



Complete Orders User Guide

Important Notice

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TaiRox Complete Orders

Summary

TaiRox Complete Orders eliminates the time-consuming steps involved in completing old Order Entry orders from the Sage ERP Accpac Order Entry module.

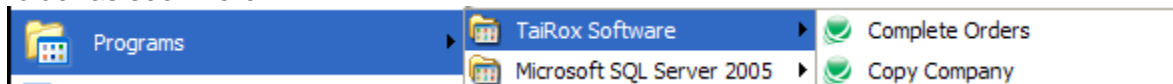
In many business situations, once a certain period of time has passed, the items not shipped in an order will never be shipped. Cleaning up old orders by completing them is desirable so that the various quantities on order are meaningful statistics. Cleanup can be a time-consuming task because each line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

Overview

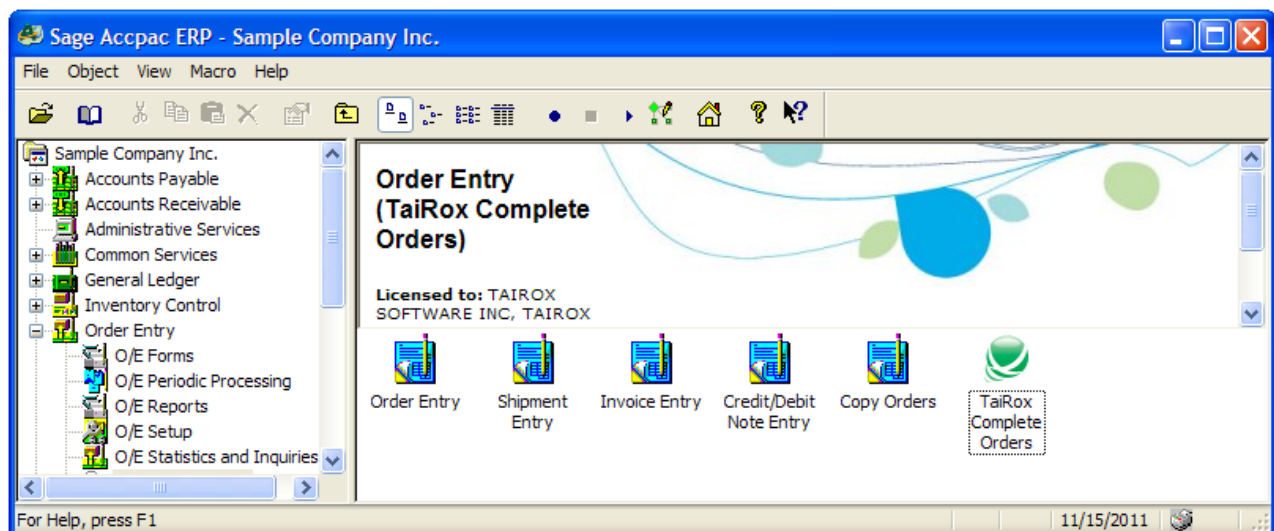
TaiRox Complete Orders selects Order Entry orders with the exact mechanisms used by Accpac's core modules when printing reports. After selection, the selected orders can be "cherry-picked" for completion. The cherry-picking mechanism can be adapted for reports by TaiRox programmers. Contact TaiRox for more details.

Running Complete Orders

TaiRox Complete Orders can be run as a stand-alone Windows program in the TaiRox Software folder as seen here:



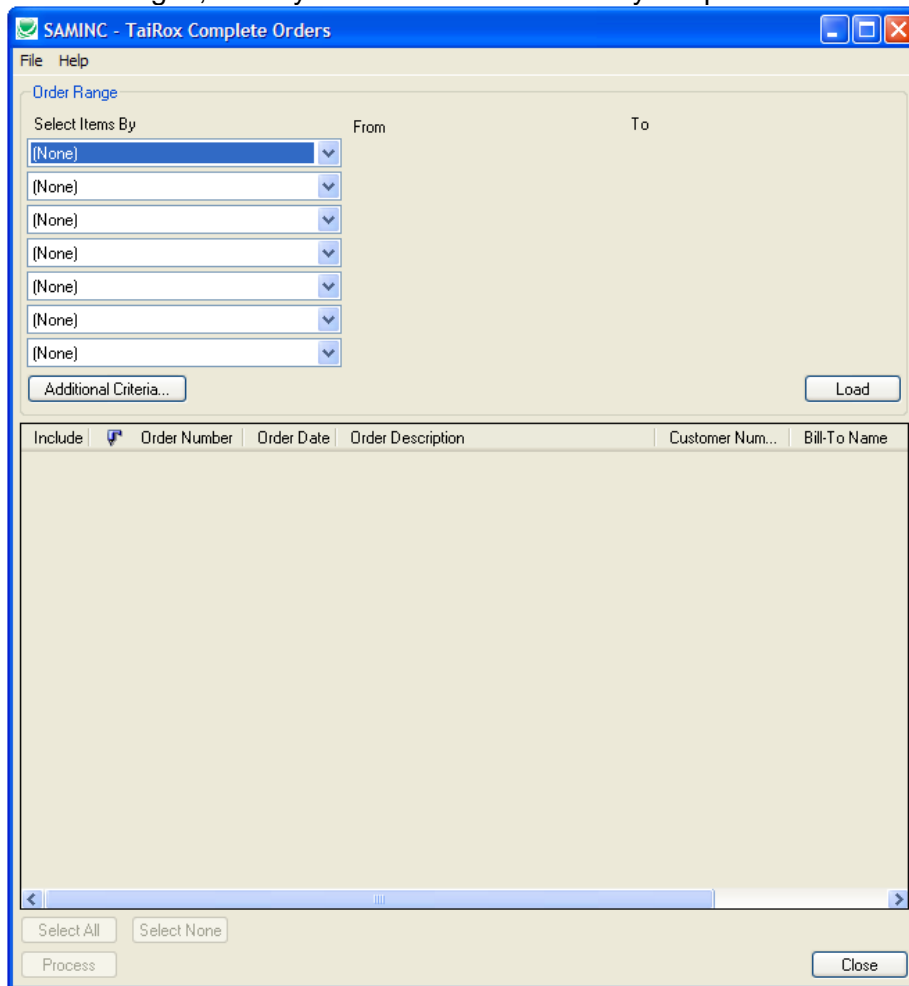
A shortcut should be created on the Accpac desktop by an administrator as seen below. To do this, right click on the desktop, select "program" and point to the TaiRox Complete Orders program in the installation folder as specified in Step 3 above. C:\Program Files\TaiRox\CompleteOrders is the default folder.



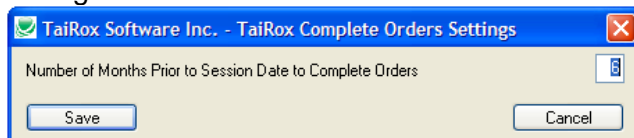
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Running Complete Orders (continued)

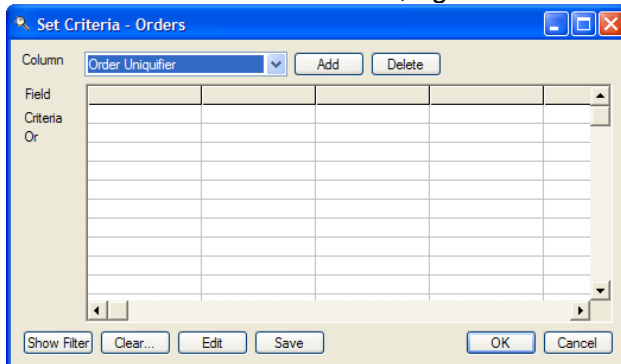
Launching the program will present a screen that allows you to select orders for completion using various ranges, in a style identical to that used by Accpac:



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



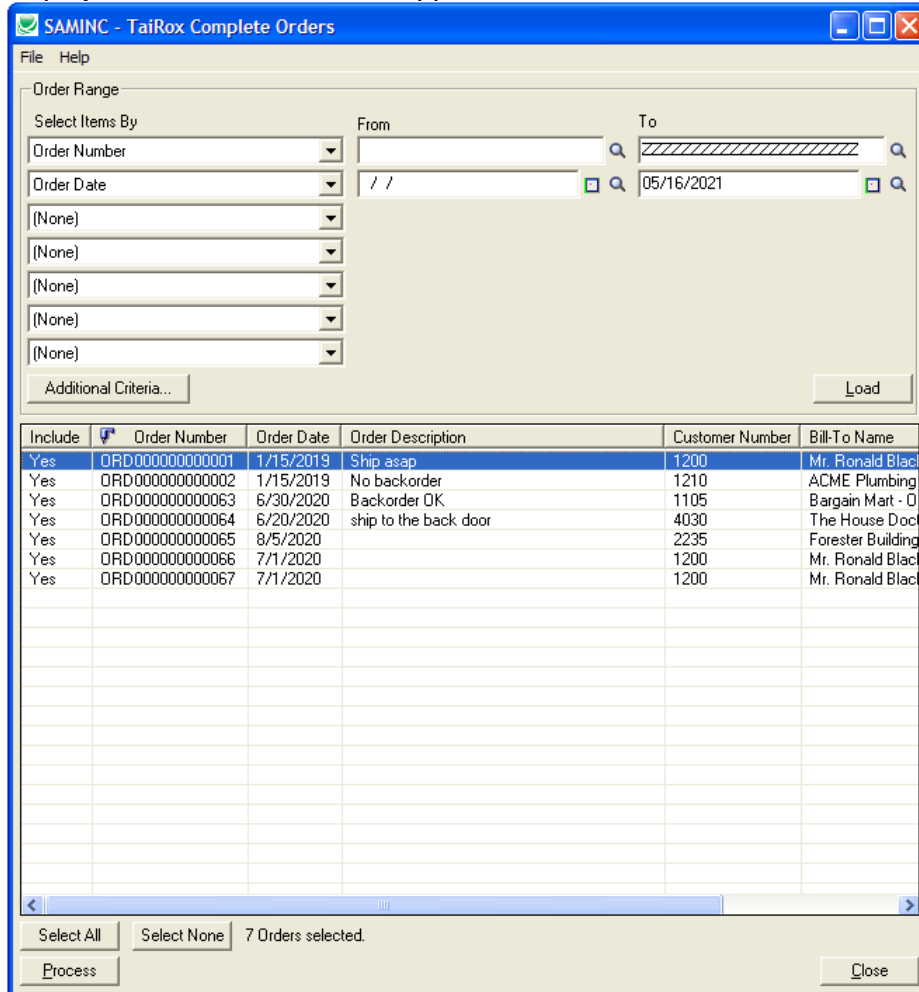
Additional criteria can be used, again in the Accpac style:



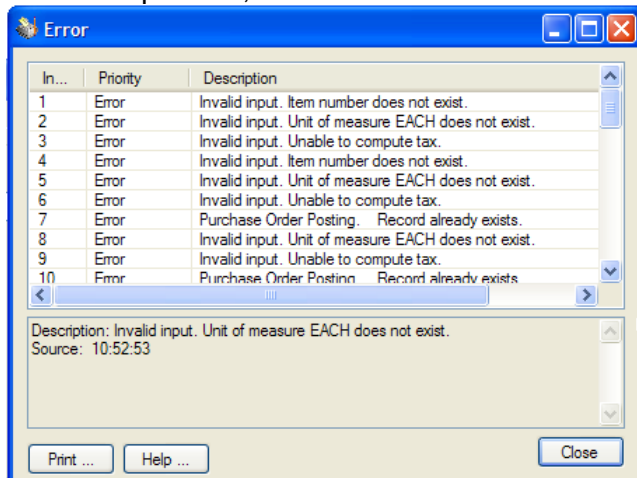
TaiRox Complete Orders

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 from sample data. Before, the line item is not complete and the quantity outstanding is 10:

The screenshot shows the SAMINC - O/E Order Entry window. The Order No. is ORD000000000001, Customer No. is 1200, and the Customer Name is Mr. Ronald Black. The Order Date is 01/15/2019, and the Location is 4 (Port of San Francisco). The Order Type is Active, and the Ship-To Location is WAREH. The Description is Ship asap, and the Reference is Ref 0901-1. The table below shows the order items:

Lin...	Type	Item No. / Misc. Charge	Qty. Ordered	Kit/BOM	Description	Price List	Loc:
1	Item	A1-103/0	10		Fluorescent Des...	USA	4
2	Item	A1-105/0	15		13W Mini Fluore...	USA	1
3	Item	A1-400/0	3		Desk Note Book	USA	4
4	Item	A1-450/0	2		Bulletin Board	USA	4

At the bottom, the summary table shows:

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location 4 (Ea.)	206	10	0	0	206
All Locations (Ea.)	657	31	486	0	657

The Order Subtotal is 816.65.

After, the line item is complete and the quantity ordered is 0. Other quantities are unaffected:

The screenshot shows the SAMINC - O/E Order Entry window with the same order details as the previous screenshot. The Order No. is ORD000000000001, Customer No. is 1200, and the Customer Name is Mr. Ronald Black. The Order Date is 01/15/2019, and the Location is 4 (Port of San Francisco). The Order Type is Active, and the Ship-To Location is WAREH. The Description is Ship asap, and the Reference is Ref 0901-1. The table below shows the order items:

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3	Item	A1-400/0	0		Desk Note Book	USA	4
4	Item	A1-450/0	0		Bulletin Board	USA	4

At the bottom, the summary table shows:

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location 4 (Ea.)	206	0	0	0	206
All Locations (Ea.)	657	21	486	0	657

The Order Subtotal is 0.00.