



[Knowledgebase](#) > [SalesPad](#) > [Sales](#) > [Sales Line Mass Update](#)

# Sales Line Mass Update

Megan De Freitas - 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.

Search By

Sales Doc #:		Item Number:		<input type="checkbox"/> Forward After Print
Customer:		City:		<input checked="" type="checkbox"/> Selected Lines Only
Sales Doc ID:		Req Ship Date:		
Sales Batch:	ACCEPTED QUOTE, CONFIRMATION, CREDIT CHECK+, C	End Date:		
Begin Date:		Customer PO:		

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

Sales Line Mass Update

Close Search Print Transfer to Invoice Forward Allocate Allocate and Forward Unallocate Update Lines Update Price Delete Lines

Search By

Sales Doc #:		Item Number:		<input type="checkbox"/> Forward After Print
Customer:		City:		<input checked="" type="checkbox"/> Selected Lines Only
Sales Doc ID:		Req Ship Date:		
Sales Batch:	ACCEPTED QUOTE, CONFIRMATION, CREDIT CHECK+, C	End Date:		
Begin Date:		Customer PO:		

Mass Update Fields

Line Fields

Item Number:		Description:	
Shipping Method:		Req Ship:	
Location:		Price Level:	
Sales Person ID:		Sales Territory:	
Drop Ship:	<input type="checkbox"/>	Non Inventory:	<input type="checkbox"/>

Price Fields

Address Fields

Search Results

Sales Batch	Sales Doc Num	Sales Doc T...	Doc Date	Item Number	Actual Ship ...	Quantity	Unit Price	Extended P...	Shipping Email	Billing Email	% of Inventory
CONFIRMA...	ORDST2284	ORDER	4/6/2018	HD-20	4/6/2018	5	0.00	0.00			0%
CONFIRMA...	ORDST2284	ORDER	4/6/2018	HD-20	4/6/2018	10	12.50	125.00			0%
CONFIRMA...	ORDST2284	ORDER	4/6/2018	HD-20	4/6/2018	100	0.00	0.00			1%
CONFIRMA...	ORDST2292	ORDER	4/19/2018	HD-40	4/19/2018	4	0.00	0.00			21%

20321.00000 365409.85...

