Sales Line Mass Update

Cavallo Support - 2025-06-11 - Sales

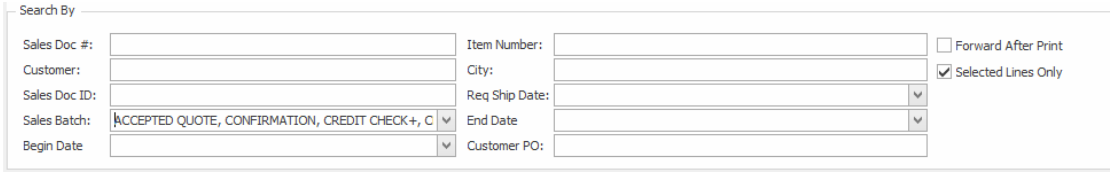
Overview

Sales Line Mass Update functionality allows users to make changes to multiple line items on multiple documents at once, rather than making changes to sales documents one at a time.

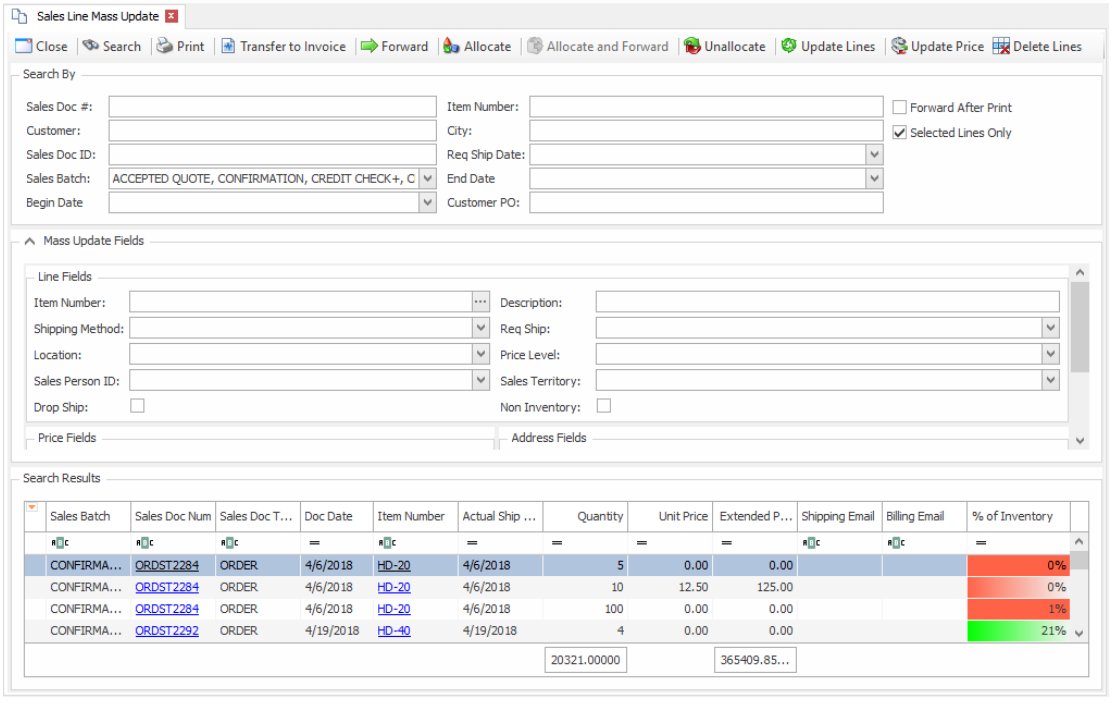
Usage

Search

Display line items by entering criteria into one or more of the search fields and clicking the **Search** button (or hit Enter). Leave all fields blank to return all open line items.



Results will display in the Search Results grid, with Quantity totals and Extended Price totals appearing in fields at the bottom:



Note: The % of Inventory column displays a percentage based on a line's allocated quantity divided by its on hand quantity. Green means the quantity available is negative; red means the quantity available is positive.

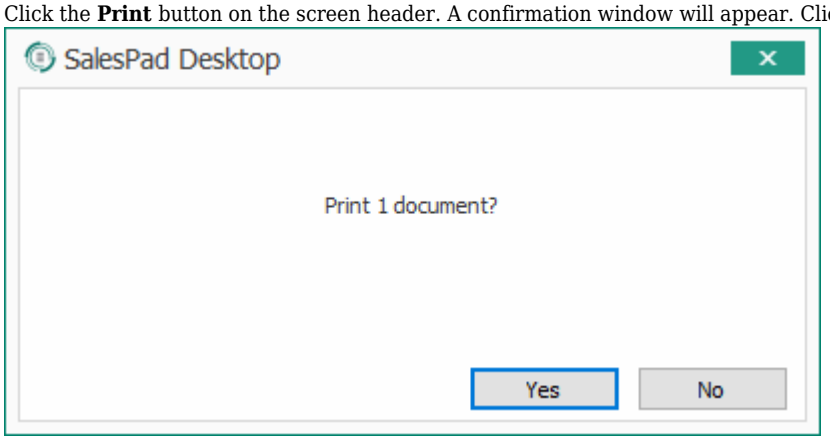
Print

Note: Multiple lines from the same sales document will be printed together on the same report/page. To print a report or reports for one or more line items, select the line or lines from the Search Results (CTRL+Click or CTRL+Shift+Click to select multiple lines).

