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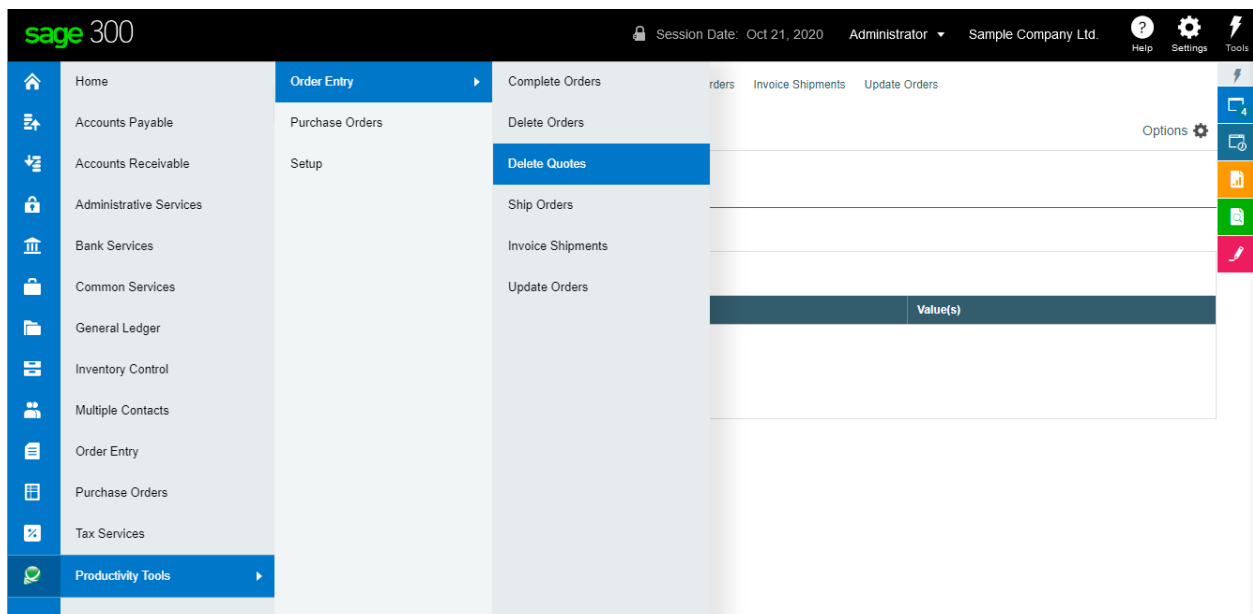
The Delete Quotes screen lets you select which quotes you wish to delete by specifying ranges of quote fields, including order number, order date, customer number, date requested, and any optional fields that you use for quotes. The following example selects all quotes older than a particular date.
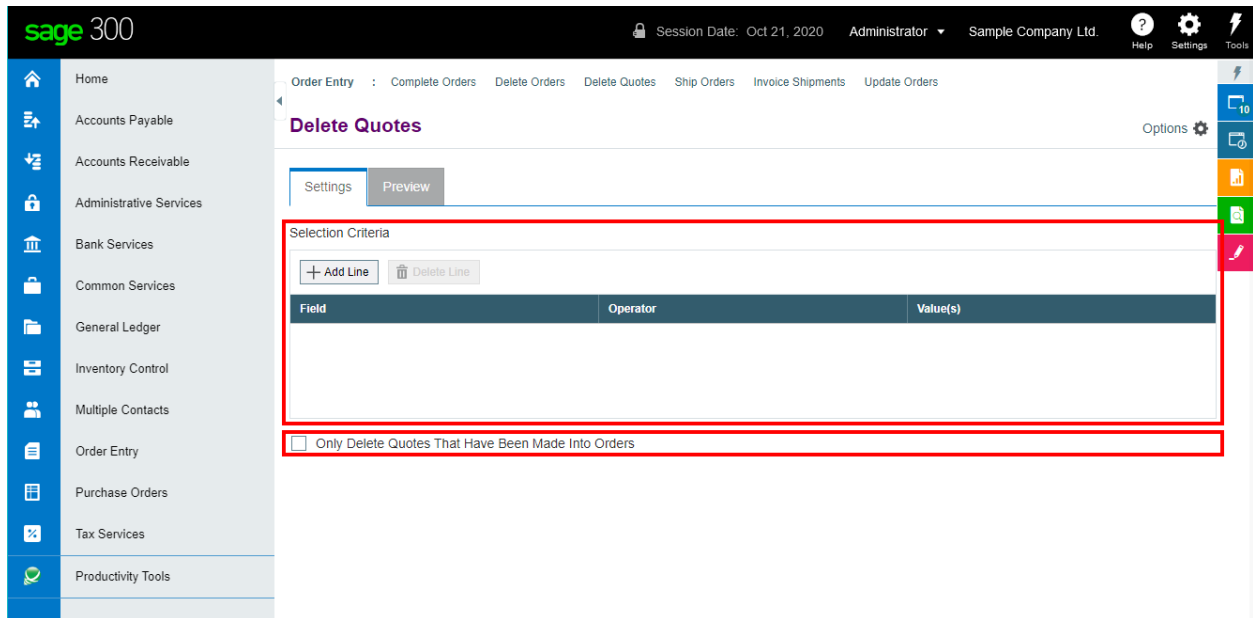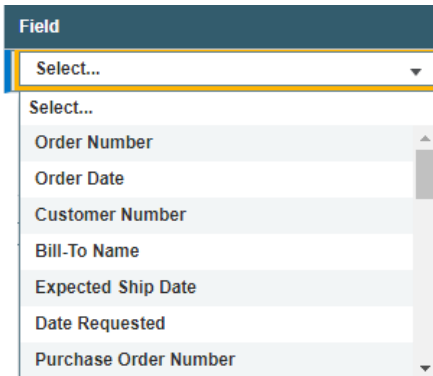
Selecting quotes for deletion

**Choose the range of quotes that you want to delete:**

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

- Choose the field for selecting quotes.

