Knowledgebase > SalesPad > Sales > Sales Document Mass Update

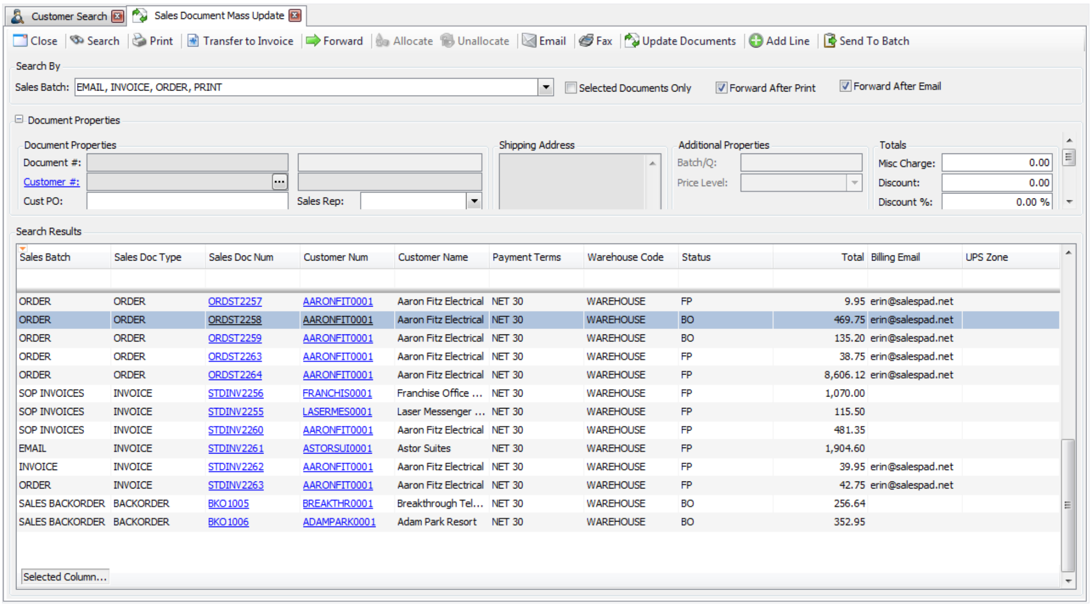
Sales Document Mass Update

Megan De Freitas - 2024-12-03 - Sales

Overview

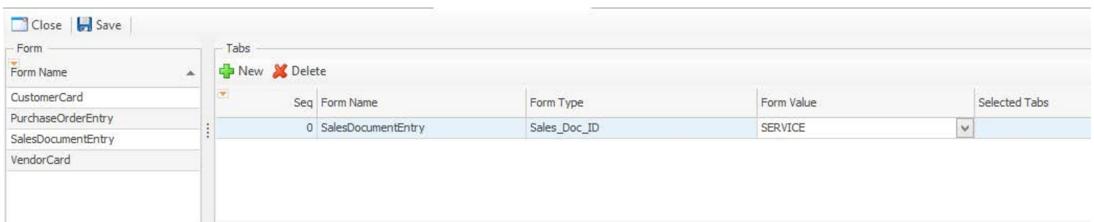
Sales Document Mass Update functionality allows users to make changes to multiple sales documents at one time, rather than making changes one at a time. Sales Document Mass Update is accessible in SalesPad from Modules > Sales > Sales Document Mass Update.

Sales Document Mass Update Screen:

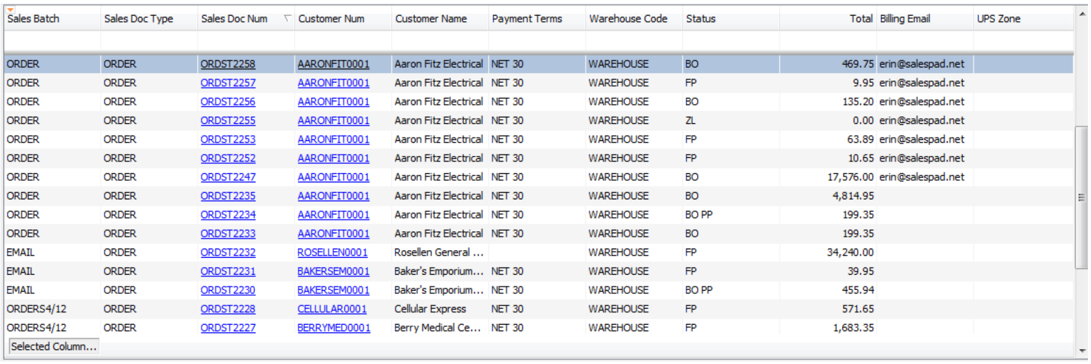


Search

Type in or select one or more sales batches in the Sales Batch field:



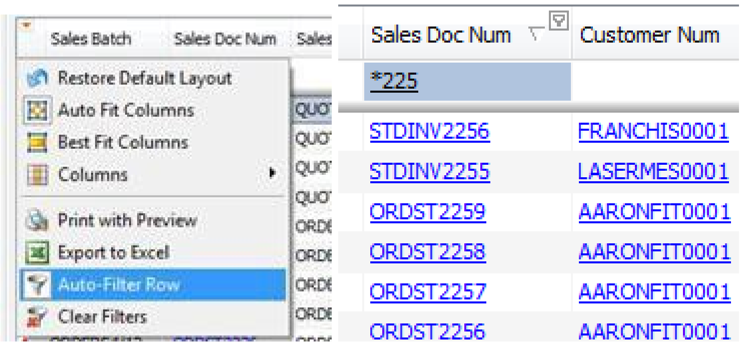
Click the **Search** button on the header or hit Enter; open documents in the selected batch(es) will display in the Search Results grid.



Sales Batch	Sales Doc Type	Sales Doc Num	Customer Num	Customer Name	Payment Terms	Warehouse Code	Status	Total	Billing Email	UPS Zone
ORDER	ORDER	ORDST2258	AARONFIT0001	Aaron Fitz Electrical	NET 30	WAREHOUSE	BO	469.75	erin@salespad.net	
ORDER	ORDER	ORDST2257	AARONFIT0001	Aaron Fitz Electrical	NET 30	WAREHOUSE	FP	9.95	erin@salespad.net	
ORDER	ORDER	ORDST2256	AARONFIT0001	Aaron Fitz Electrical	NET 30	WAREHOUSE	BO	135.20	erin@salespad.net	
ORDER	ORDER	ORDST2255	AARONFIT0001	Aaron Fitz Electrical	NET 30	WAREHOUSE	ZL	0.00	erin@salespad.net	
ORDER	ORDER	ORDST2253	AARONFIT0001	Aaron Fitz Electrical	NET 30	WAREHOUSE	FP	63.89	erin@salespad.net	
ORDER	ORDER	ORDST2252	AARONFIT0001	Aaron Fitz Electrical	NET 30	WAREHOUSE	FP	10.65	erin@salespad.net	
ORDER	ORDER	ORDST2247	AARONFIT0001	Aaron Fitz Electrical	NET 30	WAREHOUSE	BO	17,576.00	erin@salespad.net	
ORDER	ORDER	ORDST2235	AARONFIT0001	Aaron Fitz Electrical	NET 30	WAREHOUSE	BO	4,814.95		
ORDER	ORDER	ORDST2234	AARONFIT0001	Aaron Fitz Electrical	NET 30	WAREHOUSE	BO PP	199.35		
ORDER	ORDER	ORDST2233	AARONFIT0001	Aaron Fitz Electrical	NET 30	WAREHOUSE	BO	199.35		
EMAIL	ORDER	ORDST2232	ROSELLEN0001	Rosellen General ...		WAREHOUSE	FP	34,240.00		
EMAIL	ORDER	ORDST2231	BAKERSEM0001	Baker's Emporium...	NET 30	WAREHOUSE	FP	39.95		
EMAIL	ORDER	ORDST2230	BAKERSEM0001	Baker's Emporium...	NET 30	WAREHOUSE	BO PP	455.94		
ORDERS4/12	ORDER	ORDST2228	CELLULAR0001	Cellular Express	NET 30	WAREHOUSE	FP	571.65		
ORDERS4/12	ORDER	ORDST2227	BERRYMED0001	Berry Medical Ce...	NET 30	WAREHOUSE	FP	1,683.35		

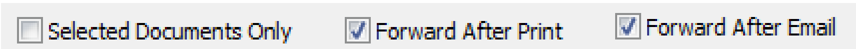
Selected Column...

You can further filter results by using the Auto-Filter Row and entering additional criteria:



Check Boxes

Three check boxes appear in the Sales Document Mass Update module, which will be important when performing actions via the buttons on the screen header:



Selected Documents Only: If checked, actions will affect only selected documents; if unchecked, actions will affect all sales documents in the Search Results grid.

