Open Order Batch Item Change

OVERVIEW

This program was added to the System Administrator Menu 2 as Tag-n-Trak Software Release 4.10.106. It allows you to change an item number on open orders and quotes, along with changing inventory related items for cases where the item is no longer available. For example, you may have open orders and quotes with a 60 watt bulb with a soft white finish that you are no longer able to purchase and want to replace those POS line items with a 60 watt bulb with a frost finish. Or as another example, you may want to replace a 100 watt bulb with a 75 watt bulb on all of your open orders and quotes because you can no longer buy the 100 watt bulb. This enhancement program can used to change those references of the old number to the new number.

In addition to changing the old item number to the new number on POS lines, this program optionally can change the Related Item number in the item master records of fixtures. For example, assume you have a generic bulb item 100A that points to a "real" item number when the generic item is sold and that the generic item 100A is set up as a related item for numerous lamps and fixtures in your inventory file. If you are no longer able to purchase the 100A and need to change the 100A to a 75A for every fixture that currently has 100A as a related item, this new enhancement program can be used to do this rather than manually editing each fixture that needs to be changed.

If you need assistance with identifying fixtures in your inventory file that have a particular related item number so that you can re-generate new Hang Tags after the related item number is changed during this batch process, please contact Mylee Customer Support BEFORE you run the new program to change the item.

NOTES:
- This program changes the item number (and optionally the item description) on open and hold Point of Sale orders and quotes. It does NOT change the sell price or the cost of the POS lines.

- When running this program, the user will be able to select whether to update just Quotes (Order Type Q) or Open Orders or both.

- When updating Open Orders, in addition to changing items on Order Type "L," this program will change line items on Order Types I, M, A and B should they be used by your lighting showroom for Line Item entry.

- The program automatically changes the UPC (fake) number of the POS Line Item to the UPC (fake) number of the new item number.

- If the line item on an open/hold order has been partially shipped, the item will not be updated but instead skipped.

- If the line item is currently backordered and is attached to a purchase order, it also will be skipped from being updated. (The program will change a customer backorder on a POS order that is not yet picked up on a PO.)

- This program does NOT change the item number in the item master file (though it can optionally change the "related item number" field in the item master records of lamps and fixtures).

- This program does not deal with quantity reserved. After using this program to change item numbers, it is recommended that you run the "Adjust Quantity Reserved" program to recalculate the reserved quantity in the item masters for the old and new item numbers.

Open Order Batch Item Change

To access the new enhancement program, select System Administrator from the Main Menu, then System Administrator Menu 2, then"**Open Order Batch Item Change."** This program can be run during the day with users on the system. See the dialog screen below.

```
            BATCH PROCESS TO CHANGE ITEM ON ORDERS AND RELATED ITEMS


ENTER OLD ITEM NUMBER              ___ _____
ENTER NEW ITEM NUMBER             ___ _____
UPDATE OPEN QUOTES                _ (Y OR N)
UPDATE OPEN ORDERS                _ (Y OR N)
UPDATE ORDER DESCRIPTIONS         _ (Y OR N)
UPDATE INVENTORY RELATED ITEMS    _ (Y OR N)


READY                             _ (Y OR N)

ITEMS CHANGED ON QUOTES
ITEMS CHANGED ON ORDERS
ITEMS SKIPPED ON ORDERS
RELATED ITEMS CHANGED
```

ENTER OLD ITEM NUMBER ___ _____
Enter the vendor code and item number of the item you want to change on Point of Sale orders and quotes. The item must be a valid item number in the inventory file.

ENTER NEW ITEM NUMBER ___ _____
Enter the vendor code and item number of the new item that is to replace the old item on Point of Sale orders and quotes. The item must be a valid item number in the inventory file.

UPDATE OPEN QUOTES **_ (Y OR N)**
Respond Y to change the old item to the new item on Quotes (Order Type Q).
Respond N if you do not wish to update Quotes.

UPDATE OPEN ORDERS **_ (Y OR N)**
Respond Y to change the old item to the new item on orders in an Open or Hold status. *(Note: In addition to changing items on Order Type "L," this program will change line items on Order Types I, M, A and B should they be used by your lighting showroom for Line Item entry.)*
Respond N if you do not wish to update Open and Hold orders.

