

TaiRox Productivity Tools User Guide

Summary - Complete Orders

Complete Orders eliminates the time-consuming steps involved in completing Order Entry orders from the Sage 300 Order Entry module. The orders may be old and all items should be completed - or - there may be discontinued items that are to be eliminated from many orders.

In many business situations, once a certain period of time has passed, the items not shipped in an order will never be shipped. Cleaning up old orders by completing them is desirable so that the various quantities on order are meaningful statistics. Cleanup can be a time-consuming task because each line item must have its quantity ordered and quantity committed values set to zero before the order can be set to complete.

Overview - Complete Orders

Complete Orders selects Order Entry orders with the exact mechanisms used by core modules when printing reports. After selection, the selected orders can be “cherry-picked” for completion. Pressing a Process button completes the operation in one-step. Optionally, completed orders can also be deleted.

Running Complete Orders

Once the TaiRox Productivity Tools are installed and activated, the Complete Orders icon will be shown from the TaiRox Productivity Tools menu on the Sage 300 desktop (and can be copied to other menu locations).

Launching Complete Orders will present a screen that allows you to select which items you wish to complete across a range of orders. The choices are shown here:

The image shows four sequential screenshots of the 'Complete Orders' dialog box. Each screenshot has a title bar that says 'Complete Orders' and a dropdown menu. The first screenshot shows the dropdown set to 'Complete all Item and Miscellaneous Charge Lines' and an 'Order Range' field below. The second screenshot shows the dropdown set to 'Complete a Specific Item Line' and an 'Item Number' input field with a search icon. The third screenshot shows the dropdown set to 'Complete a Specific Miscellaneous Charge Line' and a 'Miscellaneous Charge Code' input field with a search icon. The fourth screenshot shows the dropdown set to 'Complete a List of Items' and a small upward-pointing arrow icon to the right of the dropdown.

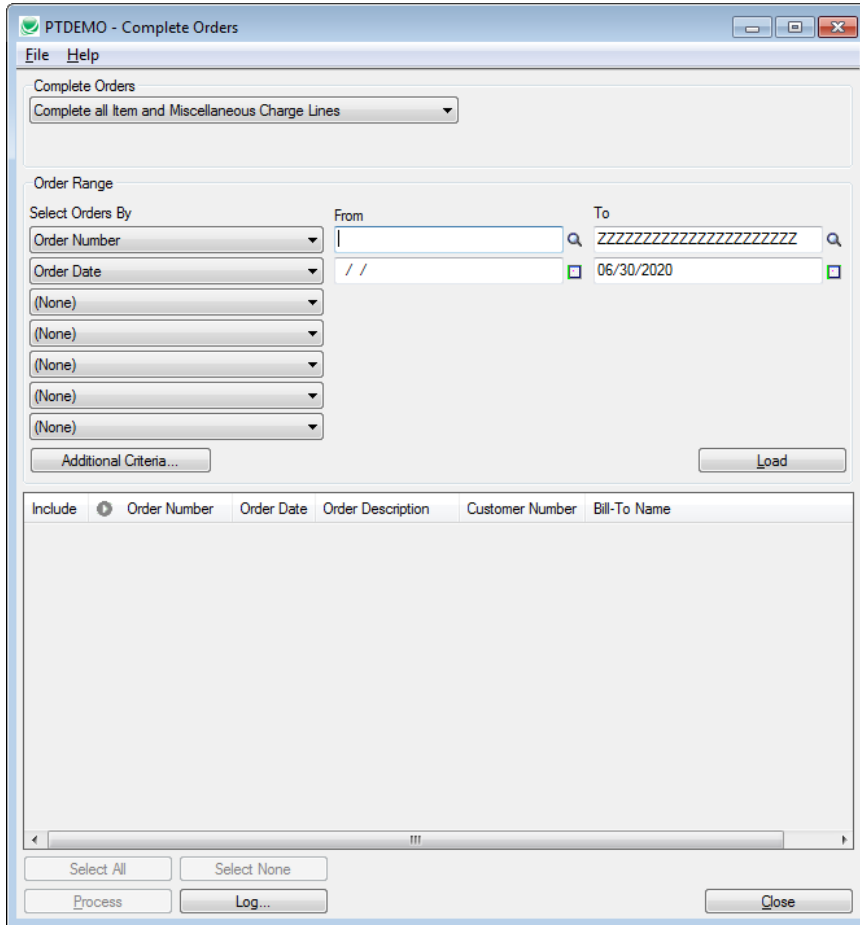
Click on the up icon to edit a list. The list will be remembered from the previous Load.

Item Number	Item Description
A1-103/0	Fluorescent Desk Lamp
A1-105/0	13W Mini Fluorescent Bulb
A1-310/0	Halogen Desk Light
A1-320/0	50W/12V Halogen Bulb

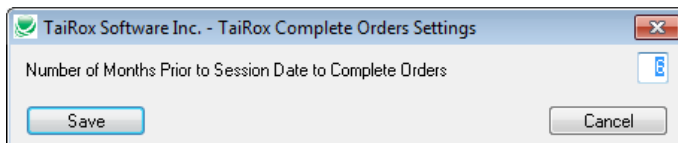
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Running Complete Orders (continued)

Launching the program will present a screen that allows you to select orders for completion using various ranges:



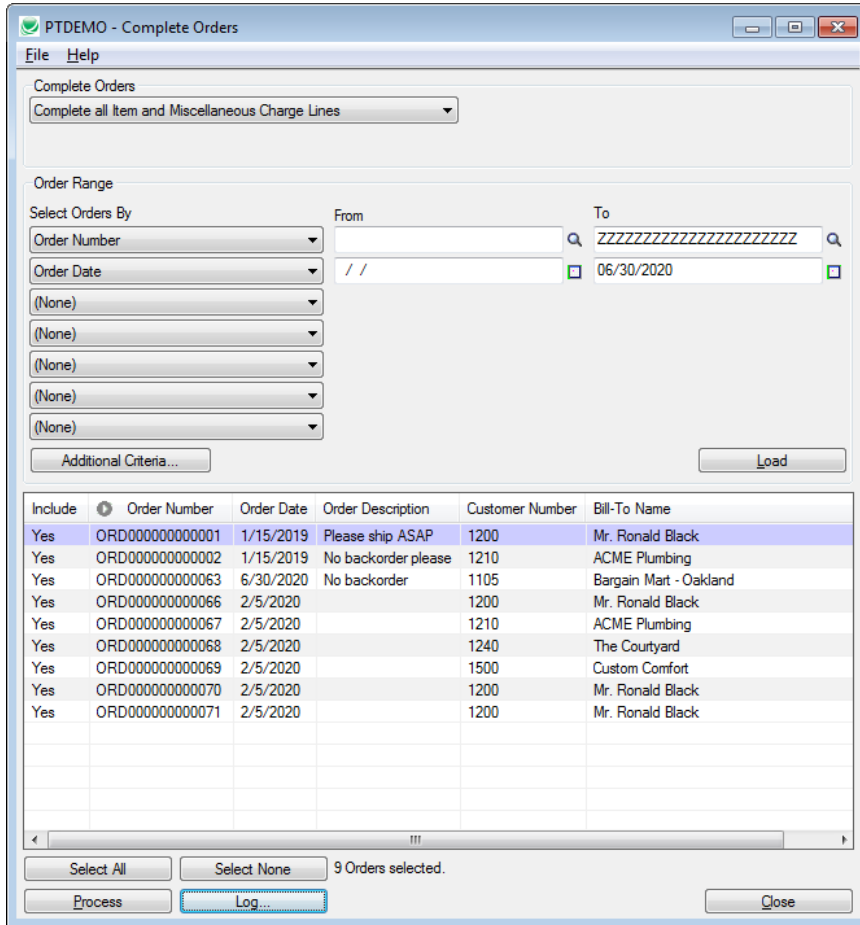
When a range of Order Dates is used, the default values are controlled by settings accessed through the File menu:



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Running Complete Orders (continued)

When the Load button is pressed, the active orders that match the selection criteria will be displayed, with full drill-down support:



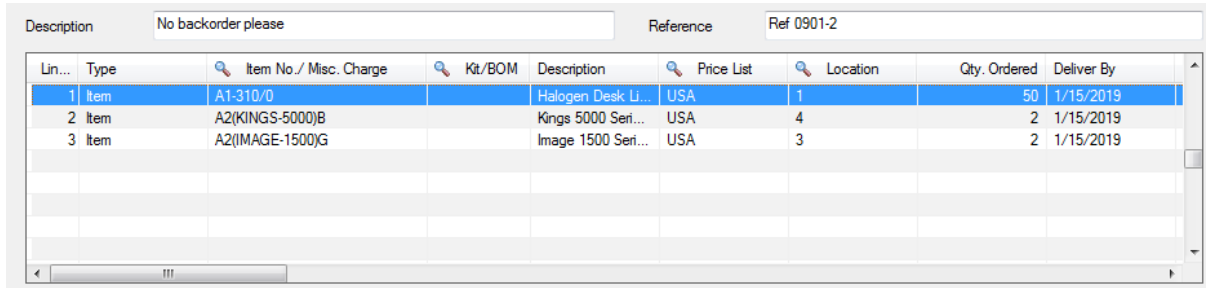
The selected orders can be selected / de-selected on an individual basis ("cherry-picked"). The Process button will now complete the process. There may be data-integrity errors that prevent some completions, in which case an error window will appear.

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Running Complete Orders (continued)

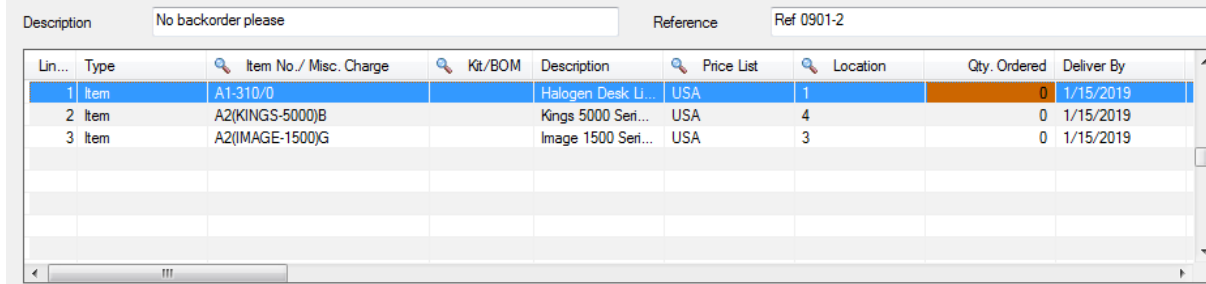
You may also **delete** an order by selecting the row and pressing the **delete key**. When the delete key is pressed you will be prompted to confirm the deletion of that order.

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 L...	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 L...	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