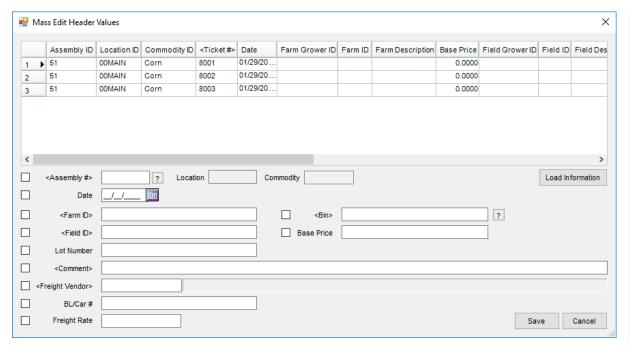# STLM Mass Edit Utilities

The Mass Edit Header Values utility allows Scale Ticket information to be updated on multiple Scale Tickets at the same time.

The following Scale Ticket information can be optionally updated:

- *Assembly #*
- *Date*
- *Farm ID*
- *Field ID*
- *Lot Number*
- *Comment*
- *Freight Vendor*
- *BL/Car #*
- *Bin*
- *Base Price*

Updating Scale Ticket Header Information

1. This utility is found at *Grain / Utilities / Mass Edit / Header Values*.
2. Select the Scale Tickets to be updated.
3. Use filters to help narrow the list of Scale Tickets.
4. If using the *Grade Factor* grid, optionally set a *Min Value* and *Max Value* to select tickets with a Grade Factor above or below the specified values then choose **Load List**.
5. Choose **Done** when all Scale Tickets are selected. The selected Scale Tickets are loaded into the top grid of the *Mass Edit Header Values* window.

6. Select the Scale Ticket with the information to use as the default when updating other tickets then choose **Load Information**.

7. Use **View** to review the Scale Ticket information on a ticket before selecting it.

8. Select the checkbox by each item to be edited.

- **Assembly #** – The *Assembly #* must be for the same *Commodity* and *Location* of the Scale Tickets selected.

- **Date** – The Scale Ticket date will be updated on all Scale Tickets selected with unsettled units.

- **Farm ID, Field ID** – The *Farm ID/Field ID* will be updated for the selected Scale Tickets with unsettled units. If only updating the Farm ID and not the Field ID or vice versa, validation happens for each ticket to ensure the selected Field ID is for the selected Farm ID.

- **Lot Number** – The *Lot Number* on the selected Scale Tickets with unsettled units will be updated.

- **Comments** – The *Comments* on the selected Scale Tickets with unsettled units will be updated.

- **Freight Vendor (at Ticket Level)** – This updates the Vendor on the Scale Ticket. If there are freight charges, the Vendor is updated for them as well. The *Freight Vendor* on the ticket may not be changed or deleted once there is a reconciled freight charge on the Scale Ticket.
  Note: Scale Tickets cannot have multiple freight charges.

- **Freight Rate** – If a *Freight Rate* is entered and no charge record exists, a charge record will be added for the Freight Vendor being assigned in this utility or using the Freight Vendor saved on the ticket.
  Note: Freight always calculates based on Gross Units.

- **BL/Car #** – The BL/Car # will be updated.

- **Bin** – Selecting a *Bin* updates the average Grade Factor results based on the Scale Tickets being assigned to that Bin. The *Bin Type* on the Scale Tickets will be validated to disallow changing the from *Regular* to *Unapproved Storage* or vice versa.
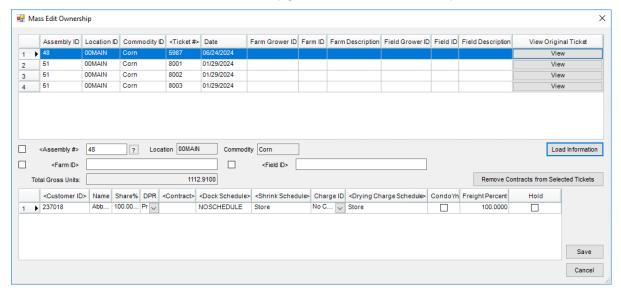
Note: A Bin Capacity warning message will display if it is configured on the newly selected Bin.