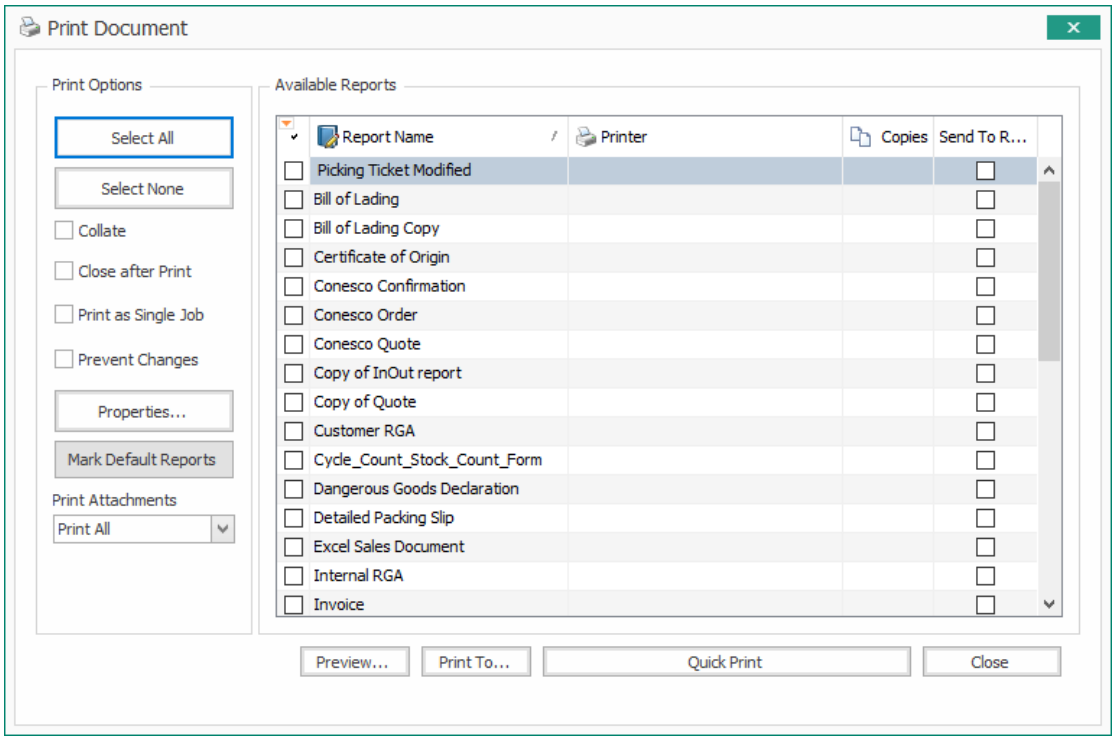
Note: If **Selected Lines Only** is not checked, there is no need to select lines as all lines displayed in the Search Results grid will be printed regardless

Note: Multiple lines from the same sales document will be printed together on the same report/page.

Click the **Print** button on the screen header. A confirmation window will appear. Click **Yes**



The Print Sales Document Report window will appear. Select the desired report, and select a print option.



For more help with printing, faxing, emailing, etc. please visit our FAQ on Emailing/Faxing/Printing

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

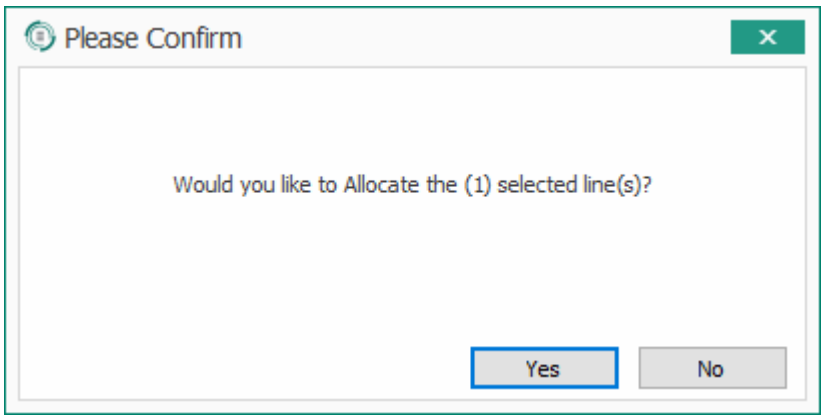
Note: If **Forward After Print** is selected on the Sales Line Mass Update screen, the document(s) will move to the next queue after printing.

Allocate

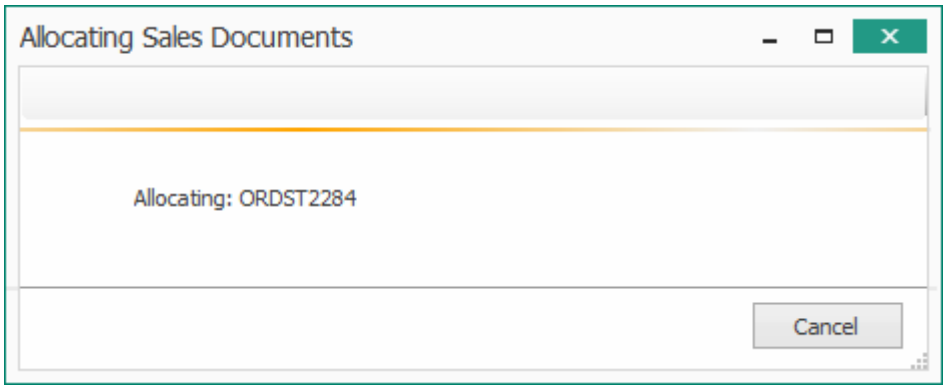
To allocate all items on the document(s) associated with one or more lines, select the desired line or lines to allocate from the Search Results (CTRL+Click or CTRL+Shift+Click to select multiple lines).

Note: if **Selected Lines Only** is not checked, there is no need to select lines as all lines displayed in the Search Results grid will be allocated.

