Added "Batch Recode" function

lubos 1   June 28, 2024, 11:44pm

The latest version (24.6.29) adds `Batch Recode` function.

This is useful when you want to recode single field across multiple forms in bulk. Yes, you can use `Batch Update` but that requires copying data into spreadsheet, modifying it in spreadsheet, then copying back to Manager.

`Batch Recode` is allows quickly recode single field across multiple forms at once.

Go to the tab where you want to update entries in bulk and click `Batch Operations` button in bottom-right corner. Then click on `Batch Recode`


You will see the following section added to your screen:

In drop-down menu, select name of field that you'd like to update on selected records. Currently only boolean fields are supported but I'll add support for other field types soon.

For example, if you are batch updating `Sales Invoices`, you can select field `Also acts as goods receipt`. This will allow you to quickly check the checkbox `Also acts as goods receipt` across many invoices at once.
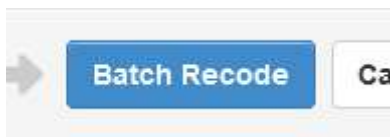
Added "Batch Recode" function
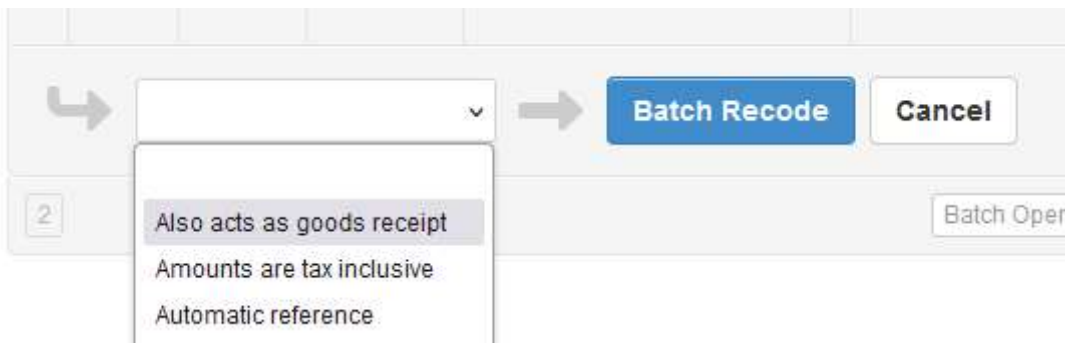
After selecting the field, select desired value:
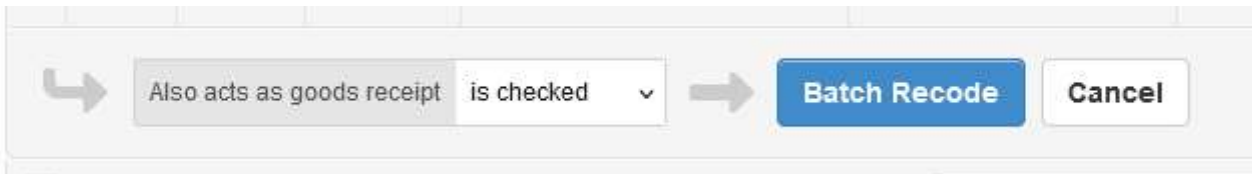
Check all the records which you'd like to batch update. You can use simple search or advanced queries to narrow down your list.
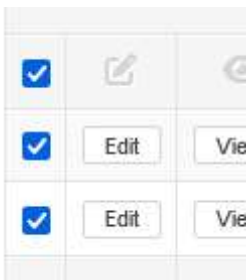
Then click `Batch Recode` button.

Your records will be updated.

If you made a mistake, you can always go back to `History` and undo your changes.

At this moment, it's limited to fields that are checkboxes only. But eventually I will add support for every type of field so So whenever you need to set some specific value across multiple forms, you do not need to go to each form individually but you will be able to use `Batch Recode` to do it across many forms at once.