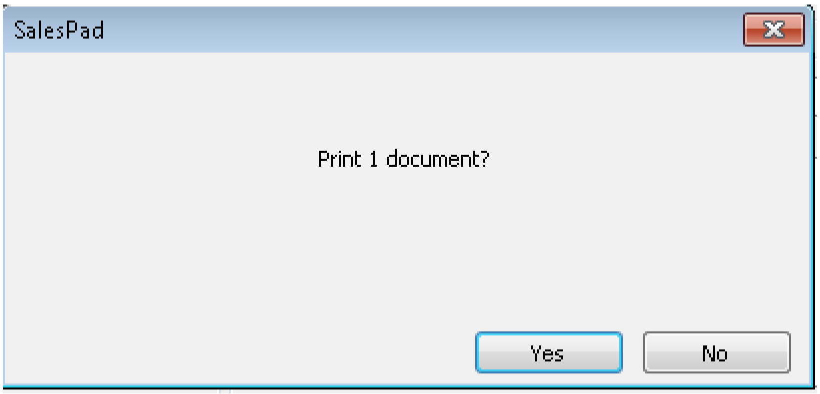
Forward After Print: If checked, forwards the document(s) to the workflow-defined next queue after printing.

Forward After Email: If checked, forwards the document(s) to the workflow-defined next queue after emailing.

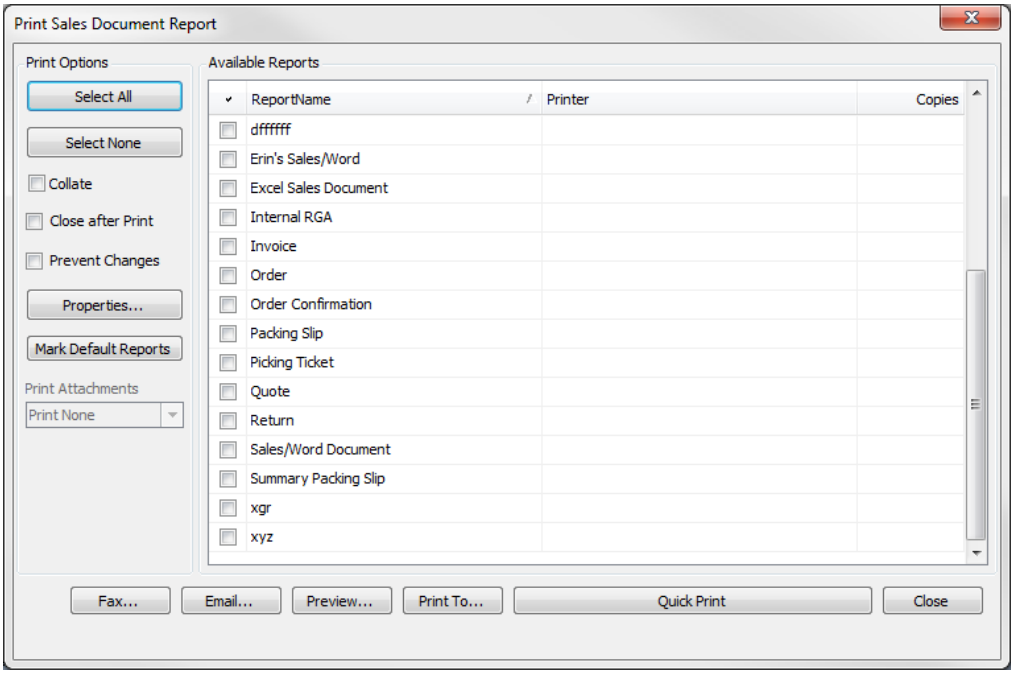
Print

To print a report or reports for one or more sales documents:

1. Select the document(s) from the Search Results that you would like to print (CTRL+Click or CTRL+Shift+Click to select multiple documents).
   Note: If **Selected Documents Only** is *not* checked, there is no need to select documents as all those displayed in the Search Results grid will be printed regardless
2. Click the **Print** button on the screen header
3. A confirmation window will appear. Click **Yes**



The "Print Sales Document Report" window will appear:



4. Select the appropriate report(s) to print
5. Select an option (Fax, Email, Preview, etc.) from the buttons at the bottom. Print, fax, or email options will appear upon selection. For more help with printing, faxing, emailing, etc. please visit this document

Once complete, a summary window will appear. If any document could not be printed, an explanatory message will be included. From here either print the confirmation (click **Print**) or close the window (click **OK**)

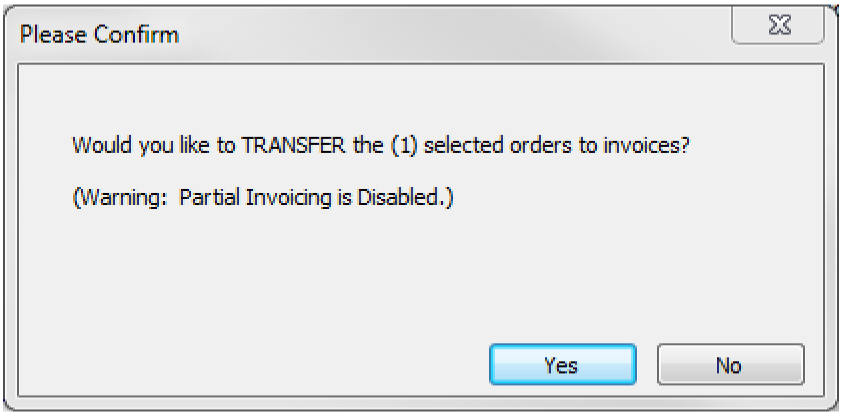
Note: If **Forward After Print** is selected on the Sales Document Mass Update screen, the document(s) will move to the next queue after printing.

Transfer to Invoice

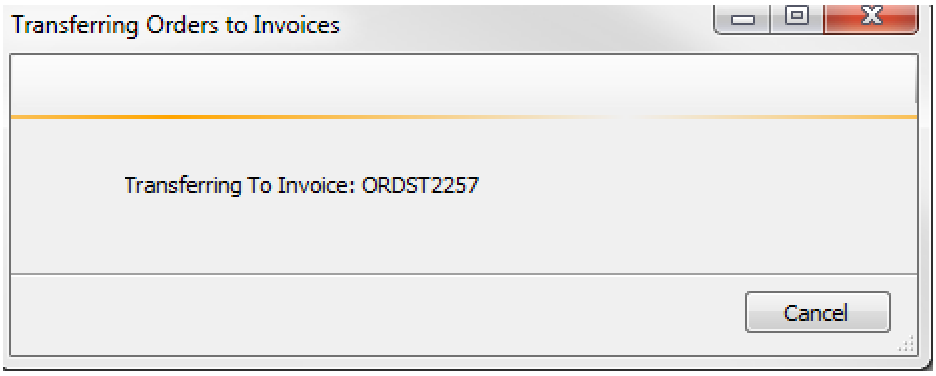
To transfer one or more documents to invoice:

1. Select the document(s) from the Search Results that you would like to transfer (CTRL+Click or CTRL+Shift+Click to select multiple documents).
   Note: if **Selected Documents Only** is *not* checked, there is no need to select documents as all those displayed in the Search Results grid will be printed regardless
2. Click the **Transfer to Invoice** button on the screen header

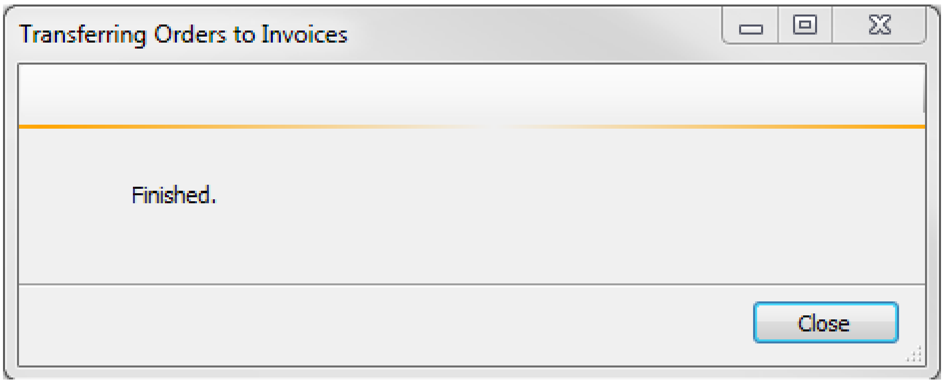
3. A confirmation window will appear. Click **Yes**



