Batch Action

Last Modified on 01/06/2023 12:03 pm EST

The Batch Action feature will help you stream line your documents status in Order Time. You can change the status of several documents at the same time and get things done faster and more efficiently.
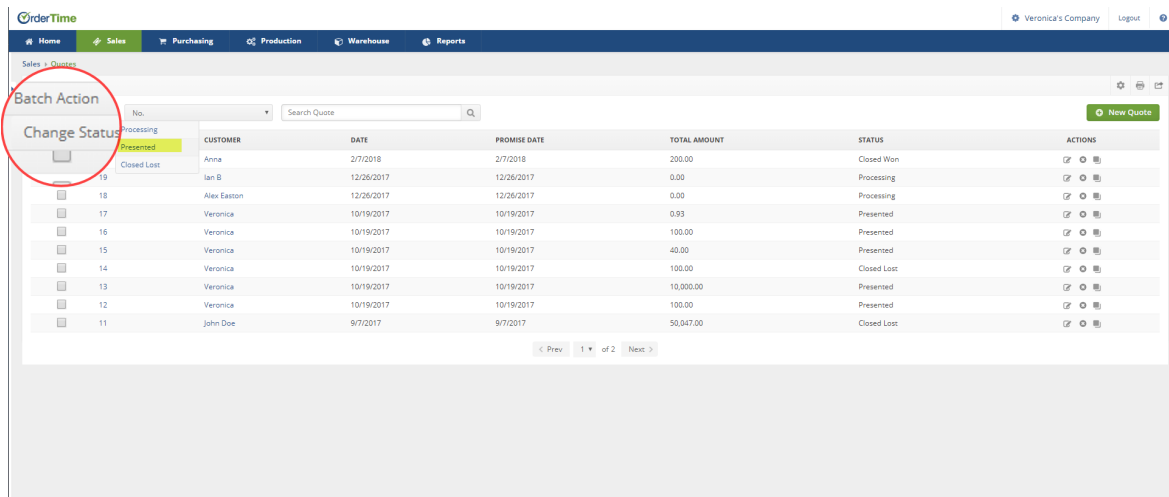
The feature is available on several transaction list. You will first need to check the box for the document that you would like to update the status of and then select the Batch Action option.

> Email sending is disabled by default during the 30 day trial period. Contact us at support@ordertime.com and we can verify your identity to enable this feature in your trial sandbox.

Changing Statuses

Quotes

In the Quotes, use the batch action to update the status of Quotes that you have already been "Presented" to your customer and you are waiting for them to respond to.

Sales Orders

Use the batch action on the Sales Order list to up date the status to "Approved" once your Sales Rep has created the sales order. This will then help up know which orders are ready to be shipped.

Ship Docs

Use the batch action on the Ship Doc list to mark your orders as "Shipped" to ensure that they get synced over into QuickBooks and create the Invoices for your customers.

Purchase Orders

In the Purchase Order, use the batch action to approve all of your processing POs. You can also change the status to "Sent" to help you keep track of when the Purchase Order was send over to your Vendor/Supplier.

Receiving Docs

On the Receiving List you can update the status to "In transit" once the Vendor has informed you that the Purchase Order is on the way and then you can update the status to "Received" when it has arrived.

Work Orders

Use the batch action in the Work Order list go through the production process and update the status from "Ready" to "In Production" and then "Finished".

Create PDF

Go to a document list, such as the Sales Order List.

Select the Sales Orders which you'd like to create into a batch PDF by checking the box next to each one.

Click on the Batch Action Drop-down and select Create PDF.

After Clicking that you'll be shown a fly-out list of all the templates you can choose from. In my example I chose to do the Pick List Template.

The PDF will be downloaded immediately after processing. Sometimes a combined raw file will be downloaded that just says batchForm. Change the file extension to [whatever name you choose].pdf and open it in acrobat or your favorite PDF viewer.

Send Emails

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Go to a document list, such as the Ship Doc List.

Select the Ship Docs whose Contacts you'd like to Email by checking the box next to each one.

Click on the Batch Action Drop-down and select Send Email.

After Clicking that you'll be shown a pop up with 2 drop-down lists.

You can choose an Email Template, Form Template or Both. I chose to send all of these Customers an Invoice with the information from the Ship Doc. I chose my Invoice Email Template and then all you have to do is click Send. The batch action processes and you can watch to see whether any of the emails fail. The Primary Contact/Customer's email address is utilized in this process. If it hasn't been entered your email will not send.

Print Labels

This requires the Label Printing add on available by subscription. Please send an email to support@ordertime.com for help subscribing

Go to a document list, such as the Items List.

Select the Items you would like to print a label for by checking the box next to each one.

Click on the Batch Action Drop-down and select Print Label.

Now click the Label Template that you would like to use.