8 Likes

Add support for "or" filter in advanced queries

Add support for "or" filter in advanced queries

[Added "Also act as delivery note" and "Also act as goods receipt" options to invoices, credit notes and debit notes](#)

[Removed screen which allows batch open or close invoices](#)

[Added "Also act as delivery note" and "Also act as goods receipt" options to invoices, credit notes and debit notes](#)

[Mian_Waqas_Azfar](#) 2 June 29, 2024, 7:29am

long awaited feature. 👍

[Abeiku](#) 4 June 29, 2024, 8:40am

When the possibility comes, it will be added immediately. I'm not a programer but I imagine these two features require a lot of programming work, or the implementation of other features to pave the way, same as the requested Transaction Approval system.

1 Like

[funkyrainbow.com](#) 5 June 30, 2024, 5:42am

Dear [@lubos](#) , thanks a lot for everything that you do! Could you please add the option to recode to delivery notes too?

Use case: My firm trades in books on a sale-or-return basis, therefore issues regular debit notes at the end of the credit cycle to return unsold stock. After the recent update we now need to issue corresponding delivery notes so that the inventory quantities are updated. Earlier we used to do it through the debit notes themselves (which we used to send along with the returns). The batch option would be very helpful.

Thanks!

			Date	Reference	Supplier	Purchase Invoice ▲	Description	Amount
☐	Edit	View	06/06/2024	73	PBI - Prakash Books India Pvt. Ltd.	BN-24-CRB-6092	Stock Returns	₹ 5,296.00
☐	Edit	View	06/06/2024	70	PBI - Prakash Books India Pvt. Ltd.	BN-24-CRB-6156	Stock Returns	₹ 10,158.00
☐	Edit	View	06/06/2024	77	PBI - Prakash Books India Pvt. Ltd.	BN-24-CRB-6179	Stock Returns	₹ 299.00
☐	Edit	View	06/06/2024	79	PBI - Prakash Books India Pvt. Ltd.	BN-24-CRB-6182	Stock Returns	₹ 1,258.00
☐	Edit	View	06/06/2024	75	PBI - Prakash Books India Pvt. Ltd.	BN-24-CRB-6188	Stock Returns	₹ 4,332.00
☐	Edit	View	06/06/2024	78	PBI - Prakash Books India Pvt. Ltd.	BN-24-CRB-7343	Stock Returns	₹ 35,191.00
☐	Edit	View	06/06/2024	67	PBI - Prakash Books India Pvt. Ltd.	BN-24-CRB-8673	Stock Returns	₹ 4,157.00
☐	Edit	View	06/06/2024	76	PBI - Prakash Books India Pvt. Ltd.	BN-24-CRB-8712	Stock Returns	₹ 3,330.00
☐	Edit	View	06/06/2024	86	PBI - Prakash Books India Pvt. Ltd.	BN-24-CRB-9137	Stock Returns	₹ 10,764.00
☐	Edit	View	06/06/2024	81	PBI - Prakash Books India Pvt. Ltd.	BN-24-CRB-9234	Stock Returns	₹ 2,691.00
☐	Ed				PBI - Prakash Books India Pvt. Ltd.	BN-24-CRB-9450	Stock Returns	₹ 1,553.00
☐	Ed			7	PBI - Prakash Books India Pvt. Ltd.	BN-24-CRB-9496	Stock Returns	₹ 958.00
☐	Ed			5	IBD - India Book Distributors (Bombay) Ltd.	IBDBLR/2024/CRB/2437	Stock Returns	₹ 10,560.00
								₹ 5,35,897.00

Also acts as goods receipt
Amounts are tax inclusive
Automatic reference
Column - Description
Column - Discount
Column - Line number
Custom theme
ExchangeRateIsInverse
Footers
Show tax amount column

Batch Recode   Cancel

50 95   Debit Notes - Lines | Form Defaults | Edit columns | ▶ Batch Operations | Copy to clipboard

LATER UPDATE: When we try to create delivery notes to suppliers from the debit notes manually, we get the option to make the delivery note only to customers, not supplies (although the goods in the debit note are being sent to the supplier). How do we handle this in the new scheme of things?