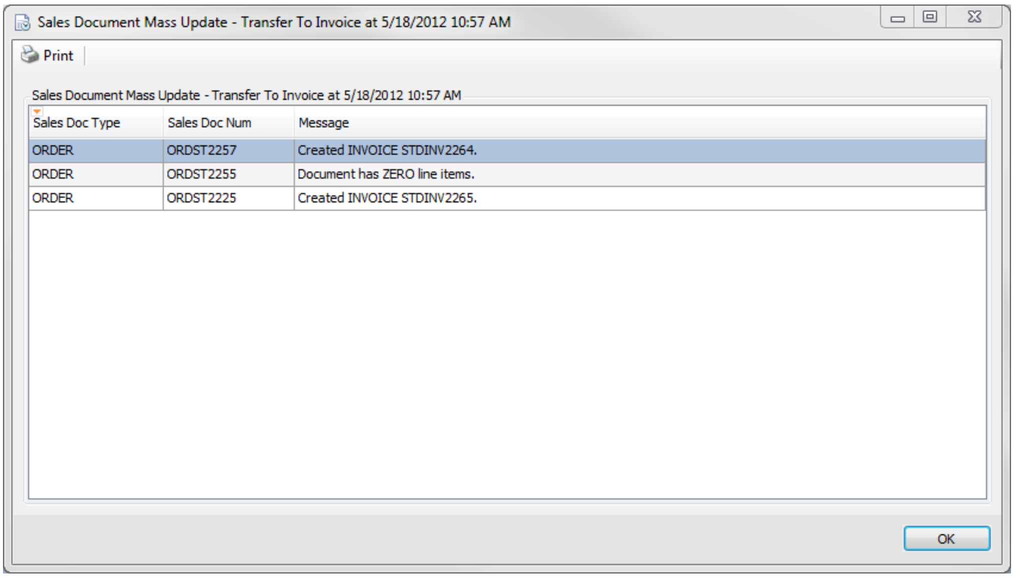
The Transferring Orders to Invoices window will appear until all of the selected documents have been transferred. This may take some time:



The window will indicate when updating is complete:



4. Click **Close**. A summary window will appear. If any document could not be transferred, an explanatory message will be included

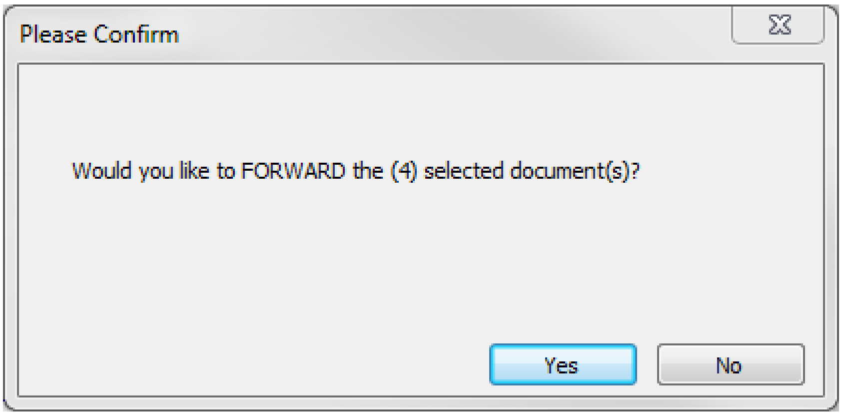


5. From here either print the confirmation (click **Print**) or close the window (click **OK**)

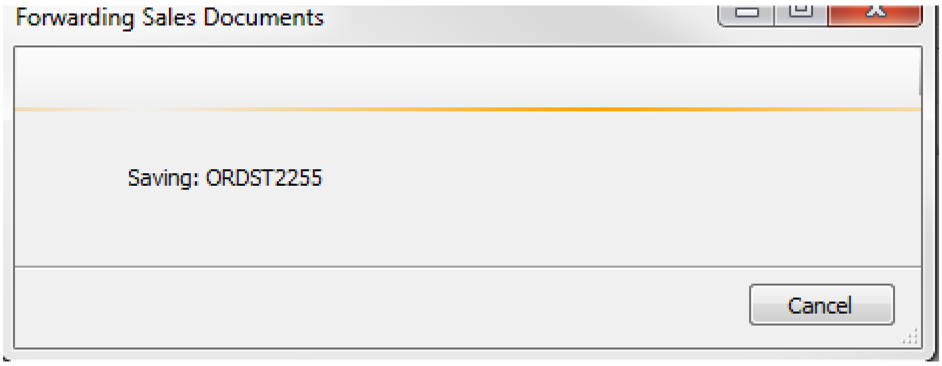
Forward

To forward documents to the next workflow batch:

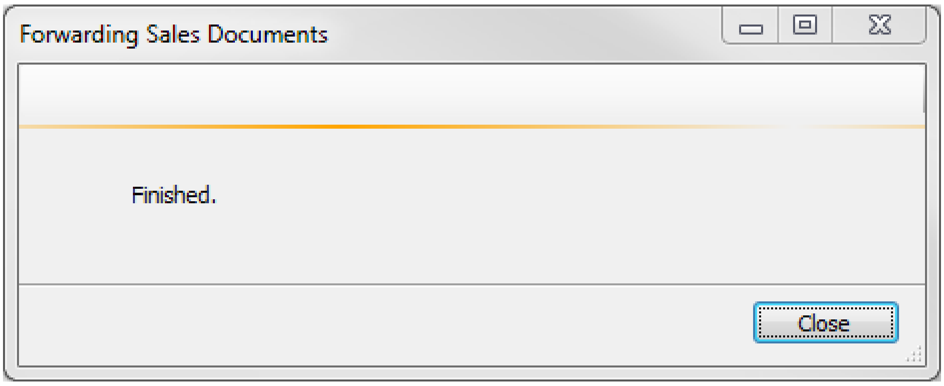
1. Select the document(s) from the Search Results that you would like to forward (CTRL+Click or CTRL+Shift+Click to select multiple documents).
   Note: if **Selected Documents Only** is *not* checked, there is no need to select documents as all those displayed in the Search Results grid will be printed regardless
2. Click the **Forward** button on the screen header
3. A confirmation window will appear. Click **Yes**



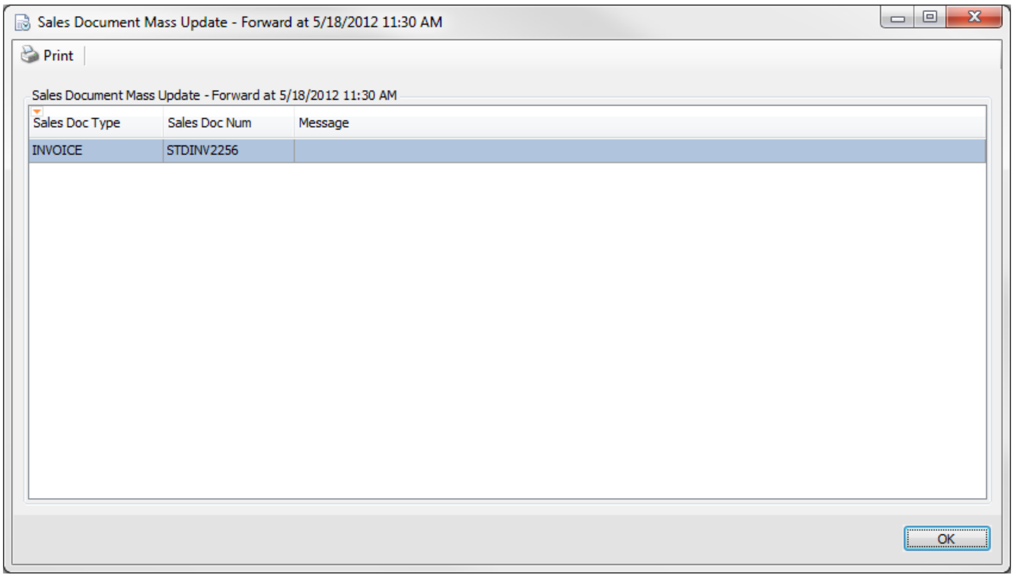
The Forwarding Sales Documents to Invoices window will appear until all of the selected documents have been forwarded. This may take some time:



The window will indicate when updating is complete:



4. Click **Close**. A summary window will appear. If any document could not be transferred, an explanatory message will be included