- **Base Price** – Setting a *Base Price* on the selected Scale Tickets will update the Non-Contracted Priced split line items, including lines already settled. If the Drying Schedule is by percent of Base Price on the split line, the drying rate and totals will be updated accordingly.

  Note: If any of the Schedules for Grade Factors (not used for drying) are by percent of Base Price, their Premium/Discount value and total will be updated accordingly.

Ownership Values

The Mass Edit Ownership Values utility allows Scale Ticket split arrangements to be changed to a different split arrangement. At the same time the *Assembly #, Farm ID, Field ID, DPR, Shrink Schedule, Dock Schedule, Drying Schedule, and Freight Percent* can be changed.

Using the Mass Edit Ownership Utility

1. The utility is found at *Grain / Utilities / Mass Edit / Ownership Values*.
2. Select Scale Tickets to change the ownership. All selected Scale Tickets will have the same ownership change. Choose **Done** when all Scale Tickets are selected.
   - Use filters to help narrow the list of Scale Tickets.
   - Only Scale Tickets with the same *Commodity ID* should be selected.
3. The selected Scale Tickets are loaded into the top grid of the *Mass Edit Ownership* window.

4. To load information into the bottom grid, highlight a Scale Ticket in the top grid and select **Load Information**.
   a. Select the Scale Ticket that contains the information to populate on all other tickets by selecting the row to highlight it. If the same information should not be populated on multiple tickets, select any Scale Ticket.

b. Choose **View** to review the Scale Ticket information on the ticket before selecting it.

c. If an Assembly is selected, the default assembly split information will default into the bottom grid.

d. If a Farm is selected, the farm splits will default into the bottom grid.

5. Changing ownership on any selected Scale Tickets containing Purchase Contracts requires selecting **Remove Contracts from Selected Tickets**. This clears the contract(s) and applies the new contract information to the Scale Ticket.

6. Updating Scale Ticket information:

   ○ An *Assembly #*, *Farm ID*, and *Field ID* can be changed on a Scale Ticket if the checkbox is selected.

      ▪ If *Assembly #* is checked, the *Assembly #* must be for the same Commodity and Location.

   ○ If no information defaults in the grid or if the defaulted information needs changed, double-click *Customer ID* to select the Customer(s) of the new split arrangement.

      ▪ *Share%*, *DPR*, *Contract*, *Shrink Schedule*, *Charge ID* (Storage/Service charge), *Drying Charge Schedule*, and *Freight Percent* can be changed for the split arrangement.

      ▪ Changing the *Charge ID* (Storage/Service Charge schedule) removes any pre-existing charges.

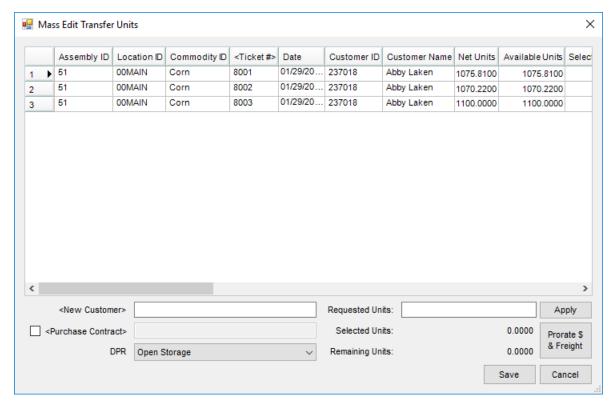7. Once split arrangement information is set, choose **Save** to update the Scale Ticket(s) selected.

Transfer Units

The Transfer Units utility allows Scale Tickets to be changed to a different ownership arrangement. At the same time the *Assembly*, *Farm*, *Field*, *DPR*, *Shrink Schedule*, *Dock Schedule*, *Drying Schedule*, and *Freight Percent* can be changed.

Using the Mass Edit Transfer Units Utility

1. The utility is found at *Grain / Utilities / Mass Edit / Transfer Units*.

2. Select Scale Tickets to change the ownership. All selected Scale Tickets will have the same ownership change. Choose **Done** when all Scale Tickets are selected. Use filters to help narrow the list of Scale Tickets. **Note:** Only Scale Tickets with the same *Commodity ID* should be selected.

