

Update Orders for Sage 300cloud

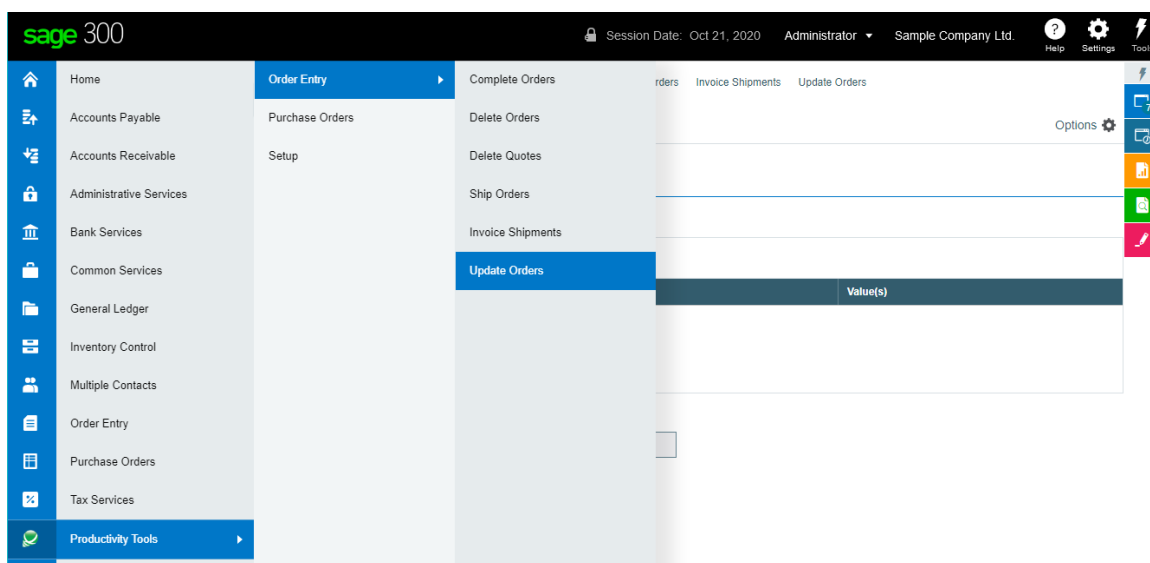
Update Orders eliminates the time-consuming steps involved in changing details for dozens or hundreds of quotes or incomplete orders in the Sage 300 Order Entry module. The Update Orders screen lets you select the ranges of orders that need to be updated, specify the update action that you want to perform, and select the items that you want to update.

You can then view and cherry-pick from the initial list of orders, and 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 Orders lets you change selected orders:

- When the components of a kit have changed.
- When a bill-of-material has changed.
- When the expected ship date of an item or list of items or all items has changed.
- When the deliver-by date of an item or list of items or all items has changed.
- When a price list has changed for an item or list of items or all items.
- When one item needs to be substituted for another.
- When a customer address changes, affecting many orders, including standing orders.
- When a large number of orders (e.g. for one customer) are to be put on hold.
- When a large number of orders (e.g. for one customer) are to be taken off hold.
- When you want to commit an item or list of items or all items on a set of orders.
- When you want to uncommit an item or list of items or all items on a set of orders.
- When you need to reduce the quantity on order to zero for items that are not in stock.
- When you want to change the salesperson code on a set of orders.

You can also choose to only update orders that have never been shipped and retain existing line pricing when substituting items, kits or BOMs.



Update Orders appears under **Productivity Tools > Order Entry** on the Sage 300c desktop.

The Update Orders screen appears below:

The selection criteria let you select orders by specifying ranges of values for particular order fields, including order numbers, order dates, customer numbers, order types, and any optional fields that you use for orders.

The “Action”, in this example, will substitute items, kits, or BOMs for a range of orders that include a specific item.

Other options let you select orders that have never been shipped and retain the existing unit price for each order line.

Selecting and updating orders

Choose field values and field ranges for selecting orders:

- Click the “Add Line” button to specify a new field value or range of values.

- Choose the field for selecting orders.

- Choose the Operator for the field value – for example, orders with a date that is **less than or equal to** July 2, 2021. The choices are “Equal To,” “Not Equal To,” “Contains,” “Greater Than or Equal To,” “Less Than or Equal To” (shown below), or “Is One Of.”

Operator
Select...
Select...
=
!=
>=
<=

- The “Contains” operator appears for text fields. The program scans the field you selected for the text in the Value field.

The following example selects orders for customers in groups that include the letters “US”.

Field	Operator	Value(s)
Customer Group Code	Contains	US

- The “Is One Of” operator appears for fields with a specific list of values – such as Order Type or optional fields with a list of values. It lets you specify more than one value – as below.

