

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

(Updated 1/16)

Your Macola Progression, ES and Macola 10 software can now be used to perform a mass closing of old or unneeded purchase orders. Yes, you no longer need to manually close them, one by one! This feature is especially useful if you have thousands of purchase orders that need to be closed. After closing them, you need to consider purging them to the history file. If your menu does not include the screen to close a range of order, you will need to upgrade your software.

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<u>Why is this new feature important?</u> Maintaining accurate on-order quantities as well as their scheduled receipt dates is critical to all organizations. For example, let's say you ordered a quantity of 1,000 but only 990 were received. Most likely, the remaining unreceived quantity of 10 will never be received. 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). Later, you the option of changing the status to a 'C' (closed) or 'H' (history).

<u>Why this white paper?</u> Many Macola users believe that the 'C' (closed) status closes the order and removes any remaining quantities from appearing on the on-order 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.

<u>When should I purge old purchase orders?</u> There is a point at which old purchase orders are no longer needed and contribute to slow processing. If you just close them and they are several years old and are no longer needed, 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.

<u>What is the difference between closing and history?</u> Using our example of an order with a remaining on-order quantity of 10, many customers do not know that closing the order 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'.

<u>How does the new 'Close a Range of Purchase Orders' program work?</u> 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.

<u>After I close my order, how do I remove them from my file of active orders?</u> Remember that 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

ES Software

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

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- 3. Key in your selection criteria and press the Enter key. 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.

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5. You will now need to run the 'Reset On-Order' program to correct the on-order quantities in the Item/Location file.

Progression Software

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

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F5 = Next Purchase Order Number; Search (F7); Note (F8)

- 3. Key in your selection criteria and press the Enter key. 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.

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5. You will now need to run the 'Reset On-Order' program to correct the on-order quantities in the Item/Location file.

Step 2: Purging Closed Purchase Orders to the History File

Now that you have closed your old orders, you need to decide if all or 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 them to the history files, you will no longer be able to view them in the P/O View screens.

ES Software

- 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.

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Progression Software

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

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