

# 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:

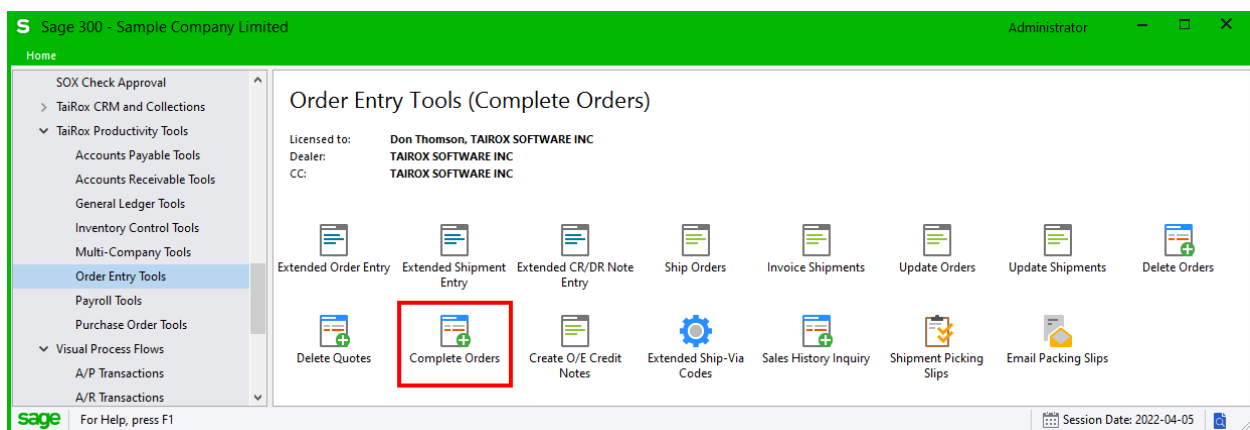
- Select incomplete orders based on items and miscellaneous charges on orders.
  - You can choose to complete all items and miscellaneous charges within a range of orders, complete a specific line item or miscellaneous charge, or complete all items specified by a list that you import from an Excel spreadsheet file or enter on the Complete Orders form.
- Select ranges of incomplete orders, then load them into a grid to further “cherry-pick” ones for completion – or import a list of the orders that you need to complete.

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

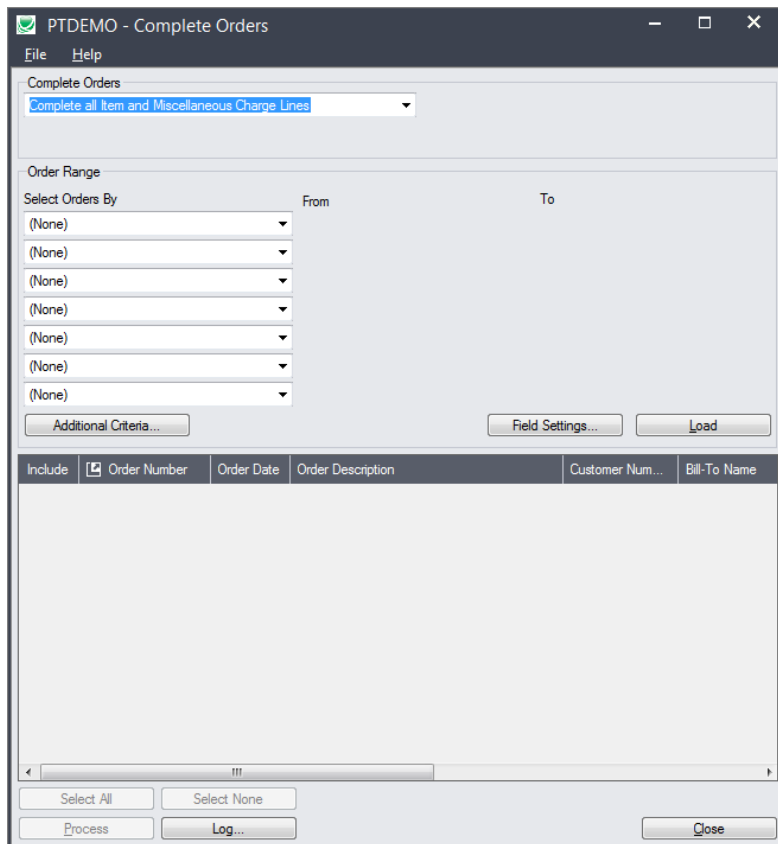
- Check order details while finalizing the completion list.
- Press a Process button to complete the operation for all selected orders in one step.
- Optionally delete completed orders.
- View a log of all changes after processing.

