Complete Purchase Orders for Sage 300cloud

Businesses frequently have incomplete purchase orders because items on order are out-of-stock or discontinued and will never be received from the vendor. As a result, POs remain open and item quantities on back order are unreliable.

Complete Purchase Orders simplifies the job of completing purchase orders by finding incomplete POs, zeroing the quantity outstanding for each incomplete line item, and then setting the PO status to "Complete."
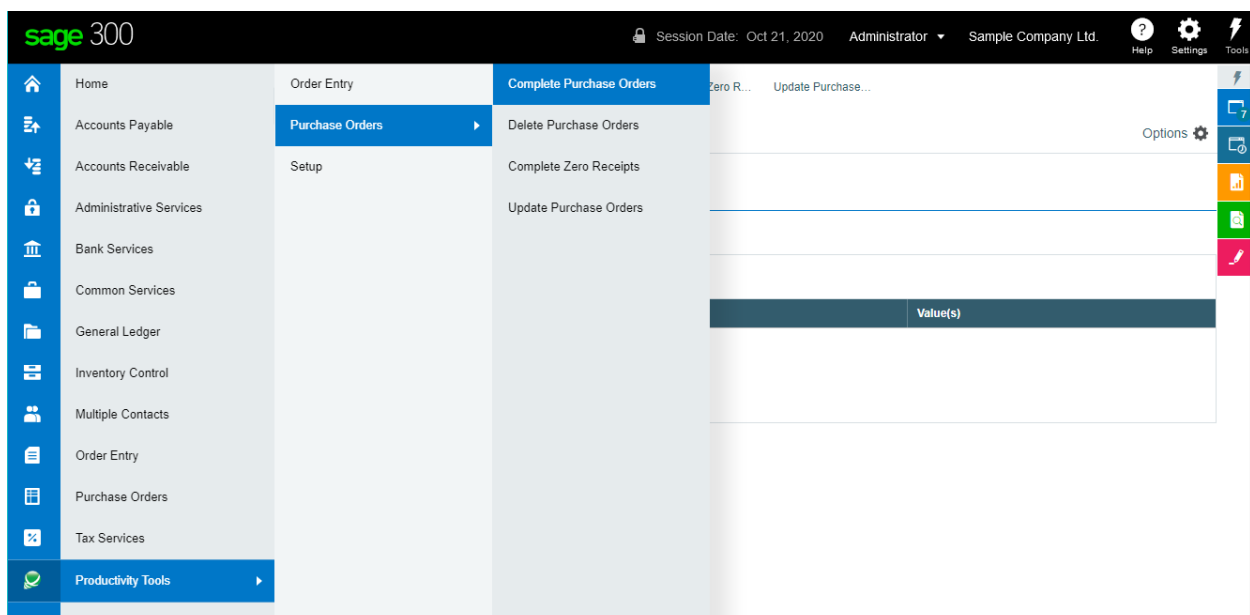
Complete Purchase Orders lets you:

- Select ranges of incomplete purchase orders, then load the POs to further "cherry-pick" ones for completion.

- Choose from Active, Blanket, Standing and Future purchase orders.
  - The business case for completing different types of purchase orders should be carefully considered, especially the completion of Blanket purchase orders.

  Important: You can save the settings for running the Complete Purchase Orders program. If you complete order types other than Active, you may wish to re-select Active before leaving the Complete Purchase Orders form.

- Select incomplete purchase orders based on items on order.

- Drill down to PO details while finalizing the completion list.

- Click the Process button to complete the operation for all selected POs in one step.

- View a log of all changes after processing.

Running Complete Purchase Orders

Complete Purchase Orders appears under **Productivity Tools > Purchase Orders** on the Sage 300c desktop.