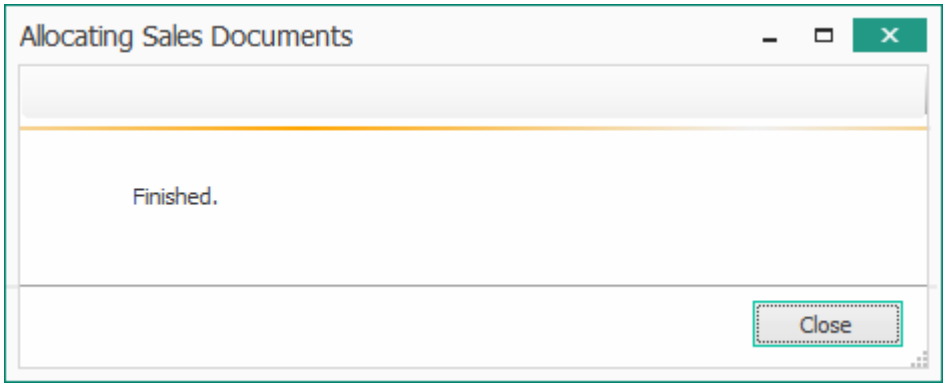
Click the **Allocate** button on the screen header, and click Yes on the confirmation window.



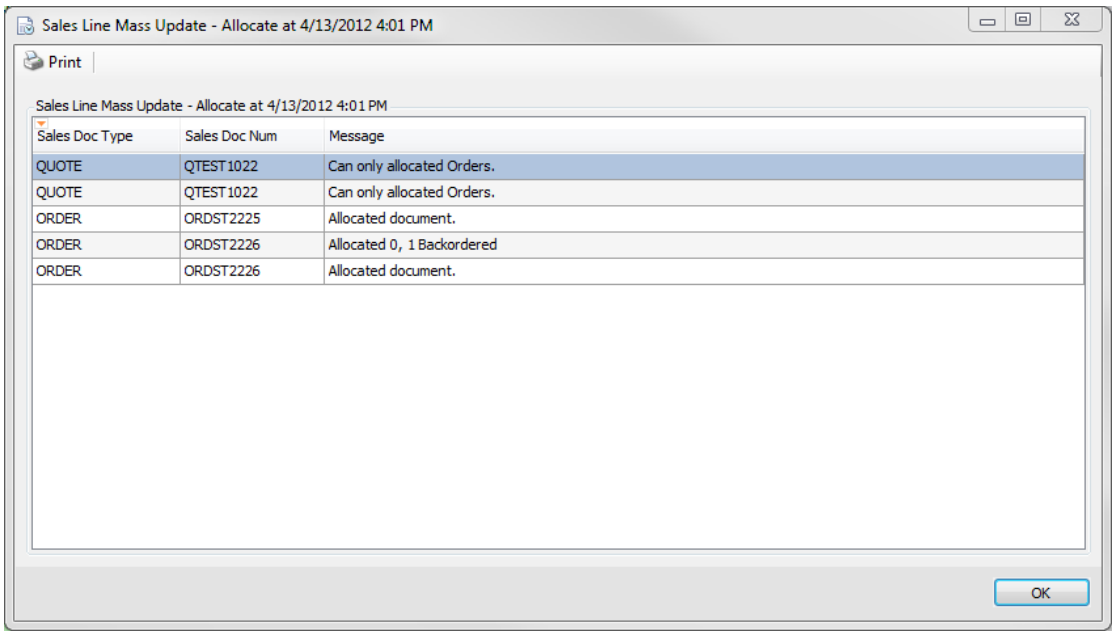
The Allocating Sales Documents window will appear until all of the selected lines have been updated. This may take some time:



The window will indicate when updating is complete:



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



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

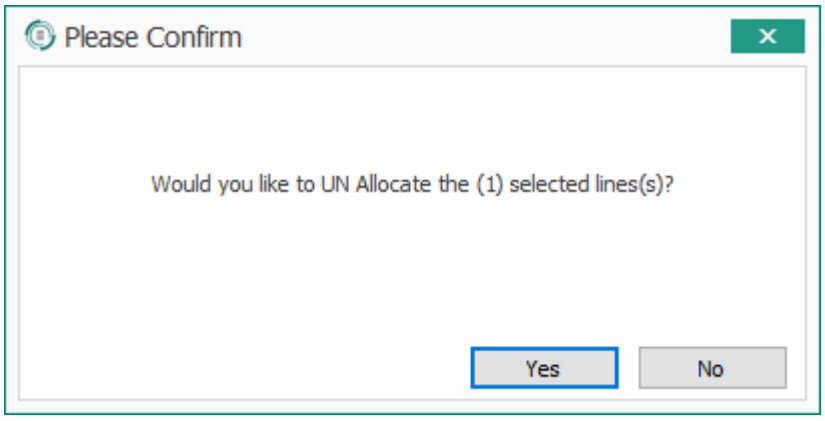
Note: Blocked items and backordered items cannot be allocated. Blocked items are indicated by either a red B or a red X, while backordered items are indicated by a red exclamation point.

Unallocate

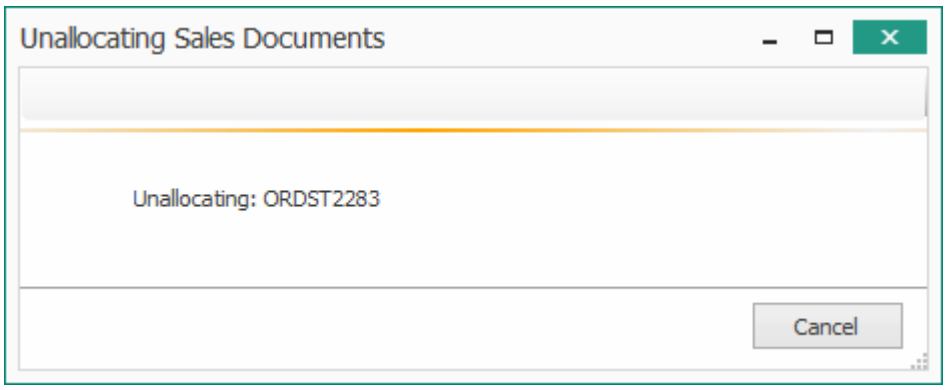
To remove allocation from documents associated with one or more lines select the desired line or lines to allocate from the Search Results (CTRL+Click or CTRL+Shift+Click to select multiple lines).