Illustration Step 1: (Copy to *New Delivery Note*)

Debit Notes ▶ Debit Note — 97 — View

Debit Note 97   Edit   Clone   Copy to ▼   Print   PDF

New Sales Quote
New Sales Order
New Sales Invoice
New Delivery Note
New Credit Note

New Purchase Order
New Purchase Invoice
New Goods Receipt
New Debit Note

View   Journal

Debit Note

Prakash Books India Pvt. Ltd.
No. 6/3, First Floor Appareddy Complex, 5th Cross Mysore Road, Bangalore - 560 026

Issue date
30/06/2024

Reference
97

Invoice
BN-24-CRB-13499

Stock Returns

#	Item	Description	Qty	Unit price	
1	9788194446842 Birds In My Garden And Beyond		1	350.00	3
2	9788194490883 The Magic Shop		1	250.00	2

Illustration Step 2: (Only *Customer* is available in the *To* option)
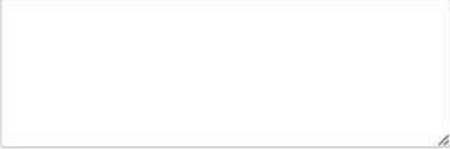


Najrash 6 June 30, 2024, 6:27am

> Abeiku:
>
> When the possibility comes, it will be added immediately. I'm not a programer but I imagine these two features require a lot of programming work,

Yes I know it requires a lot of programming work, but in my region, those two issues is why most people I introduce manager to are yet to accept the program, I believe it will help a lot when the feature is enabled to the program.

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germanliu 7 July 16, 2024, 1:50pm

This is a great feature. Thank you @lubos and the **Manager.io** team!

I was trying to batch update the Accounts to which the transactions were posted. Is this possible? In other words, I couldn't find Account in the Recode dropdown. Thanks in advance!
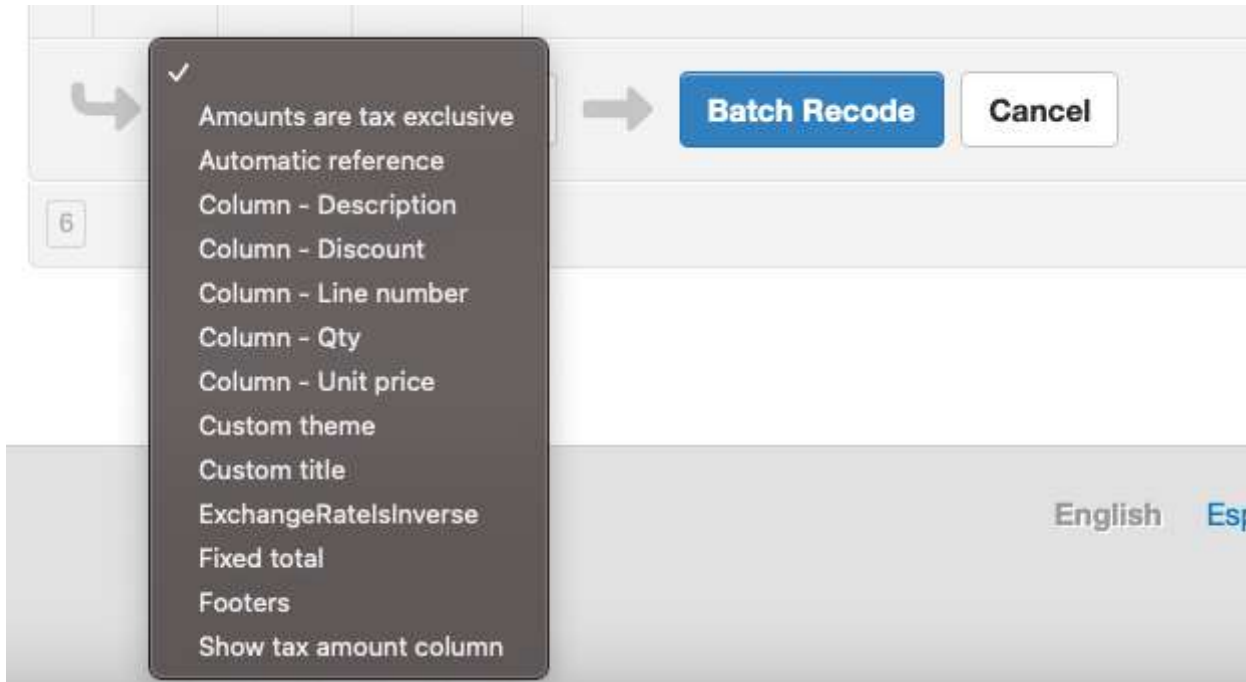
shahabb 8 July 16, 2024, 2:17pm