**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.

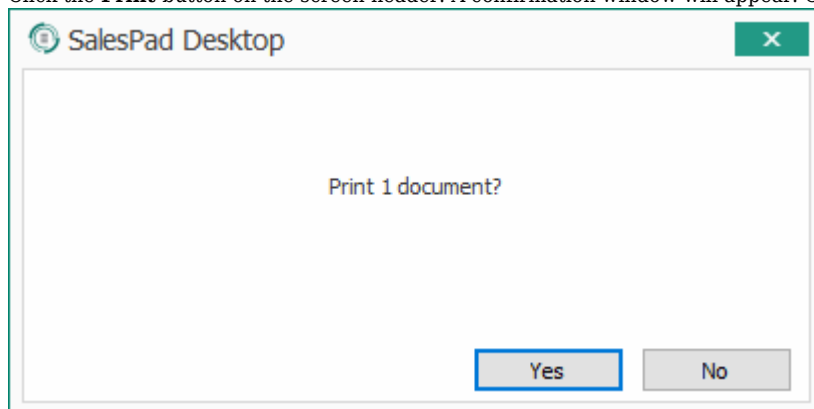
## Print

**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).

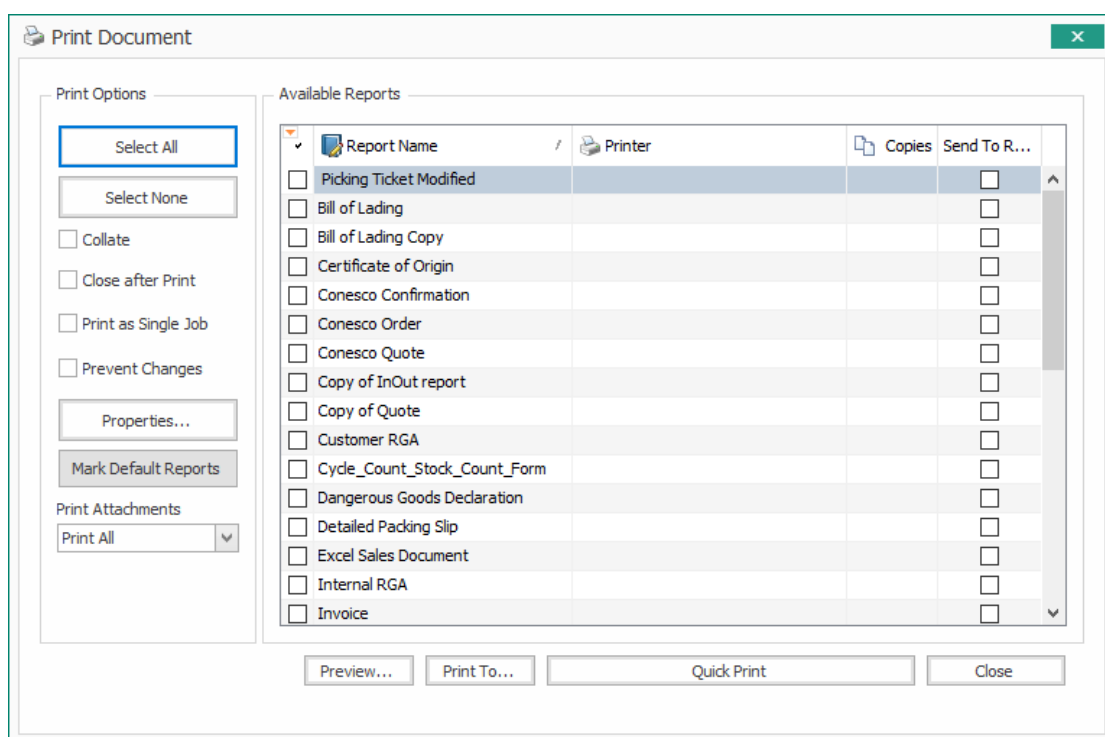
**Note:** If **Selected Lines Only** is not checked, there is no need to select lines as all lines displayed in the Search Results grid will be printed regardless

**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**)

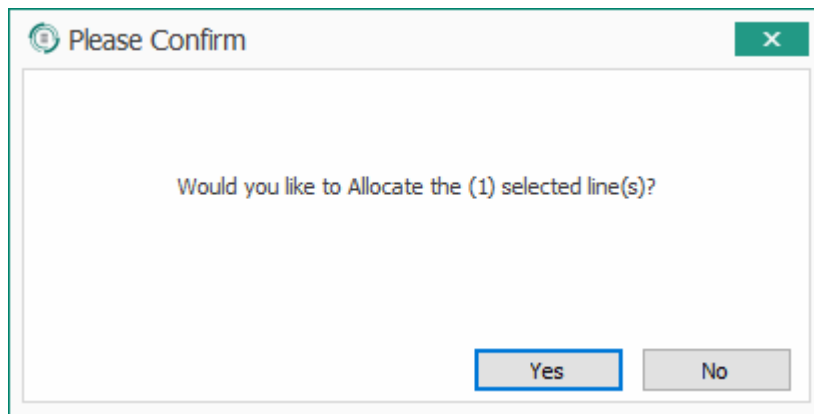
**Note:** If **Forward After Print** is selected on the Sales Line Mass Update screen, the document(s) will move to the next queue after printing.

#### Allocate

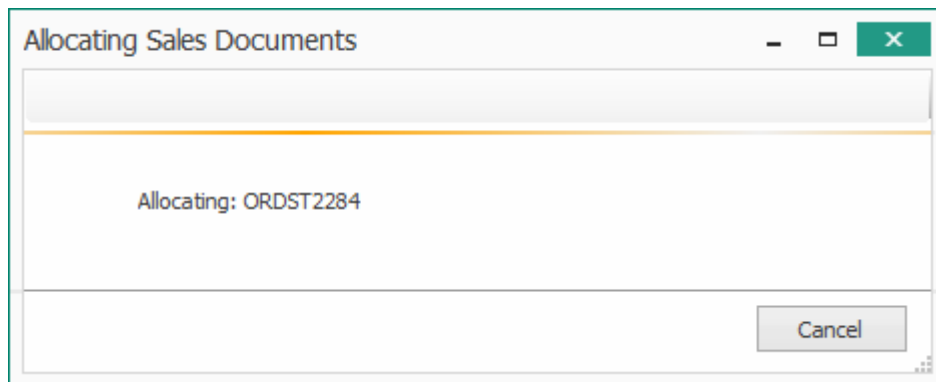
To allocate all items on the document(s) associated with one or more lines, select the desired line or lines to allocate from the Search Results (CTRL+Click or CTRL+Shift+Click to select multiple lines).

