

Batch Action

Last Modified on 04/22/2026 2:18 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.

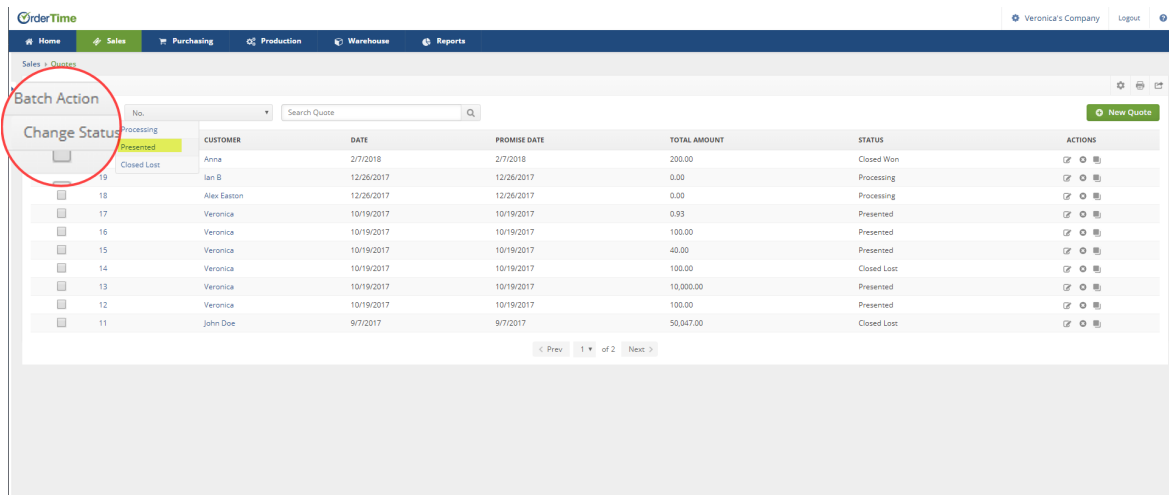
The feature is available on several transaction list. You will first need to check the box for the document that you would like to update the status of and then select the Batch Action option.

Email sending is disabled by default during the Order Time 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.

