



Order from History User Guide

Important Notice

TaiRox does not warrant or represent that your use of this software product will be uninterrupted or error-free or that the software product can be run with any other version of Sage ERP Accpac other than 5.4A, 5.5A, 5.6A, 6.0A, or any version of Sage 300 ERP other than 2012 or that the information in this document is completely accurate. TaiRox warrants that any media by which you have received this software is free from defects. TaiRox will replace any such defective media. TaiRox expressly disclaims all other warranties, representations, conditions and guarantees of any kind including, but not limited to warranties for merchantability or fitness for a particular use.

Order from History User Guide

Summary

Order from History extends the functionality of Sage 300 ERP (Accpac) Order Entry by providing a convenient means to create new orders for a customer based on what that customer ordered previously. Use of Order from History tends to increase average order size while decreasing the number of orders processed per dollar of order. The result is lower shipping costs and other operational efficiencies.

In many industries, a customer may phone to order supplies when they notice that their stock of a particular item is low. Order from History allows order entry operators to quickly display details from previous orders and add additional items that may also be low in stock for that customer. The medical supplies industry is one example of a market segment that can benefit from the use of Order from History.

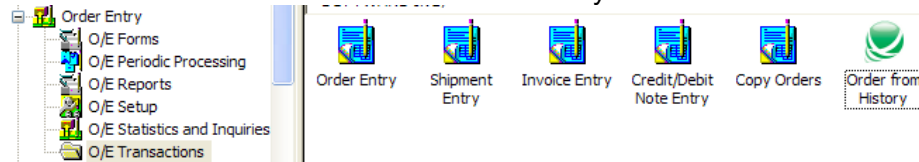
Overview

A single button labeled “Order from History” has been added to the standard O/E entry screen. When pressed, a screen will pop up showing previous orders. Items from previous orders can be selected, quantities can be changed and the selected information can be copied into a standard line item row.

Internally, Order from History performs its actions through Accpac business objects, ensuring proper multi-user operation. The technology used increases the probability that the program will operate unchanged with future versions of Accpac. As illustrative of that technology, Order from History works with versions 5.4, 5.5, 5.6 and 6.0 of Accpac.

Running Order from History

Order from History can be launched from Accpac O/E Transactions as shown here. An Accpac administrator will create the Order from History icon as the final installation step.



Order from History User Guide

Running Order from History (continued)

When launched, Order from History displays an Order entry screen with an additional button "Order from History".

Order No. No. of Shipments Last Shipment No.

Customer No. Mr. Ronald Black Last Invoice No.

Order | Customer | Taxes | Optional Fields | Sales Split | Totals

Template Code PD No. Status: Source: Entered

Order Date Location Central warehouse - Seattle

Order Type From Multiple Quotes Job Related Project Invoicing Retainage

Ship-To Location Exp. Ship Date Calc. Tax On Hold

Description Reference

Li...	Type	Item No./ Misc. Charge	Kit/BOM	Description	Price List	Location	Exp.

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location	0	0	0	0	0
All Locations	0	0	0	0	0

Item/Tax... Components... Ship All Order Subtotal

Post Delete History... Prepayment... Order from History Close

Order from History User Guide

Running Order from History (continued)

The Order from History screen will pop up. The Orders tab allows apply selection criteria and then press the Load button to request previous orders. The Sales History tab is similar, selecting on item criteria rather than order criteria. We'll trace through a typical sequence for the Orders tab.

SAMINC - Order from History

File Help

Orders | Sales History

Order Range

Select Orders By From To

(None) (None) (None) Additional Criteria...

Order Number	Order Date	Purchase Order Number	Ship-To Location Code	Order Description	Order Reference
--------------	------------	-----------------------	-----------------------	-------------------	-----------------

Line Number	Include	Line Type	Item No./Misc. Charge	Kit/BOM Number	Description	Price List	Location	Order UOM	Original
-------------	---------	-----------	-----------------------	----------------	-------------	------------	----------	-----------	----------

Location	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty Committed	Qty. Available
Location	0	0	0		0
All Locations	0	0	0		0

Load Select All Select None Order Close

Order from History User Guide

Running Order from History (continued)

Historical orders will be displayed. Select an order line to see what items comprised that order:

Order from History

File Help

Orders | Sales History

Order Range

Select Orders By: Order Date From: / / To: 12/31/9999 Additional Criteria...

