Sage 300 Purchase Orders module.

## Update Purchase Orders lets you:

- Change the expected arrival date of an item or list of items has changed
- Change the vendor cost for an item or list of items that you enter or import from an Excel file.
- Select ranges of purchase orders for updating by PO number, date, vendor, ship-via code, terms, currency, arrival date, locations, PO type, on-hold status, tax group, user, and PO optional fields, then load the resulting list of POs to further “cherry-pick” ones for updating.  
Or import a list of the purchase orders that you need to process.
- Confirm PO details while finalizing the update list.
- Press a Process button to complete the operation for all selected POs in one step.
- View a log of all updates after processing.

## Running Update Purchase Orders

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



The Update Purchase Orders screen (below) lets you update item expected arrival dates and item vendor costs for a range of purchases orders that you select by ranges of PO numbers, order dates, ship-via codes, vendors, terms, expected arrival date, locations, PO types, on-hold status, tax groups, users, and/or PO optional fields.

## Selecting Purchase Orders for updating

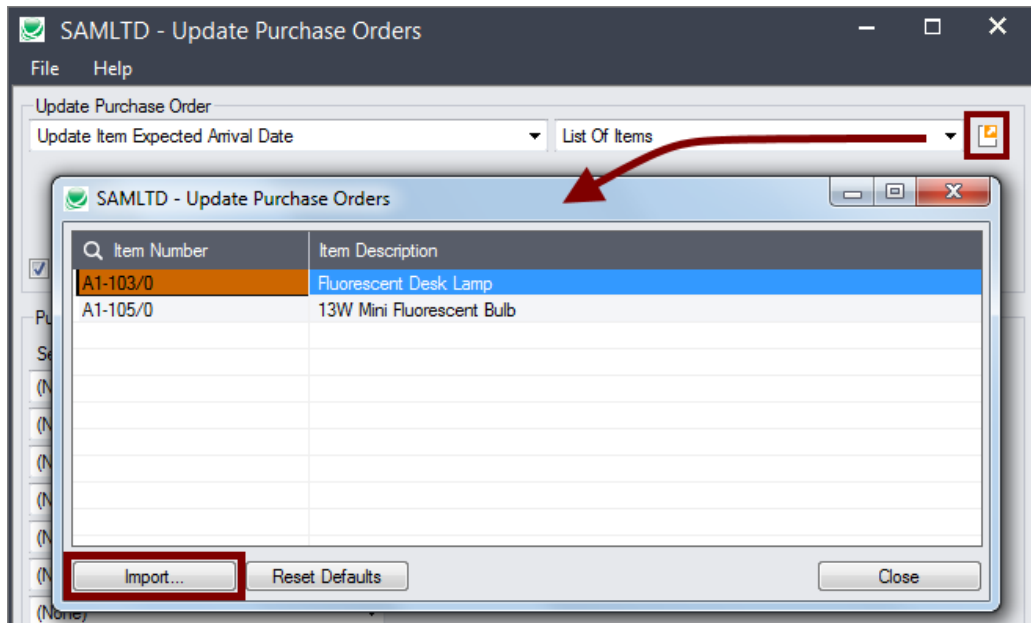
**Choose what to update – expected item arrival date or item vendor cost:**

- Select “Update Item Expected Arrival Date” or “Update Item Vendor Cost”, then
  - Enter the new Expected Arrival Date – *if changing the date.*
  - Enter the vendor code for the item – *if changing the vendor cost.*

**Choose 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 POs for updating.

- To create/edit an item list, click on the Drill Down icon on the right side of the dropdown field. The list will be remembered from the previous Load.



#### 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

## Choosing Ranges of Purchase Orders

- You can specify ranges of purchase orders – for example, to restrict POs by PO number, date, vendor, ship-via code, terms, currency, arrival date, locations, PO type, on-hold status, tax group, user, or optional PO fields (if added).

Or you can import a list of the purchase orders that you need to process.

For details on importing a list of POs, see [Importing a List of Purchase Orders for Processing](#).

- You can add or remove fields from the dropdown list using the Field Settings button.

### **Use the “Field Settings” button to customize the list of fields for selecting POs:**

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

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

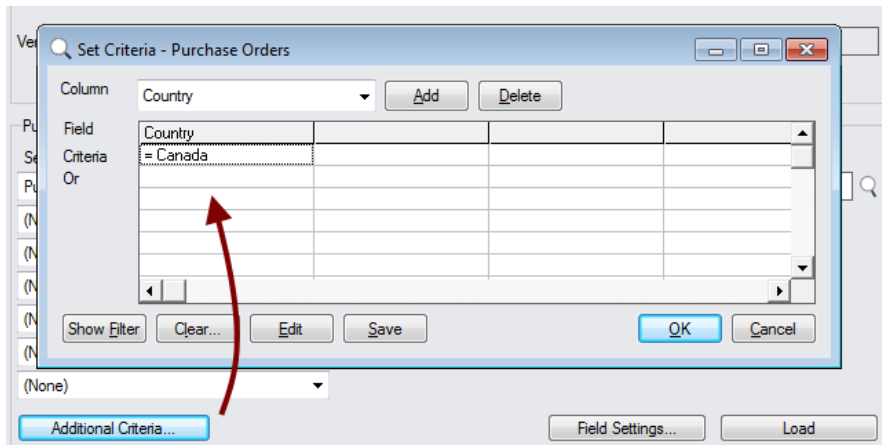
### **Note regarding PO dates:**

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

You can override the default in the Range fields.

