Delete Purchase Orders for Sage 300cloud

Many businesses delete purchase order once a certain period of time has passed; however, deleting purchase orders can be a time-consuming task because each purchase order has to be called up in Purchase Order Entry and deleted individually.

Delete Purchase Orders for Sage 300c eliminates the time-consuming steps involved in deleting old Purchase Orders from the Sage 300 Purchase Orders module.

Important Note: Delete Purchase Orders uses Sage 300 objects to delete orders safely. If Sage 300 Purchase Orders will not delete a PO, neither will Delete Purchase Orders.

Delete Purchase Orders lets you:

- Select ranges of purchase orders by PO number, date, vendor, terms, currency, arrival date, locations, PO type, and completion status, then load the resulting PO list to further "cherry-pick" ones for deletion.
- Check PO details while finalizing the deletion list.
- Click the Process button to complete the operation for all selected POs in one step.
- Optionally delete purchase orders individually by selecting from the loaded list and pressing the Delete key.
- View a log of all deletions after processing.

Running Delete Purchase Orders

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

sag	ge 300		Session Date: Oct 21, 2020 Administrator • Sample Company Ltd.			7 Tools
â	Home	Order Entry	Complete Purchase Orders	Zero R Update Purchase		4
Ēr	Accounts Payable	Purchase Orders	Delete Purchase Orders		Options 🏠	
*≊	Accounts Receivable	Setup	Complete Zero Receipts			Lø
ô	Administrative Services		Update Purchase Orders			a a
<u>ش</u>	Bank Services					J
^	Common Services					
	General Ledger			Value(s)		
8	Inventory Control					
*	Multiple Contacts					
۵	Order Entry					
⊞	Purchase Orders					
*	Tax Services					
۶	Productivity Tools					

The Delete Purchase Orders screen (below) lets you select which POs you wish to delete by specifying a range of purchase order fields, including PO numbers, order dates, vendors, currencies, expected arrival dates, locations, PO types, completion status and any optional fields that you use with purchase orders.

sag	ge 300		Session Date: Oc	t 21, 2020 Administrator 🔻 Sa	mple Company Ltd.	elp Settings	7 Tools
â	Home	Purchase Orders : Complete Purcha	Delete Purchase Complete Zero R	Update Purchase			7
Ē≁	Accounts Payable	● Delete Purchase Orders				Options 🔅	
+≊	Accounts Receivable						
ô	Administrative Services	Settings Preview					 à
血	Bank Services	Selection Criteria					J
Ê	Common Services	+ Add Line 🛱 Delete Line					
E.	General Ledger	Field Purchase Order Date	Operator <=	Value(s) 9/30/2020			
8	Inventory Control						
*	Multiple Contacts						
E	Order Entry						
	Purchase Orders						
*	Tax Services						
2	Productivity Tools						

Selecting Purchase Orders for deletion

Choose field values and ranges of purchase orders:

• Click the "Add Line" button to specify a new field value or range of values.

Selection Criteria



• Choose the field for selecting purchase orders.

I	Field				
	Purchase Order Date	•			
	Select				
	Purchase Order Number	1			
	Purchase Order Date				
	Vendor				
	Name				
	Purchase Order Type				
	On Hold				
	Order Date	-			

• Choose the Operator for the field value – for example, purchase 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				
=				
!=				
>=				
<=				

• **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

 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 will provide a Finder button.



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

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 De	elete Purchase	Complete Zero R	Update Purchase			Ŧ
►	Dalata Burahasa Ordara						\Box_0
	Delete Purchase Orders					Options 🗘	G
						Text Size	
	Settings Preview				\rightarrow	Save Settings as Default	ů.
					· · · · · · · · · · · · · · · · · · ·	Clear Saved Settings	à
	Selection Criteria					User Guide	
	+ Add Line n Delete Line					TaiRox Home Page	1
						View Today's Log	- 1
	Field	Operato	r		Value(s)		- 1
	Purchase Order Date	<=			11/30/2020		- 1
	Purchase Order Type	Is One O	f		Active		- 1

- Click the Options button to display the list of options.
- Select "Save Settings as Default." The program displays the following message:

~	Preferences saved

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 delete:

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

Note: If you do not specify any selection criteria, the program will list all POs when you go to the Preview tab. You can then pick the POs that you want to delete.