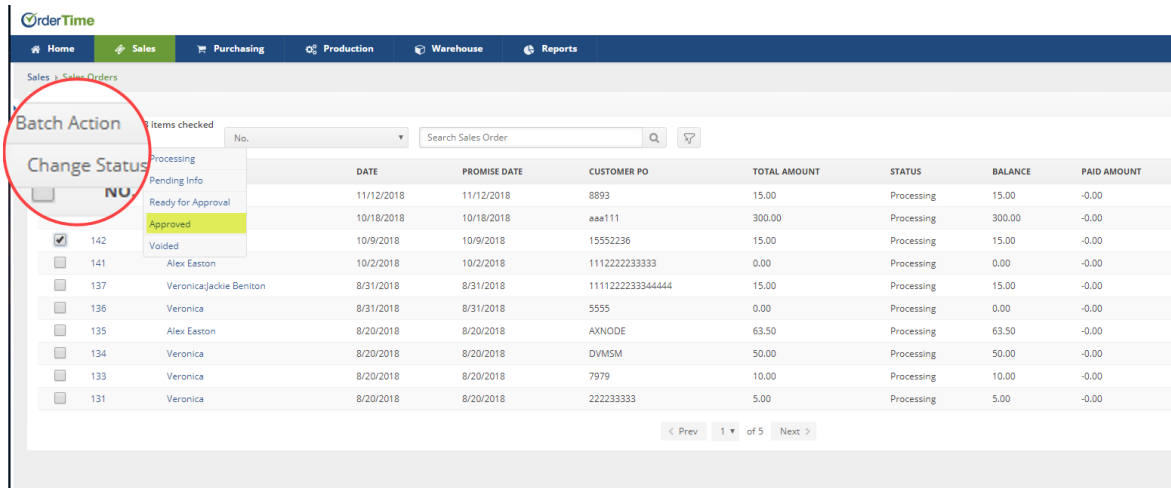


The screenshot shows the OrderTime web application interface. At the top, there is a navigation bar with tabs for Home, Sales, Purchasing, Production, Warehouse, and Reports. The user is logged in as 'Veronica's Company'. Below the navigation bar, there is a 'Sales & Quotes' section. A 'Batch Action' dropdown menu is open, showing options: 'Change Status', 'Processing', 'Presented', and 'Closed Lost'. The 'Change Status' option is circled in red. Below the menu is a table of quotes with columns: CUSTOMER, DATE, PROMISE DATE, TOTAL AMOUNT, STATUS, and ACTIONS. The table contains 11 rows of data. The 'ACTIONS' column for each row contains icons for 'Change Status', 'Processing', 'Presented', and 'Closed Lost'. A 'Now Quote' button is visible in the top right corner of the table area.

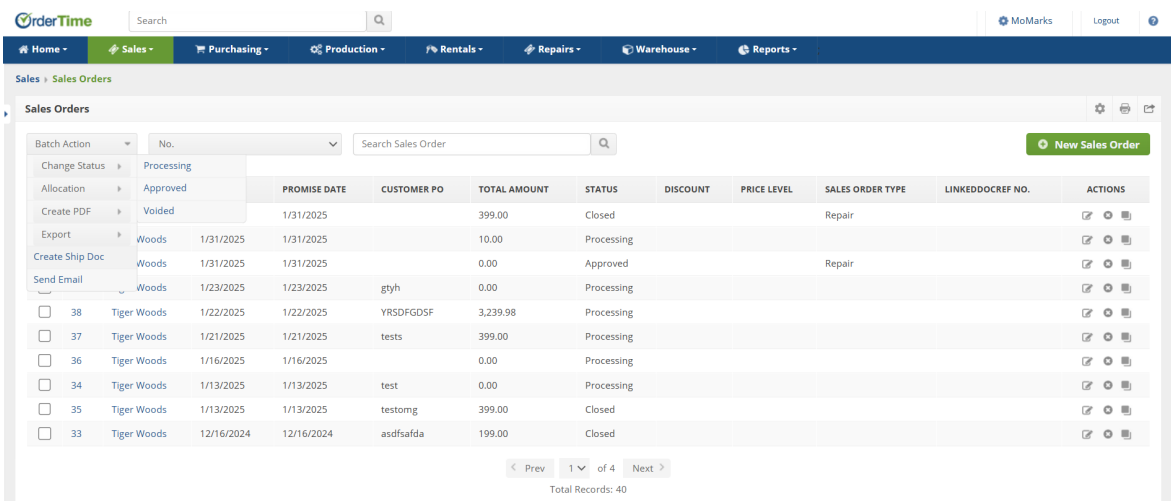
	CUSTOMER	DATE	PROMISE DATE	TOTAL AMOUNT	STATUS	ACTIONS
	Anna	2/7/2018	2/7/2018	200.00	Closed Won	(Change Status) (Processing) (Presented) (Closed Lost)
	Ian B	12/26/2017	12/26/2017	0.00	Processing	(Change Status) (Processing) (Presented) (Closed Lost)
	Alex Easton	12/26/2017	12/26/2017	0.00	Processing	(Change Status) (Processing) (Presented) (Closed Lost)
	Veronica	10/19/2017	10/19/2017	0.93	Presented	(Change Status) (Processing) (Presented) (Closed Lost)
	Veronica	10/19/2017	10/19/2017	100.00	Presented	(Change Status) (Processing) (Presented) (Closed Lost)
	Veronica	10/19/2017	10/19/2017	40.00	Presented	(Change Status) (Processing) (Presented) (Closed Lost)
	Veronica	10/19/2017	10/19/2017	100.00	Closed Lost	(Change Status) (Processing) (Presented) (Closed Lost)
	Veronica	10/19/2017	10/19/2017	10,000.00	Presented	(Change Status) (Processing) (Presented) (Closed Lost)
	Veronica	10/19/2017	10/19/2017	100.00	Presented	(Change Status) (Processing) (Presented) (Closed Lost)
	John Doe	9/7/2017	9/7/2017	50,047.00	Closed Lost	(Change Status) (Processing) (Presented) (Closed Lost)

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.

