

Update Sale Orders User Guide

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1 Overview

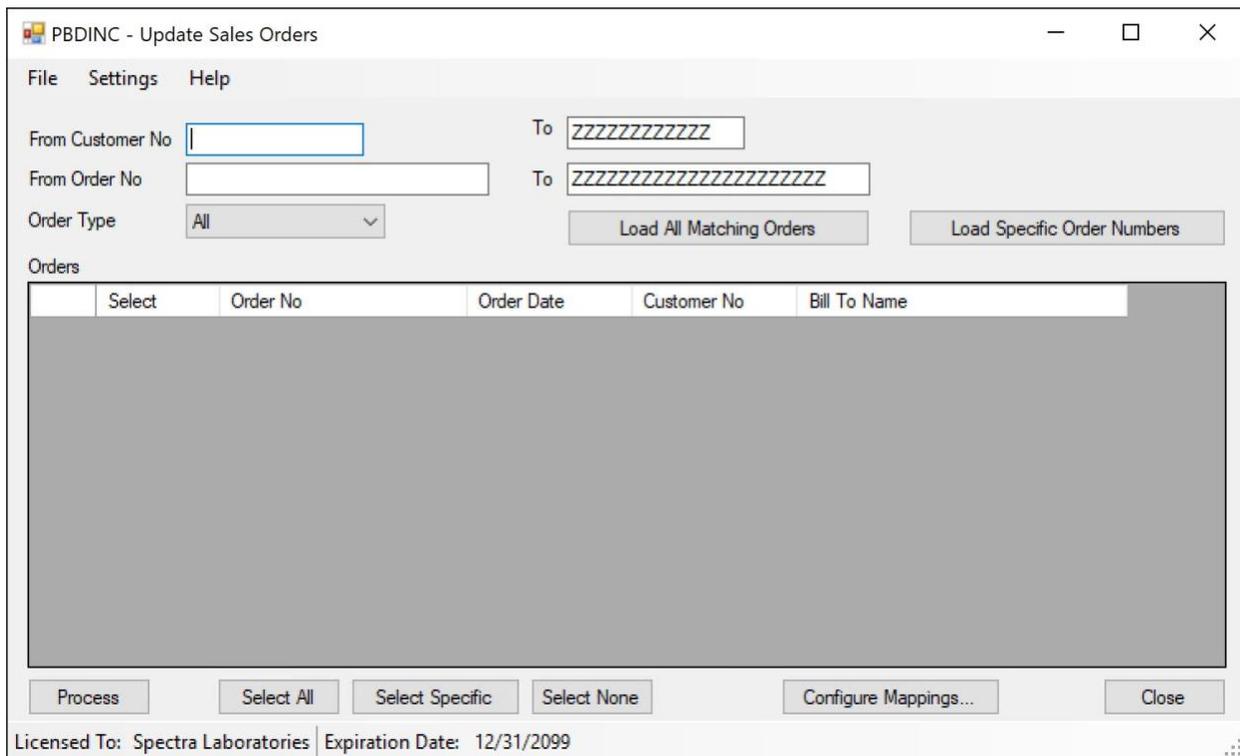
Update Sale Orders provides the following functionality:

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

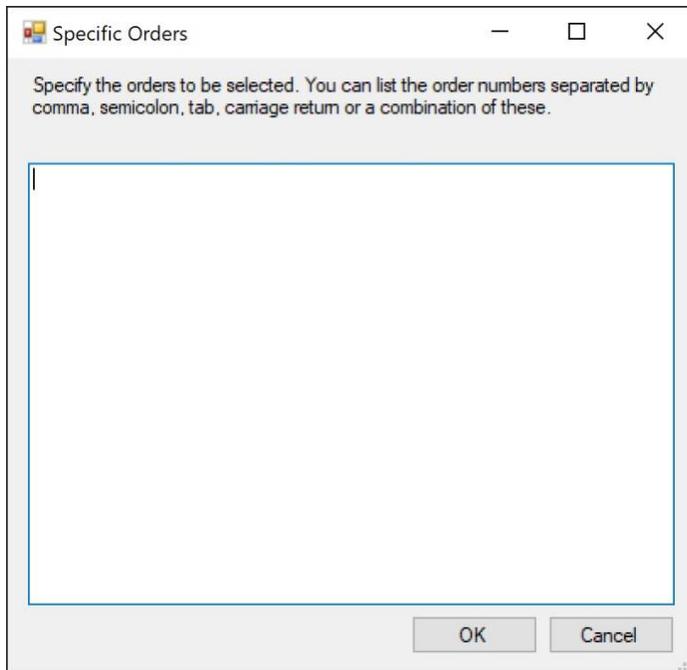
2 Updating Sale Orders

2.1 Main Screen

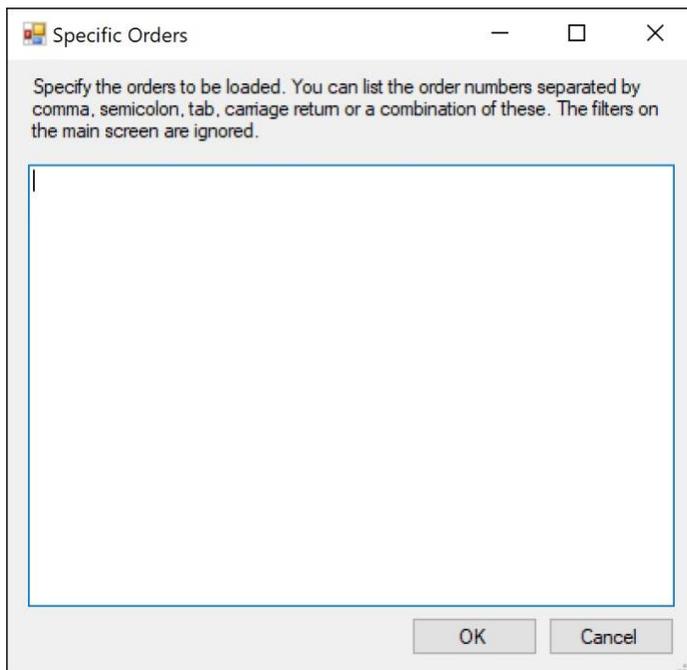
The following figure shows an example of the main screen of the application.



Select a range of customer numbers, sale order numbers, and order type and click the “Load All Matching Orders” 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. You can also select only specific orders by clicking the “Select Specific” button. The following screen appears:



You can also load only specific orders by clicking the “Load Specific Order Numbers” button:



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.

Configure Mappings

Item Mappings Location Mappings

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
*					

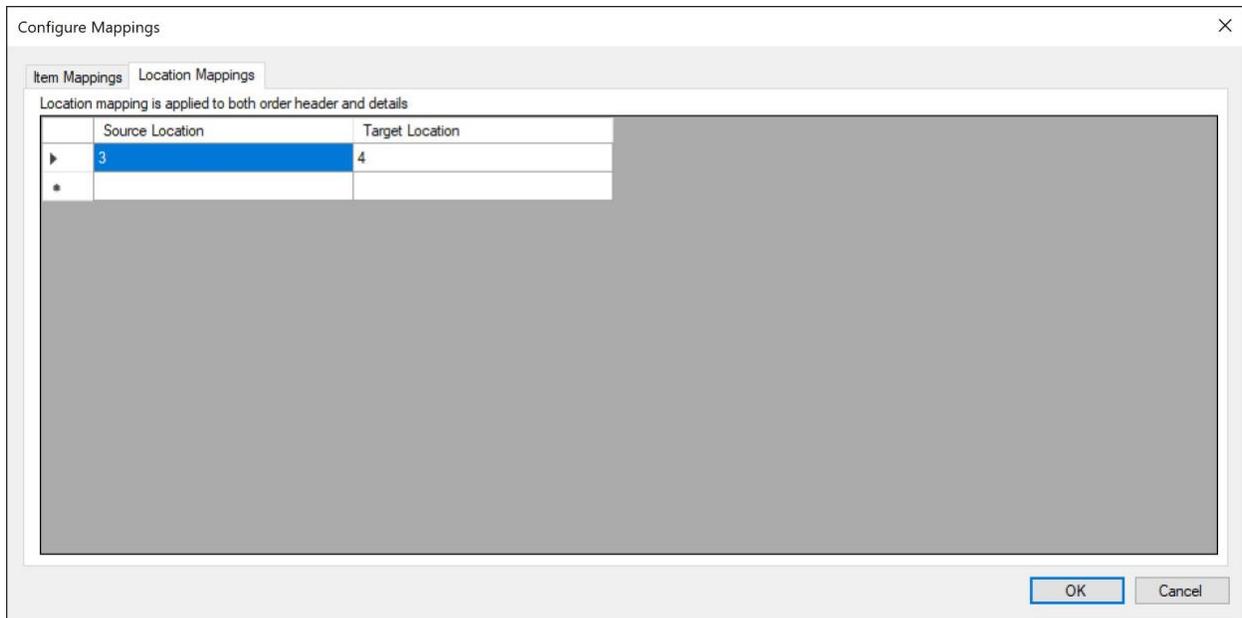
OK Cancel

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 Location Mapping

Along with updating and merging the items, you can also update the location code in the order header and details. You use the same “Configure Mapping” screen to specify location mappings.



In the example above, location code 3 is replaced by location code 4.

2.4 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.

Location codes are updated in the header and detail lines.

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.