## 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.

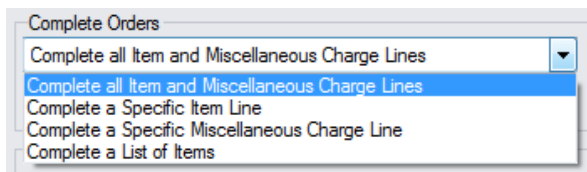


The Complete Orders screen (below) lets you select which Orders you wish to complete by specifying items, line type (items or miscellaneous charges), and various ranges of orders.



## Selecting orders for completion

### Choose items/miscellaneous charges:



Complete Orders displays the choice from the last time that you used the program – including the line item number or miscellaneous charge code or the item list that you specified previously.

#### **Complete all Item and Miscellaneous Charge Lines**

- Choose this option to complete all items and miscellaneous charges in the range of orders you specify. You can exclude orders from the range after you click the Load button.

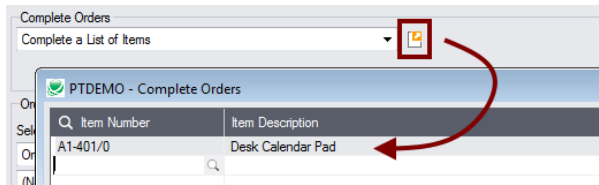
#### **Complete a Specific Item Line or a Specific Miscellaneous Charge Line**

- These choices let you complete lines for a specific item or miscellaneous charge in all orders in the range you specify. You can exclude orders from the range after you click the Load button.

#### **Complete a List of Items**

- This choice lets you create or import a list of items that you want to complete.
- Click the Drill Down icon on the right side of the dropdown field to create/import/edit the item list.

The program displays a popup form that lets you add items to the list or import a list of items from a spreadsheet.



#### To insert items:

- Use the Insert key to add more items to the list.
- Use the Delete key to remove items.
- The list will be remembered from the previous time you used it to load orders for completion.
- Click the Reset Defaults button to delete all items from the list.

#### To import a list:

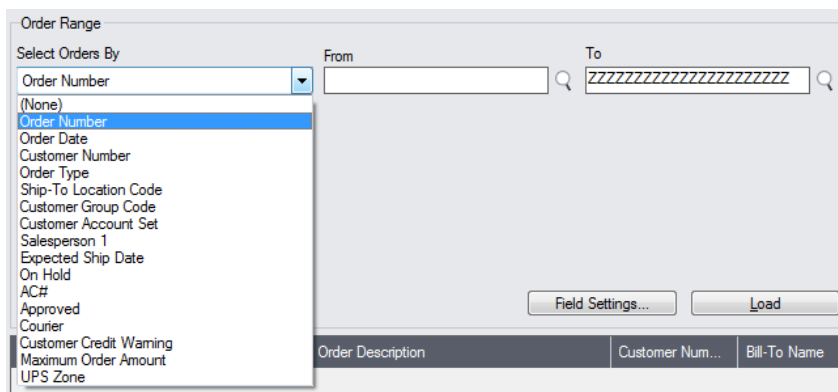
- Click the Import button at the bottom of the popup form and select the spreadsheet containing the item list.
  - The imported list will replace the current list of items.
- Use the Insert key to add more items to the list.
- Use the Delete key to remove items from the imported list.

Note: The Excel Spreadsheet item list is a single column with “ITEMNO” as the column heading in the first row.

	A
1	ITEMNO
2	A11030
3	A11050

- Item numbers can be formatted or unformatted.
- All other columns are ignored. This means that you can add item descriptions and notes to your spreadsheet without affecting the file import.

