Delete Purchase Orders

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

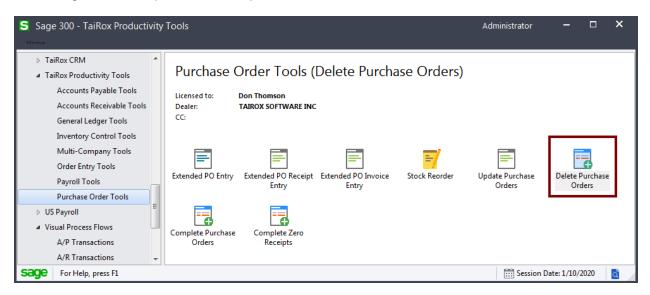
Important Note: Delete Purchase Orders uses Sage 300 objects to delete purchase orders safely. If Sage 300 Purchase Orders will not delete a purchase order, neither will Delete Purchase Orders. For example, once PO items have been received, you cannot delete a PO.

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 or import a list of the purchase orders that you need to delete.
- Check PO details while finalizing the deletion list.
- Press a 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

The Delete Purchase Orders icon appears under **TaiRox Productivity Tools > Purchase Order Tools** on the Sage 300 desktop and can be copied to other menu locations.



The Delete Purchase Orders screen (below) lets you select which POs you wish to delete by specifying a range of PO numbers, order dates, vendors, terms, currencies, expected arrival dates, locations, PO types, and completion status.

PTDEMO - Delete Purchase Ord File Help	lers		-		×
Purchase Order Range					
Select Purchase Orders By	From	То			
(None) 👻					
(None) 🔻					
(None)					
(None) -					
(None) 🔻					
(None) 🗸					
(None) -					
Additional Criteria		Field Settings		Load	
Include Purchase Order Number Purc	shase Order Date Description			Ven	100
Select All Select None					,
Process Log]			Close	

Selecting Purchase Orders for deletion

Choose ranges of purchase orders:

🗾 PTDEMO - Complete Z	ero Receipts			-		×
<u>F</u> ile <u>H</u> elp						
Receipt Range						
Select Receipts By	From		То			
Receipt Number	•	Q	2777777777	222222	777777	Q
Receipt Date	- //	#	07/10/2019			**
Vendor	▼ 1350	Q	1350			Q
(None)	-					
(None)						
(None)	•					
(None)	-					

- You can specify ranges of purchase orders to restrict them (for example) by PO numbers, order dates, vendors, terms, currencies, locations, PO types, and completion statuses.
- You can add or remove fields from the dropdown list using the Field Settings button.

For instructions on importing a list of purchase orders for deletion using the **File > Import** menu choice, see <u>Importing a List of Purchase Orders for Deletion</u>.

Use the "Field Settings" button to customize the list of fields for selecting POs:

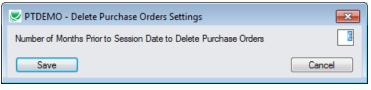
Click the **Field Settings** button to change the fields that appear in the "Select Purchase Orders By" dropdown list.

	Select Purchase Orders By Purchase Order Number	From	то С <u>ZZZZZZZZZZZZZZZZZZZZZ</u> С
Terms Code Expected Arrival Date Bill-To Location Purchase Order Type Completed On Hold	d Settings ude >> Purchase Order Number Purchase Order Date Vendor Currency Ship-To Location None	Up Down	Field Settings Load
ОК	1	Cancel	

- The list of fields on the right are the fields that will appear in the Select Purchase Orders By dropdown.
- To add a field to the dropdown list, select it in the list on the left, and click the Include button.

Note regarding PO dates:

 If you choose a range of POs by date, the default "To" date is set by a screen accessed through the Delete Purchase Orders > File > Settings menu choice:



You can override the default in the Range fields.

Choose additional criteria if necessary:

To select purchase orders with a field that is NOT available on the Field Settings form, use Additional Criteria.

DTDEMO		Purchase Orders eria - Purchase Orders			-	
-Purchase Order	Column	Date Completed	✓ <u>A</u> dd	Delete		
Select Purchas Purchase Order (None)	Field Criteria Or	Date Completed <= 11012019				
(None) (None)						
(None) (None) (None)	Show Filte	er Clear Edit	Save		ОК	Cancel
Additional Cr	iteria			Field Settings		Load

- Click the Additional Criteria button to further restrict the POs retrieved for deletion.
- Select a field in the dropdown and click the Add button.
- Double-click the Criteria field to enter a relationship and value.
- Click OK to save.

