



Summary

A simple, yet powerful, Excel utility to make mass updates to common Item Master Data fields for existing items.

Description

Item Master Data houses a multitude of information for every item in your database, so updating large amounts of fields or groups of items can be especially tedious and time-consuming. To help ease this problem we created an Excel utility, aptly titled the Item Master Utility (found in the *Utilities* menu for all Orchestrated platforms.)





****Once the Excel tool has launched, the first thing to do every time is click Refresh Data at the Top – either This Worksheet or Entire Workbook. This ensures your data is accurate and up-to-date with your real-time database before making adjustments.**

Across the Top are columns with Filters so you can make adjustments to only view the subsection of items that you're looking to update. Many cells have dropdown menus in them, as the information for the cell is restricted to one of a few options only – cells that allow free-form text (the Unit of Measure (UoM), Lead Time cells Purchase weight, Inventory Weight ect.) can be typed into directly. Item Codes cannot be changed from the Utility nor the database – you will need to create a new item and Inactivate the old item.

As you make adjustments to the *Action Required?* column on the Far Left automatically changes to a 'U' indicating the row is ready to be updated.

When you have one or more updates to send back into Orchestrated, click Process Changes to Worksheet at the Top. Once complete, your view automatically shows the status of each row on the Far Right, under Processing Results. If any errors occurred, those rows will appear at the Top with an error to help resolve the cell causing the error. If you can't resolve an error send in a Support Ticket (or contact your Implementation Consultant if still implementing) and we'll be able to help.

The changes are immediate and can be viewed from the database right after to confirm successful completion.

Note: All users, regardless of license, will have access to the utility but changes can only be performed by users with the ability to add/edit Item Master Data fields. And keep in mind you cannot add new items within the Utility.