



# Purchase from History User Guide

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# Purchase from History User Guide

## Summary

Purchase from History extends the functionality of Sage 300 ERP (Accpac) Purchase Orders by providing a convenient means to create new purchase orders for a vendor based on what you've previously ordered from that vendor. Use of Purchase from History tends to consolidate multiple orders into a single larger order. The results can include lower shipping costs, increased discounts and other operational efficiencies.

You may want to put a purchase order together in a hurry when a particular item is sold out or low in stock. Purchase from History gives you a chance to quickly add items to the purchase order – items that you typically or regularly order from that vendor.

Purchase from History also displays item quantities at the bottom of the purchase order screen, incorporating the functionality of the TaiRox Purchase Orders with Quantities product.

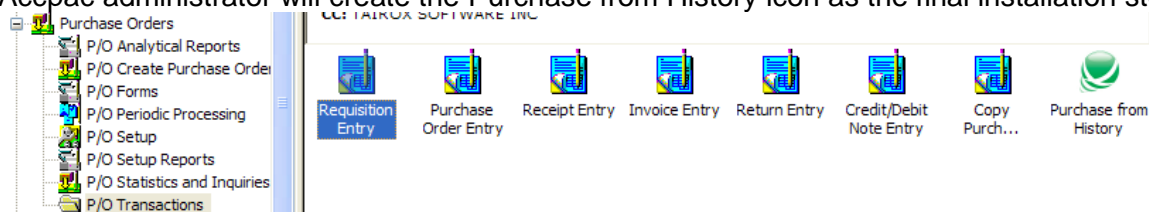
## Overview

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

Internally, Purchase 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, Purchase from History works with versions 5.4, 5.5, 5.6 and 6.0 of Accpac.

## Running Purchase from History

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





# Purchase from History User Guide

## Running Purchase from History (continued)

The Purchase from History screen will pop up. The Orders tab allows you to apply selection criteria and then press the Load button to request previous purchase 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 - Purchase from History**

File Help

Orders | Sales History

Order Range

Select Orders By From To

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

Purchase Order Number	Purchase Order Date	Bill-To Location	Ship-To Location	Description	Reference
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Line Number	Include	Item Number	Item Description	Location	Order UOM	Quantity Ordered	Qty Ordered	Unit Cost
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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

# Purchase from History User Guide

## Running Purchase from History (continued)

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

**SAMINC - Purchase from History**

File Help

Orders | Sales History

Order Range

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

(None) (None)

Purchase Order Number	Purchase Order Date	Bill-To Location	Ship-To Location	Description	Reference
PO000000025	6/23/2010	1	1	Standing order f...	
PO000000015	1/23/2010	1	1	Standing order f...	
PO000000011	3/4/2009	2	2	To refill inventory	BB request

Line Number	Include	Item Number	Item Description	Location	Order UOM	Quantity Ordered	Qty Ordered	Unit Cost
1	No	A1-103/0	Fluorescent Des...	1	Ea.	15	0	18.750...
2	No	A1-105/0	13w Mini Fluore...	1	Ea.	20	0	3.350000

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

Load Select All Select None Order Close

# Purchase from History User Guide

## Running Purchase from History (continued)

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

**Order Range**

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

(None)    (None)

Purchase Order Number	Purchase Order Date	Bill-To Location	Ship-To Location	Description	Reference
PO000000025	6/23/2010	1	1	Standing order f...	
PO000000015	1/23/2010	1	1	Standing order f...	
PO000000011	3/4/2009	2	2	To refill inventory	BB request

Line Number	Include	Item Number	Item Description	Location	Order UOM	Quantity Ordered	Qty Ordered	Unit Cost
1	Yes	A1-103/0	Fluorescent Des...	1	Ea.	15	15	18.750...
2	Yes	A1-105/0	13w Mini Fluore...	1	Ea.	20	20	3.350000

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

Buttons: Load    Select All    Select None    Order    Close

# Purchase from History User Guide

## Running Purchase from History (continued)

The quantities to be copied from the previous purchase order can be edited. Here the 15 desk lamps in the original purchase order is changed to 20 and the 20 Mini Florescent bulbs will be changed to 10. When edits are complete, press the Order button.