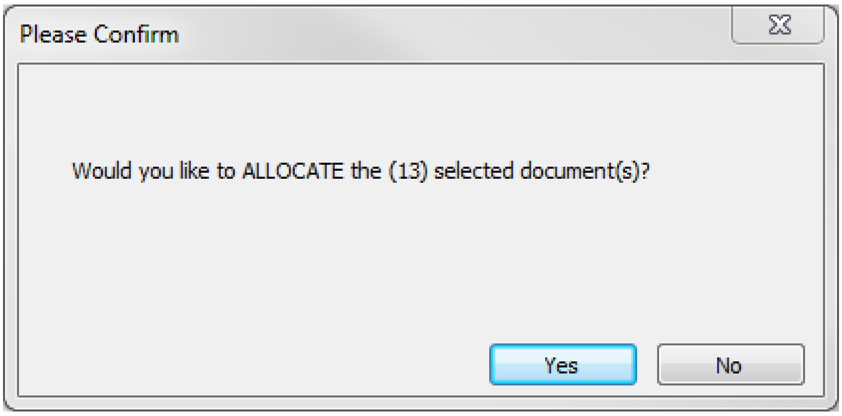


5. From here either print the confirmation (click **Print**) or close the window (click **OK**)

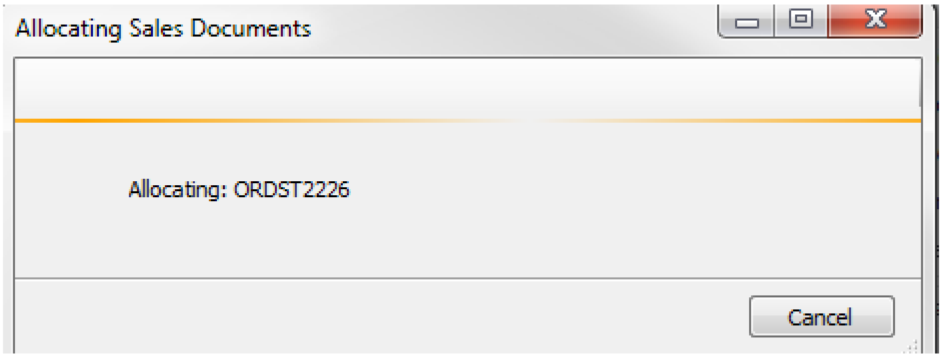
Allocate

To allocate all items on the document(s):

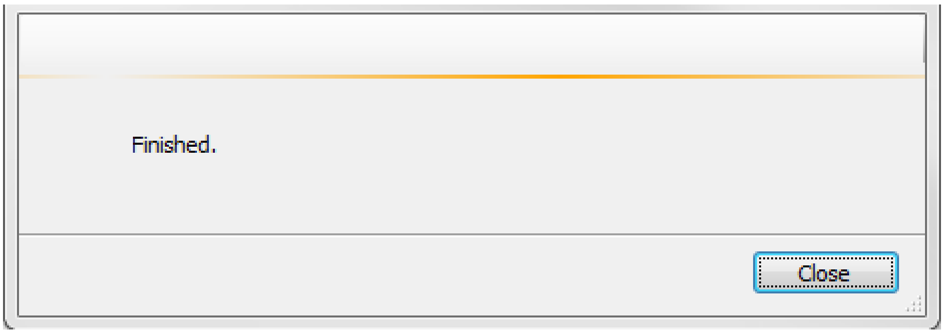
1. Select the sales document from the Search Results that you would like to allocate (CTRL+Click or CTRL+Shift+Click to select multiple documents).
   Note: if **Selected Documents Only** is not checked, there is no need to select documents as all documents displayed in the Search Results grid will be allocated regardless
2. Click the **Allocate** button on the screen header
3. A confirmation window will appear. Click **Yes** to allocate the documents



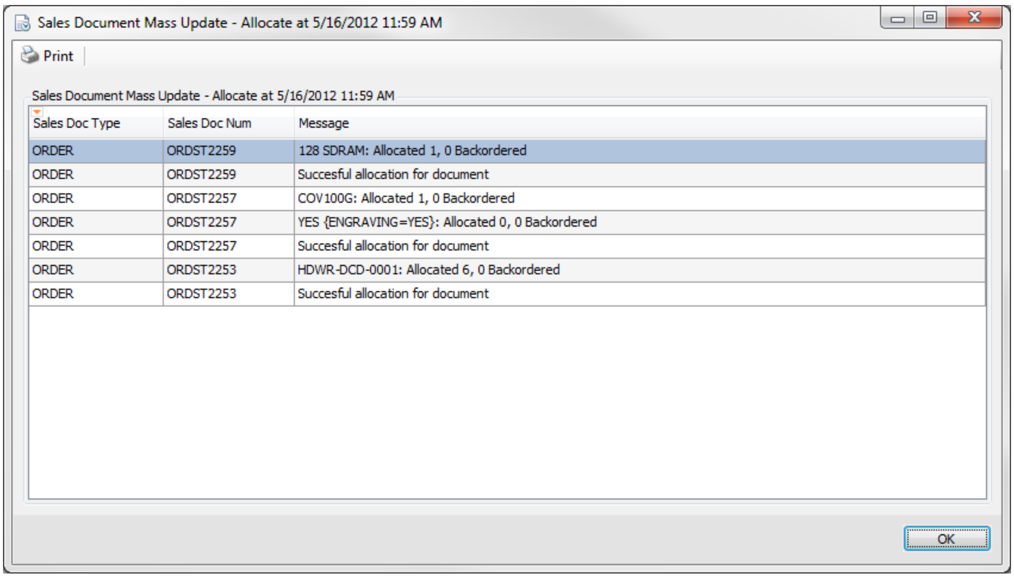
The Allocating Sales Documents window will appear until all of the selected documents have been updated. This may take some time:



The window will indicate when updating is complete:



4. Click **Close**. A summary window will appear. If any document could not be allocated, an explanatory message will be included

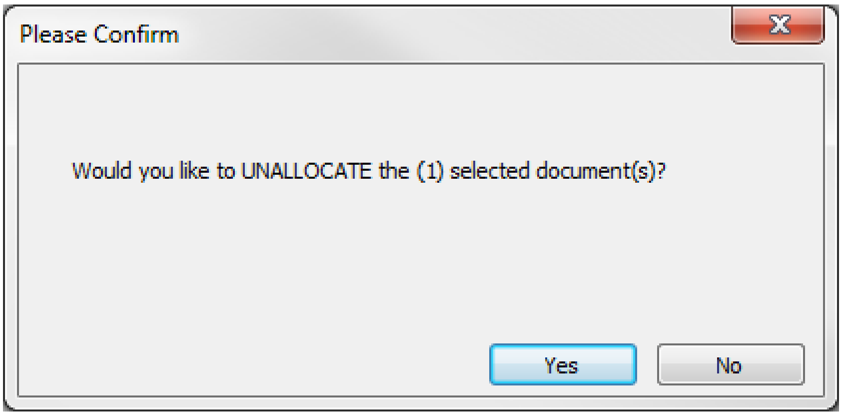


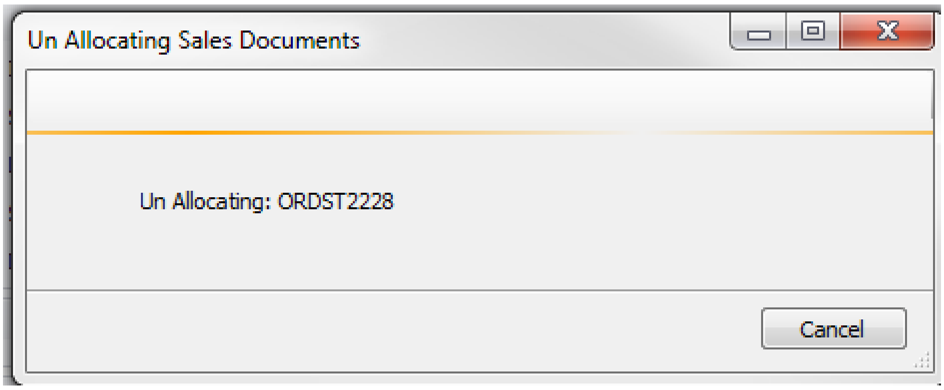
Sales Doc Type	Sales Doc Num	Message
ORDER	ORDST2259	128 SDRAM: Allocated 1, 0 Backordered
ORDER	ORDST2259	Succesful allocation for document
ORDER	ORDST2257	COV100G: Allocated 1, 0 Backordered
ORDER	ORDST2257	YES {ENGRAVING=YES}: Allocated 0, 0 Backordered
ORDER	ORDST2257	Succesful allocation for document
ORDER	ORDST2253	HDWR-DCD-0001: Allocated 6, 0 Backordered
ORDER	ORDST2253	Succesful allocation for document

