

Update Purchase Orders

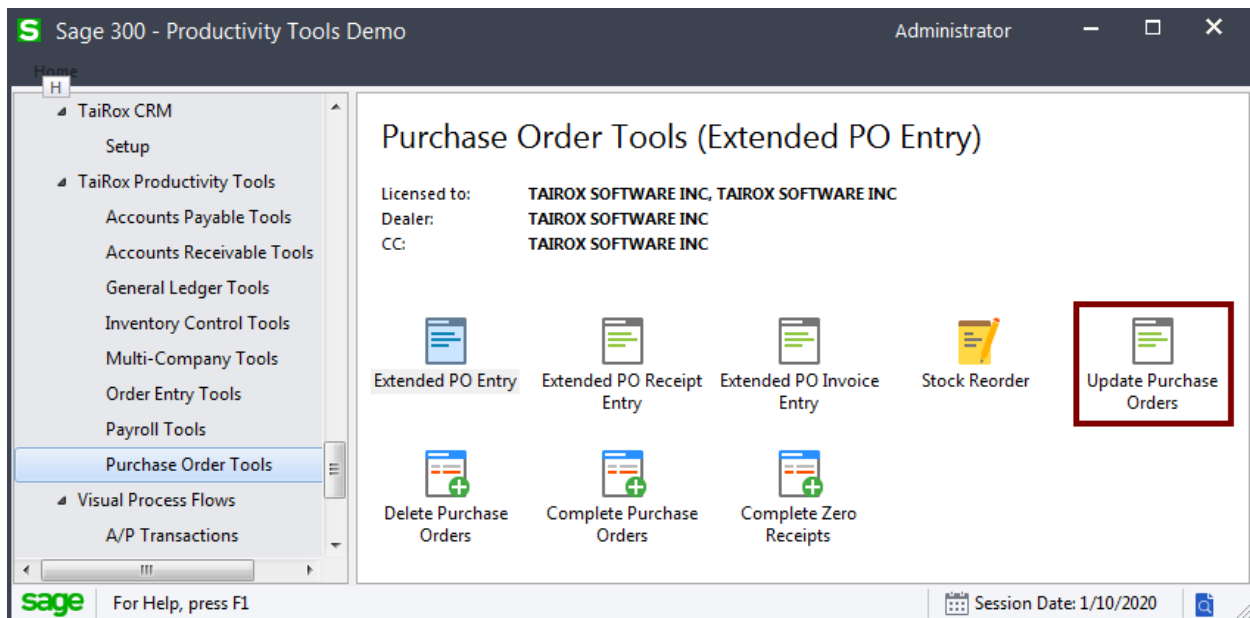
Update Purchase Orders eliminates the time-consuming steps involved in changing item arrival details and vendor cost details for dozens or hundreds of purchase orders in the Sage 300 Purchase Orders module.

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.
- Select ranges of purchase orders for updating by PO number, date, vendor, terms, currency, arrival date, locations, PO type, and completion status, then load the resulting list of POs to further “cherry-pick” ones for updating.
- 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, vendors, terms, expected arrival date, locations, PO types, and/or completion status.

Selecting Purchase Order 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 completion.

Choose additional criteria:

Set Criteria - Purchase Orders

Column: Country [Add] [Delete]

Field: Country

Criteria: = Canada

Or

[Show Filter] [Clear...] [Edit] [Save] [OK] [Cancel]

(None) [Additional Criteria...] [Load]

- Click Additional Criteria to further restrict the POs retrieved for the update. Click OK to save.

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

Include	<input checked="" type="checkbox"/> Purchase Order Number	Purchase Order Date	Expected Arrival Date	Description
Yes	PO000000020	2/1/2020		
Yes	PO000000021	6/23/2020	6/30/2020	Purchase Orders - Jun 2010
Yes	PO000000022	6/23/2020		Standing order for Ms. Adams
Yes	PO000000023	6/23/2020		Blanket for magazine sub
Yes	PO000000024	7/10/2020	7/20/2010	Future order of accessories
Yes	PO000000025	6/22/2020		Purchase for Ron Black project.
Yes	PO000000026	6/24/2020		Purchase for Ron Black project.
Yes	PO000000027	7/1/2020		
Yes	PO000000028	7/1/2020		
Yes	PO000000029	7/1/2020		

[Select All] [Select None] 26 Purchase Orders selected.

- 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	<input checked="" type="checkbox"/> 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:

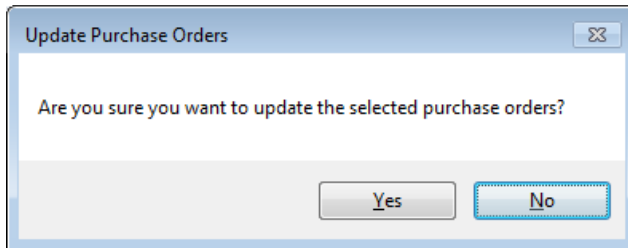
Include	<input checked="" type="checkbox"/> Purchase Order Number	Purchase Order Date	Description	Vendor
Yes	PO000000001	1/8/2019		1450
Yes	PO000000002	1/8/2019		1500
No	PO000000003	1/8/2019		2300

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.

Click the Process button to update the included purchase orders:

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

**Note:**

- When updating Item Vendor Cost, no action will be taken if there is no Item Vendor Cost or if the cost is zero.

Click the Log button to confirm which purchase orders were deleted:

```
6/25/2020 3:47:26 PM Update Purchase Orders started.
6/25/2020 3:47:26 PM
6/25/2020 3:47:26 PM Performed by user: ADMIN
6/25/2020 3:47:26 PM
6/25/2020 3:47:26 PM Update Item Expected Arrival Date
6/25/2020 3:47:26 PM All Items
6/25/2020 3:47:26 PM Expected Arrival Date [7/10/2020]
6/25/2020 3:47:26 PM Update Purchase Order Arrival Date Also [No]
6/25/2020 3:47:26 PM
6/25/2020 3:47:26 PM Purchase Order Range
6/25/2020 3:47:26 PM Purchase Order Number From [] To [ZZZZZZZZZZZZZZZZZZZZZZZZ]
6/25/2020 3:47:26 PM
6/25/2020 3:47:26 PM Updating expected arrival dates for Purchase Order Number PO000000025...
6/25/2020 3:47:26 PM Purchase Order Number PO000000025 updated.
6/25/2020 3:47:26 PM
6/25/2020 3:47:26 PM Update Purchase Orders complete.
6/25/2020 3:47:26 PM
=====
```

The Log lists:

- The user and the range settings.
- Each purchase order that was updated.