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Sales Line Mass Update

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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

- Search By

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.

Sales Doc #:		Item Number:		Forward After Print
Customer:		City:		 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 Ma	ss Update 🔀													
Close 🥸 S	earch 🛛 🍪 Print	谢 Transfer to	lnvoice 🗖	Forward	👆 Allocat	e 🛛 🛞 Allocate	and Forwa	rd 🛛 🛞 U	nallocate 🛛 🧐	Update Lines	😪 Update	Price 🙀 Delete	Line	
Search By														
Sales Doc #:					Item Numb	er:					Forward	After Print		
Customer:					City:						Selected Lines Only			
Sales Doc ID:					Reg Ship Da	ate:				~				
Sales Batch:	ACCEPTED QUOTE,	, CONFIRMATIO	N, CREDIT CH	ECK+, C ∨	End Date					~	1			
3egin Date				~	Customer P	20:					1			
-											_			
Mass Update	Fields													
Line Fields														
Item Number:	mber:					Description:							٦	
Shipping Math	adı .				~	M Bag Shint								
location:					M Drivel scole									
Location:						rice Level:								
Sales Person I	D:				× 5	sales Territory:							1	
Drop Ship:					N	Non Inventory:								
Price Fields						Address Fields								
earch Results														
Sales Batch	Sales Doc Num	Sales Doc T	Doc Date	Item Number	Actual S	hip Qua	ntity	Unit Price	Extended P	Shipping Email	Billing Email	% of Inventory	,	
RBC	REC	RBC	-	RBC	-	-	-		=	ABC	RBC	=	_	
CONFIRMA	ORDST2284	ORDER	4/6/2018	HD-20	4/6/201	8	5	0.00	0.00			0	0%	
CONFIRMA	ORDST2284	ORDER	4/6/2018	HD-20	4/6/201	8	10	12.50	125.00			0	0%	
CONFIRMA	ORDST2284	ORDER	4/6/2018	HD-20	4/6/201	8	100	0.00	0.00				1%	
CONFIRMA	<u>ORDST2292</u>	ORDER	4/19/2018	<u>HD-40</u>	4/19/20	18	4	0.00	0.00			2:	1%	

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.

Select All	~	🌄 Report Name	🚱 Printer	Copies	Send To R
		Picking Ticket Modified			
Select None		Bill of Lading			
Collate		Bill of Lading Copy			
		Certificate of Origin			
Close after Print		Conesco Confirmation			
Print as Single Job		Conesco Order			
Prevent Changes		Conesco Quote			
		Copy of InOut report			
Properties		Copy of Quote			
		Customer RGA			
Mark Default Reports		Cycle_Count_Stock_Count_Form			
Print Attachments		Dangerous Goods Declaration			
Print Attachments Print All		Detailed Packing Slip			
		Excel Sales Document			
		Internal RGA			
		Invoice			

For more help with printing, faxing, emailing, etc. please visit our <u>FAQ on emailing, faxing</u>, <u>and printing</u>.

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:

Allocating Sales Documents	- 🗆 🗙
Allocating: ORDST2284	
	Cancel

The window will indicate when updating is complete:

Allocating Sales Documents	- 🗆 🗙
Finished.	
	Close

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

Sales Line Mass (Jpdate - Allocate at 4	4/13/2012 4:01 PM		Σ
Print				
Sales Line Mass Lind	late - Allocate at 4/13/	2012 4:01 PM		
Sales Doc Type	Sales Doc Num	Message		
QUOTE	QTEST 1022	Can only allocated Orders.		
QUOTE	QTEST 1022	Can only allocated Orders.		
ORDER	ORDST2225	Allocated document.		_
ORDER	ORDST2226	Allocated 0, 1 Backordered		
ORDER	ORDST2226	Allocated document.		
			O	<

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

Note: <u>Blocked items</u> 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:

Unallocating Sales Documents	- 🗆 🗙
Unallocating: ORDST2283	
	Cancel

The window will indicate when updating is complete:

Unallocating Sales Documents	- 🗆 🗙
Finished.	
	Close

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:

 Mass Update F 	elds		
Line Fields			
Item Number:		· Description:	
Shipping Method		r Req Ship:	1
Location:	~	Price Level:	1
Sales Person ID:	×	Sales Territory:	1
Drop Ship:		Non Inventory:	
Price Fields		Address Fields	
Quantity:	0	Ship To: ····	
Price:	0	Ship To Address:	J
Cost:	0		
Comment:		J	

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:

Updating Lines		-		x
Processing				
			Cancel	

The window will indicate when updating is complete:

Updating Lines		-		x
Finished.				
			Close	

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

	. Huss opu	- Opuale Fields at 7/15/2012 5.52 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		

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:

Updating Prices	- 🗆 🗙
Updating Prices: ORDST2283	
	Cancel

The window will indicate when updating is complete:

Updating Prices		-		x
Finished.				
			Close	

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

Print			
Sales Line Mass Update	- Price Updates at 4/	13/2012 3:26 PM	
Sales Doc Type	Sales Doc Num	Message	
FULFILLMENTORDER	FULORD 1001	Could not lock document.	j
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	1
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	
RDER	ORDST2229	Item #: 500PROC, Line Number: 65536 - Price was not updated. Item price has not changed	
RDER	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	
מפתחת	000670000	Itom #1 HDIND, CIM 0001, Lipp Number, 190224, Drice was not undated. Itom price has not changed	1

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:

Deleting Lines	- 🗆 ×
Deleting Lines: ORDST2283	
	Cancel

The window will indicate when updating is complete:

Deleting Lines	_ 🗆 X
Finished.	
	Close .:i

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

Sales Document	Mass Update - Delet	e Lines at 4/16/2012 10:58 AM	
Print			
Sales Document Ma	ss Update - Delete Line	s at 4/16/2012 10:58 AM	
Sales Doc Type	Sales Doc Num	Message	
ORDER	ORDST2231	Deleted Line Item: 1-A3261A	

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:

Transferring Orders to Invoices	_		x
Transferring To Invoice: ORDST2305			
	Ca	ncel	

The window will indicate when transferring is complete:

Transferring Orders to Invoices	- 🗆 ×
Finished.	
	Close

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.