

# Complete Orders

Businesses frequently have incomplete orders because items are out-of-stock or discontinued and will never be shipped to a customer. As a result, orders remain open, and item quantities are unreliable.

Complete Orders simplifies the job of completing orders by finding incomplete ones, eliminating discontinued items, zeroing the quantity outstanding and quantity committed values for each incomplete line item, and then setting the order status to “Complete.”

## Complete Orders lets you:

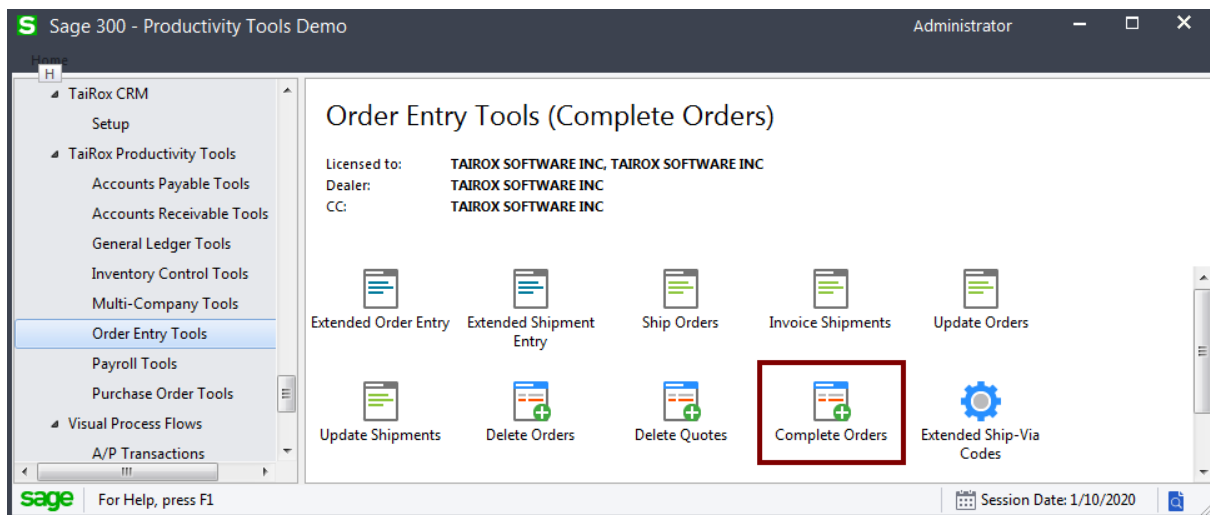
- Select incomplete orders based on items and miscellaneous charges on orders.
- Select ranges of incomplete orders, then load them into a grid to further “cherry-pick” ones for completion.

Complete Orders selects Order Entry orders with the same mechanism used by core Sage modules when printing reports.

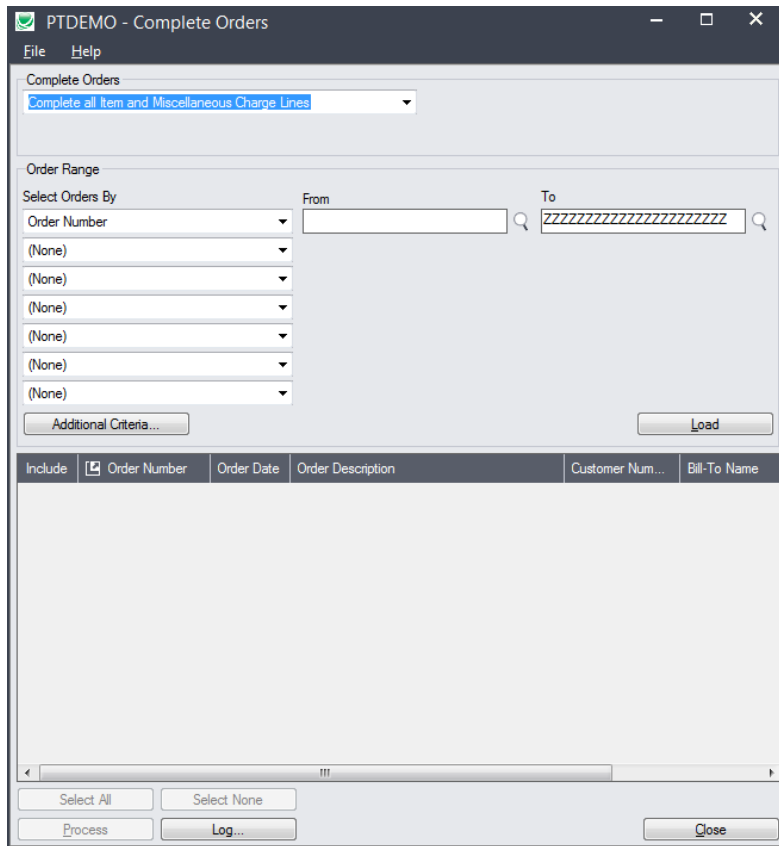
- Check order details while finalizing the completion list.
- Press a Process button to complete the operation for all selected orders in one step.
- Optionally delete completed orders.
- View a log of all changes after processing.