Not right now but

> lubos:
>
> At this moment, it's limited to fields that are checkboxes only. But eventually I will add support for every type of field so So whenever you need to set some specific value across multiple forms, you do not need to go to each form individually but you will be able to use `Batch Recode` to do it across many forms at once.

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cletus18 9 July 26, 2024, 12:10am

Thanks to you @lubos and your team, this shows your efforts to simplify user experience. At first I thought it was a typo error "recode", but when I used it I realized the usefulness.

handgun50 10 August 28, 2024, 7:42am

On invoice, using batch recode function, I try to batch recode old invoice to activate custom theme. The theme already exist and already working on new invoice. But on recode function, there is no option to select which theme to activate. So after recode, the theme didn't change after I select it to activate
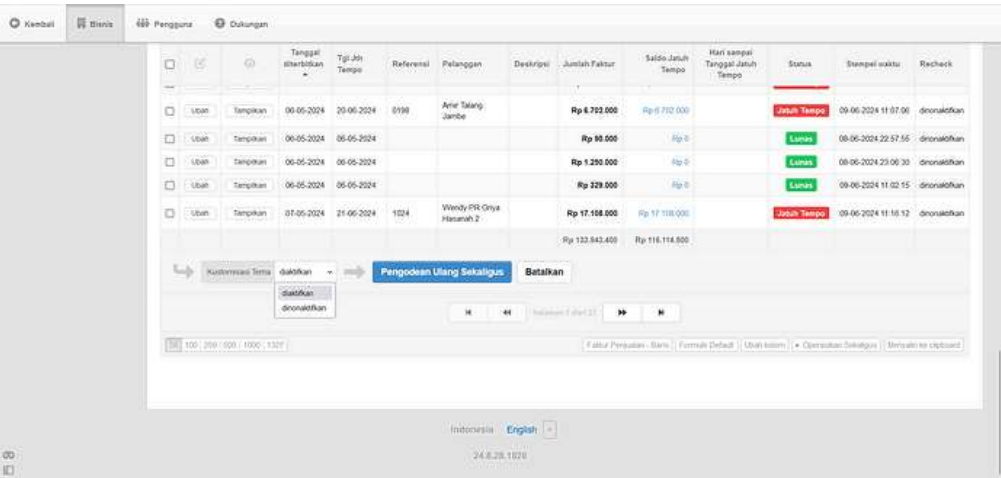
Ealfardan 11 August 28, 2024, 11:11am

Welcome to the forum @handgun50 ,

I have moved your post to the topic announcing the addition of this recent feature as it seems more appropriate.

Now regarding this:

> handgun50:
>
> So after recode, the theme didn't change after I select it to activate

The theme will not change since you can only check the box and not make a selection using `Batch Recode`.

I'm not sure whether there's any plans to expose all fields to this new `Batch Recode` function.

1 Like

Related Topics

Topic	Replies	Activity
Bulk coding	2	January 18, 2023
Making Batch changes easier	9	March 23, 2022
Added ability to do "Batch create", "Batch update" and "Batch delete"	18	January 18, 2023
Ideas for a work around for find and recode	6	May 4, 2021
Feedback: custom columns / search / import export	8	January 18, 2023