Delete Orders for Sage 300cloud

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

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

Important Note: Delete Orders uses Sage 300 objects to delete orders safely. If Sage 300 Order Entry will not delete an order, neither will Delete Orders. Once an order is shipped, it cannot be deleted.

Delete Orders lets you:

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

Running Delete Orders

Delete Orders appears under **Productivity Tools > Order Entry** on the Sage 300c desktop.
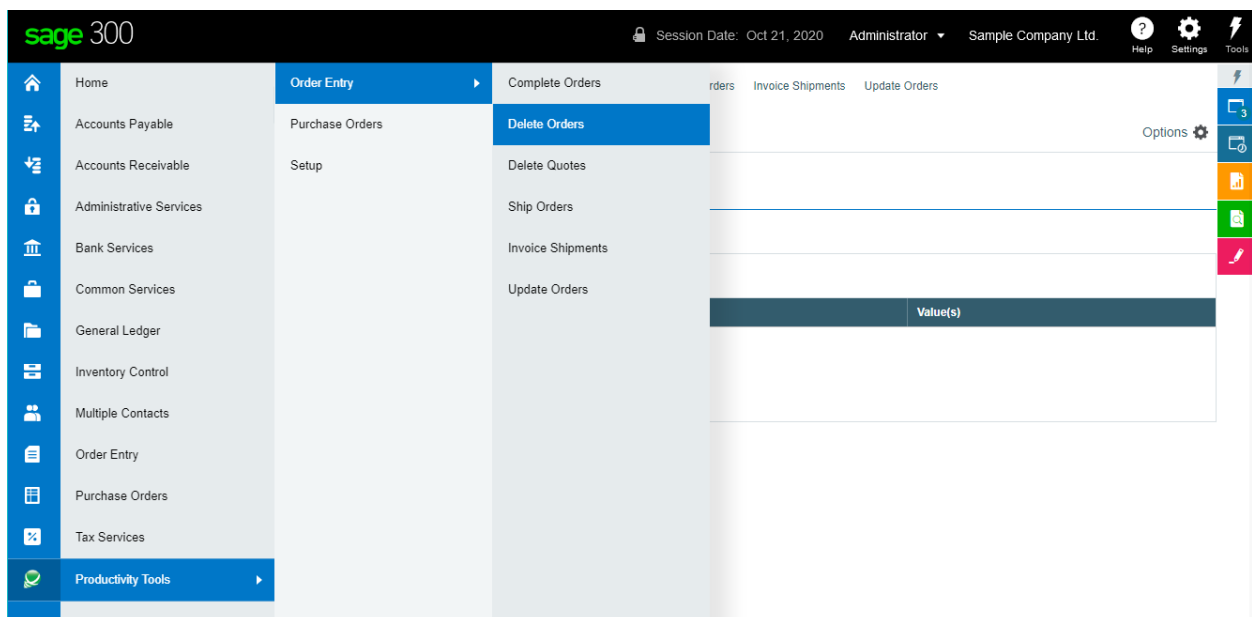
The Delete Orders screen (below) lets you select which orders you wish to delete by specifying ranges of order fields, including order numbers, order dates, customer numbers, order types, and any optional fields that you use for orders. The following example selects all orders before a particular date.

Selecting orders for deletion

Choose the range of orders that you want to delete:

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

- Choose the field for selecting orders.

- Choose the Operator for the field value – for example, 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."

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

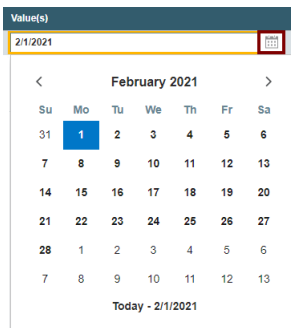 The following example selects orders for customers in groups that include the letters "US".

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 Order Type or 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:
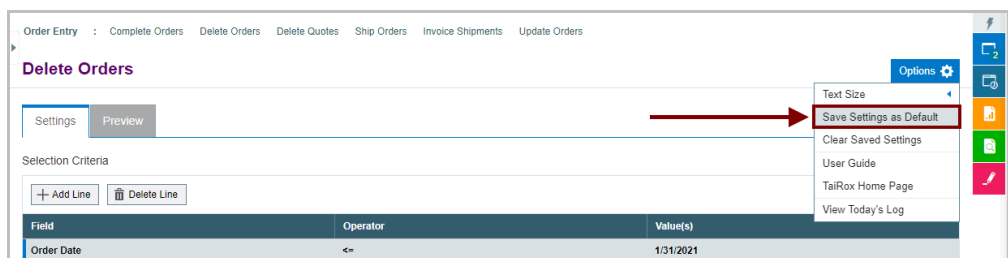
Field	Operator	Value(s)
Order Date	>=	11/1/2020
Order Date	<=	1/31/2021

- *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

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 Orders

Options ⚙

| Settings | Preview |

Selection Criteria

| + Add Line | 🗑 Delete Line |

Field	Operator	Value(s)
Order Date	<=	1/31/2021

Text Size ◂
Save Settings as Default
Clear Saved Settings
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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 orders on the Preview tab and choose which ones to delete:

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

- **Click the Preview tab to display the selected list of orders.**

  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 orders.

- Click the checkboxes on each row to select or de-select an order.

- Click the Order Number to drill down on the selected order:

Click the Process button to delete the selected orders:

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

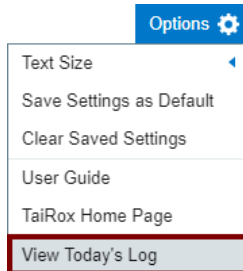**Note:** There may be data-integrity errors that prevent some deletions, in which case an error message will appear.

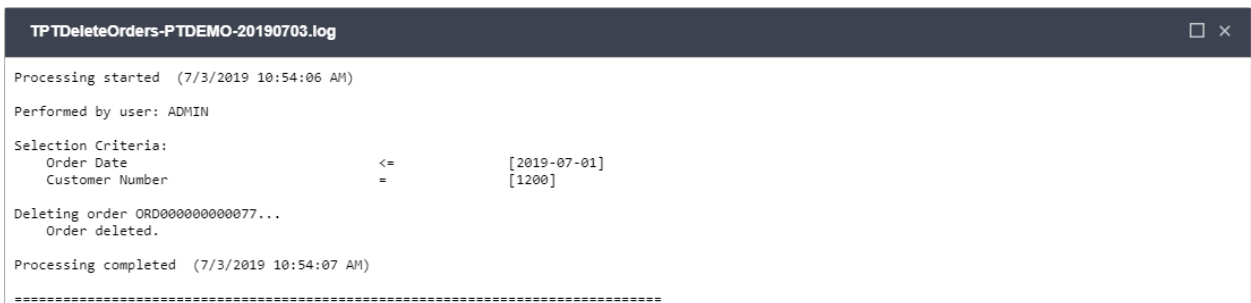If the deletion was successful, the following message will appear, stating the number of orders that were deleted:

✓   1 order processed.

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

- Click the Options button and select View Today's Log to see the order selection criteria and the orders 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:

TPTDeleteOrders-PTDEMO-20190703.log   □ ×

Processing started (7/3/2019 10:54:06 AM)

Performed by user: ADMIN

Selection Criteria:
    Order Date   <=   [2019-07-01]
    Customer Number   =   [1200]

Deleting order ORD000000000077...
    Order deleted.

Processing completed (7/3/2019 10:54:07 AM)

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The Log lists:

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