**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.

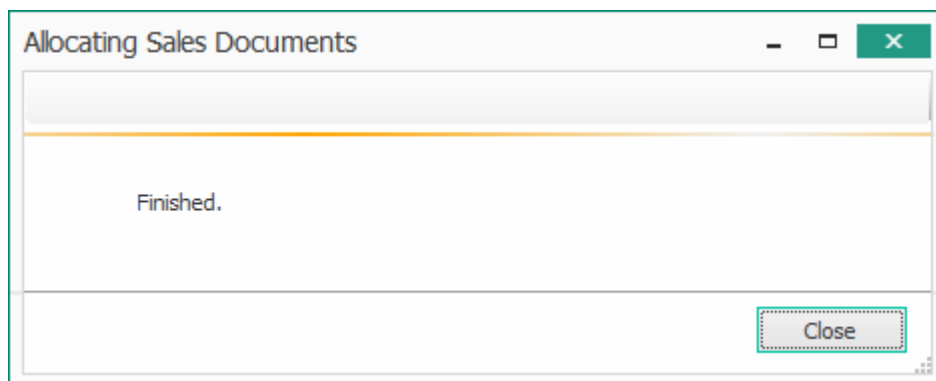
Click the **Allocate** button on the screen header, and click Yes on the confirmation window.



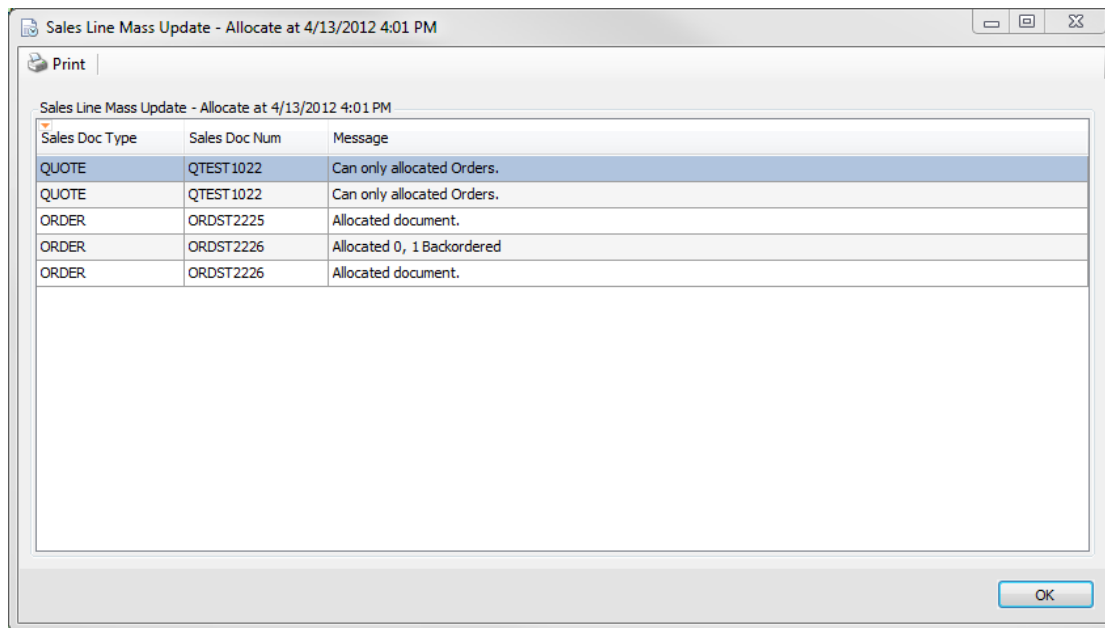
The Allocating Sales Documents window will appear until all of the selected lines have been updated. This may take some time:



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**)

