

Complete Orders for Sage 300cloud

Businesses frequently have incomplete orders because items are out-of-stock or discontinued and will never be shipped to a customer. As a result, orders remain open, and item quantities are unreliable.

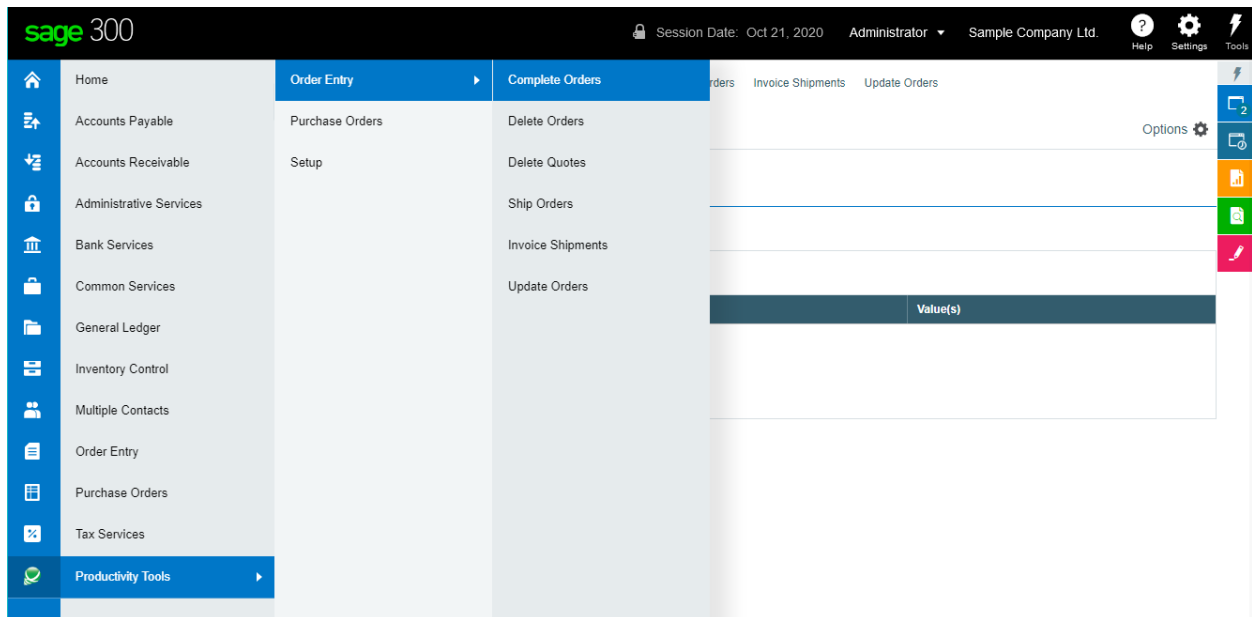
Complete Orders for Sage 300c simplifies the job of completing orders by finding incomplete ones, eliminating discontinued items, zeroing the quantity outstanding and quantity committed values for each incomplete line item, and then setting the order status to "Complete."

Complete Orders lets you:

- Use ranges of order fields and order optional field to select incomplete orders, then load them into a grid to further "cherry-pick" ones for completion.
- Select orders by order type.
- Select incomplete orders based on items and miscellaneous charges on orders.
- Check order details while finalizing the completion list.
- Click the Process button to complete the operation for all selected orders in one step.
- View a log of all changes after processing.

Running Complete Orders

Complete Orders appears under **Productivity Tools > Order Entry** on the Sage 300 Web Desktop.



The Complete Orders screen (below) lets you select which Orders you wish to complete by specifying various ranges of order fields, including order number, order date, order type, customer number, and optional fields, and by specifying orders with particular items or miscellaneous charges.

Selecting orders for completion

Choose the range of orders that you want to complete:

- Click the “Add Line” button to specify a new field range.

Selection Criteria

- Choose the field for selecting orders.

- Choose the Operator for the field value – for example, 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.”

- 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 orders for customers in groups that include the letters “US”.