Field	Operator	Value(s)
UPS Zone	Is One Of	Blue Zone X White Zone X

- Enter or choose the Value. For example, a date field provides a calendar, and other fields will provide a Finder button.

Value(s)
2/1/2021

< February 2021 >

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	1	2	3	4	5	6
7	8	9	10	11	12	13

Today - 2/1/2021

- To specify a range of dates – for example, greater than November 1, 2020 and less than January 31, 2021 – you would add two lines for the Date field – as shown below:

Field	Operator	Value(s)
Order Date	>=	11/1/2020
Order Date	<=	1/31/2021

- To remove a line**, highlight it, then click the “Delete Line” button:

<div> <div>+ Add Line</div> <div>Delete Line</div> </div>		
Field	Operator	Value(s)
Order Date	>=	11/1/2020

Choose the “Action” – what to update:

You must specify what needs to be updated in the orders that you select. Update Orders provides the following choices.

When you choose an action, the program displays a set of fields for defining the action.

- For example, if you select “Update Item Deliver By Date”, the program will provide fields for specifying items and the new date – as below:

Update Item Expected Ship Date

- Select “Update Item Expected Ship Date” and specify the new ship date for items on the order.

To Only update ship dates for specific items:

- Select the “Only Update Specified Items” checkbox.
- Click the “Items” button. (Note that the button shows you the number of items already in the list.)

- Click Add Line to add a new item to the list. When finished, click OK.
Note that you can only add normal inventory items to the list – not kits or BOMs.

To update the order expected ship dates:

- Select the “Update Order Expected Ship Date” checkbox.

Update Item Prices

Action
 Update Item Prices ▾
☒ Only Update Specified Items
 Items (1)...

Price List
 ↩ 🔍

- Select “Update Item Prices” and specify the price list containing the updated prices.

To Only update prices for specific items:

- Select the “Only Update Specified Items” checkbox.
- Click the “Items” button. (Note that the button shows you the number of items already in the list.)

Action
 Update Item Prices ▾
☒ Only Update Specified Items
 Items (1)...

Price List

Items

+ Add Line Delete Line

Item	Description
A1-105-0	13W Mini Fluorescent Bulb

OK Cancel

- Click Add Line to add a new item to the list, and use the Finder to select the item. When finished, click OK.

Note that you can only add standard inventory items to the list – not kits or BOMs.

Substitute Items / Kits / BOMs

Action
 Substitute Items / Kits / BOMs ▾
 Items (0)...

☒ Only Substitute Items On Orders That Have Never Been Shipped

☒ Retain Existing Line Item Unit Price

- Select “Substitute Items / Kits / BOMs”.
- Click the “Items” button, select the item, kit or BOM that you are substituting and select the replacement item, kit or BOM.
 - You MUST specify the items that you are substituting.
 - You can substitute multiple items in one operation.
 - You can substitute a non-kit item for a kit and vice-versa.
 - The “Items” button shows you the number of items already in the list.

Action
 Substitute Items / Kits / BOMs ▾
 Items (0)...

☒ Only Substitute Items On Orders That Have Never Been Shipped

☒ Retain Existing Line Item Unit Price

Items

+ Add Line Delete Line

Item	Description
A1-105-0	13W Mini Fluorescent Bulb

OK Cancel

Note: When updating items, kits or BOMs, it's possible to have a price change. If this happens, you must provide the ID and password of a user that has sufficient permissions to approve price changes.

- Select “Only Substitute Items On Orders That Have Never Been Shipped” if you do not want to substitute shipped items.
- Select “Retain Existing Line Item Unit Price” to keep the order prices the same – even with item substitution.
- **If necessary**, enter the ID and Password for the person approving price changes if you are not keeping original prices.
 - If the person updating the orders does not have permission to approve price changes, the program will ask you to add the ID and password of a user with full rights.

Put Orders On Hold

Action

Put Orders On Hold ▼

Reason For Putting Orders On Hold

- Select “Put Orders On Hold”, then then enter a reason for the hold. The program will display all orders that meet the selection criteria you specify.

Take Orders Off Hold

Action

Take Orders Off Hold ▼

- Select “Take Orders Off Hold”. The program will display all orders that meet the selection criteria you specify.

Update Addresses

This choice lets you update addresses for customers with many orders in process or many standing orders.

- You can select Bill-To Addresses and/or Ship-To Addresses.
 - Updated bill-to and ship-to addresses come from the Accounts Receivable system.
- You can recalculate taxes for orders with address changes.