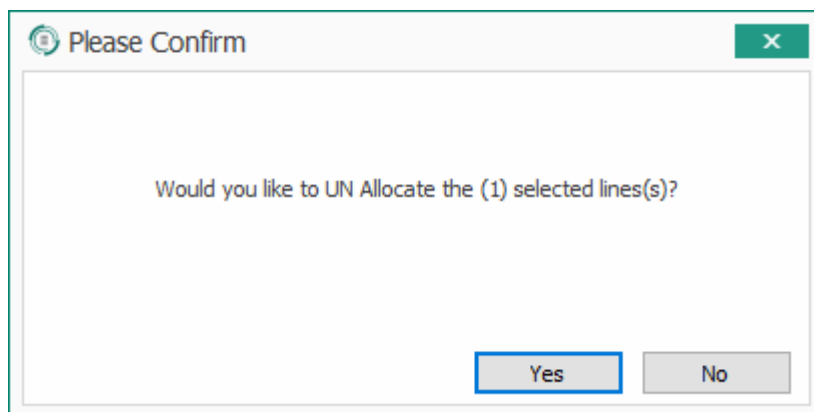
**Note:** [Blocked items](#) and backordered items cannot be allocated. Blocked items are indicated by either a red B or a red X, while backordered items are indicated by a red exclamation point.

#### Unallocate

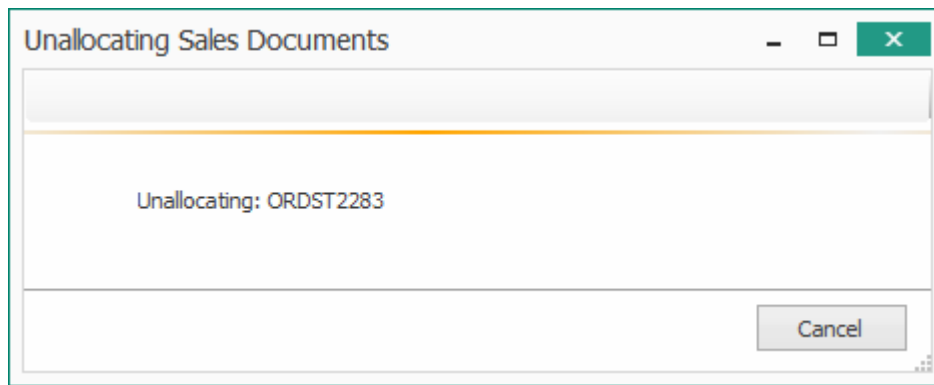
To remove allocation from documents associated with one or more lines select the desired line or lines to allocate from the Search Results (CTRL+Click or CTRL+Shift+Click to select multiple lines).

**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.

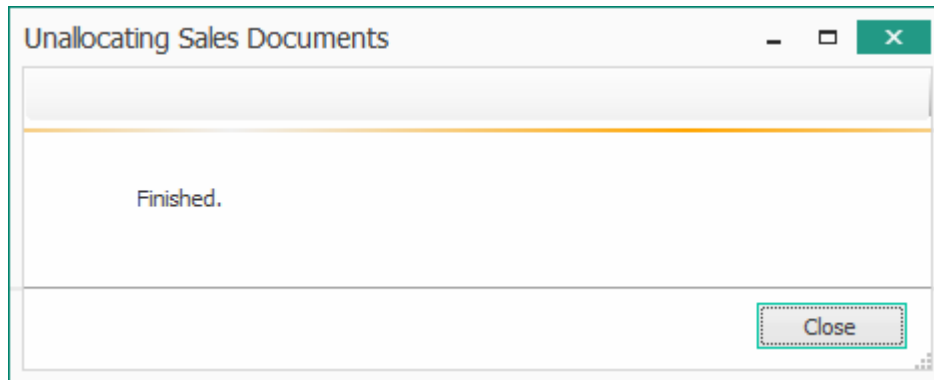
Click the **Unallocate** button on the screen header, and click Yes on the confirmation window.



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).

