Complete Purchase Orders for Sage 300cloud

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 ranges of incomplete purchase orders, then load the POs to further "cherry-pick" ones for completion.
- 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: You can save the settings for running the Complete Purchase Orders program. If you complete order types other than Active, you may wish to re-select Active before leaving the Complete Purchase Orders form.

- Select incomplete purchase orders based on items on order.
- Drill down to PO details while finalizing the completion list.
- Click the Process button to complete the operation for all selected POs in one step.
- View a log of all changes after processing.

Running Complete Purchase Orders

Complete Purchase Orders appears under **Productivity Tools > Purchase Orders** on the Sage 300c desktop.

sag	ge 300		Sessi	sion Date: Oct 21, 2020 Administrator - Sample Company Ltd. 😲 🕵	gs Tools
â	Home	Order Entry	Complete Purchase Orders	Zero R Update Purchase	<i>¥</i>
Ē∱	Accounts Payable	Purchase Orders	Delete Purchase Orders	Options	
₩2	Accounts Receivable	Setup	Complete Zero Receipts		* 5
ê	Administrative Services		Update Purchase Orders		a a
血	Bank Services				J
Ê	Common Services				
	General Ledger			Value(s)	
8	Inventory Control				
*	Multiple Contacts				
۵	Order Entry				
⊞	Purchase Orders				
%	Tax Services				
	Productivity Tools				

Productivity Tools Web Screens for Sage 300cloud Copyright © 2009-2022 TaiRox Software, Inc. All rights reserved. The Complete Purchase Orders screen (below) lets you select which POs you wish to complete by specifying ranges of purchase orders using purchase order fields (including the PO type field and optional fields), and by specifying items on POs.

sag	ge 300		Session Date: Oct 21, 2020 Administ	rator • Sample Company Ltd.	Pelp Settings	Tools				
â	Home	Purchase Orders : Complete Purcha Delete Pu	urchase Complete Zero R Update Purchase			4 5				
Ē∱	Accounts Payable	Complete Purchase Orders	omplete Purchase Orders							
+ ≊	Accounts Receivable				Options 🏠	5				
÷	Administrative Services	Settings Preview				J.				
Â	Bank Services	Selection Criteria				à				
-	Common Services	+ Add Line				J				
	General Ledger	Field	Operator	Value(s)						
	General Ledger	Purchase Order Type	=	Active						
8	Inventory Control	Purchase Order Date	<=	10/20/2020						
	Multiple Contacts									
a	Order Entry	Complete Lines With The Following Items	·			1				
⊞	Purchase Orders	+ Add Line				i I				
%	Tax Services	Item Description								
2	Productivity Tools									
		L								

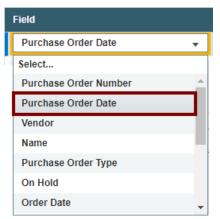
Selecting Purchase Orders for completion

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

• Click the "Add Line" button to specify a new field value or range or values.



• Choose the field for selecting orders. For example, you can choose the Purchase Order Type or the Purchase Order Date.



- Choose the Operator for the field value for example:
 - Purchase Order Type is "Equal To" an Active order type.
 - Or, orders with a date that is *less than or equal to* July 2, 2021.

I.

The choices are "Equal To," "Not Equal To," "Contains," "Greater Than or Equal To," "Less Than or Equal To" (shown below), or "Is One Of."

Operator					
Select	•				
Select					
=					
!=					
>=					
<=					

• **The "Contains" operator appears for text fields**. The program scans the field you selected for the text in the Value field.

The following example selects POs with ship-to locations that include the letters "US".

Field	Operator	Value(s)
Ship-To Location	Contains	US

 The "Is One Of" operator appears for fields with a specific list of values – such as Purchase Order Type or optional fields with a list of values. It lets you specify more than one value – as below.

Field	Operator	Value(s)
Purchase Order Type	Is One Of	Active ×
		Active
		Standing
		Future
		Blanket

• Enter or choose the Value. For example, a date field provides a calendar and other fields provide a Finder button.

Value(s)						
2/1/2021						:::
<		Feb	ruary	2021		>
Su	Мо	Ти	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	1	2	3	4	5	6
7	8	9	10	11	12	13
		Toda	ay - 2/1/	2021		

• To specify a range of dates – for example, greater than November 1, 2020 and less than January 31, 2021 – you would add two lines for the Date field – as shown below:

Field	Operator Value(s)	
Order Date	>=	11/1/2020
Order Date	<=	1/31/2021

• To remove a line, highlight it, then click the "Delete Line" button:

+ Add Line		
Field	Operator	Value(s)
Order Date	>=	11/1/2020

Choose items to complete POs based on what was ordered:

The program can complete POs based on the items in the orders.