The Complete Purchase Orders screen (below) lets you select which POs you wish to complete by specifying ranges of purchase orders using purchase order fields (including the PO type field and optional fields), and by specifying items on POs.
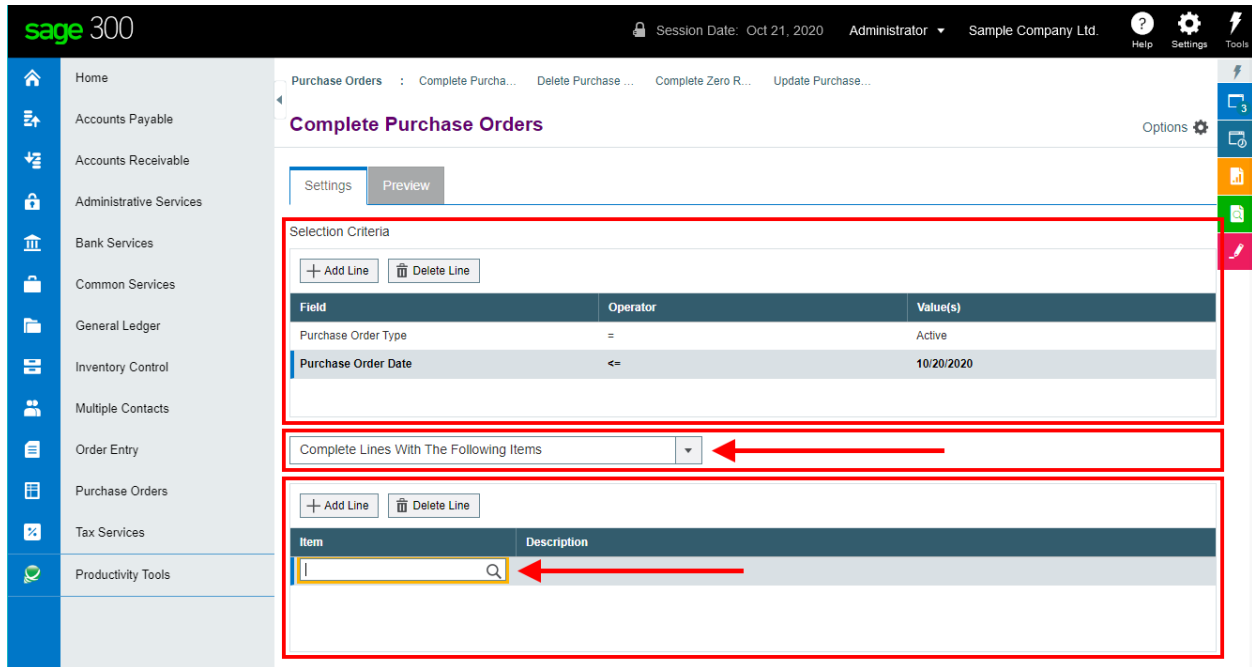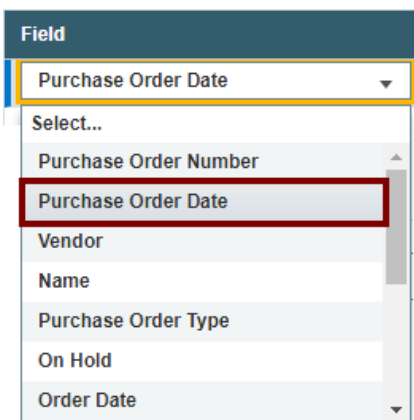

Selecting Purchase Orders for completion

Choose the range of purchase orders that you want to complete:

- Click the "Add Line" button to specify a new field value or range or values.
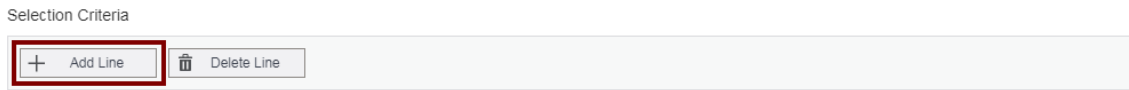
- Choose the field for selecting orders. For example, you can choose the Purchase Order Type or the Purchase Order Date.