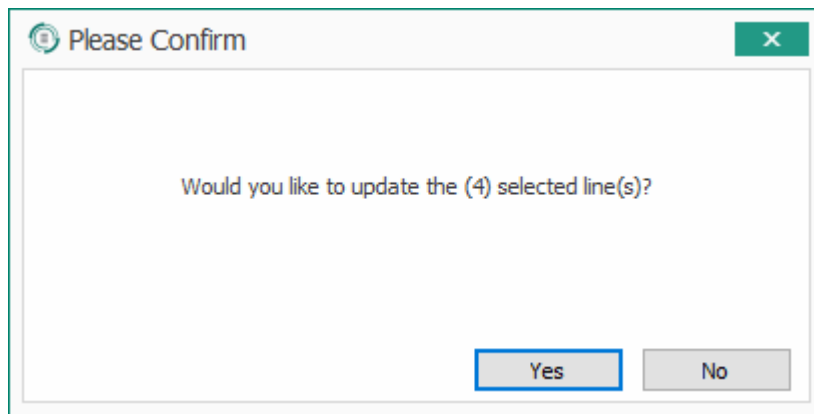
**Note:** if **Selected Lines Only** is not checked, there is no need to select lines as all lines displayed in the Search Results grid will be updated regardless

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

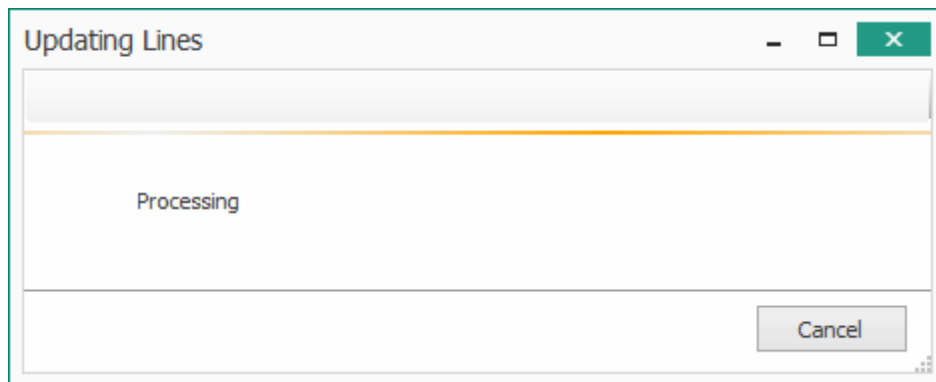
 A screenshot of a "Mass Update Fields" dialog box. It is organized into several sections:
 

- Line Fields:** Includes input fields for "Item Number", "Description", "Shipping Method", "Req Ship", "Location", "Price Level", "Sales Person ID", and "Sales Territory". There are also checkboxes for "Drop Ship" and "Non Inventory".
- Price Fields:** Includes input fields for "Quantity", "Price", "Cost", and a "Comment" field with a text area.
- Address Fields:** Includes input fields for "Ship To" and "Ship To Address".

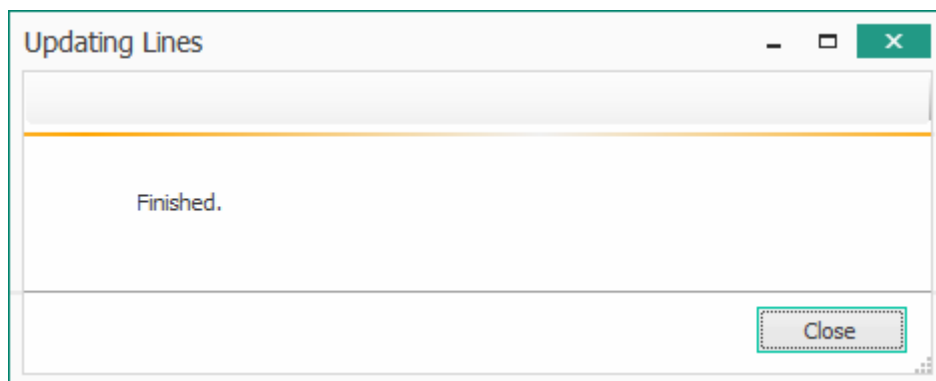
Click the **Update Lines** button on the screen header, and click **Yes** in the confirmation window.



