



Complete Purchase Orders User Guide

Important Notice

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TaiRox Complete Purchase Orders User Guide

Summary

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

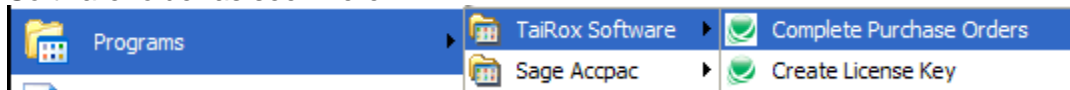
In many business situations, once a certain period of time has passed, the items not received in a purchase order will never be received. Cleaning up old purchase orders by completing them is desirable so that the various quantities on purchase order are meaningful statistics. Cleanup can be a time-consuming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

Overview

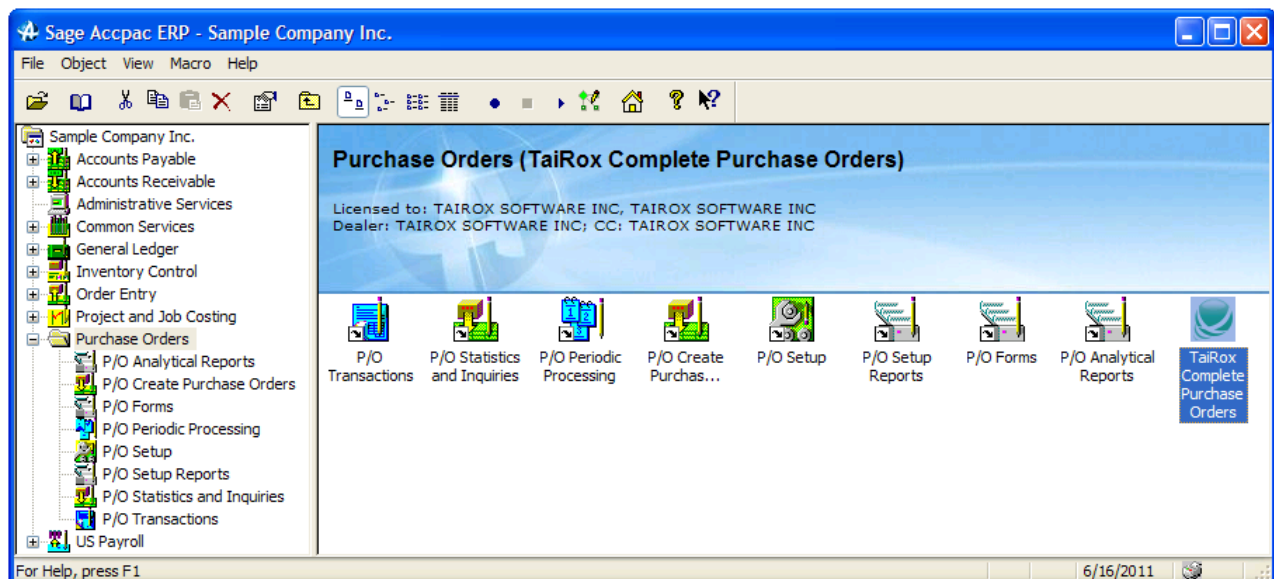
TaiRox Complete Purchase Orders selects purchase orders with the exact mechanisms used in Accpac's core module reports. After selection, the selected purchase orders can be "cherry-picked" for completion. The cherry-picking mechanism can be adapted for reports by TaiRox programmers. Contact TaiRox for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