## Running Complete Orders

The Complete Orders icon appears under **TaiRox Productivity Tools > Order Entry Tools** on the Sage 300 desktop and can be copied to other menu locations..

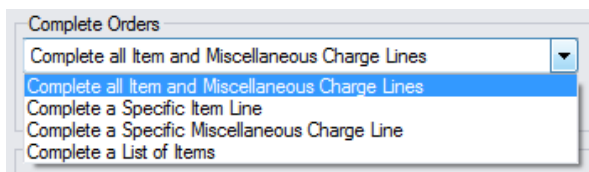


The Complete Orders screen (below) lets you select which Orders you wish to complete by specifying items, line type (items or miscellaneous charges), and various ranges of orders.

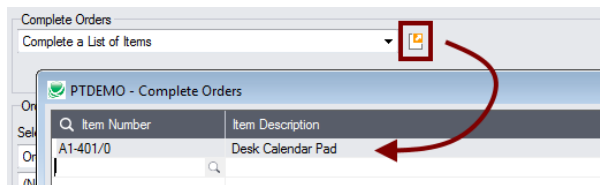


## Selecting Orders for completion

### Choose items/miscellaneous charges:

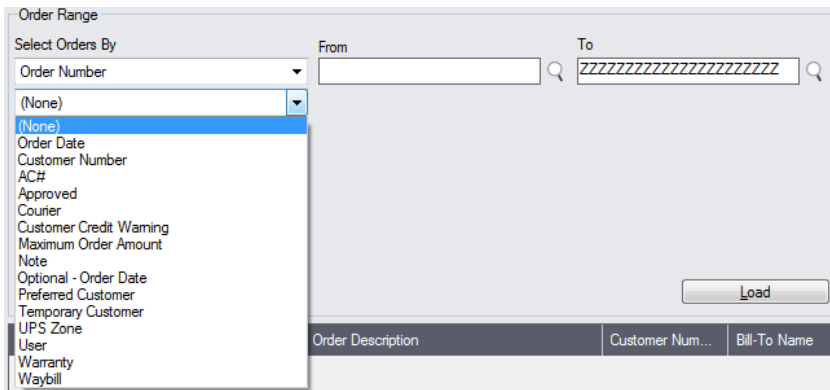


- If you choose Complete a List of Items, the list will be remembered from the previous time you used it to load orders for completion.
  - Click on the Drill Down icon on the right side of the dropdown field to create/edit the item list.



- Use the Insert key to add more items to the list.
- Use the Delete key to remove items.

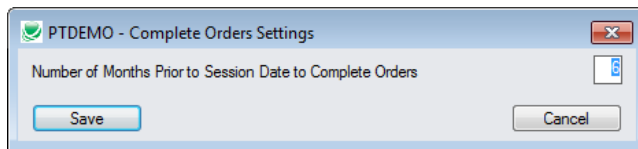
**Choose ranges of orders:**



- You can specify ranges of orders to restrict them by date, number, customer, or optional order fields (if added). The screen above provides a number of optional fields.

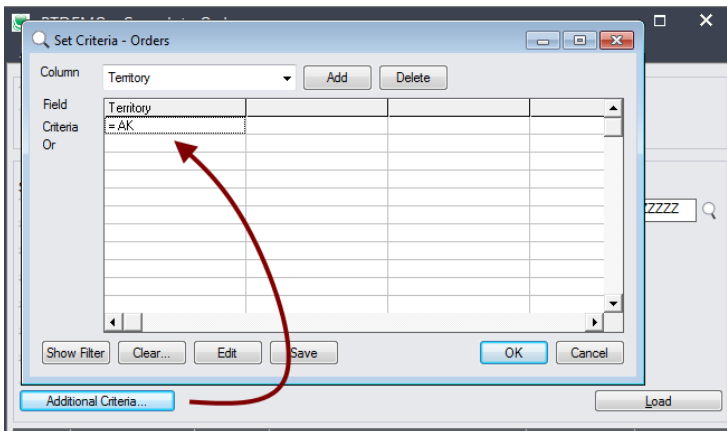
**Note regarding order dates:**

- If you choose a range of Order Dates, the default “To” date is set by a screen accessed through the **Complete Orders > File > Settings** menu choice:



