

Batch Action

Last Modified on 03/14/2025 5:39 pm EDT

The Batch Action feature will help you streamline 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.

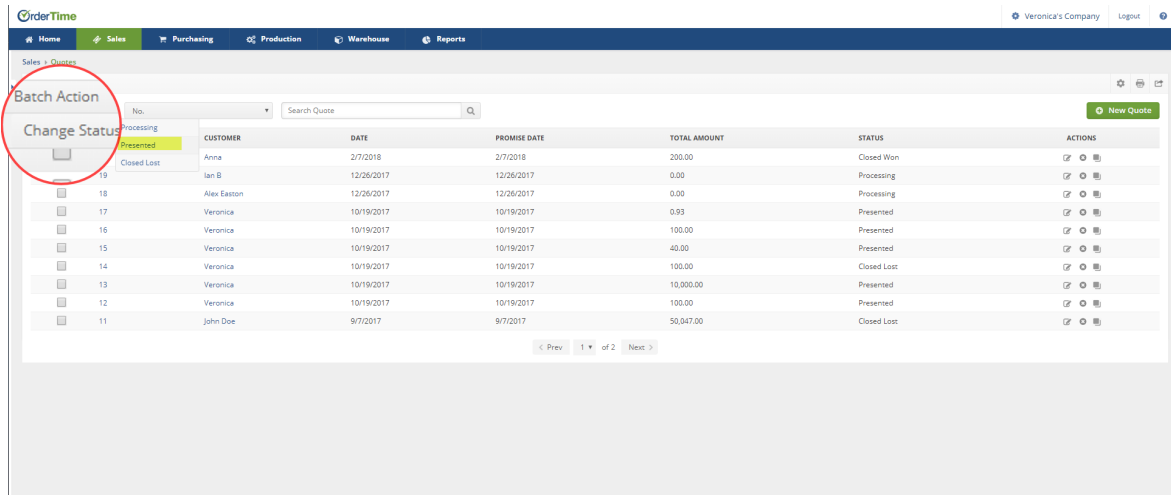
The feature is available on several transaction list. You will first need to check the box for the document that you would like to update the status of and then select the Batch Action option.

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

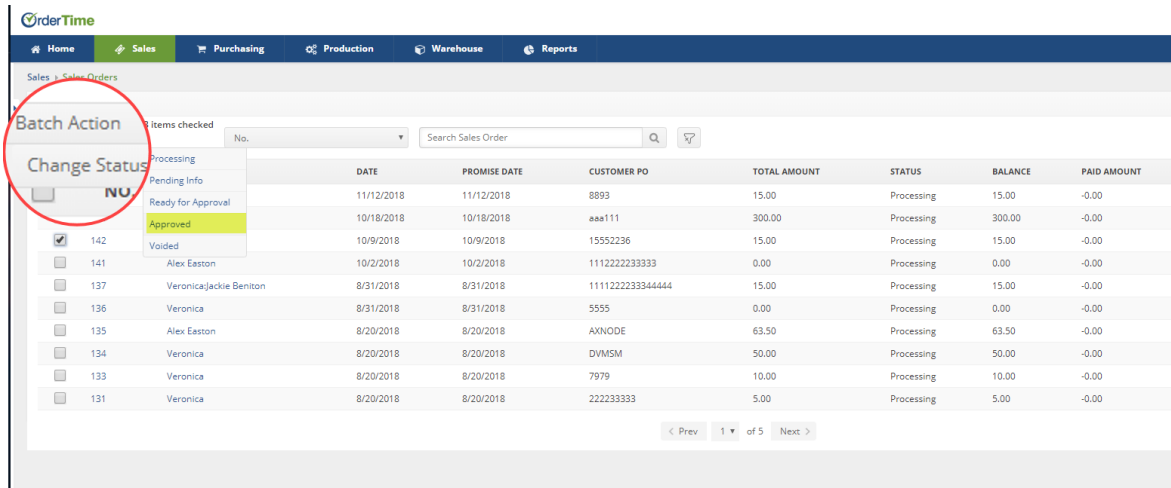
Quotes

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.