UPDATE ORDER DESCRIPTIONS **_ (Y OR N)**
Respond Y to replace/update the POS Line Item Description field with the Description from the Item Master of the new item number.
Respond N if you do not wish to replace/update the POS line description.

UPDATE INVENTORY RELATED ITEMS **_ (Y OR N)**
Respond Y to change the old item to the new item in the Related item field of your inventory file.
Respond N if you do not wish to update related items.

READY **_ (Y OR N)**
Respond Y if you are ready to begin.
Respond N if you want to exit the program.

Open Order Batch Item Change

If a Y response is given to the "Ready" prompt, the program will display the following screen as warning reminders.

```
This program is about to change open orders in your store for the old item
number entered.  This includes orders in your store that are being shipped
out of another store.  If multiple stores share a common inventory then
you need to run the item change for each store.  If you change the item
for open orders you need to run the "ADJUST QUANTITY RESERVED" program
when this program completes.  Remember, this program does not adjust the
selling price or cost of the line item of the order.  Items that have been
partially or fully shipped will be skipped along with any backorders that
are already on a PO.

Do you still want to continue?  _ (C - continue N - no)
```

Respond C to continue or N to exit the program.

Once started, the program will display the "counts" on the bottom of the screen to indicate how many records are being updated.

```
ITEMS CHANGED ON QUOTES            XXXXXX
ITEMS CHANGED ON ORDERS            XXXXXX
ITEMS SKIPPED ON ORDERS            XXXXXX
RELATED ITEMS CHANGED              XXXXXX
```

When the program has finished running, the number of records changed will remain on the screen for your reference until you press any key.

If the line item of an open order has been partially shipped, the item will not be updated but instead skipped. Also if the item is currently backordered and is attached to a purchase order, it also will be skipped from being updated.

At the bottom of the screen, you'll be prompted to:

```
Don't forget to Run Adjust Qty Reserved.  Press any key.
```

Pressing any key will return to the System Administrator Menu 2.

IMPORTANT:
As noted previously, after you are finished changing item numbers, run the "**Adjust Quantity Reserved**" program (which is also on System Administrator Menu 2) so that the quantity reserved is recalculated for the old and new item numbers.

Open Order Batch Item Change

SAMPLE #1: Item S1714 is changed to S1812.

```
            BATCH PROCESS TO CHANGE ITEM ON ORDERS AND RELATED ITEMS


ENTER OLD ITEM NUMBER            SAT S1714
ENTER NEW ITEM NUMBER            SAT S1812
UPDATE OPEN QUOTES               Y (Y OR N)
UPDATE OPEN ORDERS               Y (Y OR N)
UPDATE ORDER DESCRIPTIONS        Y (Y OR N)
UPDATE INVENTORY RELATED ITEMS   Y (Y OR N)


READY                            Y (Y OR N)

ITEMS CHANGED ON QUOTES            210
ITEMS CHANGED ON ORDERS            240
ITEMS SKIPPED ON ORDERS             10
RELATED ITEMS CHANGED              165




Don't forget to Run Adjust Qty Reserved.  Press any key.
```

SAMPLE #2: Generic Item 100A is changed to 75A for all fixtures, lamps, etc. in the inventory file that has 100A as the related item number.

```
            BATCH PROCESS TO CHANGE ITEM ON ORDERS AND RELATED ITEMS


ENTER OLD ITEM NUMBER            ZGN 100A
ENTER NEW ITEM NUMBER            ZGN 75A
UPDATE OPEN QUOTES               N (Y OR N)
UPDATE OPEN ORDERS               N (Y OR N)
UPDATE ORDER DESCRIPTIONS        N (Y OR N)
UPDATE INVENTORY RELATED ITEMS   Y (Y OR N)

READY                            Y (Y OR N)

ITEMS CHANGED ON QUOTES
ITEMS CHANGED ON ORDERS
ITEMS SKIPPED ON ORDERS
RELATED ITEMS CHANGED             48




Press any key.
```