



# Create PO from Order

## User Guide

### **Important Notice**

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## Summary

Create PO From Order extends the functionality of Sage 300 ERP (Accpac) Order Entry by providing a flexible and robust way to create purchase orders from orders. Sage 300 ERP version 2012 will blindly create purchase orders from orders. TaiRox extends this functionality by previewing the inventory items on-screen so that: Item quantities, vendors and other data can be edited before the PO is created.

- PO description and reference information can be added for the PO
- Status messages are displayed when there is no vendor for an item
- Multiple or combined purchase orders can be created
- Drill-down to purchase orders is conveniently provided after creation
- Items can be cherry-picked for inclusion

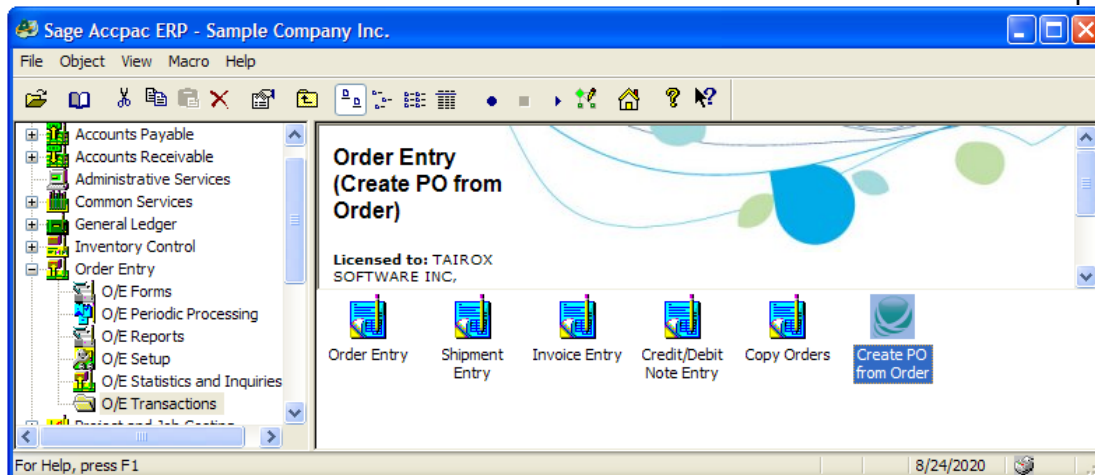
Create PO from Order works with multiple versions of Sage 300 ERP, including 2012, 6.0, 5.6, 5.5 and 5.4.

## Overview

Create PO From Order is a customization of the Sage 300 Order Entry screen. Visually, a button has been added to the bottom of the screen: Create Purchase Order. Internally, Create PO From Order performs its actions through Sage 300 business objects, ensuring proper multi-user operation. The technology used increases the probability that the program will operate unchanged with future versions of Accpac.

## Running Create PO From Order

Create PO From Order can be launched from Accpac Order Entry as shown here. An Accpac administrator will create the Create PO From Order icon as the final installation step.



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## Running Create PO From Order (continued)

When launched, Create PO From Order displays an order entry screen with 1 additional button. Until the order is posted, the Create Purchase Order button will be grayed-out.

The screenshot shows the SAMINC - O/E Order/Invoice Entry window. The interface includes a menu bar (File, Settings, Help) and a header section with fields for Order No. (\*\*\*NEW\*\*\*), Customer No. (1200), Mr. Ronald Black, No. of Shipments (0), Last Shipment No., and Last Invoice No. Below this is a tabbed interface with tabs for Order, Customer, Taxes, Optional Fields, Sales Split, and Totals. The Order tab is active, showing fields for Template Code (ACTIVE), PO No., Status (Entered), Order Date (08/24/2020), Location (1), Central warehouse - Seattle, Order Type (Active), From Multiple Quotes, Job Related, Project Invoicing, Retainage, Ship-To Location, Exp. Ship Date (08/24/2020), Calc. Tax (checked), and On Hold. A description field is also present. Below the tabs is a table with columns: Type, Item No./ Misc. Charge, Kit/BOM, Description, Price List, Location, and Exp. Ship Date. The table contains three rows of items. At the bottom of the window, there is a summary section with columns: Qty. on Hand, Qty. on Sales Order, Qty. on Purchase Order, Qty. Committed, and Qty. Available. The summary shows 137 Qty. on Hand for Location 1 (Ea.) and 657 for All Locations (Ea.). The Order Subtotal is 117.44. At the very bottom, there are buttons for Post, Delete, History..., Prepayment..., Create Purchase Order (grayed-out), and Close.

