

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.

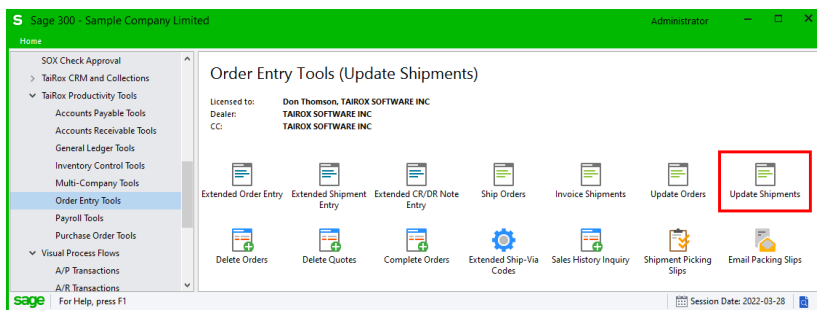
The Update Shipments screen lets you select the update action that you want to perform, the items you want to update, and then specify the ranges of shipments that need to be updated – or import a list of the shipments that you need to process.

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:

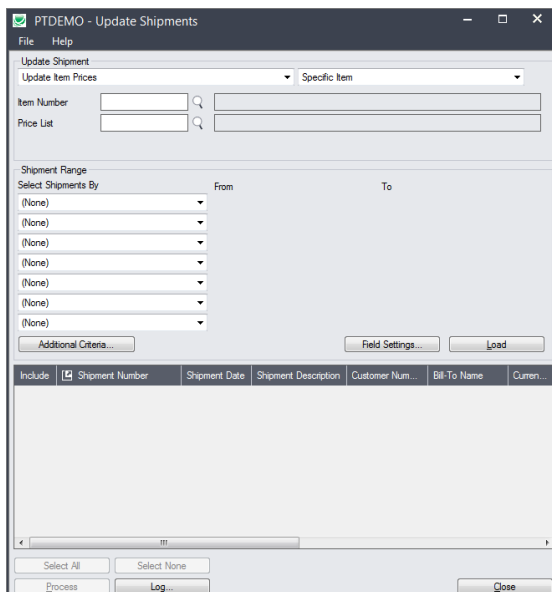
- When a price list has changed for an item or list of items or all items.
- When a ship date has changed for an item or list of items or all items.

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:

The screenshot shows a window titled 'Update Shipment'. It has a dropdown menu with three options: 'Update Item Prices', 'Update Item Prices', and 'Update Item Shipment Date'. The first 'Update Item Prices' option is highlighted in blue.

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.

The screenshot shows the 'Update Shipment' dialog box with 'Update Item Prices' selected. It includes a 'Specific Item' dropdown, an 'Item Number' field with a search icon, and a 'Price List' field with a search icon.

- 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 or to import an item list. See the section below on choosing items.

The screenshot shows a dropdown menu with 'List Of Items' selected. A red box highlights the 'List Of Items' option and the drill-down button to its right.

- Select the Price List for updating pricing.

Update Item Shipment Date

The screenshot shows the 'Update Shipment' dialog box with 'Update Item Shipment Date' selected. It includes a 'Specific Item' dropdown, an 'Item Number' field with a search icon, a 'Shipment Date' field with a calendar icon (showing 01/10/2020), and a checked checkbox for 'Update Shipment Header Shipment Date Also'.

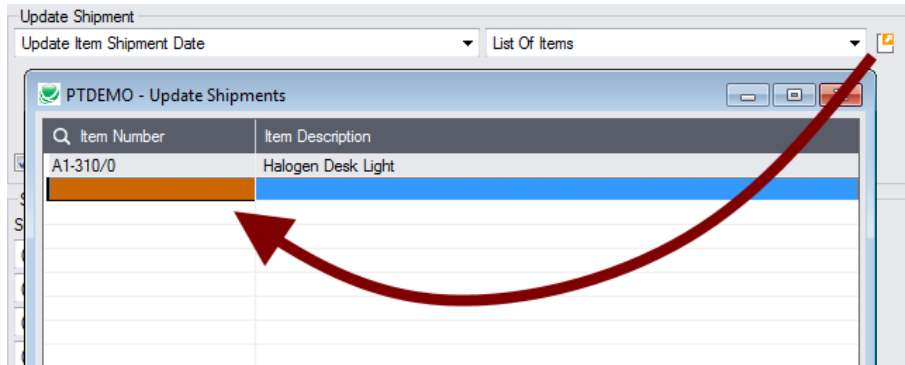
- Select “Update Item Shipment Date”, then:
 - Choose a specific item, list of items, or all items.
Click the Drill-Down button to specify a list of items or to import an item list. See the section below on choosing items.

The screenshot shows a dropdown menu with 'List Of Items' selected. A red box highlights the 'List Of Items' option and the drill-down button to its right.

- 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 or import an item list. click on the Drill Down icon on the right side of the “List of Items” choice.



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:

- Click the Import button at the bottom of the popup item list 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

Specify ranges of shipments for selection:

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

For details on importing a list of orders, see [Import a list of shipments for processing.](#)

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

- 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 shipments:

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

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

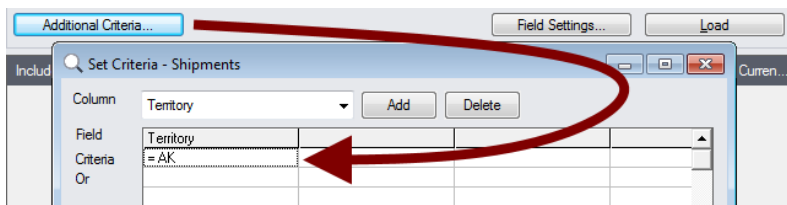
Note regarding shipment dates:

- 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.

