



How do I close a range of Macola® purchase orders and purge them to the history file?

(Updated 5/21)

You can now use the Macola® Progression, ES and 10 software to perform a mass closing of old or unneeded purchase orders. Yes, you no longer need to close them, one by one! This feature is handy if you have hundreds of purchase orders to be closed. After closing them, you need to consider purging them into the history file. If your menu does not include the screen for closing a range of order, you will need to upgrade your software.

Leahy Consulting assistance desk - (513) 723-8094 or Assistance@LeahyConsulting.com

Why is this feature important? Maintaining accurate on-order quantities as well as their scheduled receipt dates is critical to all organizations. For example, you ordered a quantity of 1,000 but only 990 were delivered. Most likely, the remaining unreceived amount will never be delivered. BUT, your Macola® software will continue to show an on-order quantity of 10 if you do not change the order status.

How do the Macola® P/O status codes work? When you print a purchase order, the status is set to 'P' (printed). After it is received and invoiced, you need to change the status to a 'C' (closed) or 'H' (history).

Why this white paper? Many Macola® users believe that the 'C' (closed) status closes the order and removes any remaining quantities from appearing on the on-order reports and MRP reports (it does not). Additionally, changing the status to an 'H' (history) *does* remove the remaining quantities from appearing on the on-order reports, but it *does not* adjust the on-order quantity in the item/location file. Most importantly, you need to run the 'Reset On-Order' program when changing orders to an 'H' status.

When should I purge old purchase orders? There is a point at which old purchase orders are no longer needed and contribute to slow processing. If they are years old, you should consider purging them to the P/O history file. First, close all of them using the 'Close a range of orders' program and then purge them using the 'Purge Closed Purchase Orders' program.

What is the difference between closing and history? Using our example of an order with a remaining on-order quantity of 10, changing to a 'C' status and running the 'Reset On-Order Quantities' program **will NOT** eliminate the remaining on-order quantity. **The ONLY way to get the 'Reset On-order Quantities' program to remove remaining on-order quantities is to change the status to 'H.'**

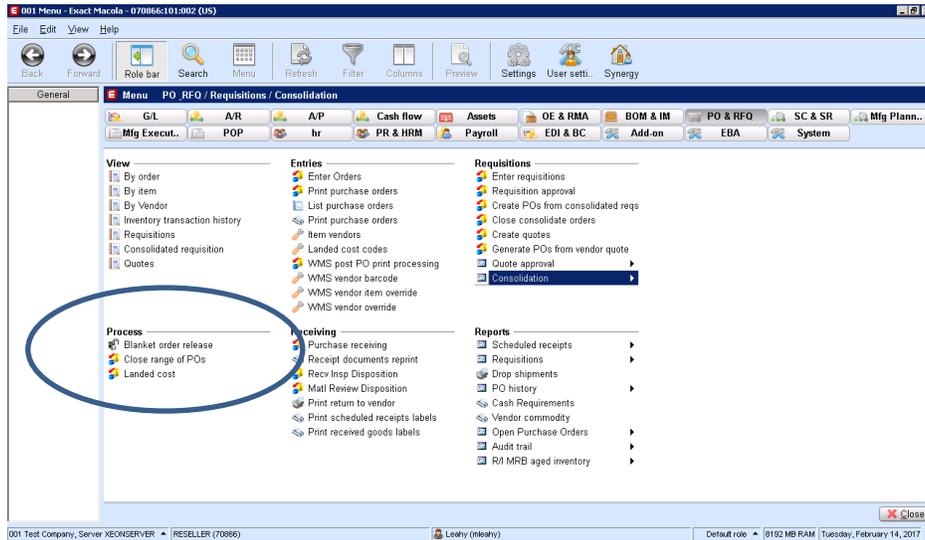
How does the 'Close a Range of Purchase Orders' program work? The program gives you the option of changing the status to either 'C' (closed) or 'H' (history) for a range of orders. **Changing the status to an 'H' does NOT transfer the order to the history file. 'H' orders will remain in the file of active purchase orders.** The program then displays orders that meet your criteria. It then allows you to select all order or certain orders to be changed. By double-clicking an order, you can select it for closing (the column changes to 'Y'). Once you have selected the orders you want to close, press Enter to close the orders.