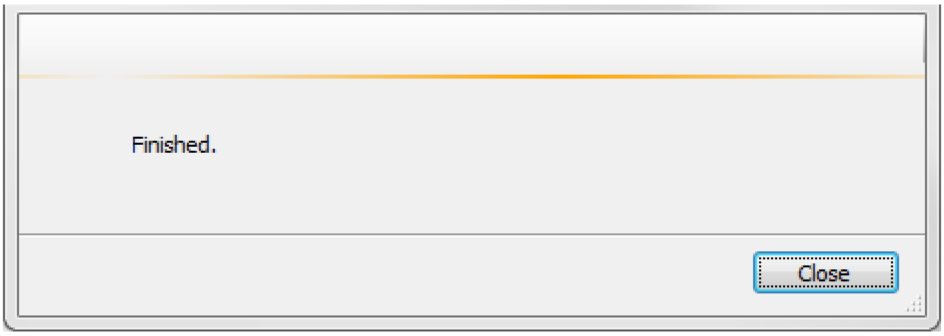
5. From here either print the confirmation (click **Print**) or close the window (click **OK**)

Un Allocate

To remove allocation of all line items on sales documents:

1. Select the document(s) from the Search Results that you would like to un-allocate (CTRL+Click or CTRL+Shift+Click to select multiple documents).
   Note: if **Selected Documents Only** is not checked, there is no need to select documents as all documents displayed in the Search Results grid will be un-allocated regardless
2. Click the **Unallocate** button on the screen header
3. A confirmation window will appear. Click **Yes** to un-allocate the document(s)
   

   The Un Allocating Sales Documents window will appear until all of the selected documents have been updated. This may take some time:
   

   The window will indicate when updating is complete:
   

4. Click **Close**. A summary window will appear. If any document could not be un-allocated, an explanatory message will be included
5. From here either print the confirmation (click **Print**) or close the window (click **OK**)

Email

Note: [You must have valid Email Server setup to use this function.]

The From email address used must match the global address pointed to by the company email server set up in the Sales Email Confirmation settings in SalesPad's Settings module. (Refer to the linked SalesPad knowledge base article).

To email sales documents:

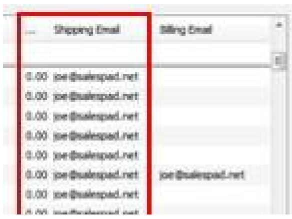
Procedure:

The sales document will pull the customer **Ship** address email into the sales document shipping email and the customer **Bill** address email into the sales document billing

email. This will only automatically populate for new sales documents. All preexisting sales documents must be manually updated.

Once email addresses are populated, you can email documents in Sales Document Mass Update.

1. Select the document(s) from the Search Results that you would like to email (CTRL+Click or CTRL+Shift+Click to select multiple documents).
   Note: if **Selected Documents Only** is not checked, there is no need to select documents as all documents displayed in the Search Results grid will be un-allocated regardless
2. Click the **Email** button on the screen header
   Note: Before you click the **Email** button, make sure that the email address field you plan to use is populated. If the customer's **Dont Email** box is checked (viewable from Customer Search), an email will not actually be sent.
   a. Make sure the shipping email and/or billing email are already populated, as in the screen below (If you do not see the proper email columns populated on the Sales Document Mass Update screen, it will not email properly.)

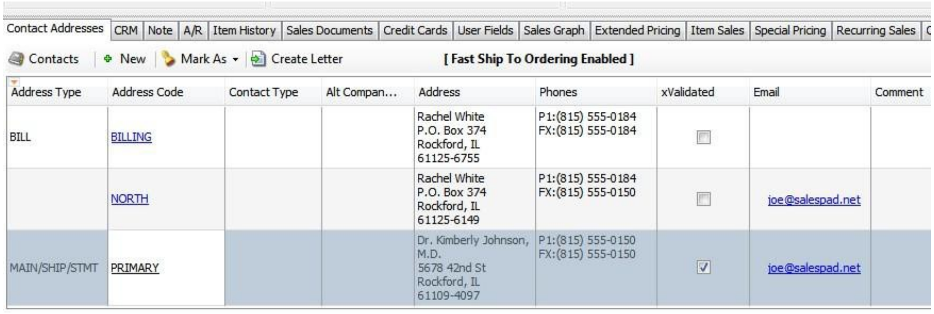


   b. If they are, proceed to step 3. If they are not, you can update them from each sales document, on the Addresses tab:

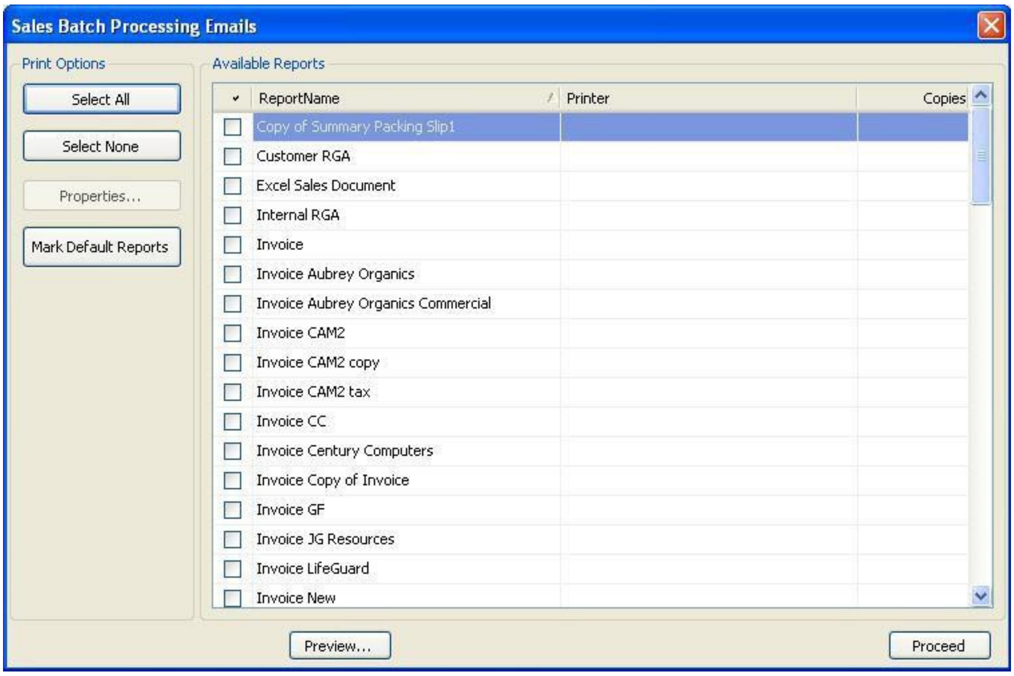
c. After updating, save and close the document

d. Refresh the information in Sales Document Mass Update by closing and reopening the screen (and re-perform your search to display documents)

Note: To automatically populate these values for new sales documents, you can fill them out on the Customer Card:

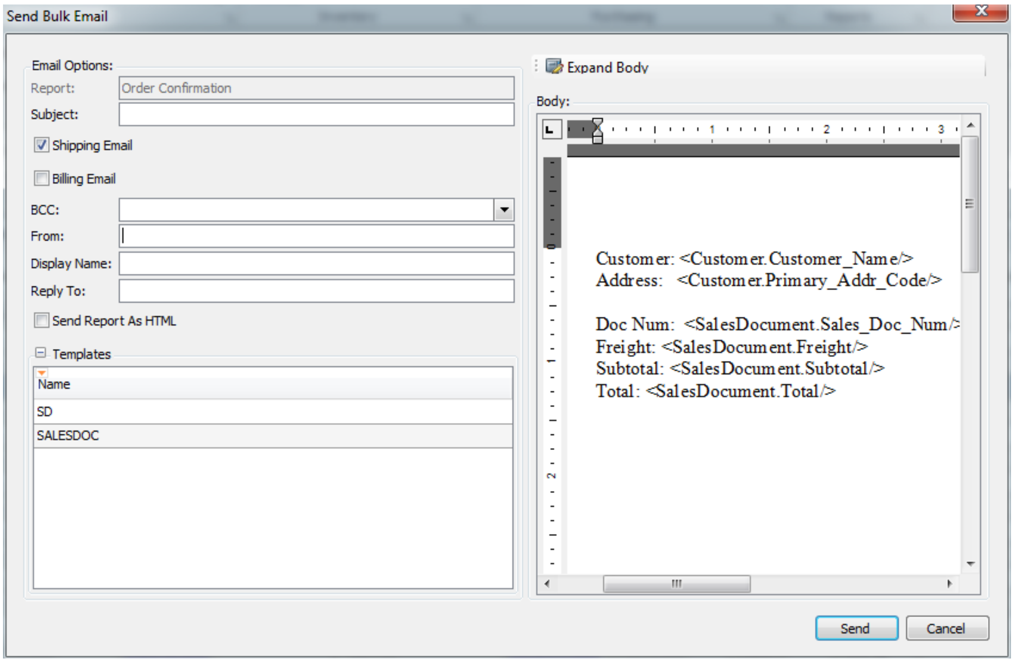


3. The Sales Batch Processing Emails screen will appear. Select the related report(s) you wish to email and click **Proceed**:



4. The Send Bulk Email screen will appear.

   Note: In a batch mode, the preview will show only the template and not a populated version of the document. Select whether to send to the Shipping Email or the Billing Email (from the Customer Card Contact Card) and fill in the other Email Options



5. Select a template for the email. A personal message can be added to the body
6. Click **Send**. The document(s) will be sent and a confirmation window will appear, which can be printed or closed

Note: If **Forward After Email** is selected on the Sales Document Mass Update screen, the document(s) will move to the next queue after emailing.