Type	Item No./ Misc. Charge	Kit/BOM	Description	Price List	Location	Exp. Ship Date
Item	A1-103/0		Fluorescent Des...	USA	1	8/24/2020
Item	A1-105/0		13W Mini Fluore...	USA	1	8/24/2020
Item	A1-310/0		Halogen Desk Li...	USA	1	8/24/2020

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location 1 (Ea.)	137	7	10	0	137
All Locations (Ea.)	657	7	10	0	657

Order Subtotal: 117.44

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## Running Create PO From Order (continued)

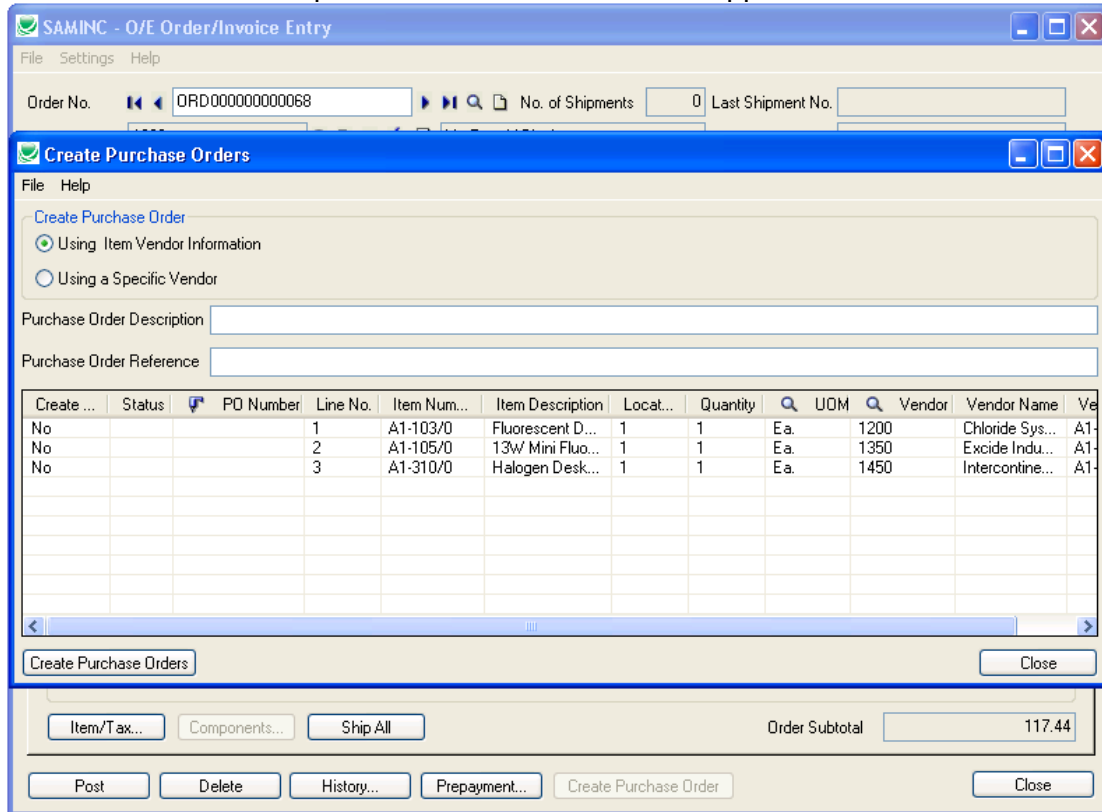
Once the order has been posted and an order number generated, the Create Purchase Order button is active:

Order No. ORD00000000073 No. of Shipments 0 Last Shipment No.   
 Customer No. 1200 Mr. Ronald Black Last Invoice No.   
 Template Code ACTIVE PD No. Status: Posted Source: Entered   
 Order Date 08/24/2020 Location 1 Central warehouse - Seattle   
 Order Type Active From Multiple Quotes Job Related Project Invoicing Retainage   
 Ship-To Location Exp. Ship Date 08/24/2020 Calc. Tax On Hold   
 Description Reference   
 Type Item No./ Misc. Charge Kit/BOM Description Price List Location Exp. Ship Date   
 Item A1-103/0 Fluorescent Des... USA 1 8/24/2020   
 Item A1-105/0 13W Mini Fluore... USA 1 8/24/2020   
 Item A1-310/0 Halogen Desk Li... USA 1 8/24/2020   
 Qty. on Hand Qty. on Sales Order Qty. on Purchase Order Qty. Committed Qty. Available   
 Location 1 (Ea.) 137 8 10 0 137   
 All Locations (Ea.) 657 8 10 0 657   
 Order Subtotal 117.44   
 Post Delete History... Prepayment... Create Purchase Order Close

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## Running Create PO From Order (continued)