Action



Update Addresses ▼

- ☐ Update Customer Bill-To Address
- ☒ Update Customer Ship-To Address
- ☐ Recalculate Tax If Address Changed

- Select “Update Addresses”, then:
 - Select “Update Customer Bill-To Addresses” to update the bill-to address on orders from the bill-to address in the A/R customer account.
 - Select “Update Customer Ship-To Addresses” to update the order ship-to address from A/R.
 - Select “Recalculate Tax If Address Changed” to recalculate all taxes using the new jurisdictions, if changed.

Update Item Deliver By Date

Action ☒ Only Update Specified Items



Update Item Deliver By Date   ☐ Update Order Deliver By Date

Items (1)...

- Select “Update Item Deliver By Date”, then
 - Select the “Only Update Specified Items” checkbox to restrict processing to specific items.
 - Click the Items button to specify a list of items.
 - Enter the new Deliver By date.
 - Select “Update Order Deliver By Date Also” to change the order date to match the item Deliver By date.

Commit Quantities

Action ☒ Only Update Specified Items

Commit Quantities   ☐ Update Order Deliver By Date

Items (1)...

☐ Only Commit Item Detail Lines That Have No Quantities Already Committed

- Select “Commit Quantities”, then
 - Select the “Only Update Specified Items” checkbox to restrict processing to specific items.
 - Click the Items button to specify a list of items.
 - Select “Only Commit Item Detail Lines That Have No Quantities Already Committed” to restrict processing to lines that have no committed quantities.

Uncommit Quantities

Action ☒ Only Update Specified Items

Uncommit Quantities   ☐ Update Order Deliver By Date

Items (1)...

- Select “Uncommit Quantities”, then
 - Select the “Only Update Specified Items” checkbox to restrict processing to specific items.
 - Click the Items button to specify a list of items.

Zero Quantity Ordered For Items Not in Stock

Action ☒ Only Update Specified Items

Zero Quantity Ordered For Items Not In Stock   ☐ Update Order Deliver By Date

Items (1)...

- Select “Zero Quantity Ordered For Items Not in Stock”, then
 - Select the “Only Update Specified Items” checkbox to restrict processing to specific items.
 - Click the Items button to specify a list of items.

Change Salesperson Code

Action

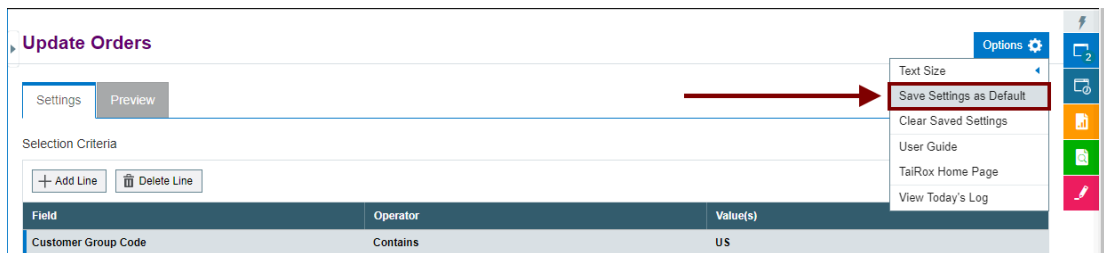
From Salesperson

To Salesperson

- Select “Change Salesperson Code”, then
 - Select the “Only Update Specified Items” checkbox to restrict processing to specific items.
 - Click the Items button to specify a list of items.
 - Select the From and To salesperson codes to update all orders for the From salesperson.

Save or clear the selection criteria:

You can save your selection criteria so it appears by default the next time you use the program.



- Click the Options button to display the list of options.
- Select “Save Settings as Default.”

To clear the default settings:

- Select “Clear Saved Settings” from the Options menu.

View selected orders on the Preview tab and choose which ones to update:

Click the Preview tab to view the list of orders that meet the range and item selection criteria that you specified on the Settings tab.

Note: If you do not specify any ranges or items, the program will list all orders when you go to the Preview tab. You can then individually select the orders that you want to update.

- Click the Preview tab to display the selected list of orders.

Order Entry : Complete Orders Delete Orders Delete Quotes Ship Orders Invoice Shipments Update Orders

Update Orders

Options

Settings Preview

Matching Orders

	Order Number	Customer Number	Customer Name	Order Date	Order Type	On Hold	Description
<input type="checkbox"/>	ORD0000000000063	1105	Bargain Mart - Oakland	6/30/2020	Active		No backorder
<input type="checkbox"/>	ORD0000000000064	1200	Mr. Ronald Black	7/1/2020	Active		
<input type="checkbox"/>	ORD0000000000065	1200	Mr. Ronald Black	7/1/2020	Active		
<input type="checkbox"/>	ORD0000000000066	NEW2	New Company	3/13/2013	Active		From CRM
<input type="checkbox"/>	ORD0000000000067	BARMART	Bargain Mart Stores Inc.	1/5/2021	Active		January Order - winter sale prices

When you click the Preview tab, the active orders that match the selection criteria will be displayed, allowing you to drill down on orders to confirm your selections.