 Choose "Complete Lines With The Following Items" to restrict processing to orders that only have specific items.



• Click the Add Line button to add a new item to the list.

+ Add Line 🛱 Delete Line	
ltem	Description
Item	Description

Select the Item from the Finder.

ltem	Description
A1-310/0	Halogen Desk Light

• Use the Delete >Line button to remove item lines.

Save or clear the selection criteria:

You can save your selection criteria so it appears by default the next time you use the program.

	Purchase Orders : Complete Purcha Delete Pur	chase Complete Zero R	Update Purchase			
μ	Complete Purchase Orders				Options 🔅	
					Text Size	<u> </u>
	Settings Preview	Save Settings as Default	a)			
	Selection Criteria				Clear Saved Settings	à
	+ Add Line 💼 Delete Line	User Guide				
	Field	Operator		Value(s)	TaiRox Home Page	~
					View Today's Log	
	Purchase Order Type	Is One Of		Active	L	

- Click the Options button to display the list of options.
- Select "Save Settings as Default."

To clear the default settings:

• Select "Clear Saved Settings" from the Options menu.

View selected POs on the Preview tab and choose which ones to complete:

Click the Preview tab to view the list of purchase orders that meet the range and item selection criteria that you specified on the Settings tab.

Note: If you do not specify any selection criteria – and choose "Complete All Lines" (instead of specifying particular items), the program will list all incomplete POs when you go to the Preview tab. You can then select the POs that you want to complete.

- Go back to the Settings tab to adjust the ranges and change the list of items if necessary.
- Click the checkbox in the column heading to select all or select none of the POs.
- Click the checkboxes on each row to select or de-select a purchase order.

Matching Pu	Matching Purchase Orders				Matching Purchase Orders					
I	PO Number	Vendor Number	Vendor Name		PO Number	Vendor Number	Vendor Na			
	PO00000003	2300	Torrington Ltc	✓	PO00000003	2300	Torrington			
✓	PO00000011	1200	Chloride System		PO00000011	1200	Chloride Sy			
✓	PO00000014	2300	Torrington Ltc		PO00000014	2300	Torrington			
✓	PO00000017	1540	Hart Batteries		PO00000017	1540	Hart Batterie			
✓	PO00000021	1500	Gould Manufa		PO00000021	1500	Gould Manu			

• Click the PO Number to drill down on the selected purchase order:

	PO Number Vendor Number V		Vendor Name	PO Date	РО Туре	Total
<	PO00000003	2300	Torrington Ltd.	1/8/2019	Active	19981.15
	PO00000011	1200	Chloride Systems	3/4/2019	Active	3753.52
~	PO00000014	2300	Torrington Ltd.	11/11/2019	Active	2437.54
	PO00000017	1540	Hart Batteries	1/23/2020	Active	5060.69
	PO00000021	1500	Gould Manufacturing Ltd.	6/23/2020	Active	3945.52

Click the Process button to complete the selected POs:

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

Confirmation	×
Are you sure you want to complete the selected purchase orders?	
No	Yes

Note: There may be data-integrity errors that prevent some completions, in which case an error message will appear.

If the process was successful, the following message will appear, stating the number of purchase orders that were completed:



Select "View Today's Log" to confirm which POs were completed:

• Click the Options button and select View Today's Log to see the purchase order selection criteria and the POs that were completed.

	Options 🔅				
Text Size	•				
Save Settings as Default					
Clear Saved Settings					
User Guide					
TaiRox Home Page					
View Today's L	.og				

• The log looks like this:

TP TCompletePurchaseOrders-P TDEMO-2	20190709.log		□×
Processing started (7/9/2020 10:08:09 A/	M)		
Performed by user: ADMIN			
Selection Criteria: Purchase Order Type Vendor Purchase Order Date Complete lines with the following items A1-103/0: Fluorescent Desk Lamp Completing purchase order P0000000003 Purchase order completed. Completing purchase order P00000000014 Purchase order completed. Processing completed (7/9/2020 10:08:10		[1] [2300] [2020-01-01]	

The Log lists:

- The user, selection criteria and options.
- Each purchase order that was marked complete.

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	۹ L	ocation	1 1	Drop-Ship	Quantity Ordered	Quantity Outstanding	٩	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	🔍 Ur	nit 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.	
									•