Fax

Note: You must have valid Email/Fax Server setup to use this function.

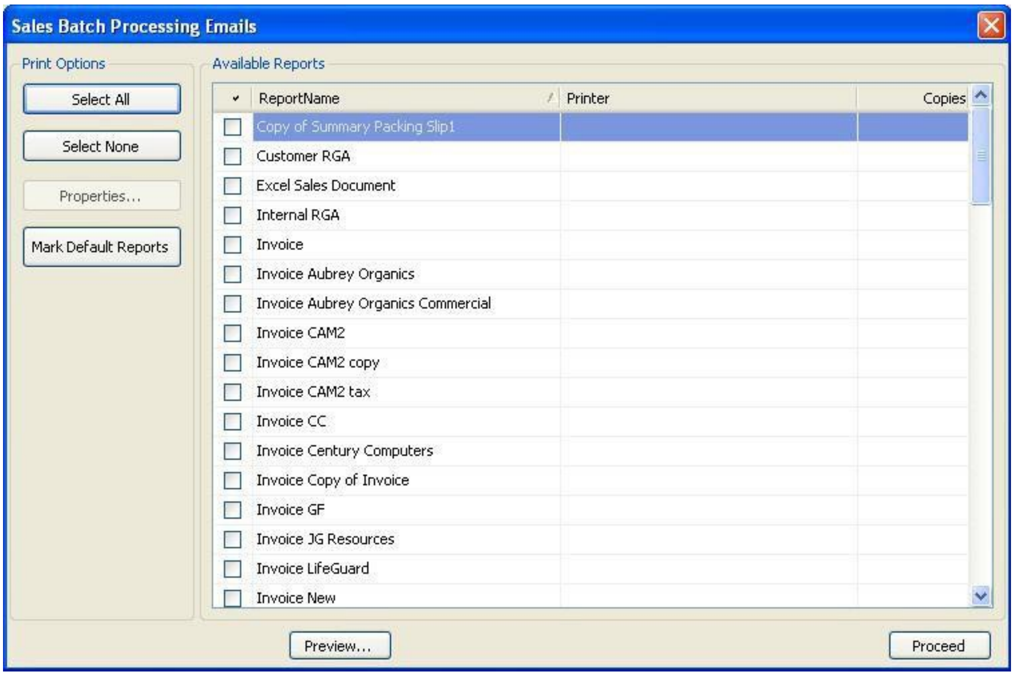
To Fax sales documents:

1. Select the document(s) from the Search Results that you would like to fax (CTRL+Click or CTRL+Shift+Click to select multiple documents).
   Note: if **Selected Documents Only** is not checked, there is no need to select documents as all documents displayed in the Search Results grid will be un-allocated regardless
2. Click the **Fax** button on the screen header
   Note: Before you click the Fax button, make sure that the fax number field is populated. If the customer's "Dont Fax" box is checked (viewable from Customer Search), a fax will not actually be sent.
   Procedure:
   a. Make sure the fax fields are populated
   b. If they are, proceed to step 3. If they are not, you can update them from each sales document, on the Addresses tab **Fax** field
   c. After updating, save and close the document
   d. Refresh the information in Sales Document Mass Update by closing and reopening the screen (and re-perform your search to display documents)
      Note: To automatically populate these values for new sales documents, you

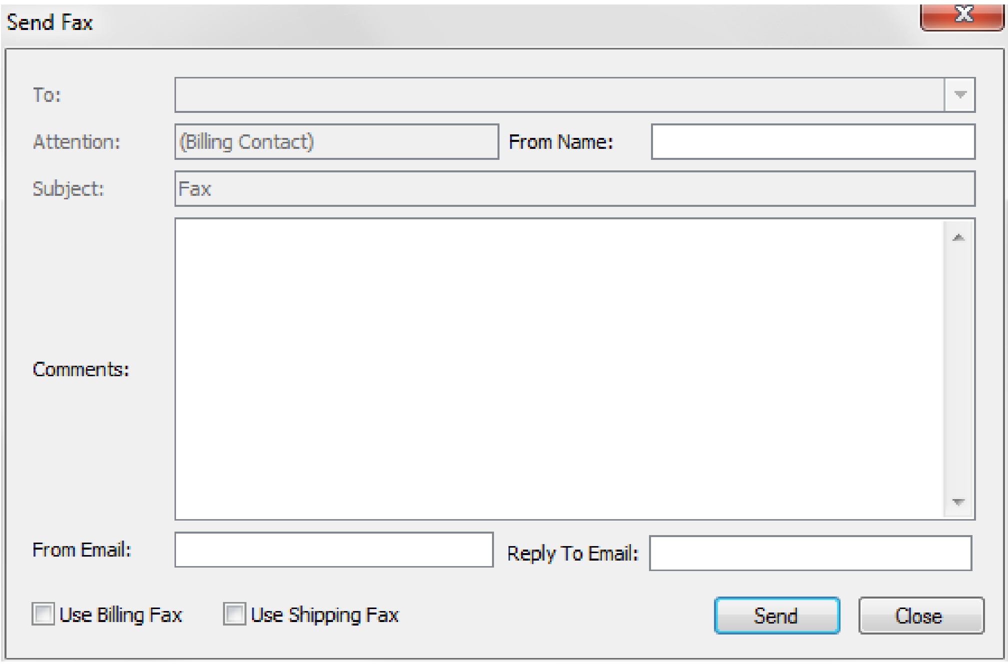
can fill them out on the Customer Card > Contact Addresses > Fax field. This will only automatically populate for new sales documents. All preexisting sales documents must be manually updated.

Once fax numbers are populated, you can fax documents in Sales Document Mass Update.

3. The same screen appears as does for Sales Batch Processing Emails:



4. Select the related report(s) you wish to fax and click **Proceed**. The Send Fax screen will appear:

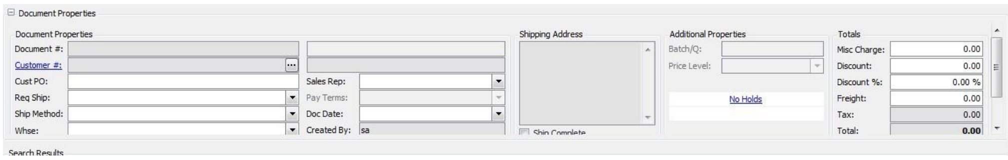


5. Fill in the necessary fields and select whether to send to the Billing Fax, Shipping Fax, or both (based on the Contact Address codes on the Customer Card)
6. Click **Send**. The document(s) will be faxed and a confirmation window will appear, which can be printed or closed

Update Documents (Document Properties)

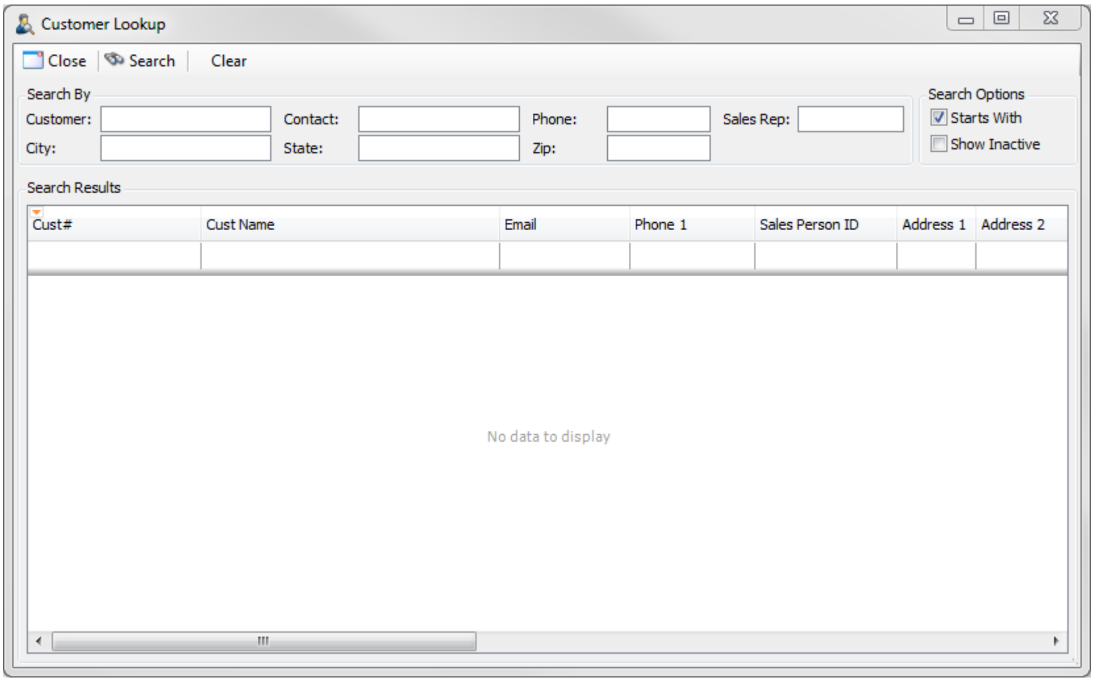
To edit one or more document properties (change shipping method, ship date, warehouse, sales rep, etc):