Purchase Order Number	Purchase Order Date	Bill-To Location	Ship-To Location	Description	Reference
PO000000025	6/23/2010	1	1	Standing order f...	
PO000000015	1/23/2010	1	1	Standing order f...	
PO000000011	3/4/2009	2	2	To refill inventory	BB request

Line Number	Include	Item Number	Item Description	Location	Order UDM	Quantity Ordered	Qty Ordered	Unit Cost
1	Yes	A1-103/0	Fluorescent Des...	1	Ea.	15	20	18.750...
2	Yes	A1-105/0	13w Mini Fluore...	1	Ea.	20	10	3.350000

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

A completion message will appear:

Message

Description: Purchase from History complete. There was 2 purchase order detail lines added to the current purchase order.

Source: 13:04:38 -

Print Help ... Close

# Purchase from History User Guide

## Running Purchase from History (continued)

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

File Settings Help

PO Number:  Last Receipt No.:

Vendor Number:  Vendor Name:  Source:

Order | Taxes | Optional Fields | Totals

Template:  From Requisition:  On Hold:

PO Date:  FOB Point:  Arrival Date:

PO Type:

Ship-To Location:  Ship-Via:

Bill-To Location:  Terms Code:  Due by Invoice Date:

Description:  Reference:

Lin...	Completed	Item Number	Item Description	Location	Drop-Ship	Quantity Ordered	Unit of Measur
1	No	A1-103/0	Fluorescent Desk Lamp	1	No	20	Ea.
2	No	A1-105/0	13W Mini Fluorescent Bulb	1	No	10	Ea.

Item/Tax... Calc. Taxes Consolidate Order Subtotal:

Post Delete History... Purchase from History Close

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty Committed	Qty. Available
Location 1 (Ea.)	70	0	0		70
All Locations (Ea.)	378	0	0		378

# Purchase from History User Guide

## Running Purchase from History (continued)

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

**Item Range**

Select Items By:  From:  To:  Additional Criteria...

(None)

(None)

Include	Item Number	Item Description	Invoice Number	Transactio...	Location	Unit of Measure	Total Quantity	Qty Ordered
No	A1-103/0	Fluorescent Des...	CC485-2281032	3/9/2009	2	Ea.	50	0
No	A1-103/0	Fluorescent Des...	CC485-2287453	4/13/2009	1	Ea.	30	0
No	A1-103/0	Fluorescent Des...	CC485-2281175	7/3/2009	4	Ea.	36	0
No	A1-103/0	Fluorescent Des...	CC485-2281179	7/3/2009	3	Ea.	10	0
No	A1-103/0	Fluorescent Des...	CC485-2281233	10/6/2009	3	Ea.	30	0
No	A1-103/0	Fluorescent Des...	CC485-2281245	10/6/2009	4	Ea.	24	0
No	A1-103/0	Fluorescent Des...	CC485-2285735	12/7/2009	4	Ea.	36	0
No	A1-103/0	Fluorescent Des...	CC485-2285330	12/7/2009	3	Ea.	10	0
No	A1-103/0	Fluorescent Des...	IN120111	5/5/2010	1	Ea.	10	0
No	A1-103/0	Fluorescent Des...	IN120121	5/10/2010	1	Ea.	15	0
No	A1-103/0	Fluorescent Des...	IN120131	6/23/2010	1	Ea.	15	0
No	A1-103/0	Fluorescent Des...	IN120141	6/30/2010	1	Ea.	12	0
No	A1-103/0	Fluorescent Des...	IN120151	6/30/2010	1	Ea.	15	0
No	A1-105/0	13W Mini Fluore...	CC485-2281032	3/9/2009	2	Ea.	30	0
No	A1-310/0	Halogen Desk Li...	CC485-2281032	3/9/2009	2	Ea.	25	0
No	A1-310/0	Halogen Desk Li...	IN120151	6/30/2010	2	Ea.	5	0

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location 2 (Ea.)	262	0	0		262
All Locations (Ea.)	657	0	0		657

Load Select All Select None Order Close