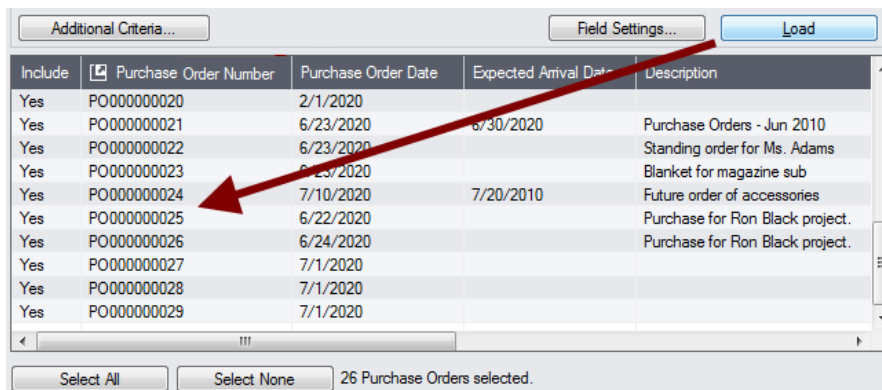
## Choose additional criteria if necessary:

To select purchase orders with a field that is NOT available on the Field Settings form, use Additional Criteria.



- Click the Additional Criteria button to further restrict the POs retrieved for the update.
- 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 POs and choose which ones to update:



- Click the Load button to display the selected list of purchase orders.
  - Go back and adjust the ranges or additional criteria if necessary.
- Use the Select All and Select None buttons.
- Click the Purchase Order Number column heading to drill down on the selected receipt:

Include	Purchase Order Number	Purchase Order Date	Description	Vendor
Yes	PO000000001	1/8/2019		1450
Yes	PO000000002	1/8/2019		1500
Yes	PO000000003	1/8/2019		2300

- Double-click in the Include column to “cherry-pick” from the PO selections:

Include	Purchase Order Number	Purchase Order Date	Description	Vendor
Yes	PO000000001	1/8/2019		1450
Yes	PO000000002	1/8/2019		1500
No	PO000000003	1/8/2019		2300

**You can also delete a PO by selecting it and pressing the Delete key:**

- You can also **delete** a purchase order from the Purchase Orders program by selecting the row in the Load list and pressing the **Delete** key. When the delete key is pressed you will be prompted to confirm the deletion of that purchase order.

## Importing a List of Purchase Orders for Processing

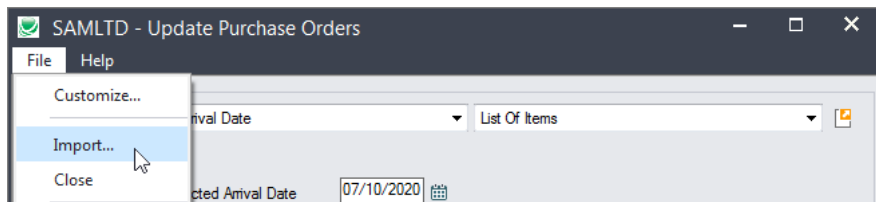
You can import a list of the purchase orders that you need to process – or you can select purchase orders by providing PO ranges and specifying additional criteria.

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

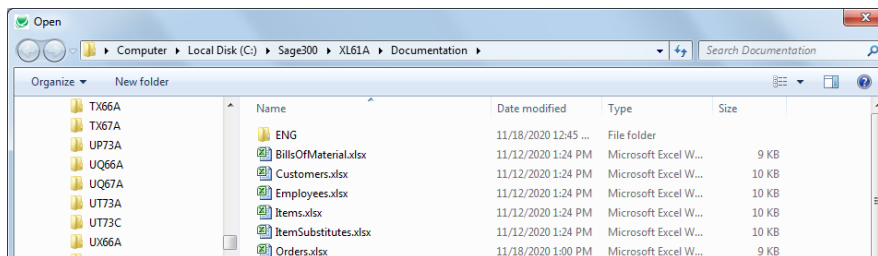
For details on specifying and loading ranges of purchase orders, see [Choosing ranges of purchase orders](#).

**To import a list of orders for updating:**

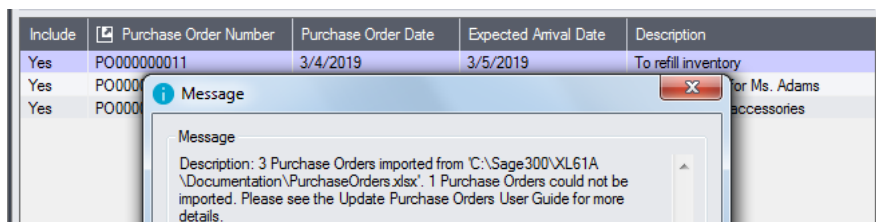
- Choose **File > Import** from the Update Purchase Orders menu.



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



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



The program will reject purchase orders that cannot be processed.



## File Formats for Imported Purchase Order and Item Lists

Update Purchase Orders has several functions that let you update groups of POs using an imported PO list and an imported list of item numbers.

Import files – purchase orders and item lists – are Excel files.

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

### Purchase Order List

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

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

	A
1	PONUMBER
2	PO000000011
3	PO000000015

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

### Item Lists

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.