Note: if **Selected Lines Only** is not checked, there is no need to select lines as all lines displayed in the Search Results grid will be unallocated.

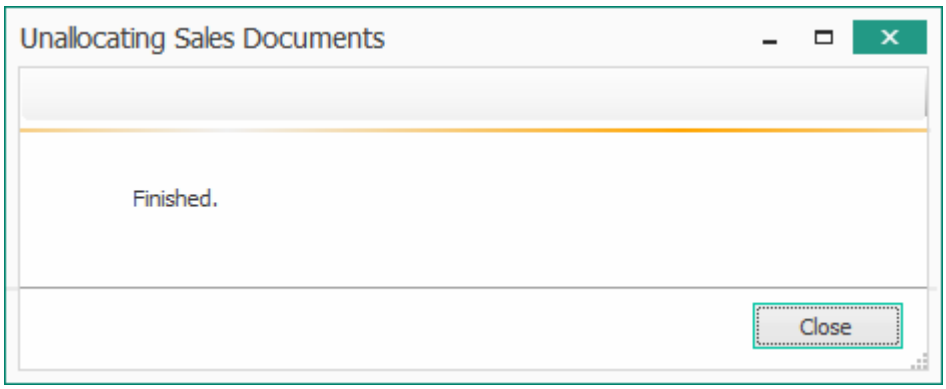
Click the **Unallocate** button on the screen header, and click Yes on the confirmation window.



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



The window will indicate when updating is complete:



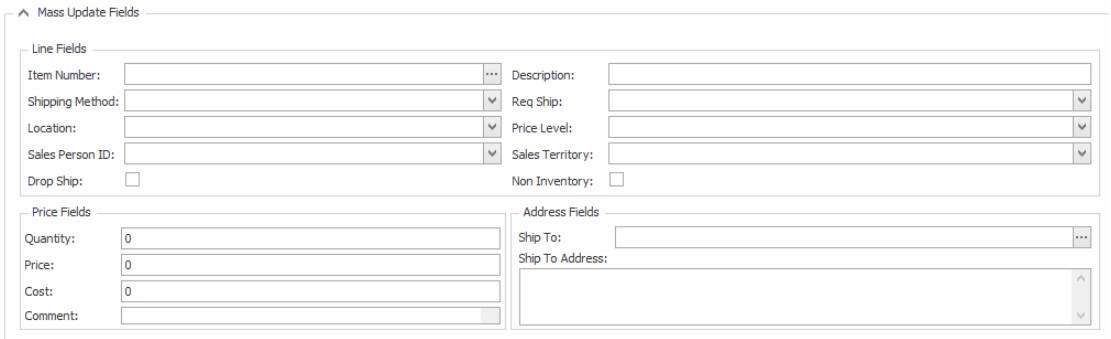
Click **Close**. A summary window will appear. If any document could not be un-allocated, an explanatory message will be included. From here either print the confirmation (click **Print**) or close the window (click **OK**).

Update Lines (Line Item Properties)

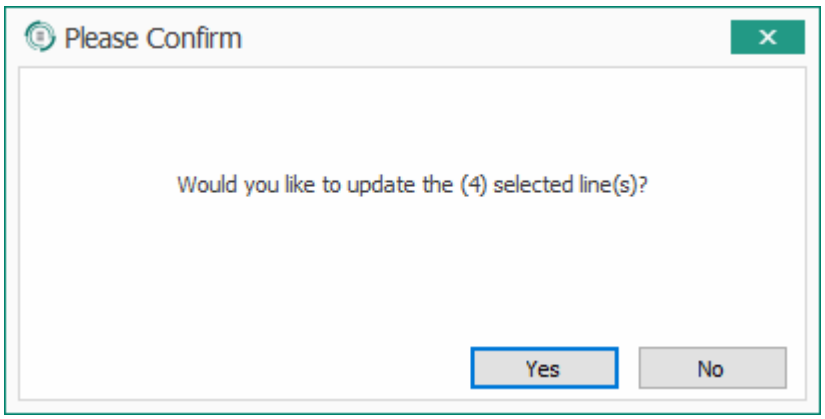
To edit one or more line item properties, (change item number, shipping method, drop ship status, quantity, etc), select the desired line or lines from the Search Results (CTRL+Click or CTRL+Shift+Click to select multiple lines).

