



Item Data Management

Purpose of this document

This document is designed to demonstrate how to use the Item Batch Update report to update Item Data. This allows you to quickly update Item Data based on desired filtering. The Item Data Management functionality provides food banks with the ability to mass update certain Item fields and allows you select/filter for the Items to be updated. An Excel output is provided after the process has been run to provide the user with immediate feedback as to any errors, and which Items/data have been updated.

Ceres Object release 5.00.00 is required for the functionality described in this document.

Table of Contents

ITEM BATCH UPDATE REPORT 3

RELATED TOPICS..... 6

Item Batch Update Report

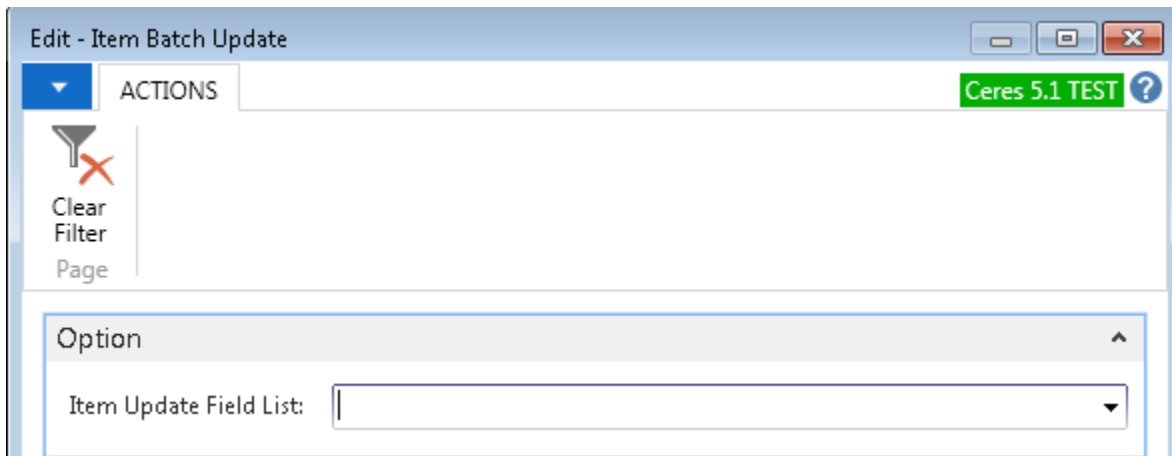
1. The Item Batch Update report link can be found at Departments → Warehouse → Inventory → Reports → Item Batch Update.

The screenshot displays the Microsoft Dynamics NAV client interface. The title bar reads "Reports - Microsoft Dynamics NAV client - connected to Dynamics 365 Business Central". The breadcrumb navigation path is "Finance Company > Departments > Warehouse > Inventory > Reports >". The left-hand navigation pane shows a tree structure with "Reports" highlighted under the "Inventory" folder. The right-hand pane, titled "Reports", lists various reports under the heading "Reports and Analysis". The "Item Batch Update" report is circled in red at the bottom of the list.

Reports and Analysis

- Item Transaction Detail
- Agency/Item Statistics Det/Sum
- Donor/Item Rec. Statistics
- Prod. Type/Item Rec Statistics
- Receipts & Distribution Report
- UNC Storage Requirement Check
- Lot Tracking
- Lot Expiration
- Shipping Pallet Tag
- Pallet Tag 6x4 w/ Barcode
- Pallet Tag 11x8.5 w/o Barcode
- Pallet Tag 11x8.5 w/ Barcode
- Bin Contents w/ Pallets
- Blue Receipt Activity Report
- Whse. Entries
- Item Quantities by Loc/Bin
- Item Details by Reason Code
- Items On Hand by Location
- Items On Hand By Date
- Bin Contents by Location
- Inventory Analysis
- Agency Food Rating Analysis
- P. Agency Food Rating Analysis
- Item Food Rating Analysis
- Available Leased Storage Bins
- Shipment Report
- Inventory Value - Donated/USDA
- Inventory Costs - Purchased
- Shipment Report
- Shipping Tag (6 x 4)
- Shipping Tag (11 x 8.5)
- Shipping Tag Posted (6 x 4)
- Shipping Tag Posted (11 x 8.5)
- Shipping Tag 2 Posted (11x8.5)
- Item Batch Update**

- When you run the Item Batch Update process you can drill down on the Item Update Field List to view the available fields to update.



A new window is displayed showing the list of available fields. You can populate the “New Value” column of any of the fields to update the data. When a value is added to the “New Value” column the “Update” column automatically gets checked to let the system know the field will be updated.

Update	Field Name	New Value
<input type="checkbox"/>	Expiration Calculation	
<input type="checkbox"/>	Pack Size	
<input type="checkbox"/>	Consume by Date Calculation	
<input type="checkbox"/>	Cost Adjustment Type	
<input checked="" type="checkbox"/>	Cost Adjustment Factor	1.12
<input type="checkbox"/>	Shopping List	
<input type="checkbox"/>	Servings per Base UOM	
<input type="checkbox"/>	Fee per Serving	
<input type="checkbox"/>	Permit Web Orders	
<input type="checkbox"/>	Feature Type	
<input type="checkbox"/>	Item Group Code	
<input type="checkbox"/>	CMobile Related	
<input type="checkbox"/>	Dormant	

Update: This field gets automatically checked when you enter a value in the “New Value” column. The user can manually check/uncheck this field. If it is checked then the system will update the field data, and if it is not checked, the system will skip it.

Field Name: The field name from the Item Card/List that you would like to update.

New Value: The value that you want to populate/update for desired Items. You can drill down on this column for fields that have options to select.

3. You can then filter for the Items that you want to update.

Item

Sorting: No. ▼

Show results:

- Where No. ▼ is Enter a value.
- And Expiration Calculation ▼ is Enter a value.
- And Pack Size ▼ is Enter a value.
- And Consume by Date Calculation ▼ is Enter a value.
- And Cost Adjustment Type ▼ is Select a value
- And Cost Adjustment Factor ▼ is Enter a value.
- And Shopping List ▼ is Select a value
- And Inventory Posting Group ▼ is COOP
- And Fee per Serving ▼ is Enter a value.
- And Permit Web Orders ▼ is Select a value
- And Feature Type ▼ is Select a value
- And Item Group Code ▼ is Enter a value.
- And CMobile Related ▼ is Select a value
- And Dormant ▼ is Select a value

Add Filter

Note: All Items meeting the filtered criteria will be updated. **If no filter is specified ALL Items will be updated.**

4. After the report has run an excel sheet opens showing you which Items have been changed, which fields have been changed, and any errors if the report encountered any. **This excel sheet must be manually saved, if you want to keep it for logs.**

Item Update List					
10/07/20 6:32:41 AM					
ESOPRO\RXF					
Item No.	Description	Field Name	Error	Error Message	Cost Adjustment Factor
10018P	Peppermint Sryup Rich				1.1
					1.12
10018S	Strawberry Syrup				1.1
					1.12

Note: The first row for an Item in the Excel spreadsheet is the old value of fields. The second row is the new value.

Related Topics

1. Item Overview