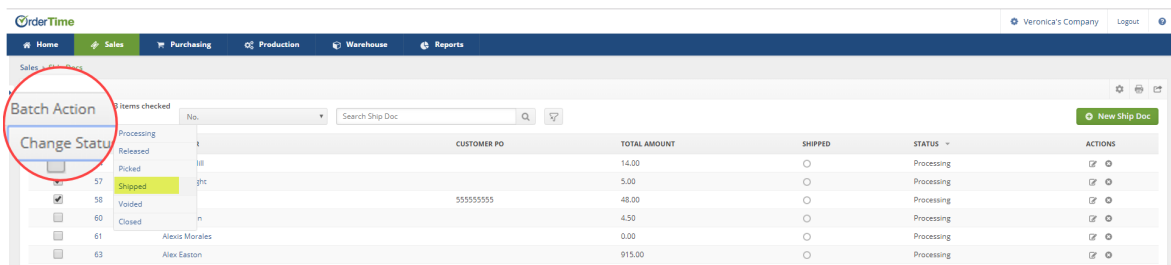


You can also now batch action create ship docs directly from the Sales Order List view. Select batch action - create ship doc.



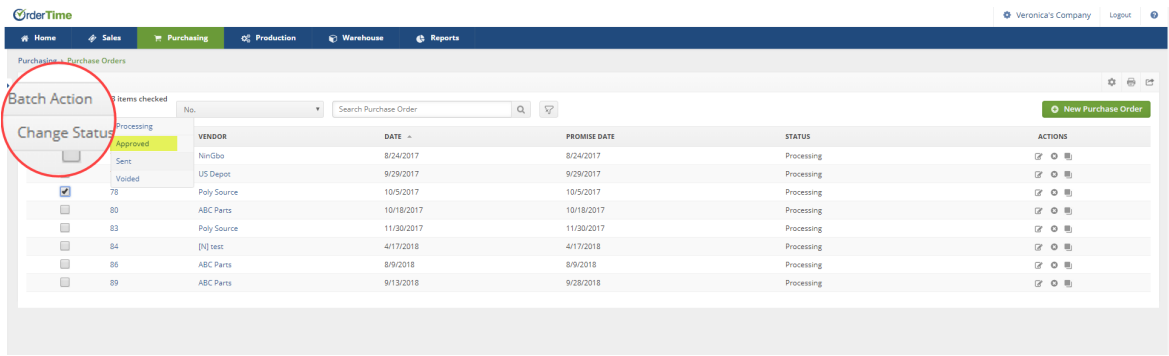
Ship Docs

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.



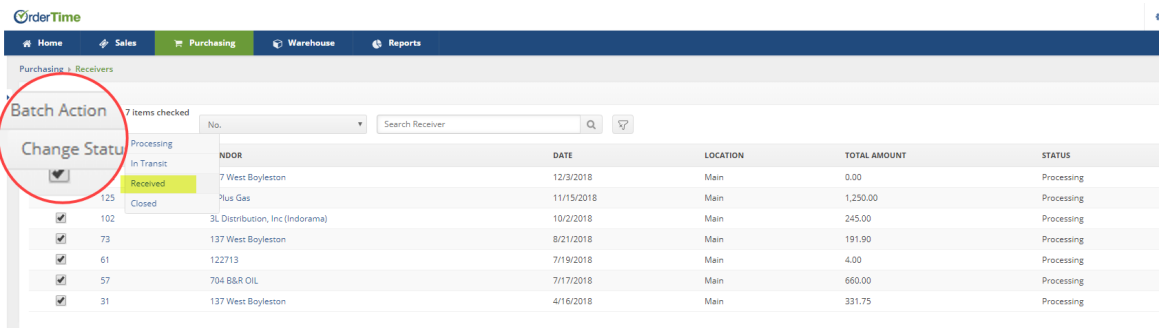
Purchase Orders

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.