Field	Operator	Value(s)
Customer Group Code	Contains	US

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

Field	Operator	Value(s)
UPS Zone	Is One Of	Blue Zone × White Zone ×

- Enter or choose the Value. For example, a date field provides a calendar, and other fields will 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/miscellaneous charges:

The program can complete orders based on the items or miscellaneous charges in the orders.

- Choose “Complete Lines With The Following Items Or Charges” to restrict processing to orders that only have specific items or miscellaneous charges.

Complete Lines With The Following Items Or Charges ▼

Complete All Lines

Complete Lines With The Following Items Or Charges

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

+ Add Line Delete Line

Type	Item / Miscellaneous Charge	Description
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- Select Item or Miscellaneous Charge.

The image shows a dropdown menu titled 'Type'. The 'Item' option is selected and highlighted with a yellow border. Below it, the 'Miscellaneous Charge' option is visible.

- Select the Item or Miscellaneous Charge from the Finder.

The image shows a table with three columns: 'Type', 'Item / Miscellaneous Charge', and 'Description'. The 'Type' column has 'Item' selected. The 'Item / Miscellaneous Charge' column contains the text 'A1-105/0' and a search icon. The 'Description' column contains the text '13W Mini Fluorescent Bulb'.

- 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.

The image shows the 'Complete Orders' settings screen. The 'Settings' tab is selected. The 'Options' menu is open, showing options like 'Text Size', 'Save Settings as Default', 'Clear Saved Settings', 'User Guide', 'TaiRox Home Page', and 'View Today's Log'. A red arrow points to the 'Save Settings as Default' option.

- 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 orders on the Preview tab and choose which ones to complete:

Click the Preview tab to view the list of 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 or miscellaneous charges), the program will list all incomplete orders when you go to the Preview tab. You can then select the orders that you want to complete.

- Click the **Preview** tab to display the selected list of orders.

Order Entry : Complete Orders Delete Orders Delete Quotes Ship Orders Invoice Shipments Update Orders

Complete Orders Options

Settings Preview

Matching Orders

	Order Number	Customer Number	Customer Name	Order Date	Order Type	On Hold	Description
<input type="checkbox"/>	ORD000000000063	1105	Bargain Mart - Oakland	6/30/2020	Active		No backorder
<input type="checkbox"/>	ORD000000000064	1200	Mr. Ronald Black	7/1/2020	Active		
<input type="checkbox"/>	ORD000000000065	1200	Mr. Ronald Black	7/1/2020	Active		
<input type="checkbox"/>	ORD000000000066	NEW2	New Company	3/13/2013	Active		From CRM
<input type="checkbox"/>	ORD000000000067	BARMART	Bargain Mart Stores Inc.	1/5/2021	Active	Yes	January Order - winter sale prices

- Go back to the Settings tab to adjust the ranges if necessary.
- Click the checkbox in the column heading to select all or select none of the orders.
- Click the checkboxes on each row to select or de-select an order.

Matching Orders

	Order Number	Customer Number	Customer Name
<input checked="" type="checkbox"/>	ORD000000000063	1105	Bargain Mart - Oakland
<input checked="" type="checkbox"/>	ORD000000000064	1200	Mr. Ronald Black
<input checked="" type="checkbox"/>	ORD000000000065	1200	Mr. Ronald Black
<input checked="" type="checkbox"/>	ORD000000000066	NEW2	New Company
<input checked="" type="checkbox"/>	ORD000000000067	BARMART	Bargain Mart Stores Inc.

Matching Orders

	Order Number	Customer Number	Customer Name
<input checked="" type="checkbox"/>	ORD000000000063	1105	Bargain Mart - Oakland
<input type="checkbox"/>	ORD000000000064	1200	Mr. Ronald Black
<input checked="" type="checkbox"/>	ORD000000000065	1200	Mr. Ronald Black
<input type="checkbox"/>	ORD000000000066	NEW2	New Company
<input checked="" type="checkbox"/>	ORD000000000067	BARMART	Bargain Mart Stores Inc.

