

TaiRox Productivity Tools User Guide

Summary - Complete Purchase Orders

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

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

Overview - Complete Purchase Orders

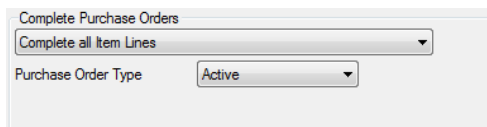
Complete Purchase Orders selects purchase orders, which can then be “cherry-picked” for completion. Pressing a Process button completes the operation in one-step. Optionally, completed purchase orders can also be deleted.

Active, Blanket, Standing and Future purchase orders can be completed and is controlled by a drop-down list. **Important Notes:** The business case for completion of different types of purchase orders should be carefully considered, especially the completion of Blanket purchase orders. The previous setting for the drop-down that controls purchase order type is remembered. If you are completing order types other than Active, you may wish to re-select Active before leaving the Complete Purchase Orders form.

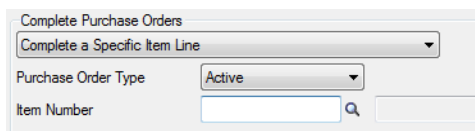
Running Complete Purchase Orders

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

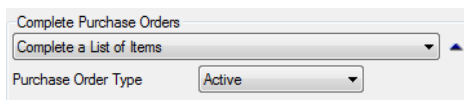
Launching Complete Purchase Orders will present a screen that allows you to select which items you wish to complete across a range of purchase orders. The choices are shown here:



Complete Purchase Orders
Complete all Item Lines
Purchase Order Type: Active



Complete Purchase Orders
Complete a Specific Item Line
Purchase Order Type: Active
Item Number: []



Complete Purchase Orders
Complete a List of Items
Purchase Order Type: Active

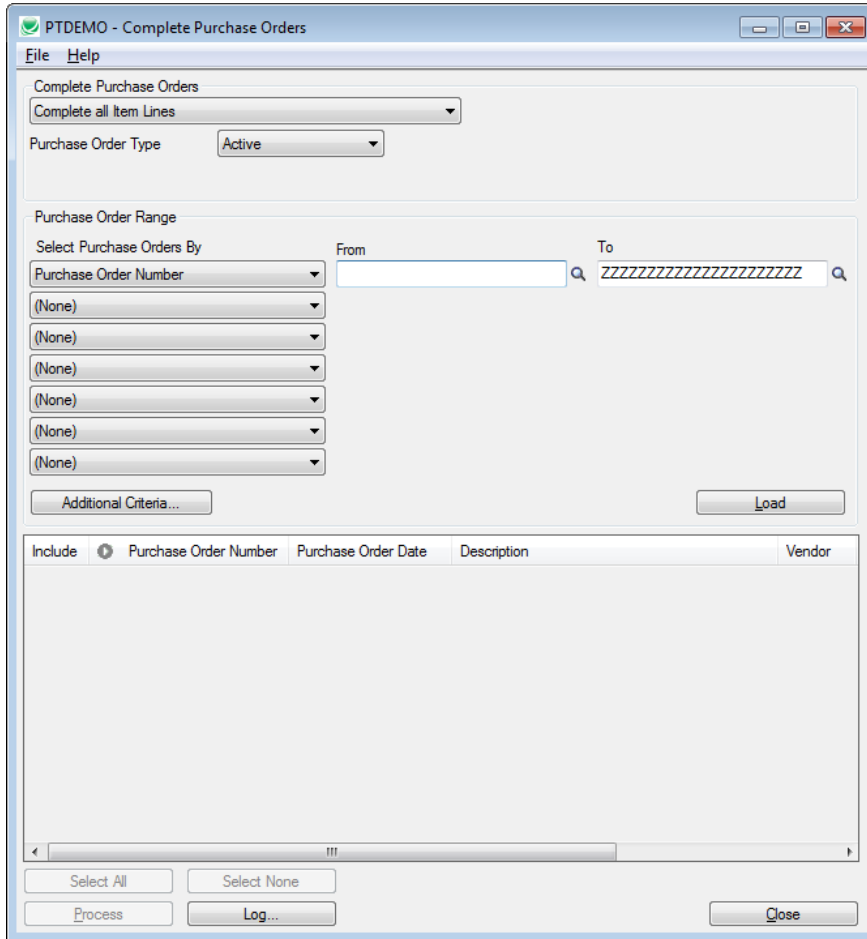
Click on the up icon to edit a list. The list will be remembered from the previous Load.

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

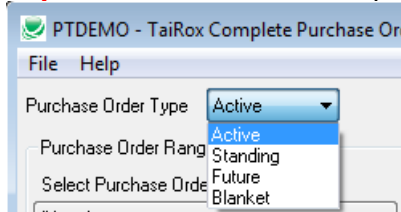
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Running Complete Purchase Orders (continued)

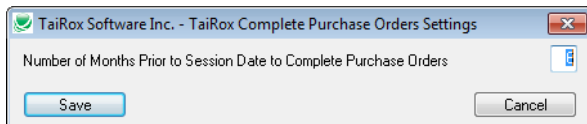
Launching the program will present a screen that allows you to select purchase orders for completion using various ranges:



Important Note: Check the purchase order type as part of the selection process:



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



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Running Complete Purchase Orders (continued)

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

PTDEMO - Complete Purchase Orders

File Help

Complete Purchase Orders

Complete all Item Lines

Purchase Order Type: Active

Purchase Order Range

Select Purchase Orders By: Purchase Order Date

From: / / To: 10/23/2019

(None) (None) (None) (None) (None) (None)

Additional Criteria... Load

Include	Purchase Order Number	Purchase Order Date	Description	Vendor
Yes	PO000000001	1/8/2019		1450
Yes	PO000000002	1/8/2019		1500
Yes	PO000000003	1/8/2019		2300
Yes	PO000000004	1/8/2019		6010
Yes	PO000000005	1/8/2019		7100
Yes	PO000000006	1/8/2019		7936
Yes	PO000000007	1/8/2019		4540
Yes	PO000000008	1/8/2019		4540
Yes	PO000000009	1/8/2019		4540
Yes	PO000000010	1/8/2019		4540
Yes	PO000000011	3/4/2019	To refill inventory	1200

Select All Select None 11 Purchase Orders selected.

Process Log... Close

The selected purchase 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.

You may also **delete** a purchase 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 purchase order.

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Running Complete Purchase Orders (continued)

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.