

Update Sale Orders

User Guide

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1 Overview

Update Sale Orders provides the following functionality:

- Update Sale Order details by replacing items numbers, units of measure, and recalculating quantities.
- Merge multiple detail lines into one.
- Update multiple sale orders at the same time based on a range of customers and order numbers or pick individual sale orders to update.

2 Updating Sale Orders

2.1 Main Screen

The following figure shows an example of the main screen of the application.

Select	Order No	Order Date	Customer No	Bill To Name
<input type="checkbox"/>	ORD000000000002	1/15/2019	1210	ACME Plumbing
<input type="checkbox"/>	ORD000000000063	6/30/2020	1105	Bargain Mart - Oakland
<input type="checkbox"/>	ORD000000000064	6/20/2020	4030	The House Doctors
<input type="checkbox"/>	ORD000000000065	8/5/2020	2235	Forester Building Supplies
<input type="checkbox"/>	ORD000000000066	7/1/2020	1200	Mr. Ronald Black
<input type="checkbox"/>	ORD000000000067	7/1/2020	1200	Mr. Ronald Black
<input type="checkbox"/>	ORD000000000070	2/8/2013	1200	Mr. Ronald Black
<input type="checkbox"/>	ORD000000000071	1/21/2019	1200	Mr. Ronald Black
<input type="checkbox"/>	ORD000000000072	5/1/2017	1200	Mr. Ronald Black

Select a range of customer numbers and sale order numbers and click the Load button. All matching orders that have not been completed appear in the list. By default, all orders are selected, but you can unselect individual orders using the “Select” column or use the Select All / Select None buttons. Once ready, click the Process button to update the order details.

2.2 Item Mapping

Before order details can be updated, you need to define how you want the item numbers and quantities in the sale order detail lines to be updated. You do this by clicking the Configure Item Mappings button. The following figure shows an example of the configuration screen.

Item Mapping						
Item Mappings						
	Source Item No	Source UOM	Target Item No	Target UOM	Operation	Factor
▶	A1-103/0	Dozen	A1-103/0	Ea.	Multiply	12
	A1-103/0	Case	A1-103/0	Ea.	Multiply	24
	A1-103/0	Crate	A1-103/0	Ea.	Multiply	48
	A1-105/0	Ea.	A1-400/0	Ea.	Multiply	1
	A1-310/0	Ea.	A1-401/0	Dozen	Divide	12
	A1-320/0	Ea.	A1-401/0	Dozen	Divide	12
*						

OK Cancel

This screenshot demonstrates multiple update scenarios:

1. For item A1-103/0, units of measure Dozen, Case and Crate are all converted to “Ea.” and respective quantities are updated by multiplying by 12, 24 and 48 respectively.
2. Item A1-105/0 is replaced by item A1-400/0. The unit of measure or quantity is not affected by this change.
3. Items A1-310/0 and A1-320/0 are both replaced with item A1-401/0 and the unit of measure and quantity are updated as well be dividing by 12.

2.3 Update Process

The update process finds order detail lines that match the Source Item No and Source UOM and replaces them with the Target Item No, Target UOM and newly calculated quantity based on Operation and Factor settings. If the new quantity is a fractional number, it is rounded up to the nearest whole number.

If multiple source items are matched to the same target item, they are consolidated into one new line in the sale order.

Completed orders are skipped from the process. Completed, or partially shipped, detail lines are skipped as well.

3 Technical Requirements

The application is designed to work with Sage 300 version 2018, 2019, 2020 or later. It requires .NET Framework version 4.8. If required version of .NET Framework is not present on the target computer, you will be prompted to download it and directed to appropriate Microsoft web site.