### Choose the range of orders that you want to complete:

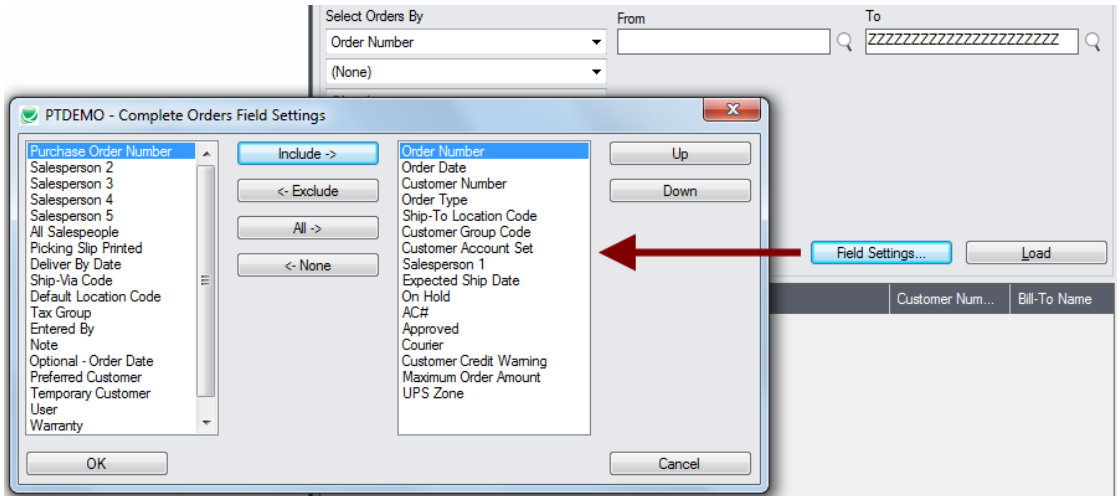


- You can select orders by specifying a range of values for up to seven order and optional fields – such as a range of order dates, order numbers, customer numbers, or optional field values. The screen above shows a list of order fields, including six optional fields.

For instructions on importing a list of orders for completion using the **File > Import** menu choice, see [Importing a List of Orders for Completion](#).

**Use “Field Settings” to customize the list of fields for selecting orders:**

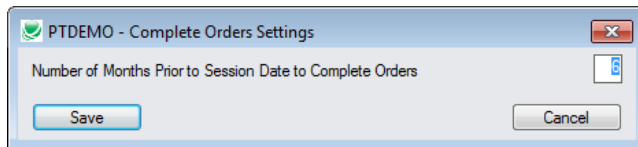
Click the **Field Settings** button to change the fields that appear in the “Select Orders By” dropdown field selection list.



- The list of fields on the right are the fields that will appear in the Select Orders By dropdown.
- To add a field to the dropdown list, select it in the list on the left, and click the Include button.

**Note regarding order dates:**

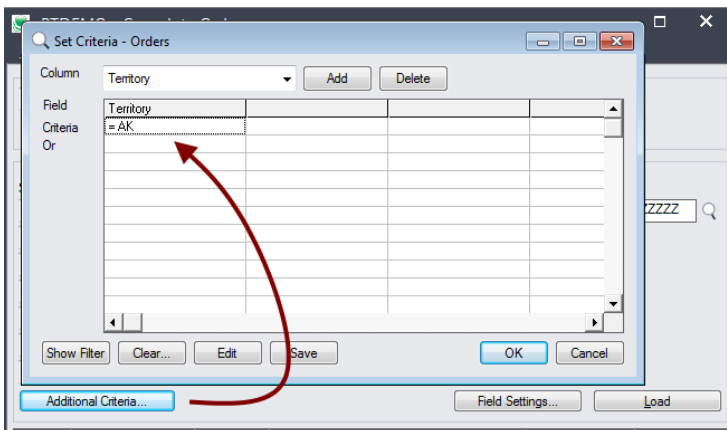
- If you choose a range of Order Dates, the default “To” date is set by a screen accessed through the **Complete Orders > File > Settings** menu choice:



You can override the default in the Range fields.

**Choose additional criteria if necessary:**

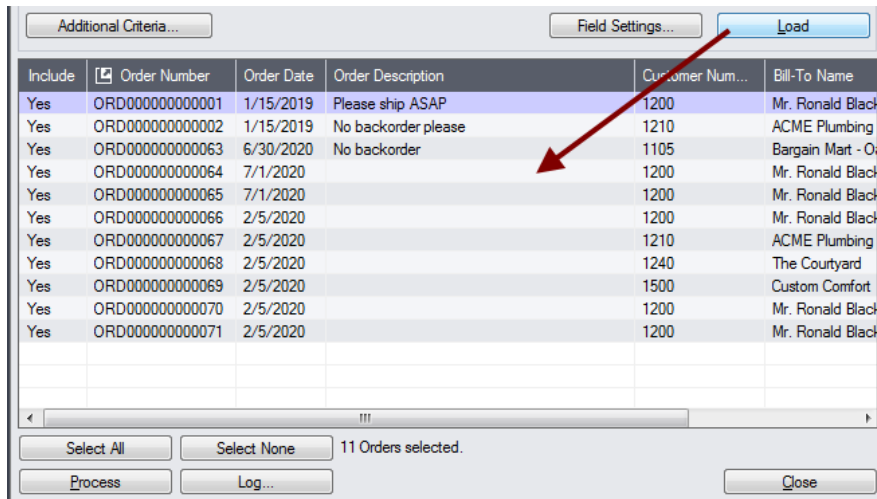
If you want to select orders from a field that is NOT available on the Field Settings form, use Additional Criteria.



- Click the Additional Criteria button to further restrict the orders retrieved for completion.
- Select a field in the dropdown and click the Add button.

- Double-click the Criteria field to enter a relationship and value.
- Click OK to save.

