Delete Quotes for Sage 300cloud

In many businesses, once a certain period of time has passed, the quotes have expired and will never become active orders, or those quotes that have become active orders can be removed.

Deleting quotes individually is a time-consuming task. Delete Quotes eliminates the time-consuming steps involved in deleting old Order Entry quotes from the Sage 300 Order Entry module.

Important Note: Delete Quotes uses Sage 300 objects to delete quotes safely. If Sage 300 Order Entry will not delete a quote, neither will Delete Quotes.

Delete Quotes lets you:

- Select ranges of quotes by order number, order date, customer number, and by any optional fields assigned to quotes and orders in OE.
- Specify additional criteria using order fields.
- Optionally, select only quotes that have been made into orders.
- Load the list of selected quotes and further "cherry-pick" ones for deletion.
- Check quote details while finalizing the deletion list.
- Press a Process button to complete the operation for all selected quotes in one step.
- View a log of all deletions after processing.

Running Delete Quotes

Delete Quotes appears under **Productivity Tools > Order Entry** on the Sage 300c desktop.

sag	ge 300		Session D	ate: Oct 21, 2020	Administrator	Sample Company Ltd.	? Help	C Settings) To
â	Home	Order Entry	Complete Orders ro	ders Invoice Shipn	nents Update Orders				1
Ē∱	Accounts Payable	Purchase Orders	Delete Orders				Optio	ons 🛱	
4₫	Accounts Receivable	Setup	Delete Quotes						ت 1
÷	Administrative Services		Ship Orders	_					LI C
<u>í</u>	Bank Services		Invoice Shipments						J
ĉ	Common Services		Update Orders						
-	General Ledger				Valu	B(S)			(
=	Inventory Control								
*	Multiple Contacts								
۵	Order Entry								
	Purchase Orders								
×	Tax Services								
	Productivity Tools								

The Delete Quotes screen lets you select which quotes you wish to delete by specifying ranges of quote fields, including order number, order date, customer number, date requested, and any optional fields that you use for quotes. The following example selects all quotes older than a particular date.

sag	je 300	General Session Date: Oct 21, 2020 Administrator ▼ Sample Company Ltd.	Help Settings	7
â	Home	Order Entry : Complete Orders Delete Orders Delete Quotes Ship Orders Invoice Shipments Update Orders		4
Ēŕ	Accounts Payable	Delete Quotes	Options 🏟	۲ ۲
增	Accounts Receivable			ەت 1.
ô	Administrative Services	Settings Preview		à
血	Bank Services	Selection Criteria		J
^	Common Services	+ Add Line 💼 Delete Line		Γ
E.	General Ledger	Field Operator Value(s)		
8	Inventory Control			
*	Multiple Contacts			
e	Order Entry	Only Delete Quotes That Have Been Made Into Orders		L
	Purchase Orders			
*	Tax Services			
2	Productivity Tools			

Selecting quotes for deletion

Choose the range of quotes that you want to delete:

• Click the "Add Line" button to specify a new field range.

Selection Criteria	
+ Add Line	

• Choose the field for selecting quotes.

Field						
Select	•					
Select						
Order Number	-					
Order Date						
Customer Number						
Bill-To Name						
Expected Ship Date						
Date Requested						
Purchase Order Number	-					

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

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The "Contains" operator appears for text fields. The program scans the field you 0 selected for the text in the Value field.

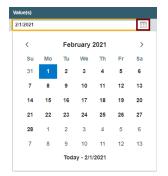
The following example selects quotes for customers in groups that include the letters "US".

Field	Operator	Value(s)	
Customer Group Code	Contains	US (Q

The "Is One Of" operator appears for fields with a specific list of values – such as 0 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.



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			

Only select quotes that have been made into an order:

- Only Delete Quotes That Have Been Made Into Orders
- Select this checkbox if you ONLY want to delete quotes that have been made into orders. •

Save or clear the selection criteria:

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

Order Entry : Complete Orders	Delete Orders D	elete Quotes	Ship Orders	Invoice Shipments	Update O	rders		#
Delete Quotes							Options 🔅	с ₂
							Text Size	<u> </u>
Settings Preview	Settings Preview						Save Settings as Default	l.
							Clear Saved Settings	à
Selection Criteria							User Guide	
+ Add Line a Delete Line						TaiRox Home Page	I	
1							View Today's Log	
Field		Operator				Value(s)		í

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- 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 quotes on the Preview tab and choose which ones to delete:

Click the Preview tab to view the list of quotes 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 quotes when you go to the Preview tab. You can then pick each quote that you want to delete.

Click the Preview tab to display the selected list of quotes.

	QT0000000000001	NEW2	New Company	1/15/2019		From CRM		
	Order Number	Customer Number	Customer Name	Order Date	On Hold	Description		J
Matching Qu	iotes							à
Settings	Preview							
Delete (Quotes						Options 🏠	G
Order Entry	: Complete Orders	Delete Orders Delete Qu	iotes Ship Orders I	nvoice Shipments Update Or	uers			

- 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 quotes.
- Click the checkboxes on each row to select or de-select a quote.

Matching	Orders			Matching Orders				
	Order Number	Customer Number	Customer Name		Order Number	Customer Number	Customer Name	
•	QT00000000063	1105	Bargain Mart - Oakland		QT000000000063	1105	Bargain Mart - Oakland	
✓	QT00000000064	1200	Mr. Ronald Black		QT000000000064	1200	Mr. Ronald Black	
	QT000000000065	1200	Mr. Ronald Black		QT000000000065	1200	Mr. Ronald Black	

• Click the Quote Number to drill down on a quote:

Order Number	Customer Number	Customer Name	Order Date	On Hold	Description
QT0000000000001	NEW2	New Company	1/15/2019		From CRM
QT000000000002	1200	Mr. Ronald Black	2/2/2021		

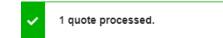
Click the Process button to delete the selected quotes:

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

Confirmation	×
Are you sure you want to delete the selected quotes?	
No	Yes

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 quotes that were deleted:

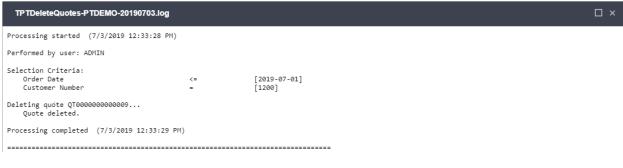


Select "View Today's Log" to confirm which quotes were deleted:

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

Options 🔅					
Text Size					
Save Settings as Default					
Clear Saved Settings					
User Guide					
TaiRox Home Page					
View Today's Log					

• The log looks like this:



The Log lists:

- The user and the selection criteria.
- Each quote that was deleted.