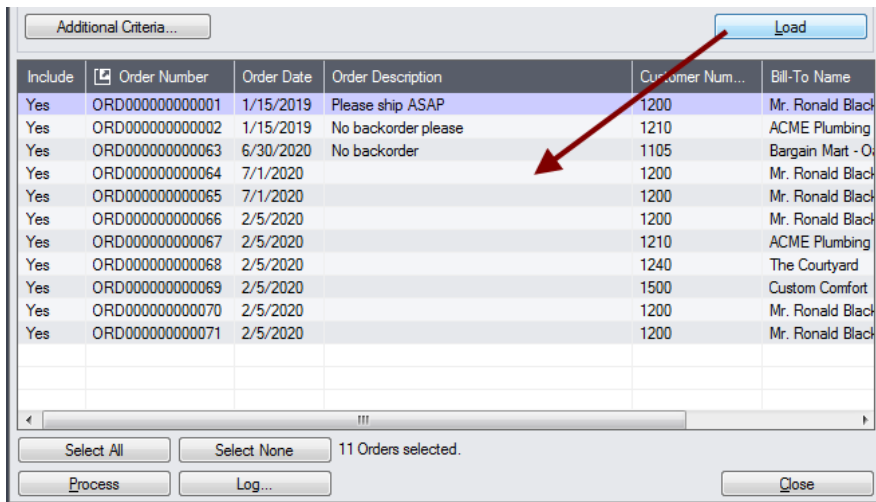
You can override the default in the Range fields.

**Choose additional criteria:**



- Click Additional Criteria to further restrict the orders retrieved for completion. Click OK to save.

## Load the list of selected orders and choose which ones to complete:



- Click the Load button to display the selected list of orders.
  - Go back and adjust the ranges or additional criteria if necessary.
- Use the Select All and Select None buttons.
- Double-click in the Include column to “cherry-pick” from the order selections:

Include	Order Number	Order Date	Order Description	Customer Num...	Bill-To Name
No	ORD000000000001	1/15/2019	Please ship ASAP	1200	Mr. Ronald Black
Yes	ORD000000000002	1/15/2019	No backorder please	1210	ACME Plumbing
No	ORD000000000063	6/30/2020	No backorder	1105	Bargain Mart - O

- Click the Order Number column heading to drill down on the selected order:

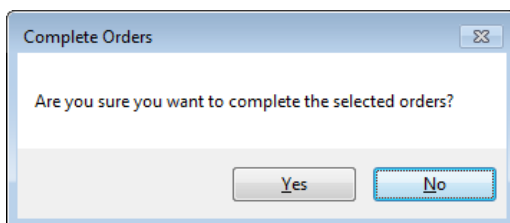
Order Number
ORD000000000001
ORD000000000002

### ***You can also delete an order by selecting it and pressing the Delete key:***

- You can also **delete** an order from the Order Entry program by selecting the row in the Load list and pressing the **Delete** key. When the delete key is pressed you will be prompted to confirm the deletion of that order.

## Click the Process button to complete the included orders:

The program asks you to confirm your choices. Click Yes to continue.



**Note:** There may be data-integrity errors that prevent some completions, in which case an error message will appear.

**Click the Log button to confirm which orders were completed:**

```

7/4/2020 1:13:25 PM Complete Orders started.
7/4/2020 1:13:25 PM
7/4/2020 1:13:25 PM Performed by user: ADMIN
7/4/2020 1:13:25 PM
7/4/2020 1:13:25 PM Complete all Item and Miscellaneous Charge Lines
7/4/2020 1:13:25 PM Order Range
7/4/2020 1:13:25 PM      Order Number From [] To [ZZZZZZZZZZZZZZZZZZZZ]
7/4/2020 1:13:25 PM
7/4/2020 1:13:25 PM Completing Order Number ORD000000000002...
7/4/2020 1:13:26 PM      Order Number ORD000000000002 marked complete.
7/4/2020 1:13:26 PM
7/4/2020 1:13:26 PM Complete Orders complete.
7/4/2020 1:13:26 PM
=====
    
```

The Log lists:

- The user, the type of lines selected, and the full range settings.
- Each order that was marked complete.

**Before and After view of an order grid**

To illustrate the effects of running the program, here are before and after views of an order grid from sample data. Before, the line item is not complete and the quantity outstanding is 50:

Description		No backorder please				Reference			Ref 0901-2	
Lin...	Type	Item No./ Misc. Charge	Kit/BOM	Description	Price List	Location	Qty. Ordered	Deliver By		
1	Item	A1-310/0		Halogen Desk Li...	USA	1	50	1/15/2019		
2	Item	A2(KINGS-5000)B		Kings 5000 Seri...	USA	4	2	1/15/2019		
3	Item	A2(IMAGE-1500)G		Image 1500 Seri...	USA	3	2	1/15/2019		

After, the line item is complete, with quantity ordered and quantity committed values set to 0. Other quantities are unaffected:

Description		No backorder please				Reference			Ref 0901-2	
Lin...	Type	Item No./ Misc. Charge	Kit/BOM	Description	Price List	Location	Qty. Ordered	Deliver By		
1	Item	A1-310/0		Halogen Desk Li...	USA	1	0	1/15/2019		
2	Item	A2(KINGS-5000)B		Kings 5000 Seri...	USA	4	0	1/15/2019		
3	Item	A2(IMAGE-1500)G		Image 1500 Seri...	USA	3	0	1/15/2019		