

# Complete Purchase Orders

Businesses frequently have incomplete purchase orders because items on order are out-of-stock or discontinued and will never be received from the vendor. As a result, POs remain open and item quantities on back order are unreliable.

Complete Purchase Orders simplifies the job of completing purchase orders by finding incomplete POs, zeroing the quantity outstanding for each incomplete line item, and then setting the PO status to “Complete.”

## Complete Purchase Orders lets you:

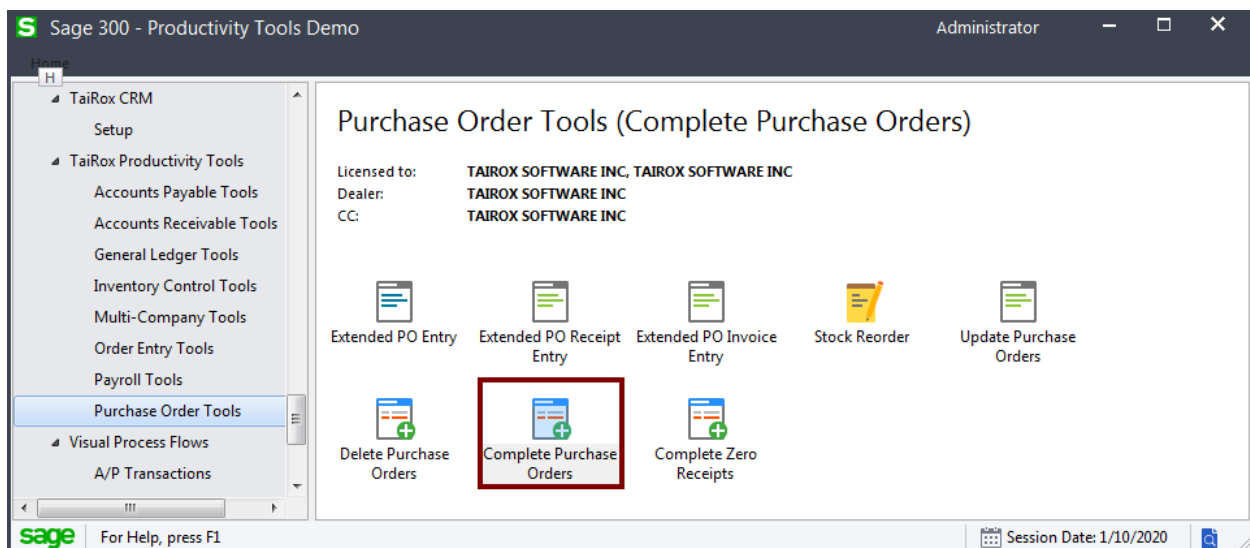
- Select incomplete purchase orders based on items on order.
- Choose from Active, Blanket, Standing and Future purchase orders.
  - The business case for completing different types of purchase orders should be carefully considered, especially the completion of Blanket purchase orders.

**Important:** The Complete Purchase Orders program “remembers” the previous setting for the drop-down that controls purchase order type. If you are completing order types other than Active, you may wish to re-select Active before leaving the Complete Purchase Orders form.

- Select ranges of incomplete purchase orders, then load the POs to further “cherry-pick” ones for completion.
- Check PO details while finalizing the completion list.
- Press a Process button to complete the operation for all selected POs in one step.
- Optionally delete completed purchase orders.
- View a log of all changes after processing.

## Running Complete Purchase Orders

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

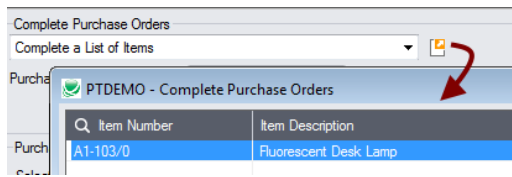


The Complete Purchase Orders screen (below) lets you select which POs you wish to complete by specifying items, PO type, and various ranges of purchase orders.

## Selecting Purchase Orders for completion

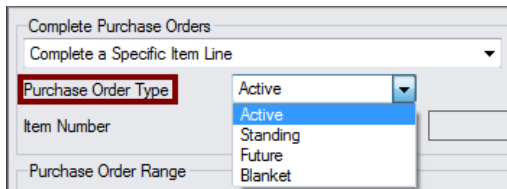
### Choose items:

- If you choose a list of items, the list will be remembered from the previous time you used it to load POs 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 purchase order type:**

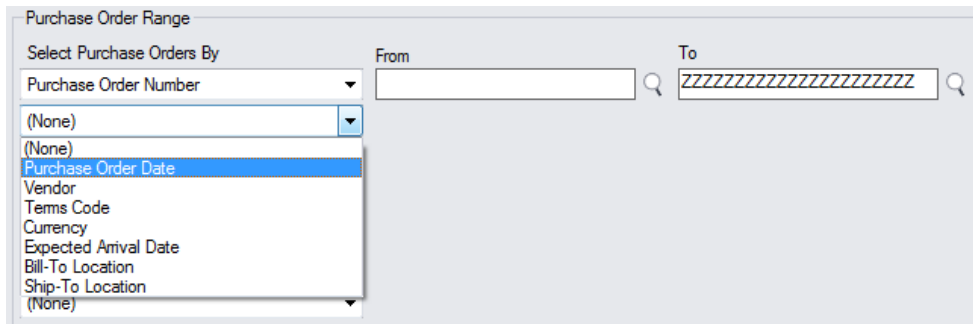


**Important:**

**Check the purchase order type** as part of the selection process.

- The Complete Purchase Orders program “remembers” the previous setting for the drop-down that controls purchase order type. If you are completing order types other than Active, you may wish to re-select Active before leaving the Complete Purchase Orders form.