(None) (None)

Order Number	Order Date	Purchase Order Number	Ship-To Location Code	Order Description	Order Reference
ORD000000000050	5/28/2010		WAREHS	Ship asap	Ref #1005-2-1
ORD000000000040	4/5/2010		WAREHS	Overnight shipm...	Ref #1004-1-1
ORD000000000032	1/4/2010			Received Dec 2...	REF #Q2009-78...
ORD000000000028	12/1/2009		HOME	Ship asap	Ref 0912-1-2
ORD000000000025	10/12/2009		WAREHS	Ship asap	Ref 0910-3
ORD000000000015	9/4/2009		WAREHS	Please ship over...	Ref 0909-1-1
ORD000000000011	8/7/2009		HOME	Backorder OK	Ref 0908-1-2

Line Number	Include	Line Type	Item No./Misc. Charge	Kit/BOM Number	Description	Price List	Location	Order UOM	Original
1	No	Item	A1-103/0		Fluorescent Des...	USA	4	Ea.	
2	No	Item	A1-320/0		50w/12V Halog...	USA	1	Ea.	
3	No	Item	A1-310/0		Halogen Desk Li...	USA	1	Ea.	

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

Load Select All Select None Order Close

Order from History User Guide

Running Order from History (continued)

Clicking on the Select All button will select all items in the previous order (the Include column now displays Yes).

Order Range

Select Orders By: Order Date From: / / To: 12/31/9999 Additional Criteria...

(None) (None)

Order Number	Order Date	Purchase Order Number	Ship-To Location Code	Order Description	Order Reference
ORD000000000050	5/28/2010		WAREHS	Ship asap	Ref #1005-2-1
ORD000000000040	4/5/2010		WAREHS	Overnight shipm...	Ref #1004-1-1
ORD000000000032	1/4/2010			Received Dec 2...	REF #Q2009-78...
ORD000000000028	12/1/2009		HOME	Ship asap	Ref 0912-1-2
ORD000000000025	10/12/2009		WAREHS	Ship asap	Ref 0910-3
ORD000000000015	9/4/2009		WAREHS	Please ship over...	Ref 0909-1-1
ORD000000000011	8/7/2009		HOME	Backorder OK	Ref 0908-1-2

Line Number	Include	Line Type	Item No./Misc. Charge	Kit/BOM Number	Description	Price List	Location	Order UOM	Original UOM
1	Yes	Item	A1-103/0		Fluorescent Des...	USA	4	Ea.	
2	Yes	Item	A1-320/0		50w/12V Halog...	USA	1	Ea.	
3	Yes	Item	A1-310/0		Halogen Desk Li...	USA	1	Ea.	

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

Buttons: Load Select All Select None Order Close

Order from History User Guide

Running Order from History (continued)

The quantities to be copied from the previous order can be edited. Here the 12 desk lamps in the original order is changed to 20. When edits are complete, press the Order button.

The screenshot shows the 'SAMINC - Order from History' application window. It features a menu bar with 'File' and 'Help'. Below the menu is a tabbed interface with 'Orders' and 'Sales History' tabs. The 'Order Range' section includes a 'Select Orders By' dropdown set to 'Order Date', a 'From' date field with '//' and a 'To' date field with '12/31/9999'. Below this are two more dropdowns, both set to '(None)'. The main area contains a table of historical orders:

Order Number	Order Date	Purchase Order Number	Ship-To Location Code	Order Description	Order Reference
ORD000000000050	5/28/2010		WAREHS	Ship asap	Ref #1005-2-1
ORD000000000040	4/5/2010		WAREHS	Overnight shipm...	Ref #1004-1-1
ORD000000000032	1/4/2010			Received Dec 2...	REF #Q2009-78...
ORD000000000028	12/1/2009		HOME	Ship asap	Ref 0912-1-2
ORD000000000025	10/12/2009		WAREHS	Ship asap	Ref 0910-3
ORD000000000015	9/4/2009		WAREHS	Please ship over...	Ref 0909-1-1
ORD000000000011	8/7/2009		HOME	Backorder OK	Ref 0908-1-2

Below the table is a summary table for the selected order:

isc. Charge	Kit/BOM Number	Description	Price List	Location	Order UOM	Original Quantity Ordered	Qty Ordered	Order Unit Price
		Fluorescent Des...	USA	4	Ea.	12	12	42.550000
		50w/12V Halog...	USA	1	Ea.	15	15	6.390000
		Halogen Desk Li...	USA	1	Ea.	10	10	50.350000

At the bottom, there is a summary table:

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

Buttons at the bottom include 'Load', 'Select All', 'Select None', 'Order', and 'Close'.

