

Create Orders User Guide

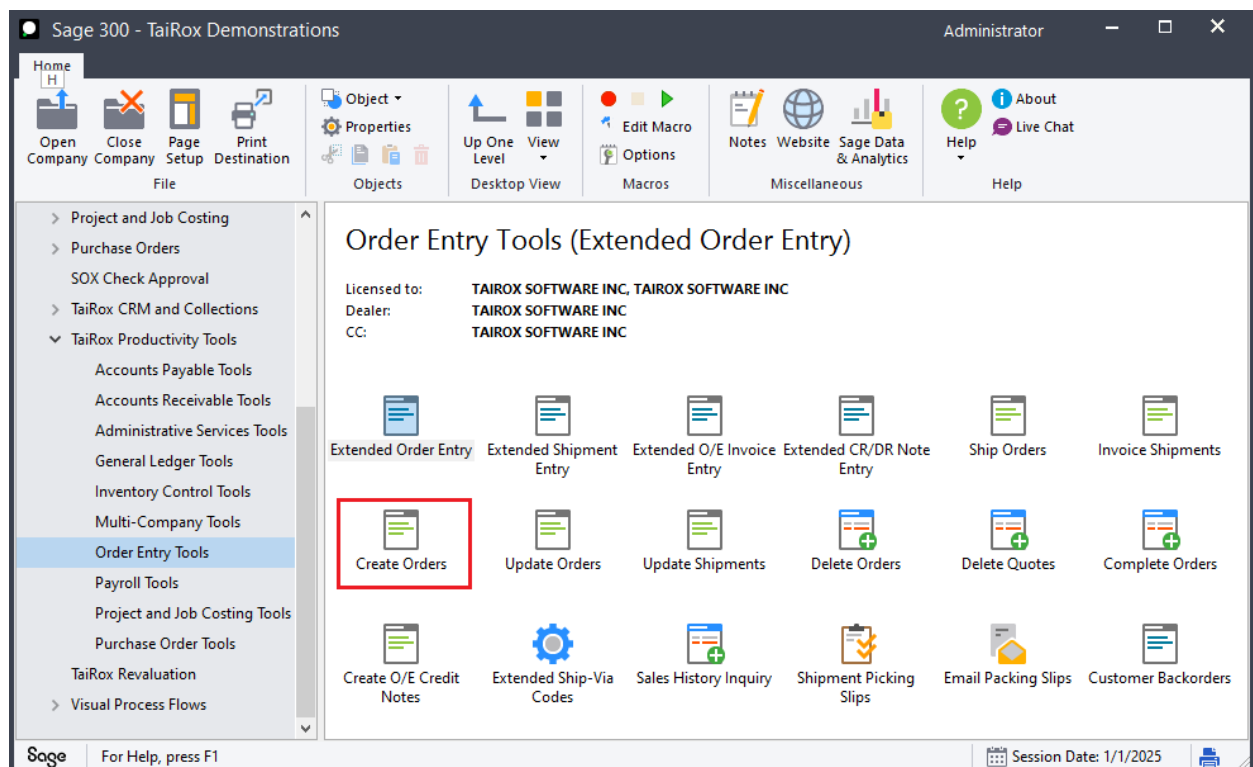
Do you create multiple active orders from standing orders every month? Do you want to activate future orders without running day-end? Our program does these operations with a few clicks..

Create Orders lets you:

- Select Standing and Future allows you to select orders based on Order Number, Order Date, and many other fields, including Order Optional Fields.
- See the list of selected and qualifying orders.
- Process some or all of the selected orders. For standing orders, new orders are created. For Future orders are set to active if their order-by date is reached.
- View a log showing all orders created and made active.

Running Create Orders

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



Note that Enterprise Productivity Tools appear only if you have an Enterprise license from TaiRox Software.

The Create Orders screen (below) lets you find standing orders and future orders that are "due". Specify a variety of selection criteria such as the Order Number, Order Date and many other fields including Order Optional Fields.

TXDEMO - Create Orders

File Help

Order Range

Select Standing or Future Orders By

From To

Order Number Order Date (None) (None) (None) (None) (None)

Additional Criteria... Field Settings... Load

Include	Order Type	Order Number	Order Date	Order Description	Customer Number	Bill-To Name
Yes	Standing	ORD000000000112	1/1/2025		1200	Mr. Ronald Black
Yes	Future	ORD000000000113	1/1/2025		1210	ACME Plumbing

Select All Select None 2 Orders selected.

Process Log... Close

Choosing Orders from the Grid for Processing

- Use the Select All and Select None buttons.
- Double-click in the Include column to "cherry-pick" the items.

Click the Process button to close the items:

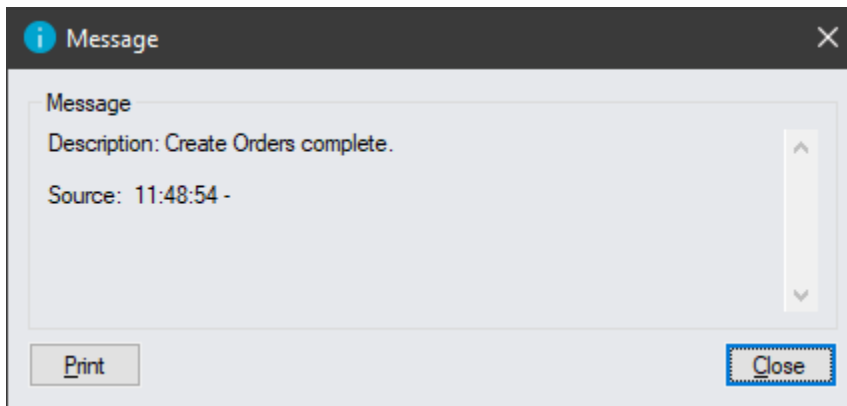
The program asks you to confirm your choices. Click Yes to continue:

Create Orders

Are you sure you want to create or activate orders from the selected standing or future orders?

Yes No

When processing is completed, a message will appear indicating errors, if any.



Click the Log button to confirm which items were closed and which items could not be closed.

```
8/14/2026 11:48:53 AM Create Orders started.
8/14/2026 11:48:53 AM Build 9722 created on 2026/08/14
8/14/2026 11:48:53 AM
8/14/2026 11:48:53 AM Performed by user: ADMIN
8/14/2026 11:48:53 AM
8/14/2026 11:48:53 AM Order Range
8/14/2026 11:48:53 AM      Order Number From [] To [ZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZ]
8/14/2026 11:48:53 AM      Order Date From [] To [12/31/9999]
8/14/2026 11:48:53 AM
8/14/2026 11:48:53 AM Creating order from standing order ORD0000000000112 for Customer Number 1200...
8/14/2026 11:48:54 AM Order Number ORD0000000000114 was created.
8/14/2026 11:48:54 AM Activating future order ORD0000000000113 for Customer Number 1210...
8/14/2026 11:48:54 AM Order Number ORD0000000000113 activated.
8/14/2026 11:48:54 AM
8/14/2026 11:48:54 AM Create Orders complete.
8/14/2026 11:48:54 AM =====
```