- Choose the Operator for the field value – for example:
  - o Purchase Order Type is "Equal To" an Active order type.
  - o Or, orders with a date that is *less than or equal to* July 2, 2021.

The choices are "Equal To," "Not Equal To," "Contains," "Greater Than or Equal To," "Less Than or Equal To" (shown below), or "Is One Of."

Operator

Select... ▼
Select...
=
!=
>=
<=

- o **The "Contains" operator appears for text fields**. The program scans the field you selected for the text in the Value field.

  The following example selects POs with ship-to locations that include the letters "US".

Field	Operator	Value(s)
Ship-To Location	Contains	US

- o **The "Is One Of" operator appears for fields with a specific list of values** – such as Purchase Order Type or optional fields with a list of values. It lets you specify more than one value – as below.

Field	Operator	Value(s)
Purchase Order Type	Is One Of	Active ✕
		Active
		Standing
		Future
		Blanket

- Enter or choose the Value. For example, a date field provides a calendar and other fields provide a Finder button.

Value(s)

2/1/2021 📅

<	**February 2021**	>

Su	Mo	Tu	We	Th	Fr	Sa
31	**1**	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	1	2	3	4	5	6
7	8	9	10	11	12	13

Today - 2/1/2021

- To specify a range of dates – for example, greater than November 1, 2020 and less than January 31, 2021 – you would add two lines for the Date field – as shown below:

Field	Operator	Value(s)
Order Date	>=	11/1/2020
Order Date	<=	1/31/2021

- *To remove a line*, highlight it, then click the "Delete Line" button:

+ Add Line	🗑 Delete Line	

Field	Operator	Value(s)
Order Date	>=	11/1/2020

Choose items to complete POs based on what was ordered:

The program can complete POs based on the items in the orders.

- Choose "Complete Lines With The Following Items" to restrict processing to orders that only have specific items.

Complete Lines With The Following Items	▼
Complete All Lines	
Complete Lines With The Following Items	

- Click the Add Line button to add a new item to the list.

+ Add Line	🗑 Delete Line	
Item	**Description**	

- Select the Item from the Finder.

Item	**Description**
A1-310/0 🔍	Halogen Desk Light

- Use the Delete >Line button to remove item lines.

Save or clear the selection criteria:

You can save your selection criteria so it appears by default the next time you use the program.

Purchase Orders : Complete Purcha... Delete Purchase ... Complete Zero R... Update Purchase...	
Complete Purchase Orders	Options ⚙
	Text Size ◄
Settings Preview	**Save Settings as Default**
Selection Criteria	Clear Saved Settings
+ Add Line 🗑 Delete Line	User Guide
	TaiRox Home Page
Field **Operator** **Value(s)**	View Today's Log
Purchase Order Type Is One Of Active	

- Click the Options button to display the list of options.
- Select "Save Settings as Default."

To clear the default settings:

- Select "Clear Saved Settings" from the Options menu.

View selected POs on the Preview tab and choose which ones to complete:

Click the Preview tab to view the list of purchase orders that meet the range and item selection criteria that you specified on the Settings tab.

> *Note:* If you do not specify any selection criteria – and choose "Complete All Lines" (instead of specifying particular items), the program will list all incomplete POs when you go to the Preview tab. You can then select the POs that you want to complete.

- o Go back to the Settings tab to adjust the ranges and change the list of items if necessary.
- Click the checkbox in the column heading to select all or select none of the POs.
- Click the checkboxes on each row to select or de-select a purchase order.

- Click the PO Number to drill down on the selected purchase order:

Click the Process button to complete the selected POs:

The program asks you to confirm your choices. Click Yes to continue.
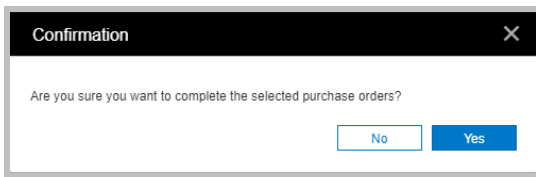

Note: There may be data-integrity errors that prevent some completions, in which case an error message will appear.