Confirmation and completion messages will appear:

The screenshot shows a confirmation dialog box titled 'Order from History'. It contains a question mark icon and the text: 'Do you want to add items and miscellaneous charges to the current order using historical item and miscellaneous charge prices from order ORD000000000015?'. Below the text are three buttons: 'Yes', 'No', and 'Cancel'.

The screenshot shows a message dialog box titled 'Message'. It contains a question mark icon and the text: 'Description: Order from History complete. There was 3 order detail lines added to the current order. Source: 14:48:02 -'. Below the text are three buttons: 'Print', 'Help ...', and 'Close'.

Order from History User Guide

Running Order from History (continued)

The order screen has now been populated with line items from the historical order:

The screenshot displays the 'SAMINC - Order from History' application window. The interface includes a menu bar (File, Settings, Help) and several input fields for order information:

- Order No.: **** NEW ****
- Customer No.: 1200
- Mr. Ronald Black
- No. of Shipments: 0
- Last Shipment No.:
- Last Invoice No.:

Below these fields are tabs for 'Order', 'Customer', 'Tags', 'Optional Fields', 'Sales Split', and 'Totals'. The 'Order' tab is active, showing fields for Template Code (ACTIVE), PO No., Status (Entered), Order Date (05/28/2012), Location (1), Central warehouse - Seattle, Order Type (Active), From Multiple Quotes (unchecked), Calc. Tax (checked), On Hold (unchecked), Ship-To Location, Exp. Ship Date (05/28/2012), and Description/Reference fields.

The main area contains a table with the following data:

Lin...	Type	Item No./ Misc. Charge	Kit/BOM	Description	Price List	Location	Exp. Ship Date
1	Item	A1-103/0		Fluorescent Des...	USA	4	5/28/2012
2	Item	A1-320/0		50w/12w Halog...	USA	1	5/28/2012
3	Item	A1-310/0		Halogen Desk Li...	USA	1	5/28/2012

At the bottom, there is a summary table for inventory levels:

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Available	Stocking UOM
Location 1	128	0	0	128	Ea.
All Locations	443	0	0	443	Ea.

Buttons at the bottom include 'Item/Tax...', 'Components...', 'Ship All', 'Order Subtotal' (1,109.95), 'Post', 'Delete', 'History...', 'Prepayment...', 'Order from History', and 'Close'.

Order from History User Guide

Running Order from History (continued)

The Sales History tab allows a similar sequence of operations – selection, editing of quantities and copying to the order.

Item Range

Select Items By: **Item Number** From: **A1-103/0** To: **A1-320/0** Additional Criteria...

(None) (None)

Include	Item Number	Kit/BOM Number	Description	Order Number	Order Date	Purchase Order Number	Location	Or
No	A1-103/0		Fluorescent Des...	ORD000000000004	2/17/2009		4	Ea
No	A1-103/0		Fluorescent Des...	ORD000000000015	9/4/2009		4	Ea
No	A1-103/0		Fluorescent Des...	ORD000000000025	10/12/2009		4	Ea
No	A1-103/0		Fluorescent Des...	ORD000000000032	1/4/2010		4	Ea
No	A1-103/0		Fluorescent Des...	ORD000000000040	4/5/2010		3	Ea
No	A1-103/0		Fluorescent Des...	ORD000000000050	5/28/2010		3	Ea
No	A1-310/0		Halogen Desk Li...	ORD000000000004	2/17/2009		1	Ea
No	A1-310/0		Halogen Desk Li...	ORD000000000006	5/8/2009		1	Ea
No	A1-310/0		Halogen Desk Li...	ORD000000000011	8/7/2009		1	Ea
No	A1-310/0		Halogen Desk Li...	ORD000000000015	9/4/2009		1	Ea
No	A1-310/0		Halogen Desk Li...	ORD000000000025	10/12/2009		1	Ea
No	A1-310/0		Halogen Desk Li...	ORD000000000028	12/1/2009		1	Ea
No	A1-310/0		Halogen Desk Li...	ORD000000000032	1/4/2010		1	Ea
No	A1-320/0		50w/12V Halog...	ORD000000000004	2/17/2009		1	Ea
No	A1-320/0		50w/12V Halog...	ORD000000000015	9/4/2009		1	Ea

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

Buttons: Load, Select All, Select None, Order, Close