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

Sales Line Mass Update - Update Fields at 4/13/2012 9:52 AM

Print

Sales Line Mass Update - Update Fields at 4/13/2012 9:52 AM

Sales ...	Sales ...	Line Num	Component Seq Num	...
ORDER	RMA0...	Setting field Item_Description to for line/item 16384/3-J2094A		
ORDER	RMA0...	Switching item: 3-J2094A for item: A100		
ORDER	ORDS...	Setting field Item_Description to for line/item 16384/FAXX-SLK-2100		
ORDER	ORDS...	Switching item: FAXX-SLK-2100 for item: A100		
ORDER	ORDS...	Setting field Item_Description to for line/item 16384/128 SDRAM		
ORDER	ORDS...	Switching item: 128 SDRAM for item: A100		
ORDER	ORDS...	Setting field Item_Description to for line/item 49152/333PROC		
ORDER	ORDS...	Switching item: 333PROC for item: A100		
ORDER	ORDS...	Setting field Item_Description to for line/item 65536/4.5HD		
ORDER	ORDS...	Switching item: 4.5HD for item: A100		
ORDER	RMA0...	Could not Save. EConnect Errors: Line items contain qauntity types that are not allowed for the Order DOCI...		

OK

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.

Please Confirm

Would you like to update the (4) selected sales lines(s)?

Yes No

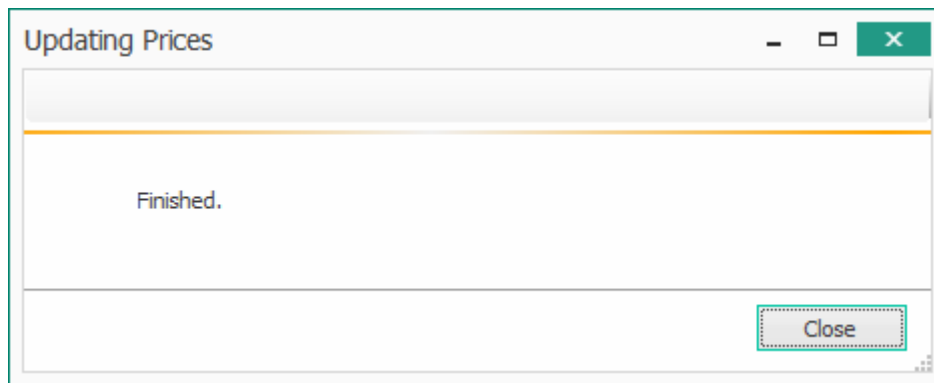
The Updating Prices window will appear until all of the selected lines have been updated. This may take some time:

Updating Prices

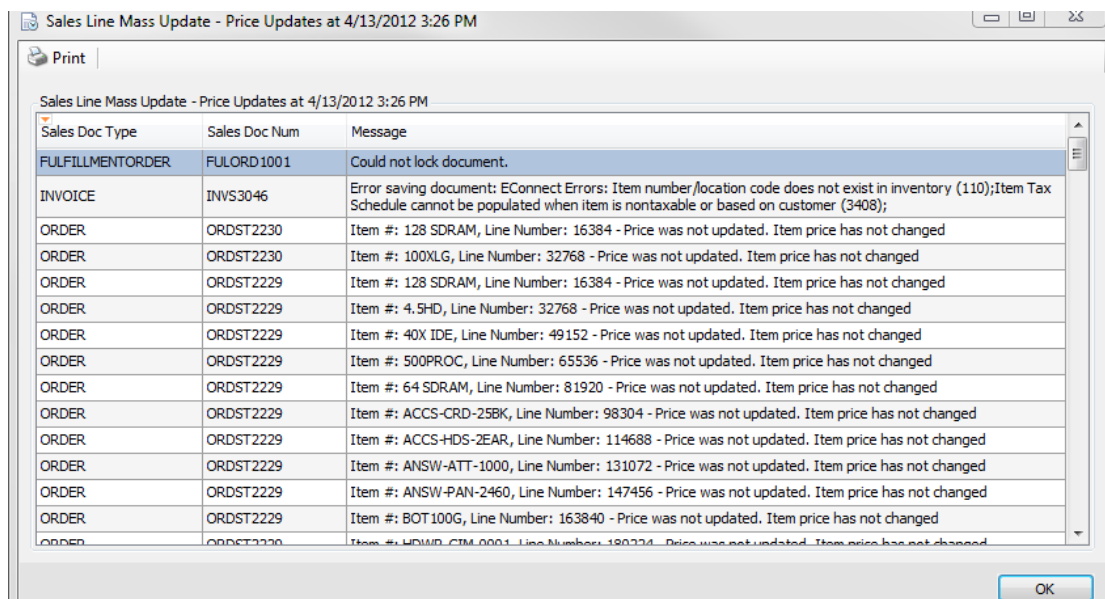
Updating Prices: ORDST2283

Cancel

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



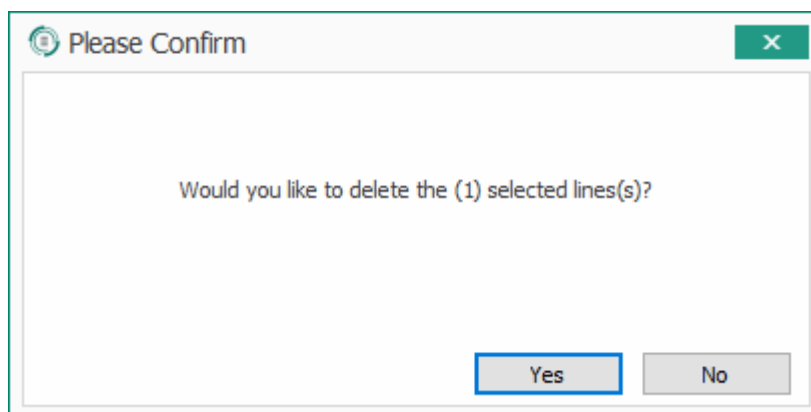
From here either print the confirmation (click **Print**) or close the window (click **OK**)

#### 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

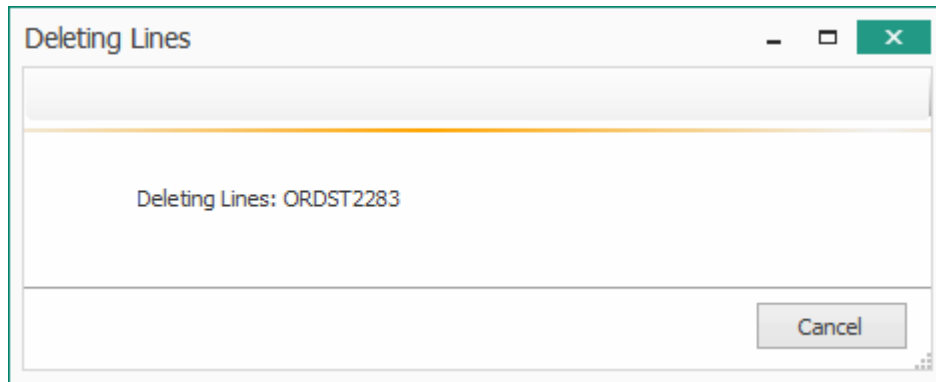
Click the **Delete Lines** button on the screen header and click **Yes** to update the lines.



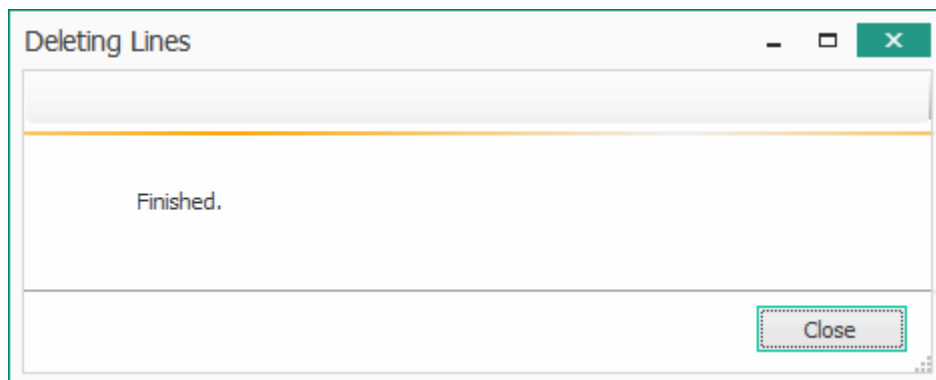
The Deleting Line(s) window will appear until all of the selected lines have been updated. This may take some