3. The selected Scale Tickets are loaded into the top grid of the *Mass Edit Transfer Units* window.

Mass Edit Transfer Units

	Assembly ID	Location ID	Commodity ID	<Ticket #>	Date	Customer ID	Customer Name	Net Units	Available Units	Selec
1 ▶	51	00MAIN	Corn	8001	01/29/20...	237018	Abby Laken	1075.8100	1075.8100	
2	51	00MAIN	Corn	8002	01/29/20...	237018	Abby Laken	1070.2200	1070.2200	
3	51	00MAIN	Corn	8003	01/29/20...	237018	Abby Laken	1100.0000	1100.0000	

<New Customer> [ ]   Requested Units: [ ]   Apply

☐ <Purchase Contract> [ ]   Selected Units: 0.0000   Prorate $ & Freight

DPR [Open Storage ⌄]   Remaining Units: 0.0000

Save   Cancel

4. Select the new Customer to populate on the tickets by double-clicking in the *New Customer* field. The original Customer will not be removed from the ticket, however the units will be transferred to the new customer.

5. Select the number of units to be transferred, populate the *Requested Units* field, and choose **Apply**.

   Note: Units can be assigned per ticket by updating the *Selected Units* box on each ticket row and totaling the units in the *Requested Units* box.

6. Select **Prorate $ & Freight** to update the dollars paid and percent.

7. The new Customer can have any available existing Purchase Contracts applied by checking the *Purchase Contract* box and selecting the contract or creating a new contract or spot.

8. The *DPR* can be selected as well for the new Customer's units if no contract is to be applied and the split line tables will be adjusted accordingly.

9. Once split arrangement information is set, choose **Save** to update the Scale Ticket(s) selected.

Split Values

The Mass Edit Split Values Utility allows the assignment of Purchase Contracts on Scale Tickets. It also allows the change of *DPR*, *Storage/Service Charge*, *Dock Schedule*, *Shrink Schedule*, and *Drying Schedule*.
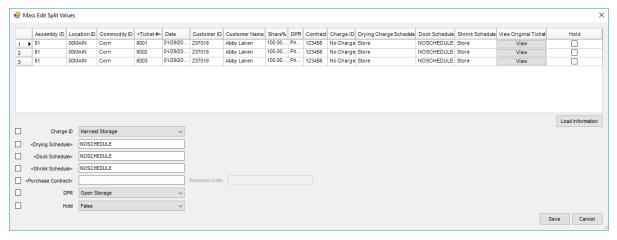
Editing Scale Ticket Split Information

1. Navigate to *Grain / Utilities / Mass Edit / Split Values*.

2. Using the filters to narrow down the listed Scale Tickets, select the Scale Tickets to edit the split information. All selected Scale Tickets will update with the same information.

Note: Select Scale Tickets with the same *Commodity ID* to update Scale Ticket information.

3. Choose **Done**.

4. The selected Scale Tickets display in the top grid.

5. To use a Scale Ticket as a model for future Scale Tickets, select the row of the Scale Ticket then choose **Load Information**. The information defaults into the selection options below the grid. The **View** option on the Scale Ticket line in the grid is helpful when selecting a model or default Scale Ticket.

6. Optionally choose fields to update by checking the option and selecting the default.

7. If changing the *Charge ID* (Storage/Service Charge Schedule), the charges on the previous schedule update the pre-existing charges on the Scale Ticket. The *Charge Start Date* defaults to today's date and charges are calculated according to the new Charge Schedule.

8. Changing schedules and DPR on Reshrunk/Locked Scale Tickets does not reopen Scale Tickets to be Reshrunk/Locked.

   Note: When a Scale Ticket split line has a Purchase Contract already established, a different contract cannot be applied to the Scale Ticket split line. When assigning a Purchase Contract once an overfill is applied to a non-contract line item or the overfill Contract is selected, the Utility stops on the most recently updated Scale Ticket.

9. Once all update information is checked, choose **Save** to update the Scale Ticket information.