If the process was successful, the following message will appear, stating the number of purchase orders that were completed:

✓ 1 purchase order processed.

Select "View Today's Log" to confirm which POs were completed:

- Click the Options button and select View Today's Log to see the purchase order selection criteria and the POs that were completed.
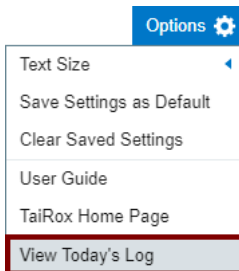
- The log looks like this:

```
TPTCompletePurchaseOrders-PTDEMO-20190709.log                          □  ×

Processing started  (7/9/2020 10:08:09 AM)

Performed by user: ADMIN

Selection Criteria:
    Purchase Order Type                 =              [1]
    Vendor                              =              [2300]
    Purchase Order Date                 <=             [2020-01-01]

Complete lines with the following items
    A1-103/0: Fluorescent Desk Lamp

Completing purchase order PO000000003...
    Purchase order completed.

Completing purchase order PO000000014...
    Purchase order completed.

Processing completed  (7/9/2020 10:08:10 AM)

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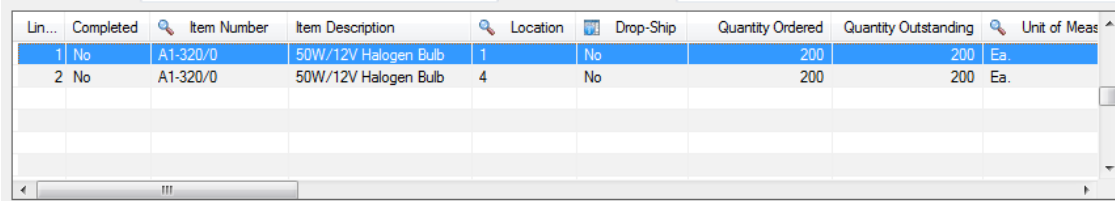
The Log lists:

- The user, selection criteria and options.

- Each purchase order that was marked complete.
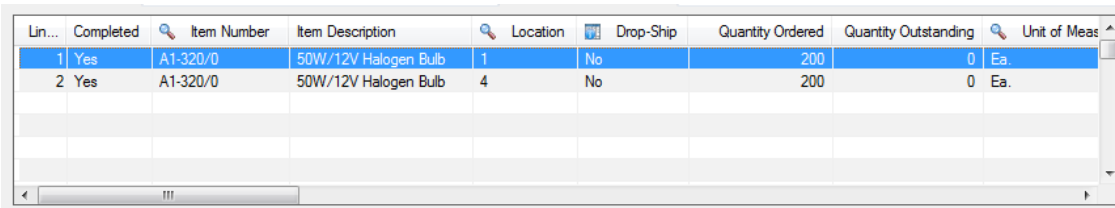
Effects of Running Complete Purchase Orders

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 75.

Lin...	Completed	🔍 Item Number	Item Description	🔍 Location	🖩 Drop-Ship	Quantity Ordered	Quantity Outstanding	🔍 Unit of Meas
1	No	A1-320/0	50W/12V Halogen Bulb	1	No	200	200	Ea.
2	No	A1-320/0	50W/12V Halogen Bulb	4	No	200	200	Ea.

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

Lin...	Completed	🔍 Item Number	Item Description	🔍 Location	🖩 Drop-Ship	Quantity Ordered	Quantity Outstanding	🔍 Unit of Meas
1	Yes	A1-320/0	50W/12V Halogen Bulb	1	No	200	0	Ea.
2	Yes	A1-320/0	50W/12V Halogen Bulb	4	No	200	0	Ea.