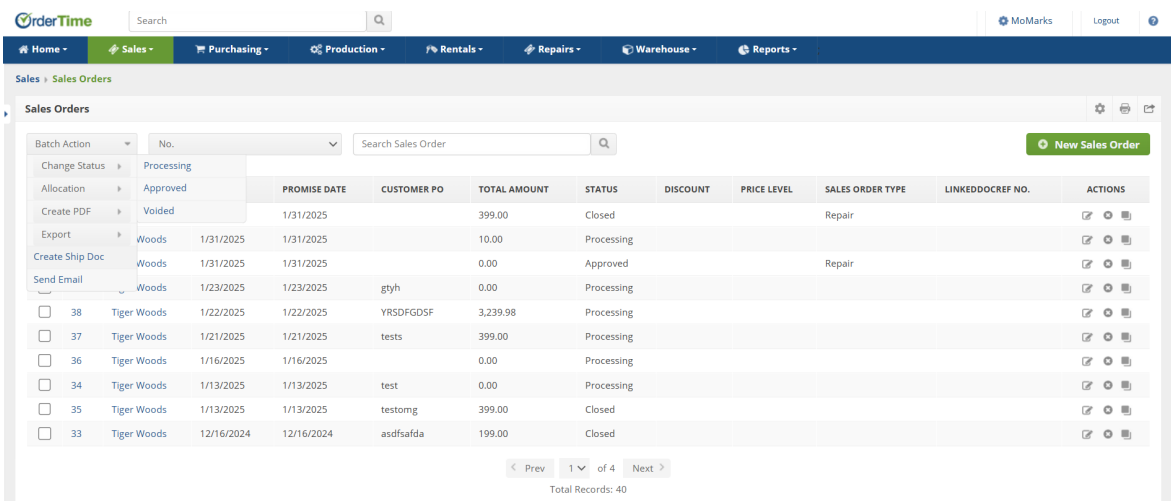


Sales Orders

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

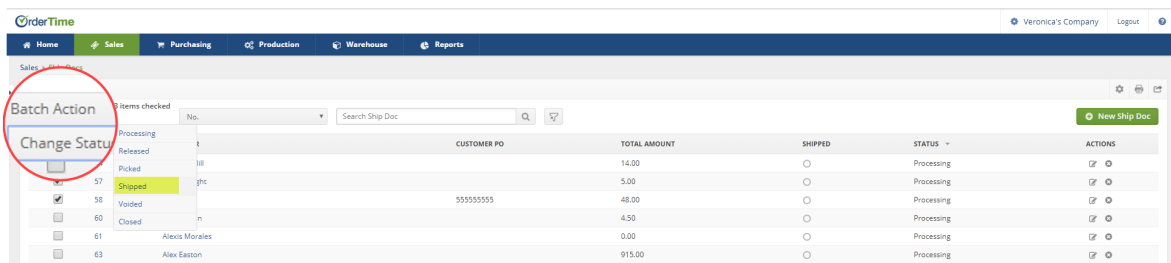


You can also now batch action create ship docs directly from the Sales Order List view. Select batch action - create ship doc.



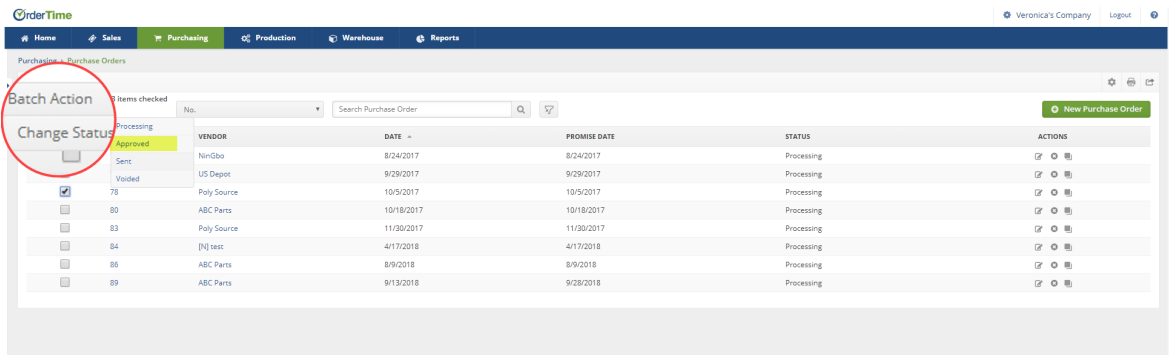
Ship Docs

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.