1. Select the document(s) from the Search Results that you would like to make the same change or changes to (CTRL+Click or CTRL+Shift+Click to select multiple documents).
   Note: if **Selected Documents Only** is not checked, there is no need to select documents as all documents displayed in the Search Results grid will be updated regardless
2. Enter your mass changes into the desired property fields under Document Properties**:**



Note:Use the +/- next to the title to toggle between showing and hiding Document Properties. Depending on your window sizing, there may be a scroll bar on the right side of the Document Properties section that you may need to use to view all fields.

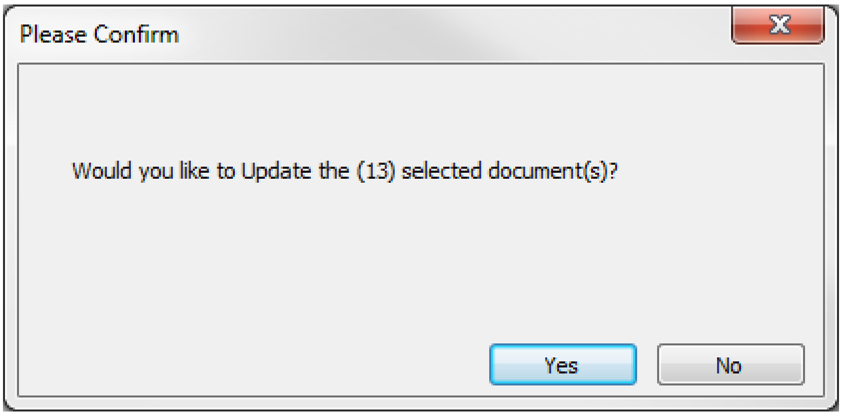
Note: On the Customer # field, click the ellipsis (…) to open the Customer Lookup screen where you can search for and select a customer:



Once a customer is added to the Customer # field , click the Customer # hyperlink to open the customer's [Customer Card](#).

Note: Hitting Enter after entering an existing customer number into the Customer # field, or entering or selecting information on any other field will simply repeat the Search for criteria entered; it will not make any changes to the documents.

2. A confirmation window will appear. Click **Yes** to update the document information

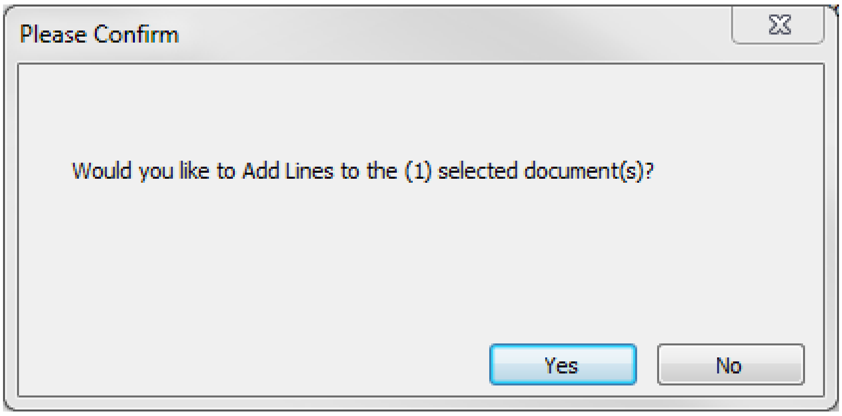


An update window will appear until all of the selected documents have been updated. This may take some time.
3. When the window indicates that updating is complete, click **Close**. A summary window will appear. If any document could not be updated, an explanatory message will be included
4. From here either print the confirmation (click **Print**) or close the window (click **OK**)

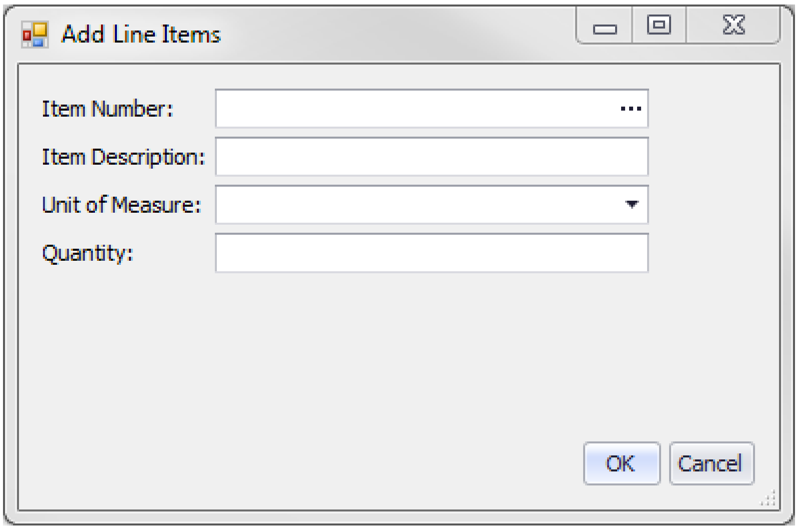
Add Line

To add a line item to sales documents:

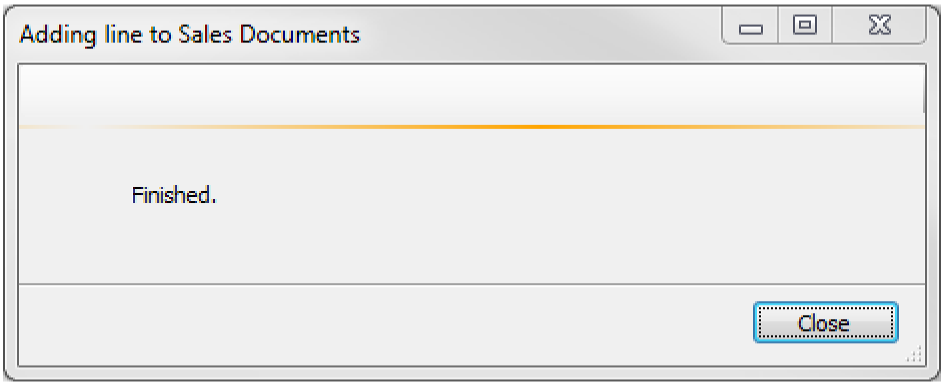
1. Select the document(s) from the Search Results that you would like to add a line item to (CTRL+Click or CTRL+Shift+Click to select multiple documents).
Note: if **Selected Documents Only** is not checked, there is no need to select documents as all documents displayed in the Search Results grid will be un-allocated regardless
2. Click the **Add Line** button on the screen header
3. A confirmation window will appear. Click **Yes** to continue to the Add Line Items window



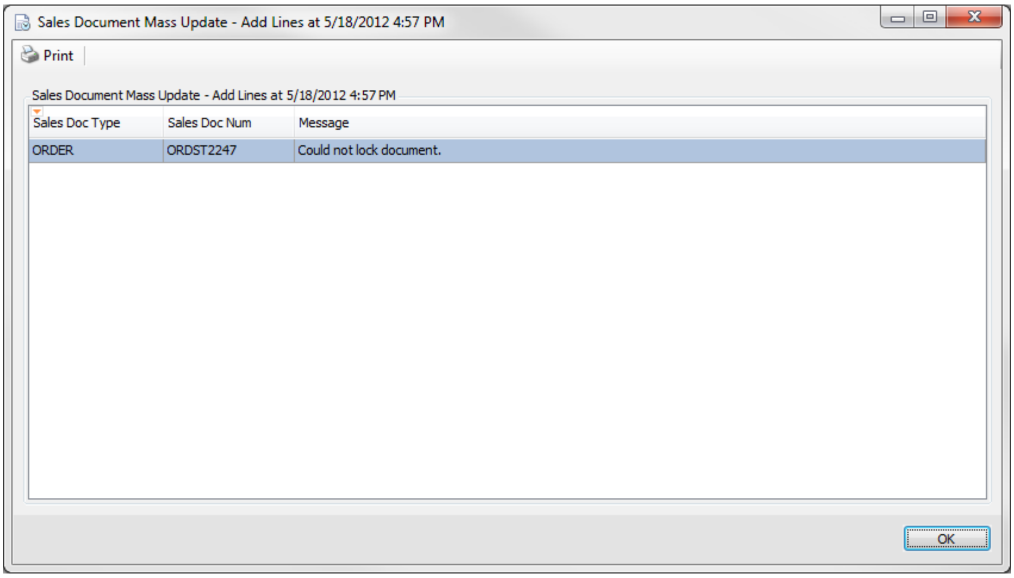
4. In the Add Line Items window, enter the Item Number of the item you wish to add. Tab off the Item Number field. The Item Description, Unit of Measure (default), and Quantity (defaults to 1) will automatically populate, and you can change the information as needed:



5. When finished, Click **OK**. The Adding line to Sales Documents screen will appear, displaying progress until the line is added to all selected documents:



6. Click **Close**. A summary window will appear. If any document could not be updated, an explanatory message will be included



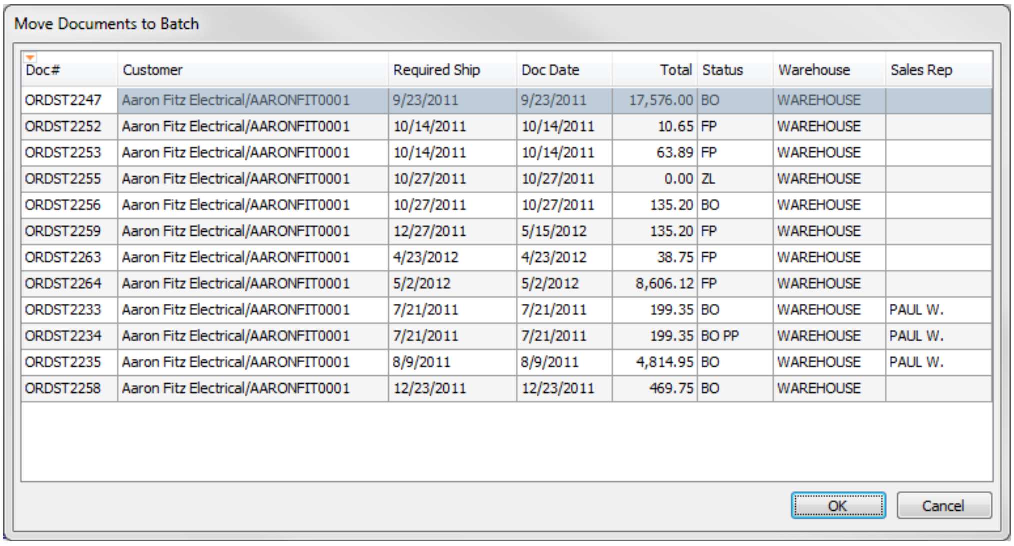
7. From here either print the confirmation (click **Print**) or close the window (click **OK**)

Send To Batch

Note: Send To Batch functionality works by Sales Batch, independently of the display in the Search Results grid.

To send documents to a different [workflow](#) batch:

1. Select *only one* Sales Batch in the the Search By section
2. Click the **Send To Batch** button on the screen header
3. Documents in the selected batch will be listed in the Move Documents to Batch window. Select one or more documents in this list to move and click **OK**

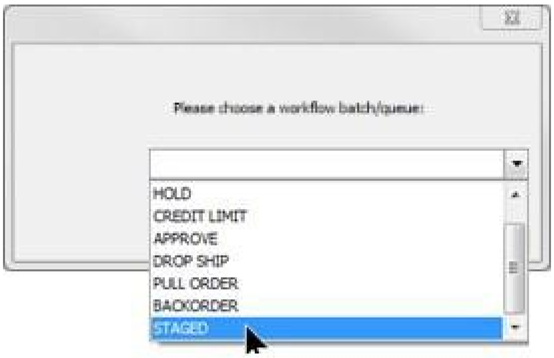


Move Documents to Batch

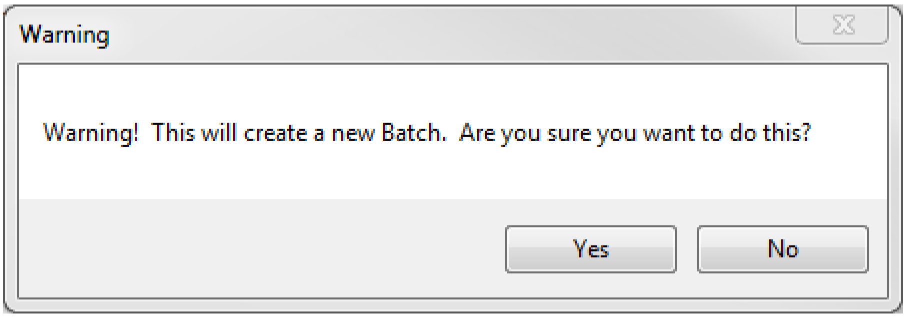
Doc#	Customer	Required Ship	Doc Date	Total	Status	Warehouse	Sales Rep
ORDST2247	Aaron Fitz Electrical/AARONFIT0001	9/23/2011	9/23/2011	17,576.00	BO	WAREHOUSE	
ORDST2252	Aaron Fitz Electrical/AARONFIT0001	10/14/2011	10/14/2011	10.65	FP	WAREHOUSE	
ORDST2253	Aaron Fitz Electrical/AARONFIT0001	10/14/2011	10/14/2011	63.89	FP	WAREHOUSE	
ORDST2255	Aaron Fitz Electrical/AARONFIT0001	10/27/2011	10/27/2011	0.00	ZL	WAREHOUSE	
ORDST2256	Aaron Fitz Electrical/AARONFIT0001	10/27/2011	10/27/2011	135.20	BO	WAREHOUSE	
ORDST2259	Aaron Fitz Electrical/AARONFIT0001	12/27/2011	5/15/2012	135.20	FP	WAREHOUSE	
ORDST2263	Aaron Fitz Electrical/AARONFIT0001	4/23/2012	4/23/2012	38.75	FP	WAREHOUSE	
ORDST2264	Aaron Fitz Electrical/AARONFIT0001	5/2/2012	5/2/2012	8,606.12	FP	WAREHOUSE	
ORDST2233	Aaron Fitz Electrical/AARONFIT0001	7/21/2011	7/21/2011	199.35	BO	WAREHOUSE	PAUL W.
ORDST2234	Aaron Fitz Electrical/AARONFIT0001	7/21/2011	7/21/2011	199.35	BO PP	WAREHOUSE	PAUL W.
ORDST2235	Aaron Fitz Electrical/AARONFIT0001	8/9/2011	8/9/2011	4,814.95	BO	WAREHOUSE	PAUL W.
ORDST2258	Aaron Fitz Electrical/AARONFIT0001	12/23/2011	12/23/2011	469.75	BO	WAREHOUSE	

OK Cancel

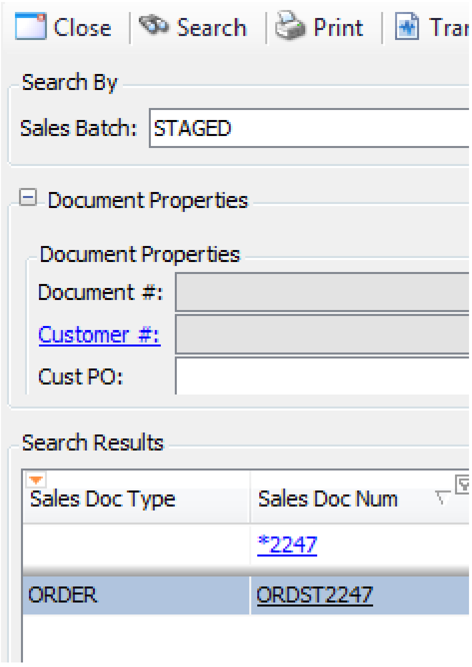
4. From the dropdown, select the batch where selected documents should move: or enter the name of a batch in the field and click **OK**:



You can also enter the name of an existing batch, or create a new one (click **Yes**):



5. After clicking **Yes** or **OK**, the window will close and you will return to the Sales Document Mass Update screen (if a document or documents could not be moved, an error message will appear). To confirm that the document or documents have been moved, select the same Sales Batch selected in step 4 and click **Search**. The document(s) selected in step 3 should appear in the Search Results grid.



Close

Clicking this button will close the Sales Document Mass Update module.

Security

*Sales Document Mass Update** - enables the Sales Document Mass Update Module must be checked in the Security Editor.