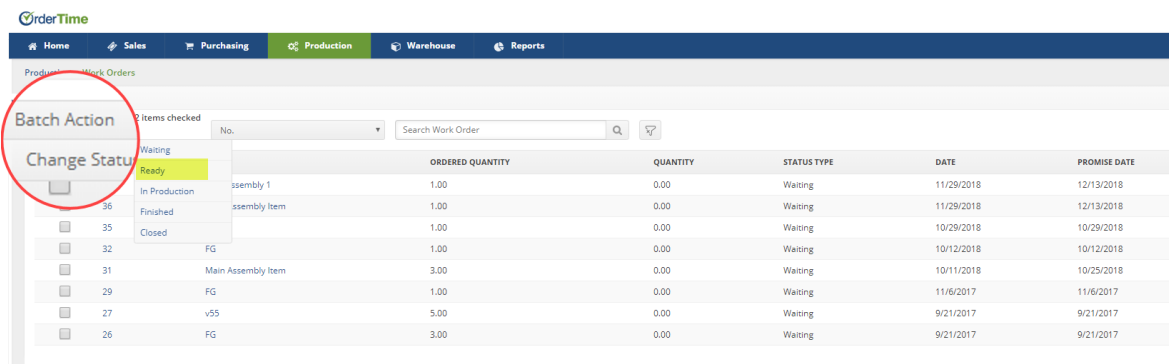
Receiving Docs

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.