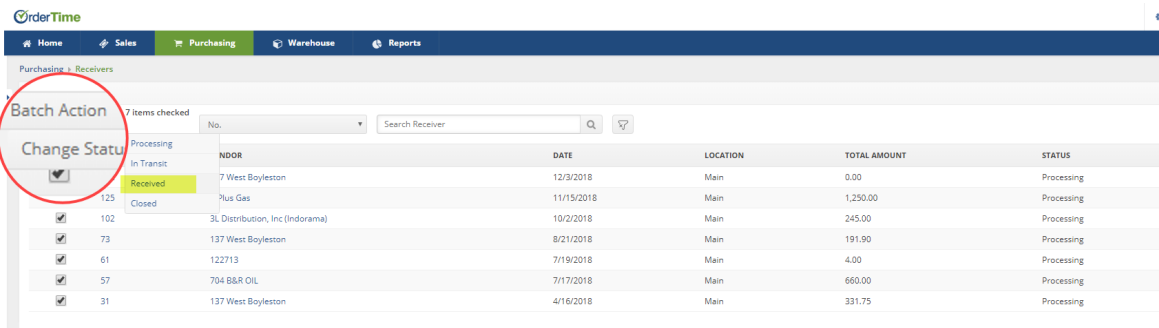
Purchase Orders

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.



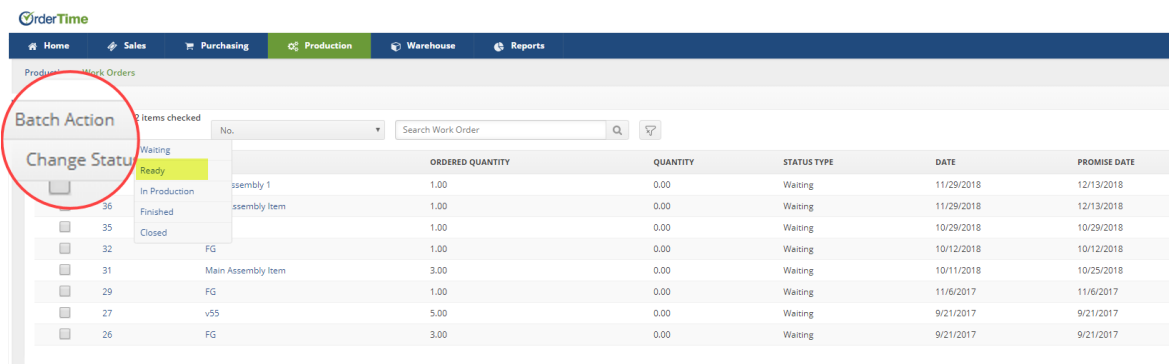
Receiving Docs

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.

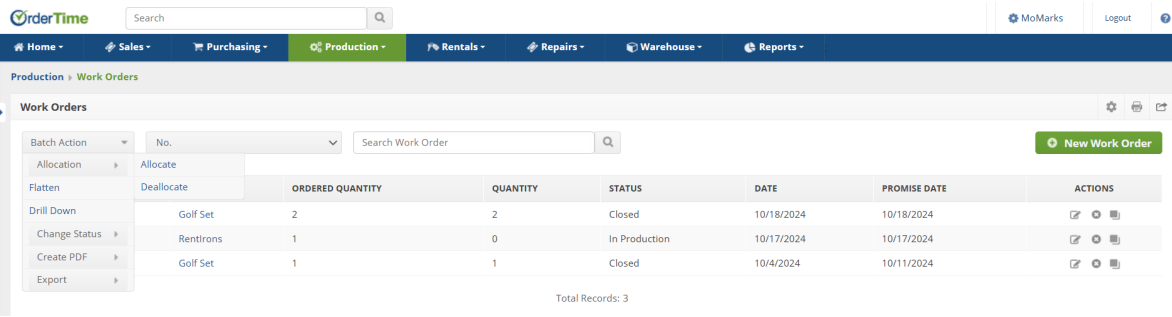


Work Orders

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".