Running Complete Purchase Orders

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



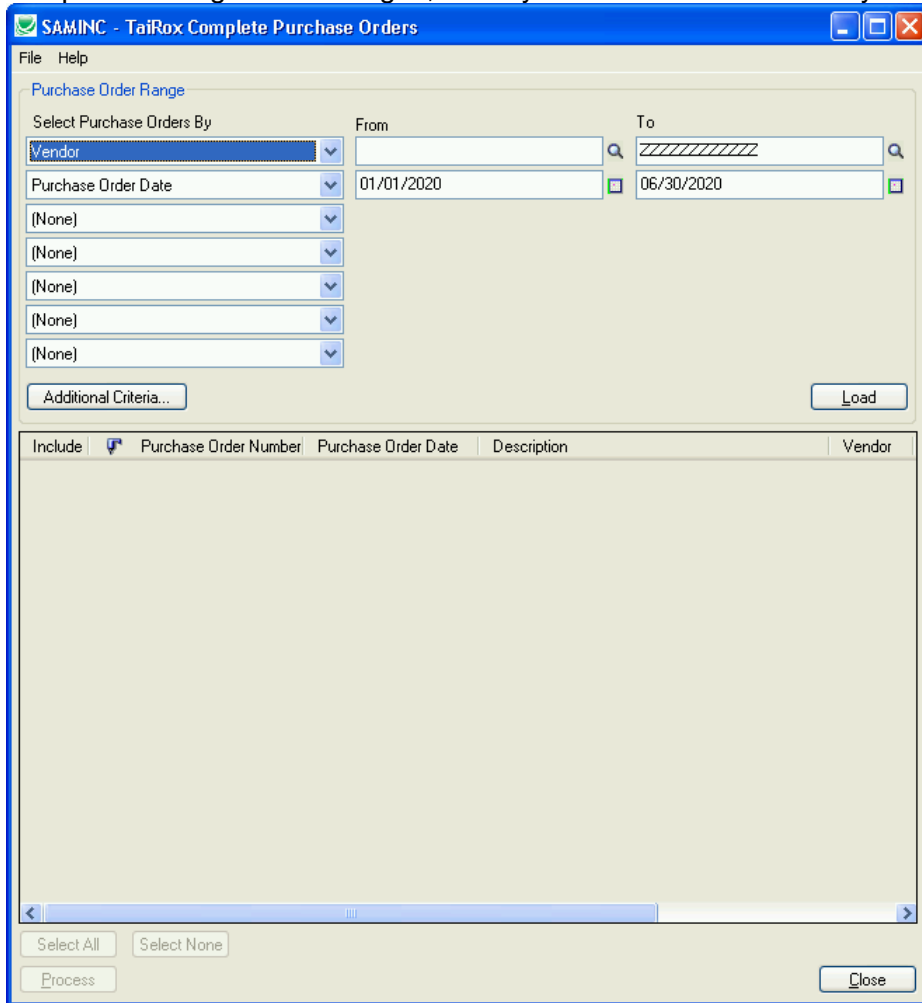
A shortcut should be created on the Accpac desktop by an administrator as seen below. To do this, right click on the desktop, select "program" and point to the TaiRox Complete Purchase Orders program in the installation folder as specified in Step 3 above. C:\Program Files\TaiRox\CompletePurchaseOrders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



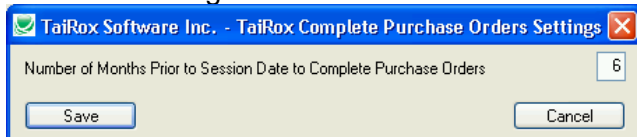
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Running Complete Purchase Orders (continued)

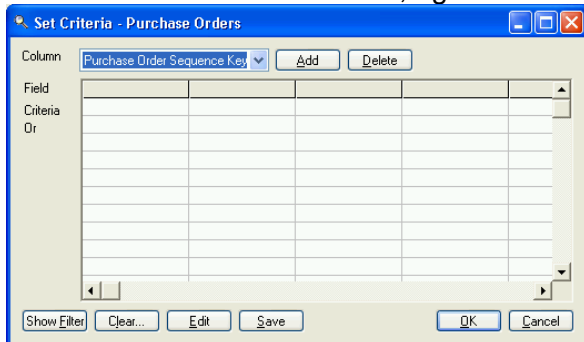
Launching the program will present a screen that allows you to select purchase orders for completion using various ranges, in a style identical to that used by Accpac:



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



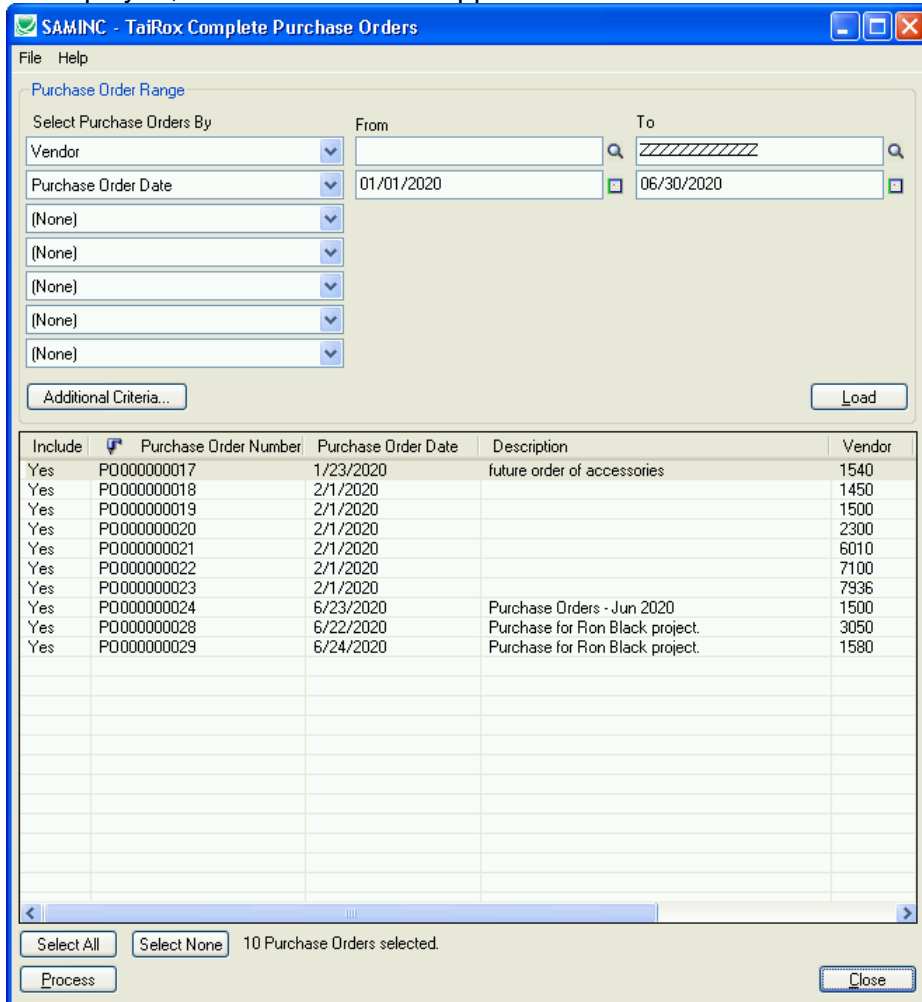
Additional criteria can be used, again in the Accpac style:



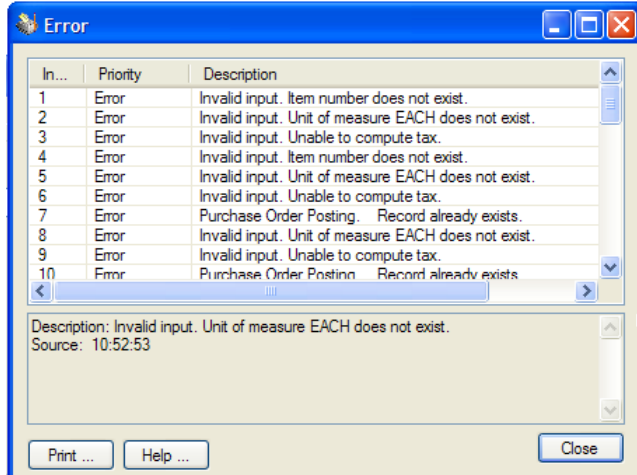
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Running Complete Purchase Orders (continued)

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



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:



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Running Complete Purchase Orders (continued)

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.

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 10:

The screenshot shows the 'SAMINC - P/O Purchase Order Entry' window. The PO Number is PD000000029, Vendor Number is 1580, and the Vendor is Grant Office Supplies. The PO Date is 06/24/2020, and the FOB Point is Tulsa, OK. The PO Type is Active. The Description is 'Purchase for Ron Black project.' The Order Subtotal is 200.00. The table below shows the line item details:

Li...	Completed	Quantity Ordered	Quantity Outstanding	Quantity Received	Cost Class	Contract	Project
1	No	10	10	0	Material	120-1200-10	1002

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

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PO Number: P0000000029
Vendor Number: 1580
Vendor Name: Grant Office Supplies
Last Receipt No.:
Source: Entered

Order | Taxes | Optional Fields | Totals

Template: From Requisition On Hold Job Related
PO Date: 06/24/2020 FOB Point: Tulsa, OK Arrival Date: / /
PO Type: Active
Ship-To Location: Ship-Via:
Bill-To Location: Terms Code: DUETBL Due by Invoice Date
Vendor Acct. Set: USA Accounts payable, Other
Description: Purchase for Ron Black project Reference:

Li...	Completed	Quantity Ordered	Quantity Outstanding	Quantity Received	Cost Class	Contract	Project
1	Yes	10	0	0	Material	120-1200-10	1002

Item/Tax... Calc. Taxes Consolidate Order Subtotal: 0.00
Post Delete History... Close