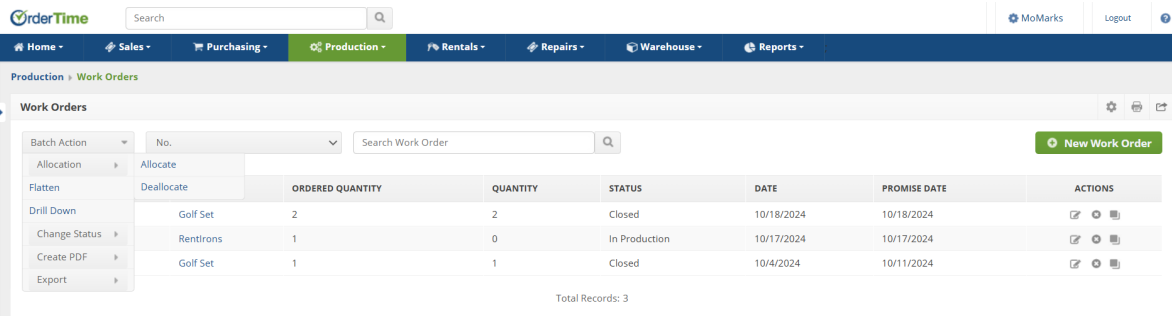


Work Orders

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

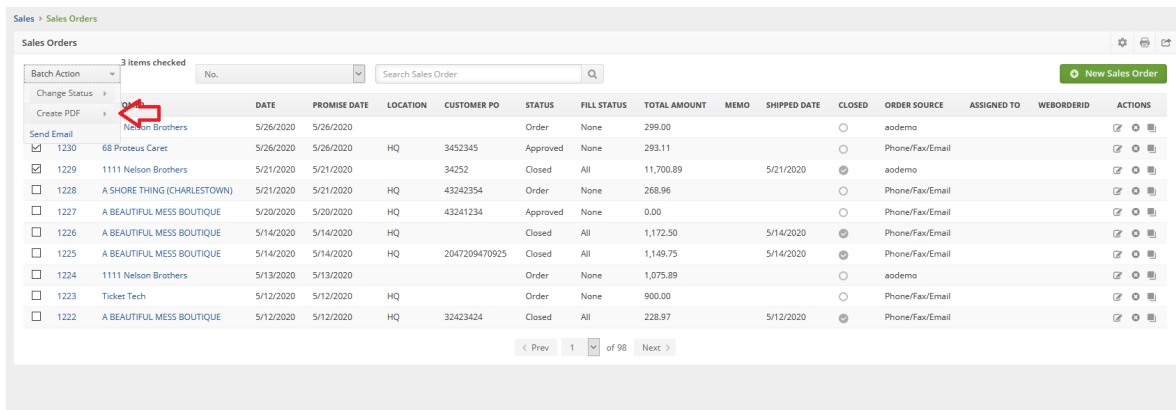


Create PDF

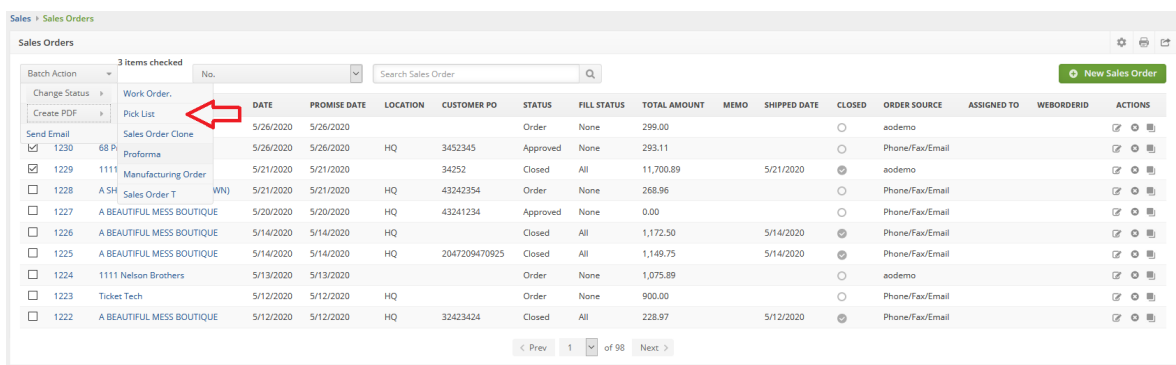
Go to a document list, such as the Sales Order List.

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 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.

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

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

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

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																
Name / Number																
Search Item																
Second View																
New Item																
		Item Number	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		Test Price Level 3		<input checked="" type="radio"/>			
<input checked="" type="checkbox"/>	5		PC3200	Part	Parts Group	ATX WHITE	EA	12.00	22.00		Test Price Level 3		<input checked="" type="radio"/>			
<input checked="" type="checkbox"/>	6	Bin No. 1	PC3001	Part	Parts Group	MINI ITX BLACK	EA	10.00	15.00				<input checked="" type="radio"/>			
<input type="checkbox"/>	7	Default	PC3000	Part	Parts Group	MINI ITX WHITE	EA	5.00	40.12				<input type="radio"/>			
<input type="checkbox"/>	8		PC3100	Part	Parts Group	MICRO ATX WHITE	HR	8.00	18.00				<input type="radio"/>			
<input type="checkbox"/>	9		PC3101	Part	Parts Group	MICRO ATX BLACK	EA	8.00	18.00				<input type="radio"/>			
<input type="checkbox"/>	10		PC3300	Part	Parts Group	EATX WHITE	EA	45.00	22.00				<input type="radio"/>			
<input type="checkbox"/>	11		PC3301	Part	Parts Group	EATX BLACK	EA	12.00	22.00				<input type="radio"/>			
<input type="checkbox"/>	111		PC3500	Part	Parts Group		EA	0.00	0.00				<input type="radio"/>			

Total Records: 9