You can now also use the batch action function in the Work Order list view to allocate and deallocate. Go to Batch Action -> Allocation - Select Allocate or Deallocate

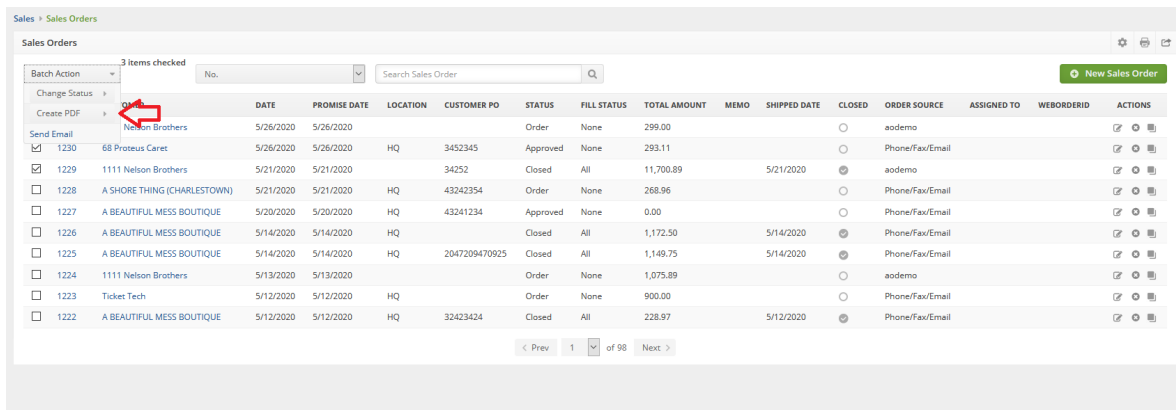


Create PDF

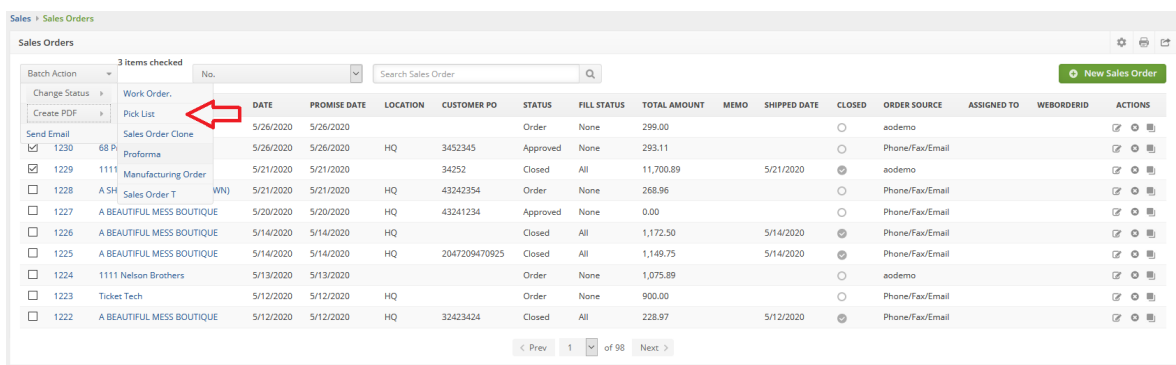
Go to a document list, such as the Sales Order List.

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.