Note: if **Selected Lines Only** is not checked, there is no need to select lines as all lines displayed in the Search Results grid will be updated regardless

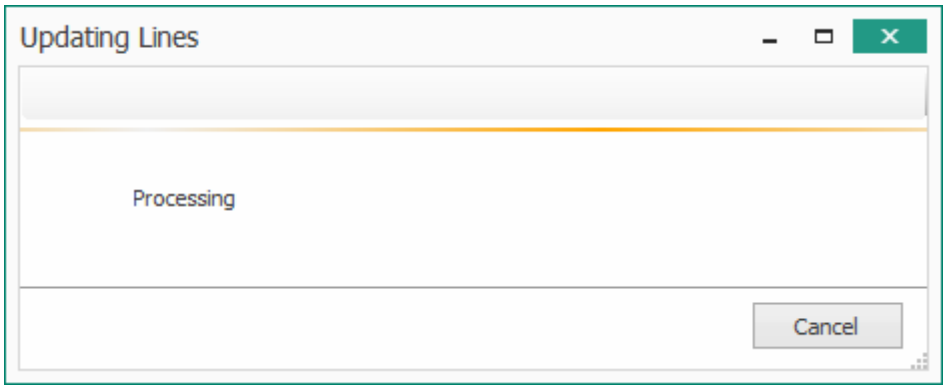
Enter the mass changes into the desired property fields under Mass Update Fields:



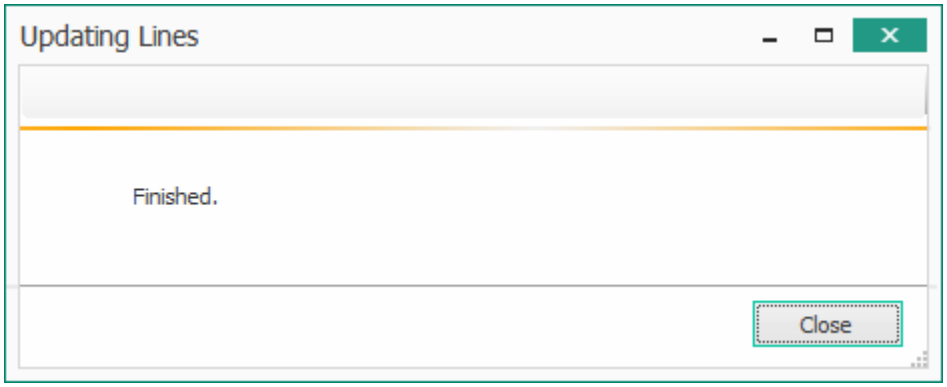
Click the **Update Lines** button on the screen header, and click **Yes** in the confirmation window.



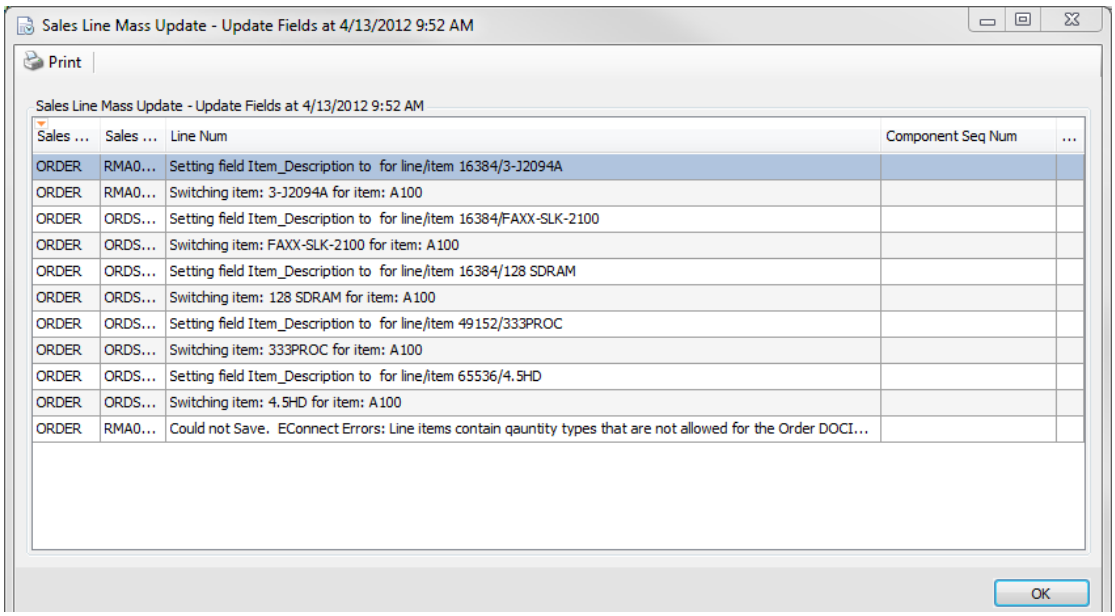
The Updating Line(s) window will appear until all of the selected lines have been updated. This may take some time:



The window will indicate when updating is complete:



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



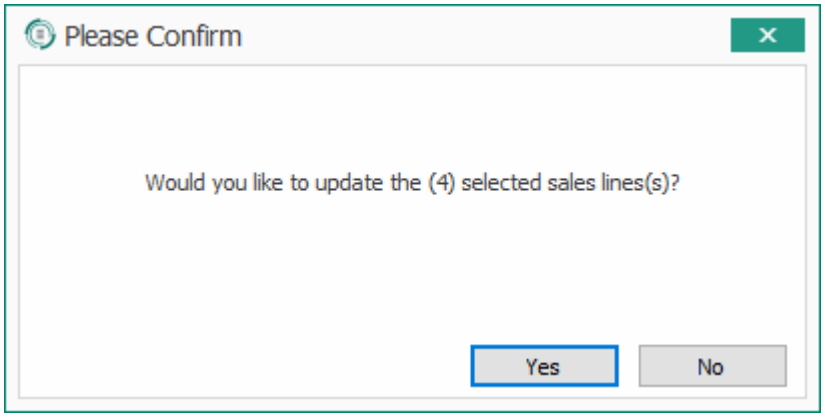
From here either print the confirmation (click **Print**) or close the window (click **OK**)