After I close my order, how do I remove them from my file of active orders? **Changing the status to 'C' or 'H' does not transfer the order to the history file. You will need to run the 'Purge Closed Purchase Orders' program to transfer them to the history file.**

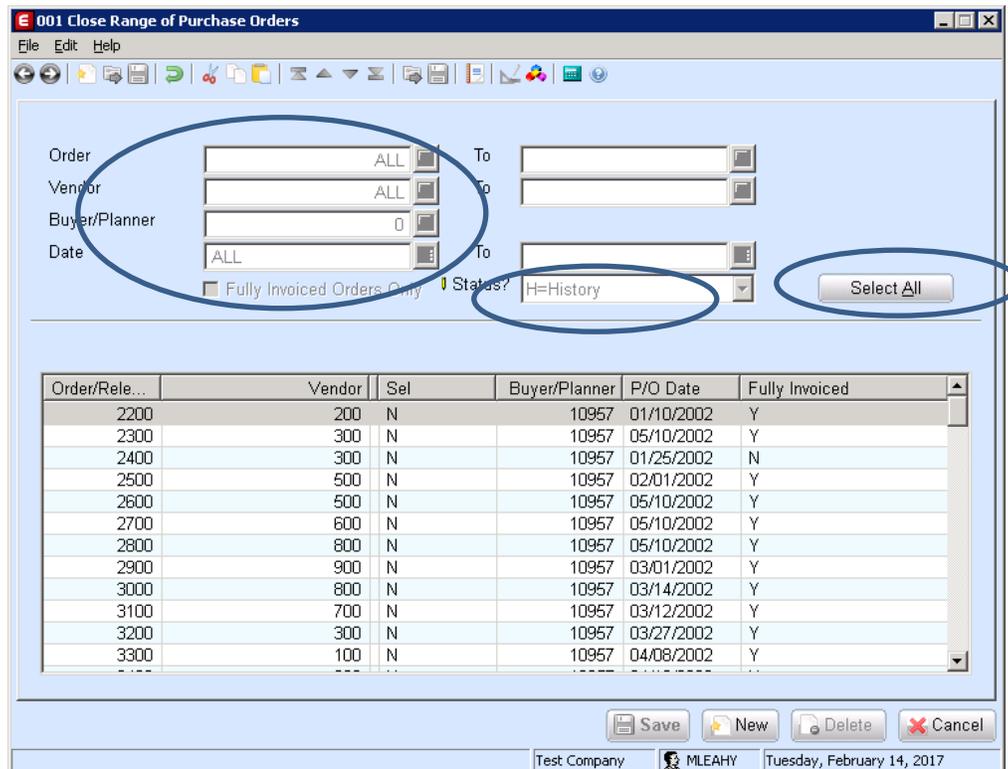
Step 1: Closing Purchase Orders

For ES/10 Software Users

1. Go to the PO_RFQ menu.
2. Within the Processes submenu, click the 'Close Range of PO's' option.



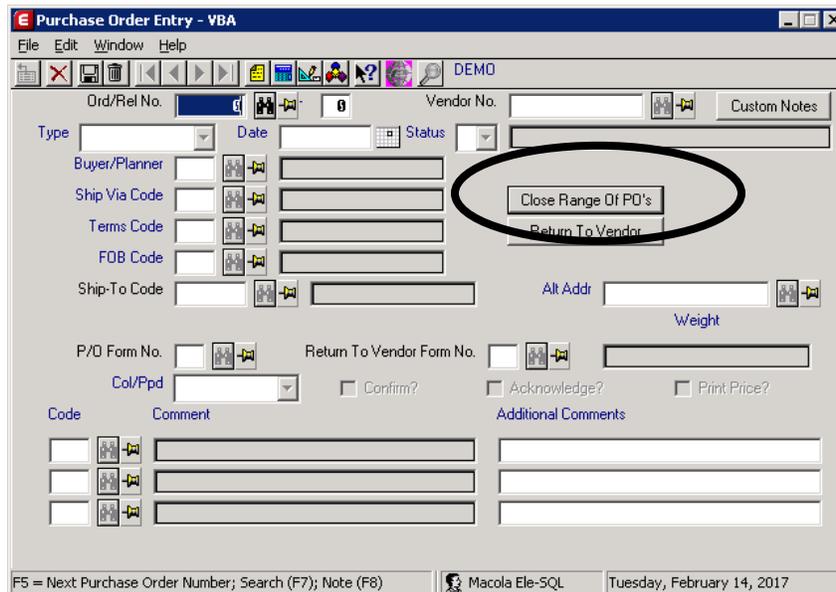
3. Key in your selection criteria and press the Enter key. **Set the status to H=History.** Double-click on each order to be selected or click on the 'Select All' button.
4. Press the escape button when finished. A message will appear asking you if it is OK to process the orders you selected. **NOTE: this program will only close 50 orders at a time. That is, when you press the 'Select All' button, it will ONLY process the 50 orders displayed on your screen. So, if you have 1,000 orders to close, this will take some time and a lot of patience. As an alternative, we offer a fee service to close them in mass for you in a few minutes using a SQL script.**