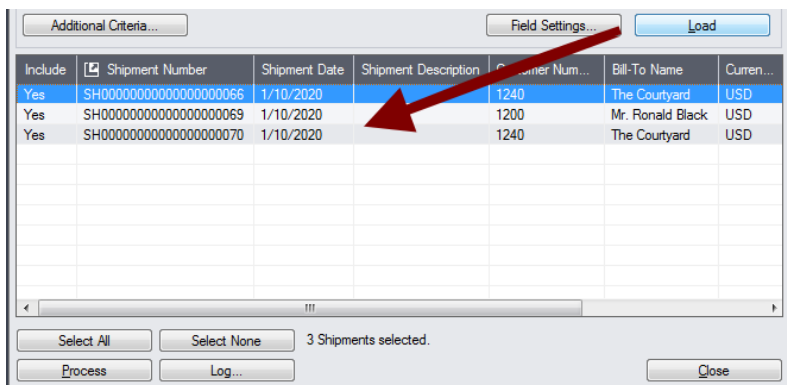
Choose additional criteria if necessary:

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



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

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



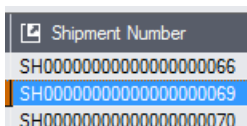
- Click the Load button to display the selected list of shipments.
When the Load button is pressed, the active shipments that match the selection criteria will be displayed, allowing you to drill down on shipments to confirm your selections.
- **Important Note:** Shipments are selected for inclusion **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:



Import a list of shipments for processing

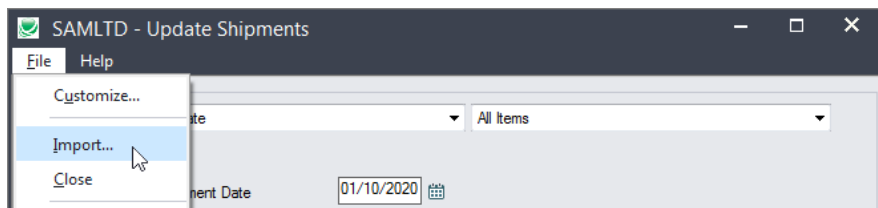
you can import a list of the shipments that you need to process – or you can select shipments by providing shipment ranges and specifying additional criteria.

Note that you must specify what you are updating in the “Update Shipment” section at the top of the form before you import the shipment list.

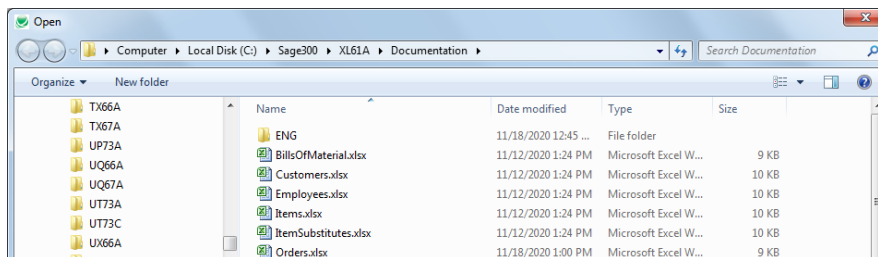
For details on specifying and loading ranges of shipments, see [Specify ranges of shipments for selection](#).

To import a list of shipments for updating:

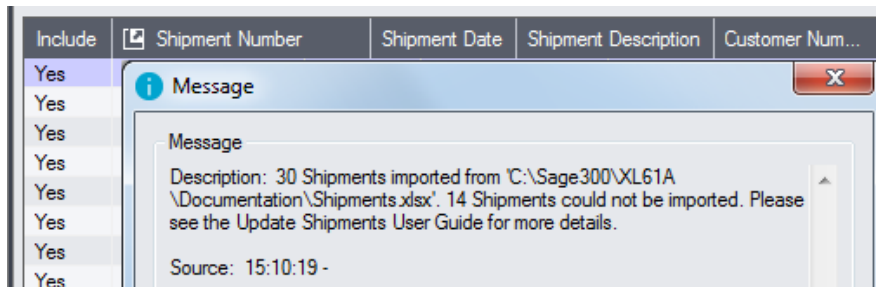
- Choose **File > Import** from the Update Shipments menu.



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



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



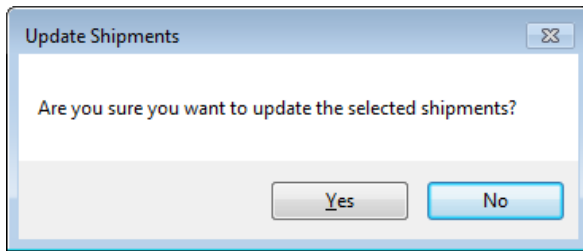
The program will reject shipments that cannot be processed.

For example

- If you specified a list of items for updating shipments, the program will reject shipments that do not include the items you specified.
- The program will reject completed shipments.
- You can double-click the “Include” column to remove shipments from the update.

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.

File Formats for Imported Shipment and Item Lists

Update Shipments lets you change shipments based on an imported shipment list and an imported item list.

Import files – shipments and items – are Excel files.

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

Shipment List

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

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

	A
1	SHINUMBER
2	SH000000000000000000063

- All other columns are ignored. This means that you can add item 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.