Update Price

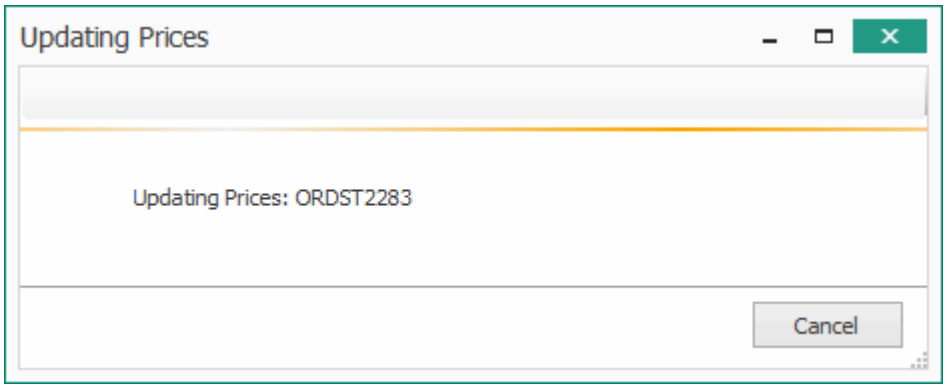
To update the price on one or more lines according to the list price set up in Dynamics GP, select the desired line or lines to update from the Search Results (CTRL+Click or CTRL+Shift+Click to select multiple lines).

Note: if **Selected Lines Only** is not checked, there is no need to select lines as all lines displayed in the Search Results grid will be updated regardless

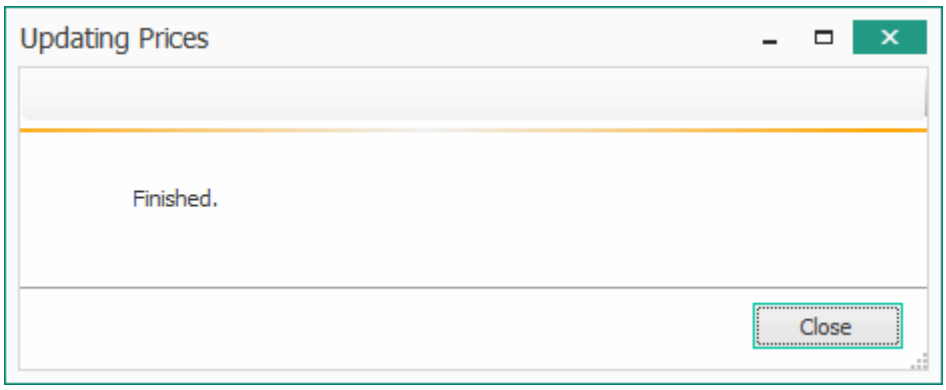
Click the **Update Price** button on the screen header, and click **Yes** in the confirmation window.



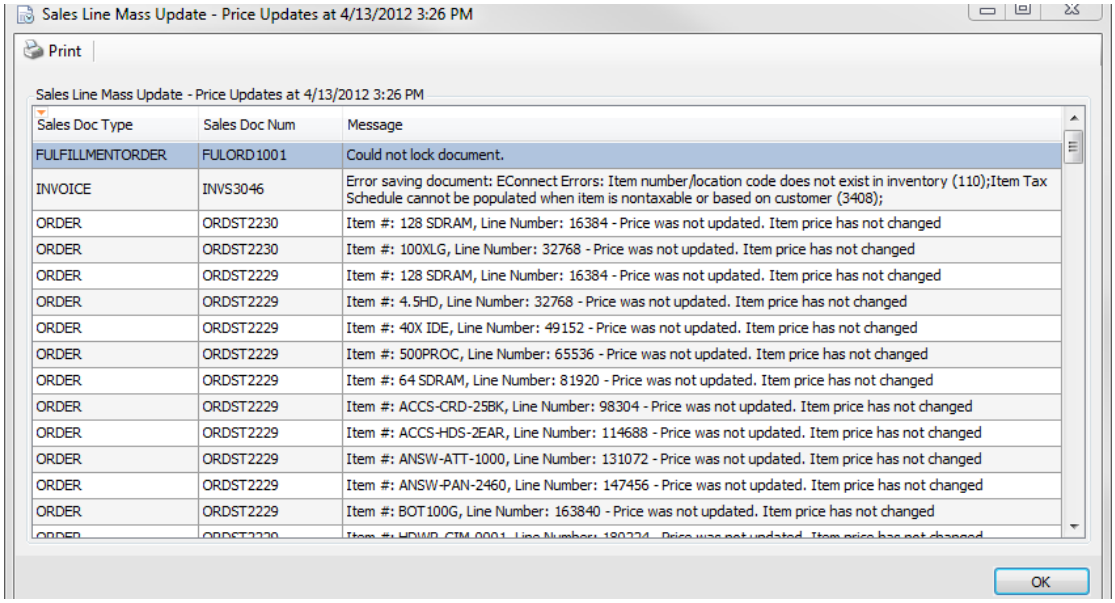
The Updating Prices window will appear until all of the selected lines have been updated. This may take some time:



The window will indicate when updating is complete:



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



Sales Doc Type	Sales Doc Num	Message
FULFILLMENTORDER	FULORD1001	Could not lock document.
INVOICE	INVS3046	Error saving document: EConnect Errors: Item number/location code does not exist in inventory (110);Item Tax Schedule cannot be populated when item is nontaxable or based on customer (3408);
ORDER	ORDST2230	Item #: 128 SDRAM, Line Number: 16384 - Price was not updated. Item price has not changed
ORDER	ORDST2230	Item #: 100XLG, Line Number: 32768 - Price was not updated. Item price has not changed
ORDER	ORDST2229	Item #: 128 SDRAM, Line Number: 16384 - Price was not updated. Item price has not changed
ORDER	ORDST2229	Item #: 4.5HD, Line Number: 32768 - Price was not updated. Item price has not changed
ORDER	ORDST2229	Item #: 40X IDE, Line Number: 49152 - Price was not updated. Item price has not changed
ORDER	ORDST2229	Item #: 500PROC, Line Number: 65536 - Price was not updated. Item price has not changed
ORDER	ORDST2229	Item #: 64 SDRAM, Line Number: 81920 - Price was not updated. Item price has not changed
ORDER	ORDST2229	Item #: ACCS-CRD-25BK, Line Number: 98304 - Price was not updated. Item price has not changed
ORDER	ORDST2229	Item #: ACCS-HDS-2EAR, Line Number: 114688 - Price was not updated. Item price has not changed
ORDER	ORDST2229	Item #: ANSW-ATT-1000, Line Number: 131072 - Price was not updated. Item price has not changed
ORDER	ORDST2229	Item #: ANSW-PAN-2460, Line Number: 147456 - Price was not updated. Item price has not changed
ORDER	ORDST2229	Item #: BOT100G, Line Number: 163840 - Price was not updated. Item price has not changed

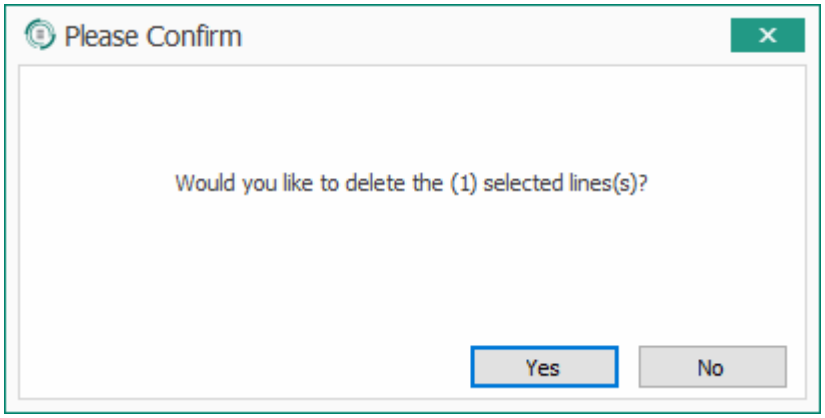
From here either print the confirmation (click **Print**) or close the window (click **OK**)

Delete Lines

To delete one or more lines from their sales documents, select the desired line or lines to delete from the Search Results (CTRL+Click or CTRL+Shift+Click to select multiple lines).

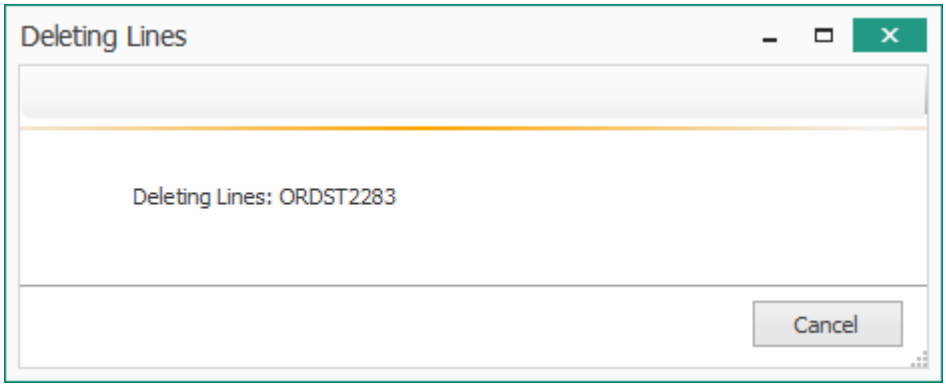
Note: if **Selected Lines Only** is not checked, there is no need to select lines as all lines displayed in the Search Results grid will be updated regardless

Click the **Delete Lines** button on the screen header and click **Yes** to update the lines.

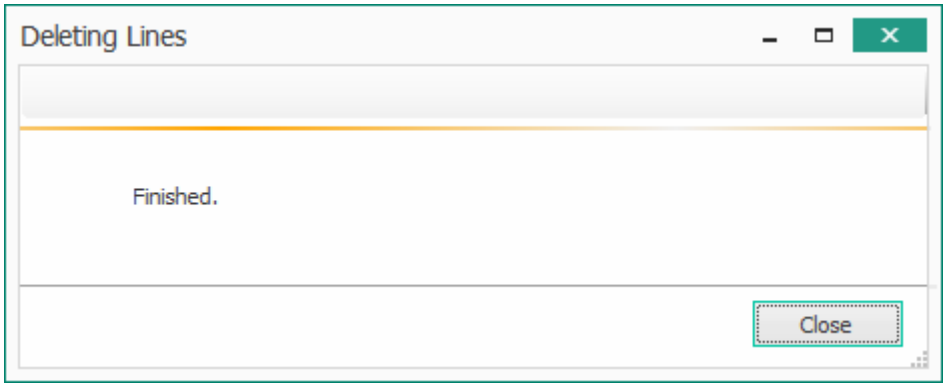


The Deleting Line(s) window will appear until all of the selected lines have been updated. This may take some