• Click the Preview tab to display the selected list of purchase orders.

Purchase (Orders : Complete Purch	a Delete Purchase	Complete Zero R Update Purch	nase			#
Delete	Purchase Order	rs				Options 🏠	
Settings	s Preview						
Matching I	Purchase Orders						à
	PO Number	Vendor Number	Vendor Name	PO Date	РО Туре	Total	1
	PO00000004	6010	J. D. Garner Enterprises	1/8/2019	Active	34254.78	
	PO00000013	1500	Gould Manufacturing Ltd.	11/11/2019	Active	190.91	
	PO00000017	1540	Hart Batteries	1/23/2020	Active	5060.69	
	PO00000018	6010	J. D. Garner Enterprises	2/1/2020	Active	15951.31	
	PO00000019	7100	Stewart Office Supplies	2/1/2020	Active	8983.5	
	PO00000020	7936	Sentry Supplies	2/1/2020	Active	3593.4	
	PO00000021	1500	Gould Manufacturing Ltd.	6/23/2020	Active	3945.52	
	PO00000025	3050	M & P Sales Ltd.	6/22/2020	Active	4102.68	
	PO00000026	1580	Grant Office Supplies	6/24/2020	Active	216.5	
	PO00000027	1200	Chloride Systems	7/1/2020	Active	1082.5	

- o 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 POs.
- Click the checkboxes on each row to select or de-select a purchase order.

М	Matching Purchase Orders				Matching F	Matching Purchase Orders			
	∠	PO Number	Vendor Number	Vendor Name		PO Number	Vendor Number	Vendor N	
T	✓	PO00000004	6010	J. D. Garner Enterprises		PO00000004	6010	J. D. Gan	
	✓	PO00000013	1500	Gould Manufacturing Ltd.		PO00000013	1500	Gould Ma	
	✓	PO00000017	1540	Hart Batteries		PO00000017	1540	Hart Batt	
	✓	PO00000018	6010	J. D. Garner Enterprises		PO00000018	6010	J. D. Garr	
	✓	PO00000019	7100	Stewart Office Supplies		PO00000019	7100	Stewart (
	✓	PO00000020	7936	Sentry Supplies		PO00000020	7936	Sentry Su	

• Click the PO Number to drill down on a purchase order:

	PO Number	Vendor Number	Vendor Name	PO Date	РО Туре	Total
✓	PO00000004	6010	J. D. Garner Enterprises	1/8/2019	Active	34254.78
	PO00000013	1500	Gould Manufacturing Ltd.	11/11/2019	Active	190.91
✓	PO00000017	1540	Hart Batteries	1/23/2020	Active	5060.69

Click the Process button to delete the selected purchase orders:

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

Confirmation		×
Are you sure you want to delete the sel	lected purchase orders?	
	No Ye	s

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

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



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

• Click the Options button and select View Today's Log to see the PO selection criteria and the POs that were deleted.

	Options 🔅			
Text Size	•			
Save Settings as Default				
Clear Saved Settings				
User Guide				
TaiRox Home I	Page			
View Today's L	.og			

• The log looks like this:

TPTDeletePurchaseOrders-PTDEMO-20190709.log								
Processing started (7/9/2019 1:41:37 PM)								
Performed by user: ADMIN								
Selection Criteria:								
Vendor	! =	[4540]						
Purchase Order Date	<=	[2019-07-01]						
Purchase Order Type	=	[1]						
Deleting purchase order P0000000003 Purchase order deleted.								
Deleting purchase order P000000004 Purchase order deleted.								
Processing completed (7/9/2019 1:41:38 PM)								

The Log lists:

- The user and the settings selected.
- Each purchase order that was deleted.