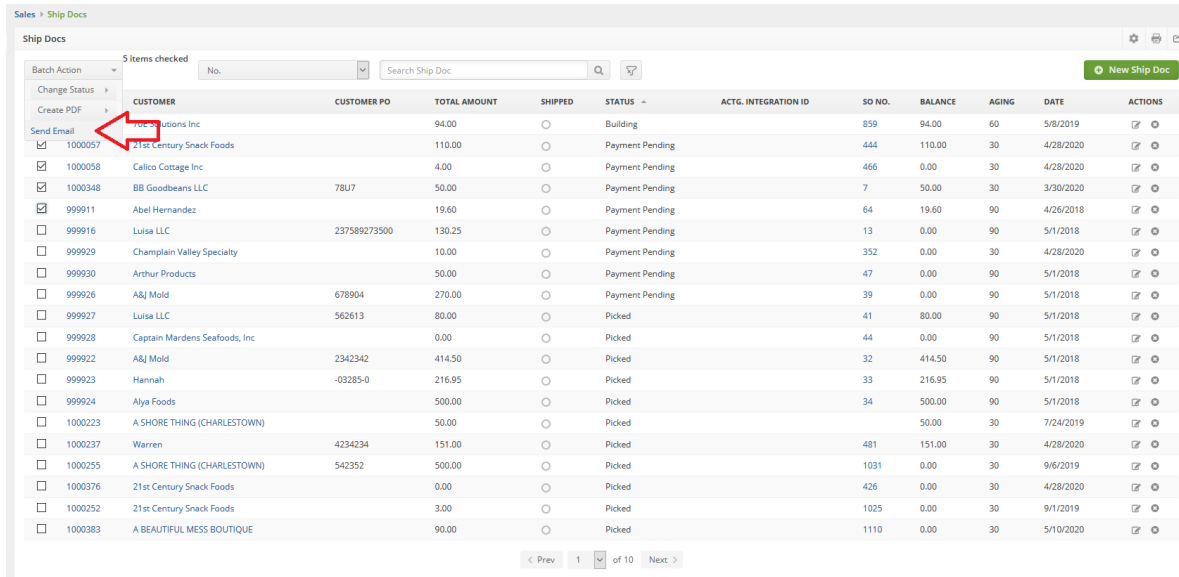
Send Emails

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.

Go to a customer 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.

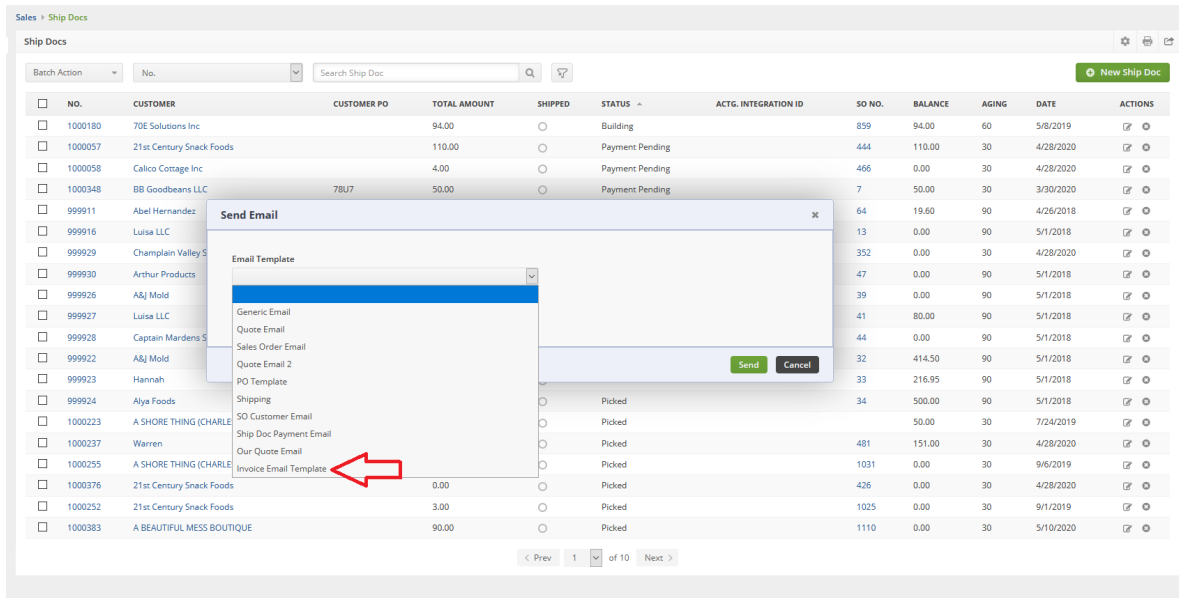
Click on the Batch Action Drop-down and select Send Email.



The screenshot shows a table of Ship Docs with columns: NO., CUSTOMER, CUSTOMER PO, TOTAL AMOUNT, SHIPPED, STATUS, ACTG. INTEGRATION ID, SO NO., BALANCE, AGING, DATE, and ACTIONS. A red arrow points to the 'Send Email' option in the 'Batch Action' dropdown menu. The table contains 20 rows of data.