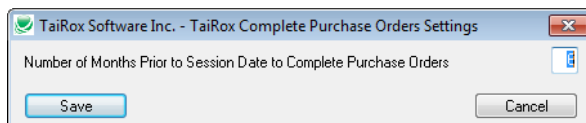
**Choose ranges of purchase orders:**



- You can specify ranges of purchase orders to restrict POs by date, number, vendor, terms, currency, arrival date, locations, or optional PO fields (if added).

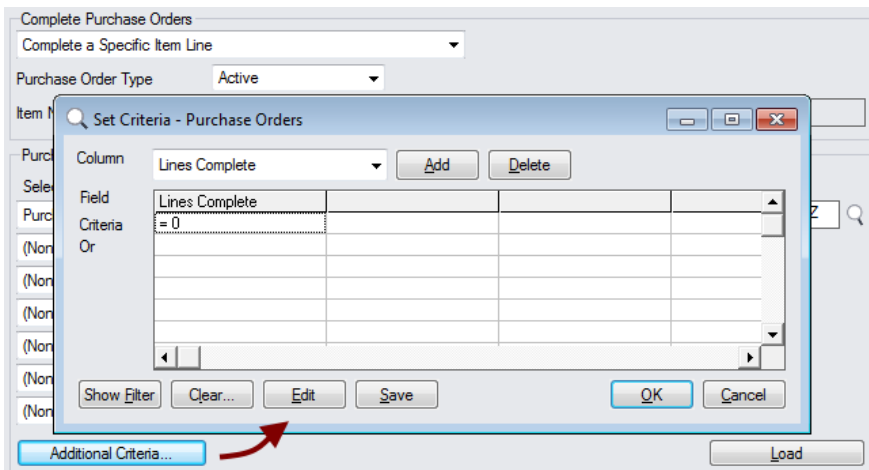
**Note regarding PO dates:**

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



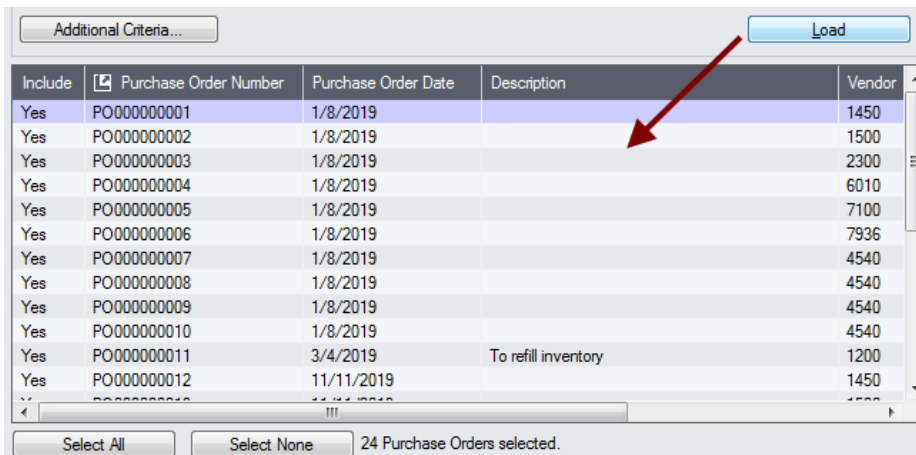
You can override the default in the Range fields.

**Choose additional criteria:**

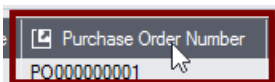


- Click Additional Criteria to further restrict the POs retrieved for completion. Click OK to save.

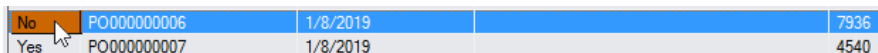
**Load the list of selected POs and choose which ones to complete:**



- Click the Load button to display the selected list of POs.
  - Go back and adjust the ranges or additional criteria if necessary.
- Use the Select All and Select None buttons.
- Click the Purchase Order Number column heading to drill down on the selected PO:



- Double-click in the Include column to “cherry-pick” from the PO selections:



**You can also delete a PO by selecting it and pressing the Delete key:**

- You can also **delete** a purchase order from the Purchase Orders 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 purchase order.



## Effects of Running Complete Purchase Orders

To illustrate the effects of running the program, here are before and after views of a purchase order from sample data.

**Before:** the line item is not complete and the quantity outstanding is 75.

Lin...	Completed	Item Number	Item Description	Location	Drop-Ship	Quantity Ordered	Quantity Outstanding	Unit of Meas
1	No	A1-320/0	50W/12V Halogen Bulb	1	No	200	200	Ea.
2	No	A1-320/0	50W/12V Halogen Bulb	4	No	200	200	Ea.

**After:** the line item is complete and the quantity outstanding is 0. Other quantities are unaffected.

Lin...	Completed	Item Number	Item Description	Location	Drop-Ship	Quantity Ordered	Quantity Outstanding	Unit of Meas
1	Yes	A1-320/0	50W/12V Halogen Bulb	1	No	200	0	Ea.
2	Yes	A1-320/0	50W/12V Halogen Bulb	4	No	200	0	Ea.