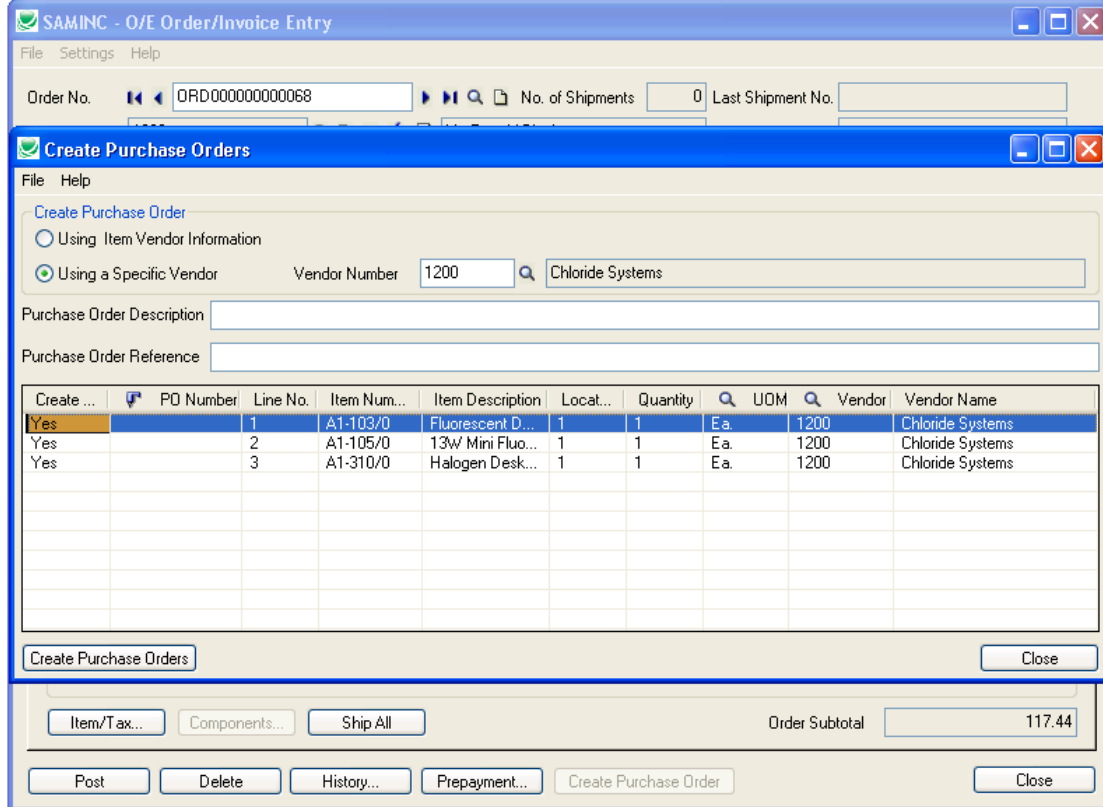
Clicking the Create Purchase Order button will call up a list of purchase order items. You have the option of creating the purchase orders “Using Item Vendor Information” or “Using a Specific Vendor”. Note that the Create PO column allows you to “cherry-pick” which purchase orders to create. If there is an inconsistency, the Status column will show the reason why the line items cannot be added to the purchase order. Drill-down is supported.



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## Running Create PO From Order (continued)

If you choose “Using a Specific Vendor” then you must enter a Vendor Number to create the purchase orders for. When you enter a Vendor Number all the lines are set to “Create PO” equals Yes and the “Vendor Number” for each line is set to the Vendor Number entered. You can override the “Vendor Number” for each line if you choose.



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## Running Create PO From Order (continued)

Drilling-down to a purchase order:

The screenshot displays three overlapping windows from the SAMINC software. The top window, 'SAMINC - O/E Order/Invoice Entry', shows order details for Order No. ORD00000000073, Customer No. 1200, and Customer Name Mr. Ronald Black. The middle window, 'Create Purchase Orders', shows a list of purchase orders with columns for Create, Status, PO Number, Line No., Item Num..., Item Description, Locat..., Quantity, UOM, Vendor, and Vendor Name. The bottom window, 'SAMINC - P/O Purchase Order Entry', shows details for PO Number PO0000000051, Vendor Number 1450 (Intercontinental Electronics), and PO Date 08/24/2020. It includes a table for line items and a subtotal of 25.44.

Create ...	Status	PO Number	Line No.	Item Num...	Item Description	Locat...	Quantity	UOM	Vendor	Vendor Name	Ve
No		PO000000049	1	A1-103/0	Fluorescent D...	1	1	Ea.	1200	Test Chlorid...	A11
No		PO000000050	2	A1-105/0	13w/ Mini Fluo...	1	1	Ea.	1350	Excide Indu...	A11
No		PO000000051	3	A1-310/0	Halogen Desk...	1	1	Ea.	1450	Intercontine...	A11

Li...	Completed	Item Number	Item Description	Location	Drop-Ship	Quantity Ordered	Unit of Meas
1	No	A1-310/0	Halogen Desk Light	1	No	1	Ea.