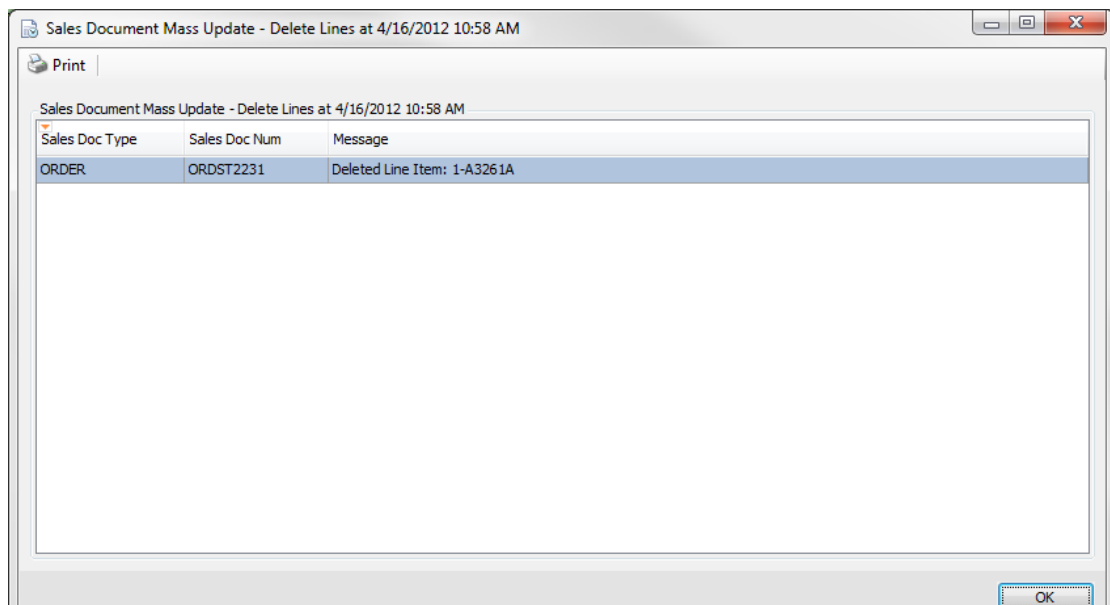
time:



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**).

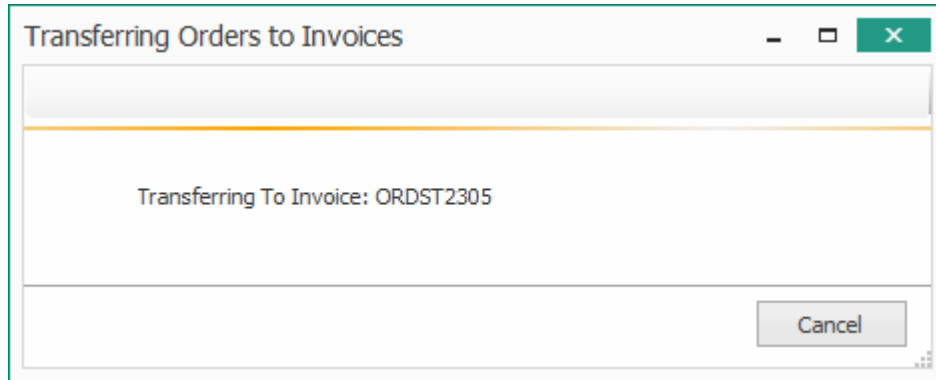
#### Transfer to Invoice

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).

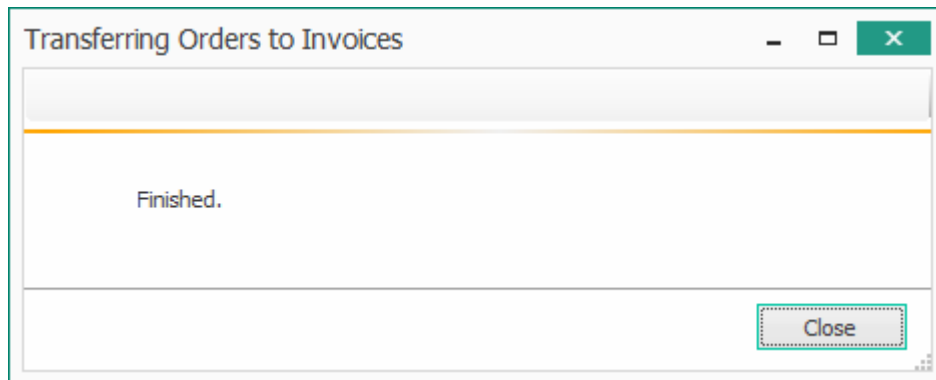
**Note:** if **Selected Lines Only** is not checked, there is no need to select lines as all lines displayed in the Search Results grid will be updated regardless

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 transferred, 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.