- Click the Order Number to drill down on the selected order:

	Order Number	Customer Number	Customer Name	Order Date	Order Type	On Hold	Description
<input checked="" type="checkbox"/>	ORD000000000063	1105	Bargain Mart - Oakland	6/30/2020	Active		No backorder
<input type="checkbox"/>	ORD000000000064	1200	Mr. Ronald Black	7/1/2020	Active		

Click the Process button to complete the selected orders:

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

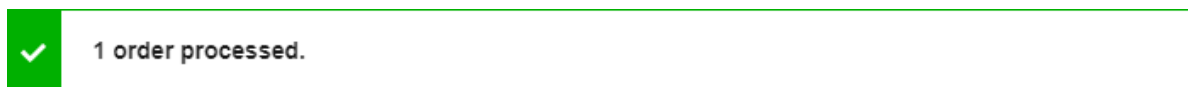
Confirmation

Are you sure you want to complete the selected orders?

No Yes

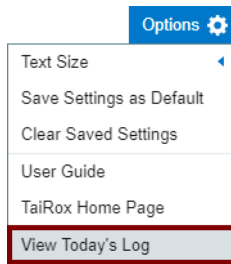
Note: There may be data-integrity errors that prevent some completions, in which case an error message will appear.

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

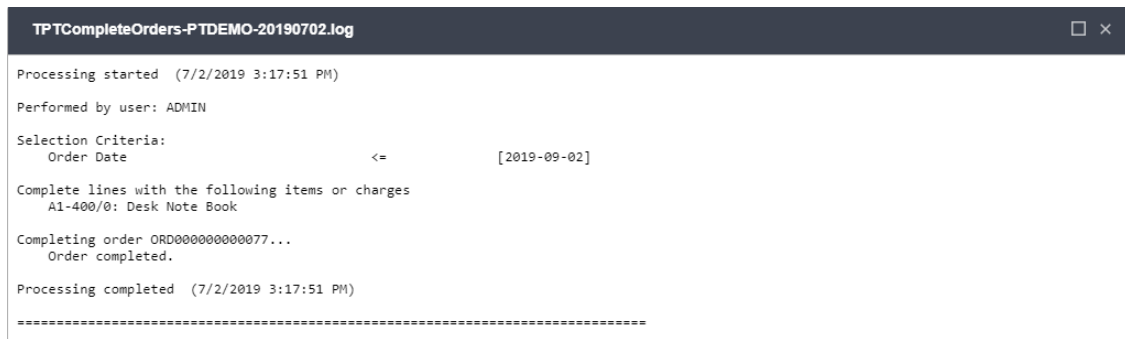


Select "View Today's Log" to confirm which orders were completed:

- Click the Options button and select View Today's Log to see the order selection criteria and the orders that were completed.



- The log looks like this:







The Log lists:

- The user, the range settings and the items/miscellaneous charges selected.
- Each order that was marked complete.

Before and After view of an order grid

To illustrate the effects of running the program, here are before and after views of an order grid from sample data. Before, the line item is not complete and the quantity outstanding is 50:

Description				No backorder please		Reference		Ref 0901-2	
Lin...	Type	 Item No./ Misc. Charge	 Kit/BOM	Description	 Price List	 Location	Qty. Ordered	Deliver By	
1	Item	A1-310/0		Halogen Desk L...	USA	1	50	1/15/2019	
2	Item	A2(KINGS-5000)B		Kings 5000 Seri...	USA	4	2	1/15/2019	
3	Item	A2(IMAGE-1500)G		Image 1500 Seri...	USA	3	2	1/15/2019	

After, the line item is complete, with quantity ordered and quantity committed values set to 0. Other quantities are unaffected:

Description				No backorder please		Reference		Ref 0901-2	
Lin...	Type	Item No. / Misc. Charge	Kit/BOM	Description	Price List	Location	Qty. Ordered	Deliver By	
1	Item	A1-310/0		Halogen Desk L...	USA	1	0	1/15/2019	
2	Item	A2(KINGS-5000)B		Kings 5000 Seri...	USA	4	0	1/15/2019	
3	Item	A2(IMAGE-1500)G		Image 1500 Seri...	USA	3	0	1/15/2019	