- 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."
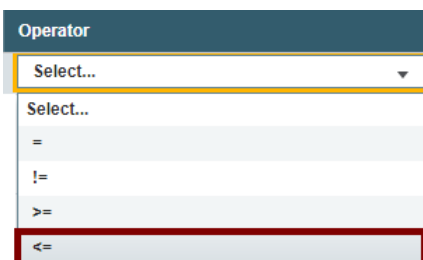
- o **The "Contains" operator appears for text fields**. The program scans the field you selected for the text in the Value field.
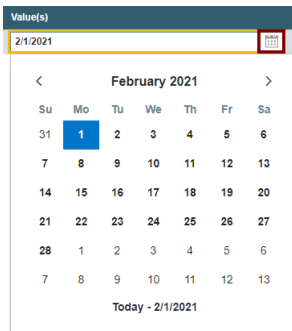
  The following example selects quotes for customers in groups that include the letters "US".

Field	Operator	Value(s)
Customer Group Code	Contains	US

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

Value(s)	
2/1/2021	🗓

	February 2021	
‹		›

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	1	2	3	4	5	6
7	8	9	10	11	12	13

Today - 2/1/2021

- 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:

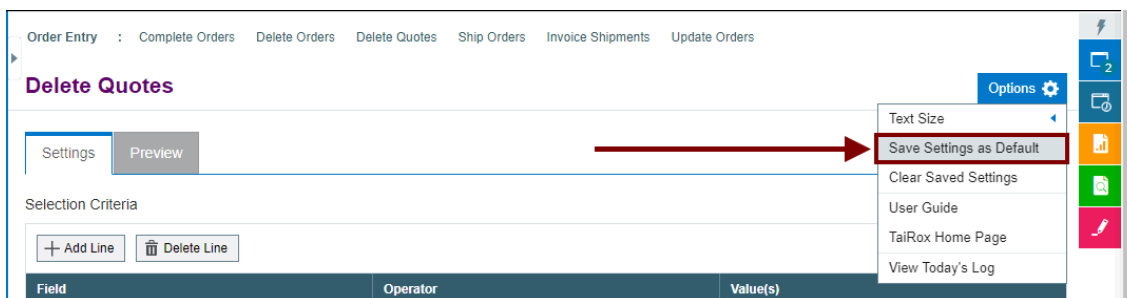 | ＋ Add Line | 🗑 Delete Line | |
  |---|---|---|
  | **Field** | **Operator** | **Value(s)** |
  | Order Date | >= | 11/1/2020 |
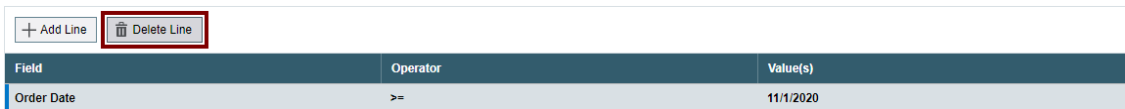
Only select quotes that have been made into an order:

☑ 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	Delete Quotes	Ship Orders	Invoice Shipments	Update Orders		

Delete Quotes   Options ⚙

| Settings | Preview |

Selection Criteria

| ＋ Add Line | 🗑 Delete Line |

| Field | Operator | Value(s) |

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

- 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.**

- 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.

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

Click the Process button to delete the selected quotes:

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.

If the deletion was successful, the following message will appear, stating the number of quotes that were deleted:
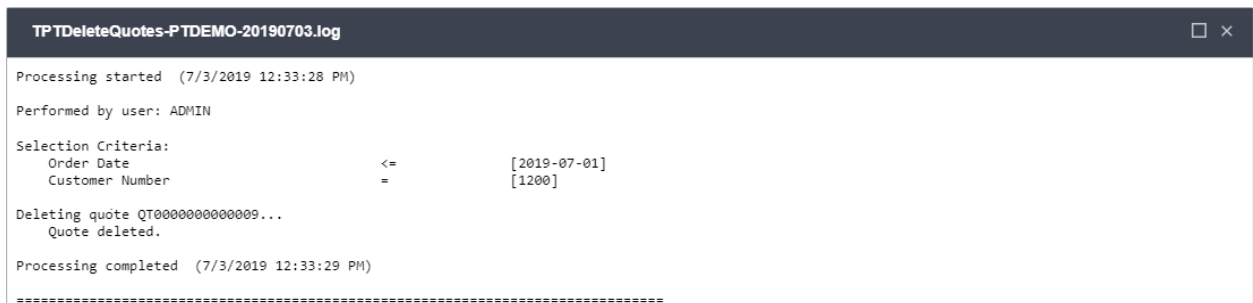
✓   1 quote processed.
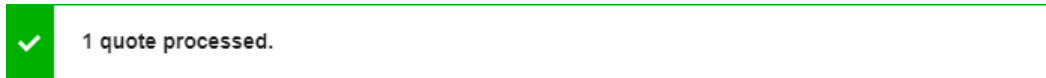
Select "View Today's Log" to confirm which quotes were deleted:

- Click the Options button and select View Today's Log to see the selection criteria and the quotes that were deleted.
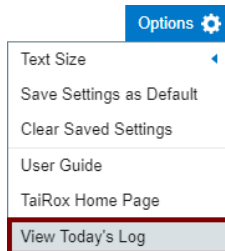
- The log looks like this:

The Log lists:

- The user and the selection criteria.

- Each quote that was deleted.