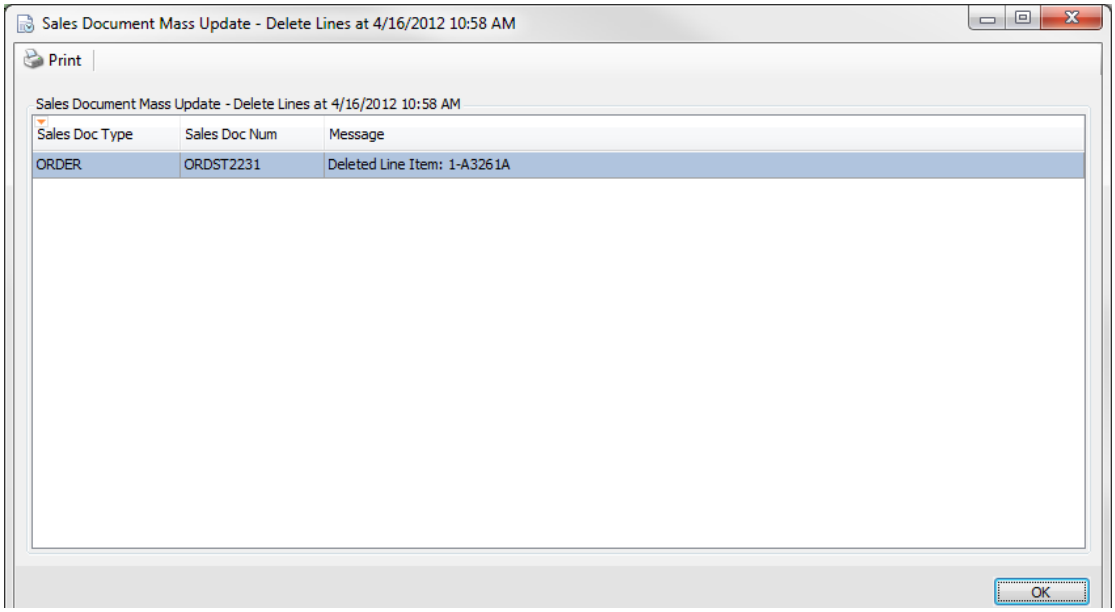
time:



The window will indicate when updating is complete:



Click **Close**. A summary window will appear. If any line could not be deleted, an explanatory message will be included



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

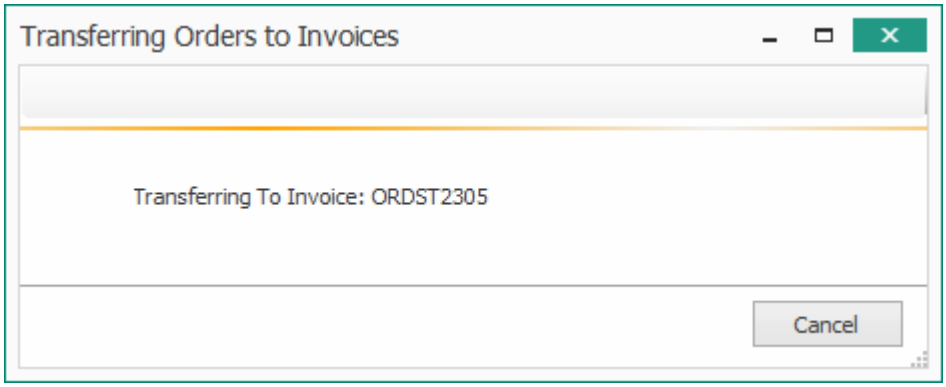
Transfer to Invoice

To transfer one or more lines into an invoice, select the desired line or lines to transfer from the Search Results (CTRL+Click or CTRL+Shift+Click to select multiple lines).

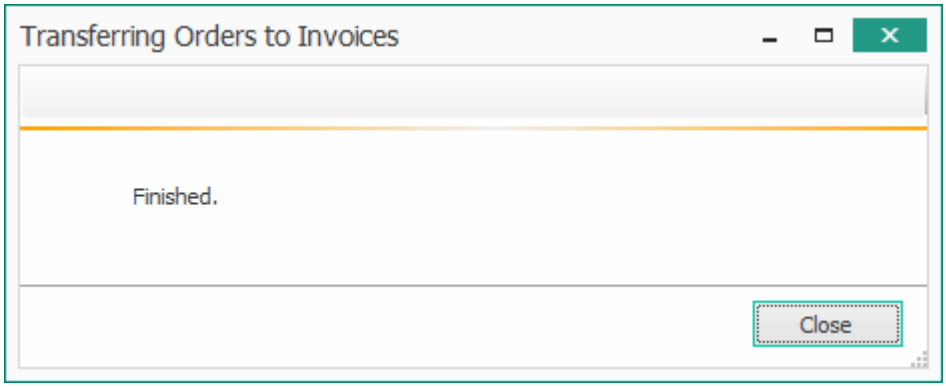
Note: if **Selected Lines Only** is not checked, there is no need to select lines as all lines displayed in the Search Results grid will be updated regardless

Click the **Transfer to Invoice** button on the screen header.

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



The window will indicate when transferring is complete:



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

Security

Sales Line Mass Update - Grants access to the Sales Line Mass Update module.

Can Allocate – Allows a user to allocate line items.

Can Forward – Allows a user to forward documents to the next workflow queue.

Can Unallocate – Allows a user to remove allocations from previously allocated lines.

Can Update Prices – Allows a user to update line prices.

Price Source Exclusion List – To exclude any price sources from mass price updates, enter those price sources in this field, separated by semicolons. Sales lines with sources matching the entries in this list will be excluded during the mass price update.

Print Allowed – Allows a user to print the documents associated with displayed/selected lines

Sales Batches Allowed – To only allow lines/documents in certain sales batches to display in search results, enter the allowed batches in this field, separated by semicolons. Leave blank to allow all batches.

Sales Document Types Allowed – To only allow lines on certain document types to display in search results, enter the allowed document types in this field, separated by semicolons. Leave blank to allow all document types.

Transfer To Invoice Allowed – Non-functional in the initial 4.1 release.

Use Order Number As Invoice Number – Set to True to use the order number as the invoice number when transferring orders to invoice.

Warehouses Allowed – The semicolon delimited list of warehouses that will be returned in the search results.