NO.	CUSTOMER	CUSTOMER PO	TOTAL AMOUNT	SHIPPED	STATUS	ACTG. INTEGRATION ID	SO NO.	BALANCE	AGING	DATE	ACTIONS
1000180	70E Solutions Inc		94.00		Building		859	94.00	60	5/8/2019	
1000057	21st Century Snack Foods		110.00		Payment Pending		444	110.00	30	4/28/2020	
1000058	Calico Cottage Inc		4.00		Payment Pending		466	0.00	30	4/28/2020	
1000348	BB Goodbeans LLC	78U7	50.00		Payment Pending		7	50.00	30	3/30/2020	
999911	Abel Hernandez		19.60		Payment Pending		64	19.60	90	4/26/2018	
999916	Luisa LLC	237589273500	130.25		Payment Pending		13	0.00	90	5/1/2018	
999929	Champlain Valley Specialty		10.00		Payment Pending		352	0.00	30	4/28/2020	
999930	Arthur Products		50.00		Payment Pending		47	0.00	90	5/1/2018	
999926	A&J Mold	678904	270.00		Payment Pending		39	0.00	90	5/1/2018	
999927	Luisa LLC	562613	80.00		Picked		41	80.00	90	5/1/2018	
999928	Captain Mardens Seafoods, Inc		0.00		Picked		44	0.00	90	5/1/2018	
999922	A&J Mold	2342342	414.50		Picked		32	414.50	90	5/1/2018	
999923	Hannah	-03285-0	216.95		Picked		33	216.95	90	5/1/2018	
999924	Alya Foods		500.00		Picked		34	500.00	90	5/1/2018	
1000223	A SHORE THING (CHARLESTOWN)		50.00		Picked			50.00	30	7/24/2019	
1000237	Warren	4234234	151.00		Picked		481	151.00	30	4/28/2020	
1000255	A SHORE THING (CHARLESTOWN)	542352	500.00		Picked		1031	0.00	30	9/6/2019	
1000376	21st Century Snack Foods		0.00		Picked		426	0.00	30	4/28/2020	
1000252	21st Century Snack Foods		3.00		Picked		1025	0.00	30	9/1/2019	
1000383	A BEAUTIFUL MESS BOUTIQUE		90.00		Picked		1110	0.00	30	5/10/2020	

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



The screenshot shows the same Ship Docs table as above, but with a 'Send Email' dialog box open. The dialog box has a title bar 'Send Email' and a close button 'x'. It contains a dropdown menu for 'Email Template' with the following options: Generic Email, Quote Email, Sales Order Email, Quote Email 2, PO Template, Shipping, SO Customer Email, Ship Doc Payment Email, Our Quote Email, and Invoice Email Template. A red arrow points to the 'Invoice Email Template' option. There are 'Send' and 'Cancel' buttons at the bottom of the dialog box.

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.

Home > Items

Items

3 items checked

Batch Action: Print Label (selected), Item Label (highlighted)

Name / Number: [dropdown] Search Item: [input] Second View: [dropdown]

Add to open doc

	NAME / NUMBER	TYPE	GROUP	DESCRIPTION	UOM	STD. COST	PRICE	TRACK LOTS OR SERIAL NUMBERS	PRICE LEVEL	PRODUCT FAMILY	ACTIVE	ACTIONS
<input checked="" type="checkbox"/>	4 Bin No. 2 PC3201	Part	Parts Group	ATX BLACK	EA	20.00	20.00	<input type="radio"/>	Test Price Level 3		<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	5 PC3200	Part	Parts Group	ATX WHITE	EA	12.00	22.00	<input type="radio"/>	Test Price Level 3		<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	6 Bin No. 1 PC3001	Part	Parts Group	MINI ITX BLACK	EA	10.00	15.00	<input type="radio"/>			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	7 Default PC3000	Part	Parts Group	MINI ITX WHITE	EA	5.00	40.12	<input type="radio"/>			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	8 PC3100	Part	Parts Group	MICRO ATX WHITE	HR	8.00	18.00	<input type="radio"/>			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	9 PC3101	Part	Parts Group	MICRO ATX BLACK	EA	8.00	18.00	<input type="radio"/>			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	10 PC3300	Part	Parts Group	EATX WHITE	EA	45.00	22.00	<input type="radio"/>			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	11 PC3301	Part	Parts Group	EATX BLACK	EA	12.00	22.00	<input type="radio"/>			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	111 PC3500	Part	Parts Group		EA	0.00	0.00	<input type="radio"/>			<input type="checkbox"/>	<input type="checkbox"/>

Total Records: 9