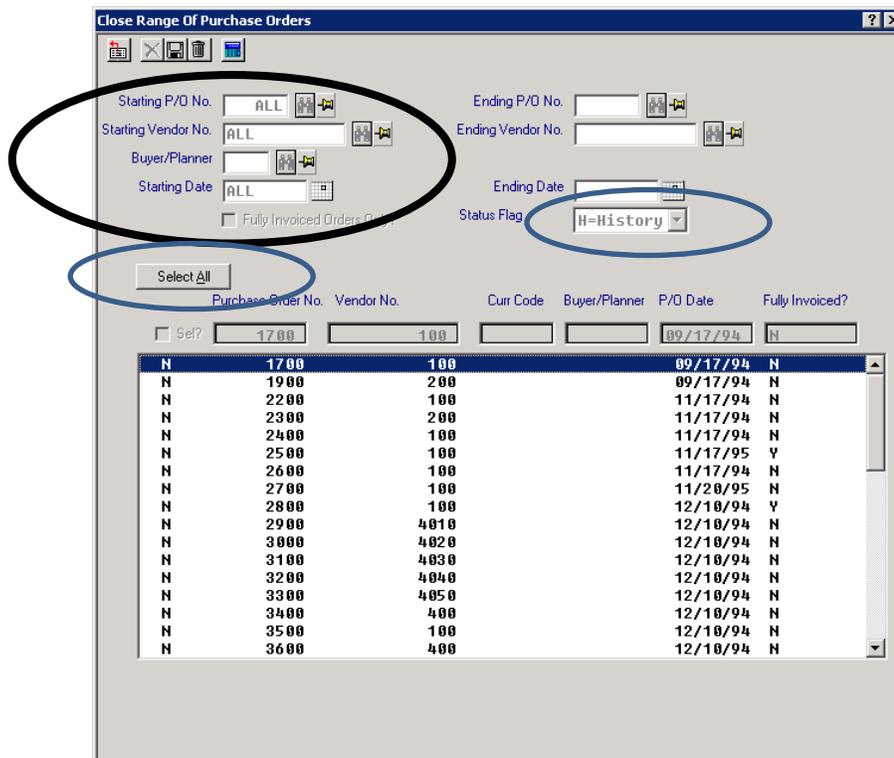
5. Now, run the 'Reset On-Order' program to correct the on-order quantities.

For Progression Software Users

1. Go to > Purchase Order > Trx > Purchase Order Entry.
2. Click the 'Close Range of PO's' button.



3. Key in your selection criteria and press the Enter key. **Set the status to H=History.** Double-click on each order to be selected or click on the 'Select All' button.
4. Press the escape button when finished. A message will appear asking you if it is OK to process the orders you selected. **NOTE: this program will only close 50 orders at a time. That is, when you press the 'Select All' button, it will ONLY process the 50 orders displayed on your screen. So, if you have 5,000 orders to close, this will take some time and a lot of patience. As an alternative, we offer a fee service to close them in mass in a few minutes using a SQL script.**



5. Now, run the 'Reset On-Order' program to correct the on-order quantities.

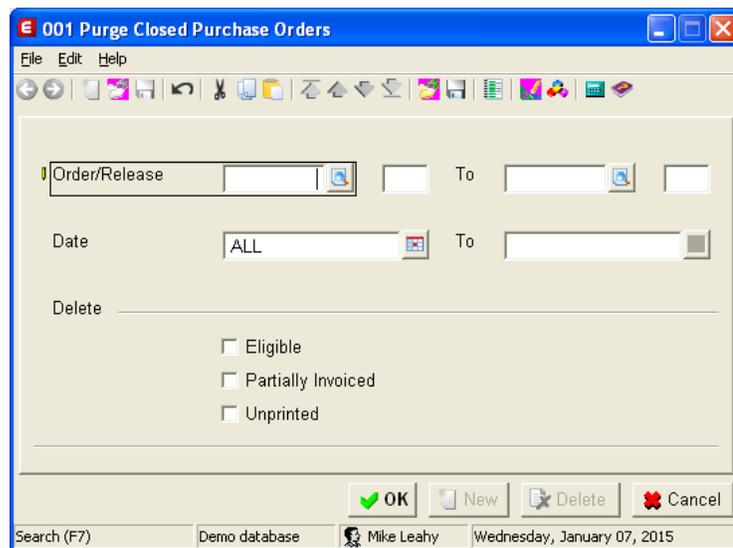
Step 2: Purging Closed Purchase Orders to the History File

Now that you have closed your old orders, you need to decide if some of them should be removed from your active files and moved to the P/O history files. There is a point at which old purchase orders are no longer needed and contribute to slow computer processing.

NOTE: When you purge to the history files, they will no longer be visible via the P/O View screens.

ES Software Users

1. Go to the System menu.
2. Go to > Utilities > Distribution > Purchase Order > click the 'Purge Closed POs' option.
3. Select the date range of orders to be purged to the history file. Press F1 to read the on-line documentation.



Progression Software Users

1. Go to the Purchase Order menu.
2. Go to > Processes > click the 'Purge Closed Orders'. Press Ctl-F1 read the on-line documentation.