Load the list of selected purchase orders and choose which ones to delete:

Addi	tional Criteria		Field Settings	oad	
Include	🗳 Purchase Order Number	Purchase Order Date	Description	Vendor	
Yes	PO00000001	1/8/2019		1450	
Yes	PO00000002	1/8/2019	K	1500	
Yes	PO00000003	1/8/2019		2300	Ξ
Yes	PO00000004	1/8/2019		6010	

- Click the Load button to display the selected list of purchase orders.
 - \circ $\;$ Go back and adjust the ranges or additional criteria if necessary.

Importing a List of Purchase Orders for Deletion

• Choose File > Import from the Delete Purchase Orders menu.

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File Help				
Customize		То		
Import	y From ▼	10		
Close	•			

• Select the list of purchase orders that you want to process.

Open						×
🔾 🗸 🕌 🕨 Computer 🕨 I	Local Disk (C:) > Sage300 > XL61A > Docume	entation 🕨	▼ 4 9	Search Documentation	,
Organize 🔻 New folder					8= -	0
鷆 TX66A	*	Name	Date modified	Туре	Size	
TX67A		퉬 ENG	11/18/2020 12:45	File folder		
UP73A		BillsOfMaterial.xlsx	11/12/2020 1:24 PM	Microsoft Excel W	9 KB	
UQ66A		🖾 Customers.xlsx	11/12/2020 1:24 PM	Microsoft Excel W	10 KB	
UQ67A UT73A		Employees.xlsx	11/12/2020 1:24 PM	Microsoft Excel W	10 KB	
		Items.xlsx	11/12/2020 1:24 PM	Microsoft Excel W	10 KB	
UT73C	_	ItemSubstitutes.xlsx	11/12/2020 1:24 PM	Microsoft Excel W	10 KB	
UX66A		🔊 Orders.xlsx	11/18/2020 1:00 PM	Microsoft Excel W	9 KB	

The program will import the list and load all relevant purchase orders into the grid – setting all
POs to "Include" – and display a message stating the number of purchase orders that were
successfully loaded, and the number of POs that could not be imported.

Include	Purchase Order Number	Purchase Order Date	Description	Vendor		
Yes	PO00000015	1/23/2020	Standing order for Ms. Adams	1200		
Yes	PO0000			7100		
Yes	PO0000 Message			1540		
	Message Description: 3 Purchase Orders imported from 'C:\Sage300\XL61A \Documentation\PurchaseOrders.xlax'. 1 Purchase Orders could not be imported. Please see the Delete Purchase Orders User Guide for more details.					

The program will reject POs that cannot be processed, and will not import them.

• For example, you cannot delete a partially received order.

All POs that can be deleted will be loaded into the grid at the botton of the screen. You can then confirm which purchase orders you want to delete.

Choosing Purchase Orders from the Grid for Processing

• Use the Select All and Select None buttons.

Select All Select None

• Double-click in the Include column to "cherry-pick" from the PO selections:

Include	🖪 Purchase Order Number	Purchase Order Date	Description	Vendor	-
Yes	PO00000001	1/8/2019		1450	
Yes	PO00000002	1/8/2019		1500	
No	PO00000003	1/8/2019		2300	

Click the Purchase Order Number column heading to drill down on the selected PO:

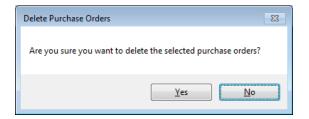
Include	🖪 Purchase Order Number	Purchase Order Date	Description	Vendor
Yes	PO00000001	1/8/2019		1450
Yes	PO00000002	1/8/2019		1500
Yes	PO00000003	1/8/2019		2300

You can also delete a PO by selecting it and pressing the Delete key:

• You can also **delete** a purchase order from the Purchase Orders program by selecting the row in the Load list and pressing the **Delete key**. When the delete key is pressed you will be prompted to confirm the deletion of that purchase order.

Click the Process button to delete the included purchase orders:

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



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

Click the Log button to confirm which purchase orders were deleted:

The Log lists:

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

File Formats for Imported Purchase Order Lists

Instead of specifying a range of purchase orders for deletion and clicking the Load button, you can directly import a list of POs.

Import files are Excel files.

You can find examples of import lists in directory "...\Sage300\XL61A\Documentation".

Purchase Order List

The Excel Spreadsheet PO list is a single column with "PONUMBER" as the column heading in the first row.

	Α
1	PONUMBER
2	PO00000011
3	PO00000015

• All other columns are ignored. This means that you can add descriptions and notes to your spreadsheet without affecting the file import.