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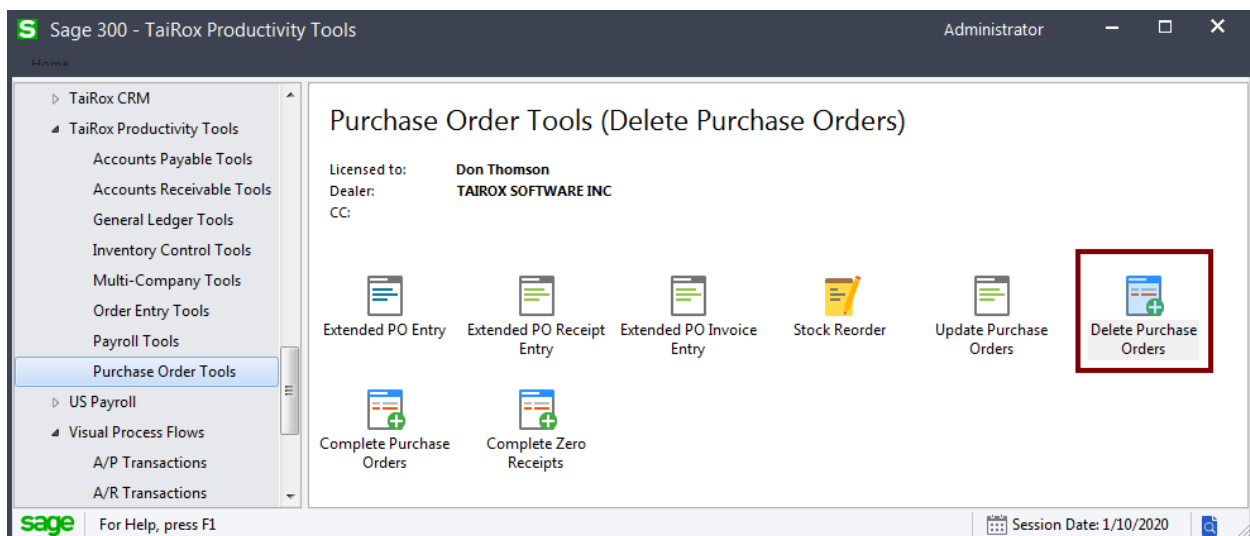
The Delete Purchase Orders screen (below) lets you select which POs you wish to delete by specifying a range of PO numbers, order dates, vendors, terms, currencies, expected arrival dates, locations, PO types, and completion status.

Selecting Purchase Orders for deletion

Choose ranges of purchase orders:

- 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 Importing a List of Purchase Orders for Deletion.

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.

- 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:
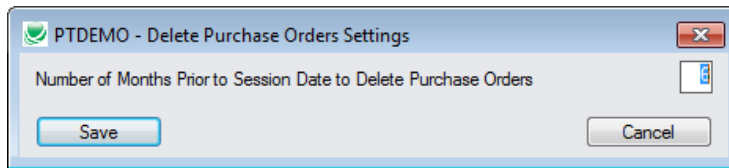
You can override the default in the Range fields.

Choose additional criteria if necessary:

To select purchase orders with a field that is NOT available on the Field Settings form, use Additional Criteria.
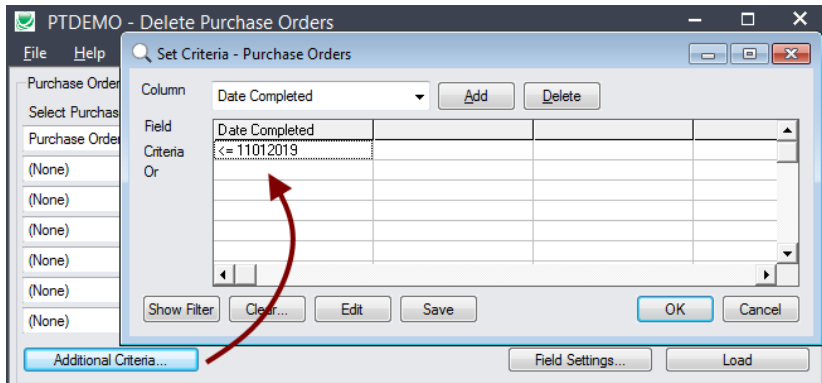
- Click the Additional Criteria button to further restrict the POs retrieved for deletion.
- Select a field in the dropdown and click the Add button.
- Double-click the Criteria field to enter a relationship and value.
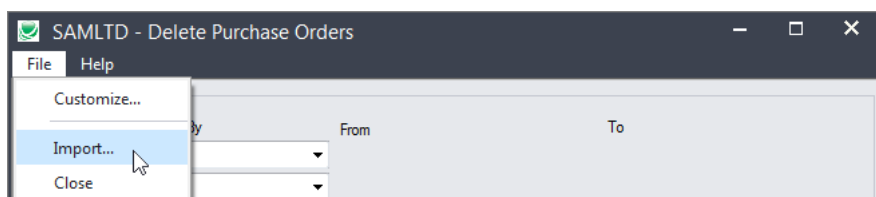- Click OK to save.