Important Note: Orders are selected for inclusion *at the moment you click Preview*; however, orders may be changed before processing is completed. Make sure that you consult the log to see the actual processing that has taken place.

- You can go back to the Settings tab to adjust ranges and other settings, if necessary, and then click Preview again.
- Click the checkbox in the column heading to select all or select none of the orders loaded in the grid.

<input checked="" type="checkbox"/>	Order Number	Customer Number	Customer Name	Order Date	Order Type	On Hold	Description
<input checked="" type="checkbox"/>	ORD0000000000063	1105	Bargain Mart - Oakland	6/30/2020	Active		No backorder
<input checked="" type="checkbox"/>	ORD0000000000064	1200	Mr. Ronald Black	7/1/2020	Active		
<input checked="" type="checkbox"/>	ORD0000000000065	1200	Mr. Ronald Black	7/1/2020	Active		
<input checked="" type="checkbox"/>	ORD0000000000066	NEW2	New Company	3/13/2013	Active		From CRM
<input checked="" type="checkbox"/>	ORD0000000000067	BARMART	Bargain Mart Stores Inc.	1/5/2021	Active		January Order - winter sale prices

- Click the checkboxes on each row to cherry-pick orders for updating.

<input type="checkbox"/>	Order Number	Customer Number	Customer Name	Order Date	Order Type	On Hold	Description
<input type="checkbox"/>	ORD0000000000063	1105	Bargain Mart - Oakland	6/30/2020	Active		No backorder
<input type="checkbox"/>	ORD0000000000064	1200	Mr. Ronald Black	7/1/2020	Active		
<input type="checkbox"/>	ORD0000000000065	1200	Mr. Ronald Black	7/1/2020	Active		
<input type="checkbox"/>	ORD0000000000066	NEW2	New Company	3/13/2013	Active		From CRM
<input checked="" type="checkbox"/>	ORD0000000000067	BARMART	Bargain Mart Stores Inc.	1/5/2021	Active		January Order - winter sale prices

- Click the Order Number to drill down to the selected order.

<input type="checkbox"/>	Order Number	Customer Number	Customer Name	Order Date	Order Type	On Hold	Description
<input type="checkbox"/>	ORD0000000000063	1105	Bargain Mart - Oakland	6/30/2020	Active		No backorder
<input type="checkbox"/>	ORD0000000000064	1200	Mr. Ronald Black	7/1/2020	Active		
<input type="checkbox"/>	ORD0000000000065	1200	Mr. Ronald Black	7/1/2020	Active		
<input type="checkbox"/>	ORD0000000000066	NEW2	New Company	3/13/2013	Active		From CRM
<input checked="" type="checkbox"/>	ORD0000000000067	BARMART	Bargain Mart Stores Inc.	1/5/2021	Active		January Order - winter sale prices

Click the Process button to update the selected orders:

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

Confirmation

×

Are you sure you want to update the selected orders?

No

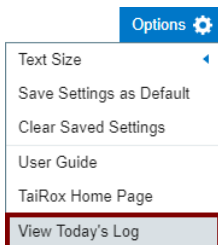
Yes

Important Notes:

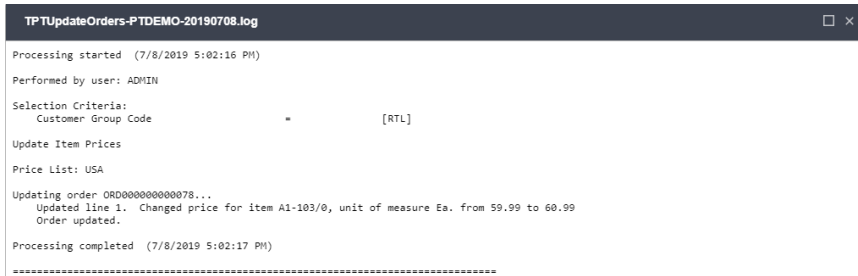
- Update Orders will not change line items that have serial or lot numbers (which may be unusual for unshipped orders or quotes in any case).
- There may be data-integrity errors that prevent some updates, in which case an error message will appear.
- If the process was successful, the following message will appear, stating the number of orders that were updated:

**Select “View Today’s Log” to confirm which orders were updated:**

- Click the Options button and select View Today’s Log to see the order selection criteria and the orders that were updated.



- The log looks like this:

**The Log lists:**

- The user, the settings, and the results