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

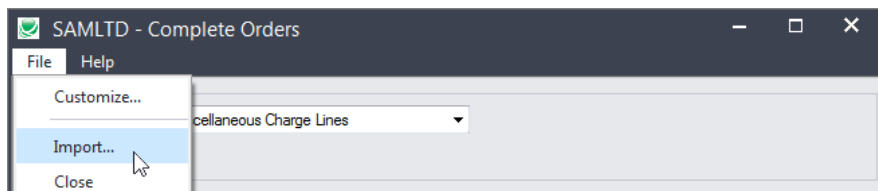


- Click the Load button to display the selected list of orders.
  - Go back and adjust the ranges or additional criteria if necessary.

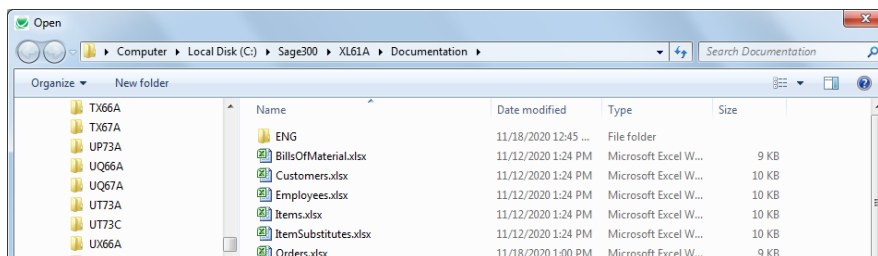
## Importing a List of Orders for Completion

**Important:** You must choose options for selecting items or miscellaneous charges **before** importing the list of orders for completion. See [Choose items/miscellaneous charges.](#)

- Choose **File > Import** from the Complete Orders menu.



- Select the list of orders that you want to process.



- The program will import the list and load all relevant orders into the grid – setting all orders to “Include” – and display a message stating the number of orders that were successfully loaded, and the number of orders that could not be imported.

Include	Order Number	Order Date	Order Description	Customer Num...	Bill-To Name
Yes	ORD0000000000063	6/30/2020	No backorder	1105	Bargain Mart - O
Yes	ORD000				Mr. Ronald Black
Yes	ORD000				Mr. Ronald Black
Yes	ORD000				New Company
Yes	ORD000				Bargain Mart - O
Yes	ORD000				ACME Plumbing
Yes	ORD000				Mr. Ronald Engli

The program will reject orders that cannot be processed, and will not import them.

All orders that can be completed will be loaded into the grid at the bottom of the screen. You can then confirm which orders you want to complete.

## Choosing Orders from the Grid for Processing

- 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	ORD0000000000001	1/15/2019	Please ship ASAP	1200	Mr. Ronald Black
Yes	ORD0000000000002	1/15/2019	No backorder please	1210	ACME Plumbing
No	ORD0000000000063	6/30/2020	No backorder	1105	Bargain Mart - O

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

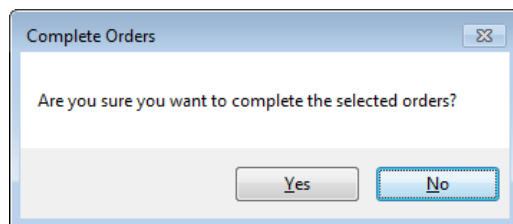
Order Number
ORD0000000000001
ORD0000000000002

**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 [ZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZ]
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:

Lin...	Type	Item No./ Misc. Charge	Kit/BOM	Description	Price List	Location	Qty. Ordered	Deliver By
1	Item	A1-310/D		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:

Lin...	Type	Item No./ Misc. Charge	Kit/BOM	Description	Price List	Location	Qty. Ordered	Deliver By
1	Item	A1-310/D		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

## File Formats for Imported Order and Item Lists

Complete Orders lets you complete groups of orders using an imported order list and an imported list of item numbers.

Import files – orders and item lists – are Excel files.

You can find examples of import lists in directory “...\Sage300\XL61A\Documentation”.

### Order List

Instead of specifying a range of orders and clicking the Load button, you can directly import a list of orders.

The Excel Spreadsheet order list is a single column with “ORDNUMBER” as the column heading in the first row.

	A
1	ORDNUMBER
2	ORD000000000071

- All other columns are ignored. This means that you can add item descriptions and notes to your spreadsheet without affecting the file import.

### Item Lists

You can import item lists to further select orders for completion.

The Excel Spreadsheet item list is a single column with “ITEMNO” as the column heading in the first row.

	A
1	ITEMNO
2	A11030
3	A11050

Notes:

- Item numbers can be formatted or unformatted.
- All other columns are ignored. This means that you can add item descriptions and notes to your spreadsheet without affecting the file import.