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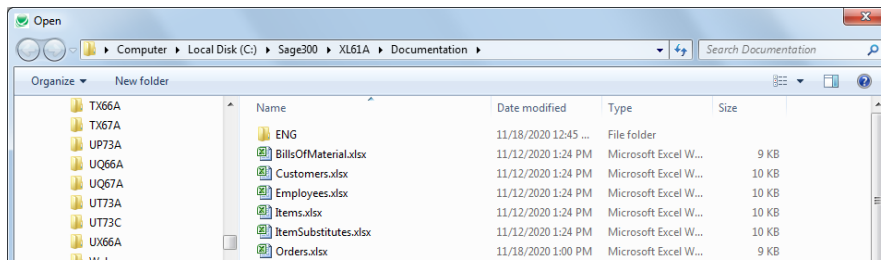

- Click the Load button to display the selected list of purchase orders.
  - Go back and adjust the ranges or additional criteria if necessary.

# Importing a List of Purchase Orders for Deletion

- Choose **File > Import** from the Delete Purchase Orders menu.

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

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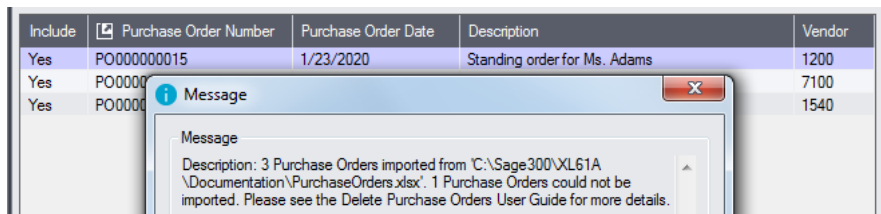
The program will reject POs that cannot be processed, and will not import them.

- 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.

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

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

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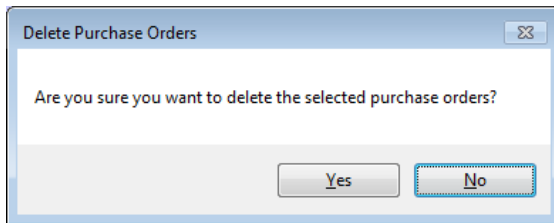
Note: There may be data-integrity errors that prevent some deletions, in which case an error message will appear.

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

```
6/25/2020 1:38:59 PM Delete Purchase Orders started.
6/25/2020 1:38:59 PM
6/25/2020 1:38:59 PM Performed by user: ADMIN
6/25/2020 1:38:59 PM
6/25/2020 1:38:59 PM Purchase Order Range
6/25/2020 1:38:59 PM     Purchase Order Number From [] To [ZZZZZZZZZZZZZZZZZZZZZZ]
6/25/2020 1:38:59 PM
6/25/2020 1:38:59 PM     Processing Purchase Order Number PO000007223...
6/25/2020 1:38:59 PM         Purchase Order Number PO000007223 deleted.
6/25/2020 1:38:59 PM
6/25/2020 1:38:59 PM Delete Purchase Orders complete.
6/25/2020 1:38:59 PM
=============================================================================
```

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.

	A
1	PONUMBER
2	PO000000011
3	PO000000015

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