Delete Purchase Orders for Sage 300cloud

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 for Sage 300c 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 orders safely. If Sage 300 Purchase Orders will not delete a PO, neither will Delete Purchase Orders.

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.

- Check PO details while finalizing the deletion list.

- Click the 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

Delete Purchase Orders appears under **Productivity Tools > Purchase Orders** on the Sage 300c desktop.
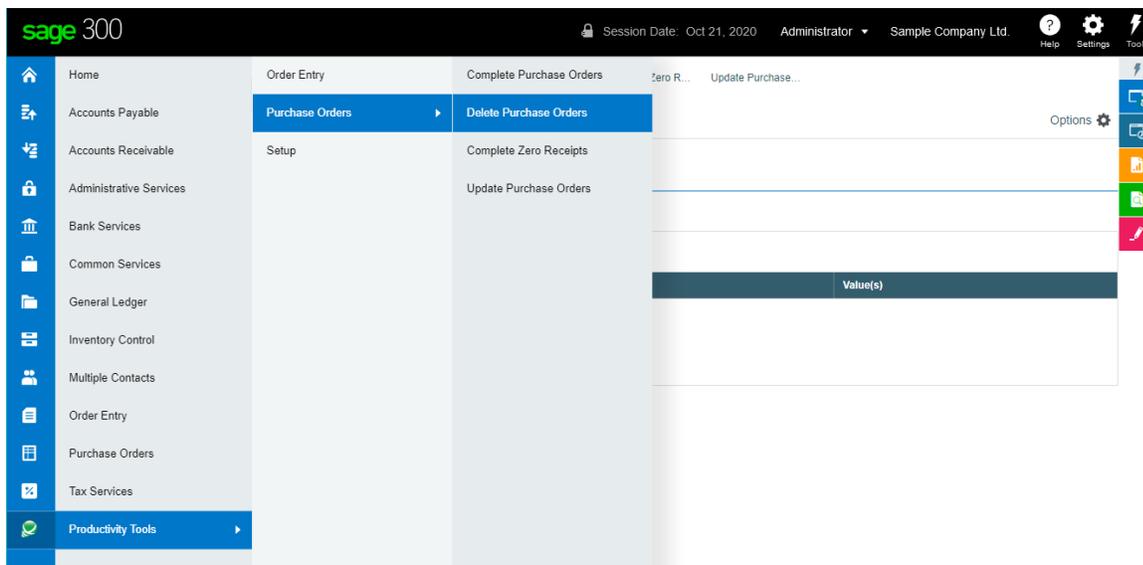

The Delete Purchase Orders screen (below) lets you select which POs you wish to delete by specifying a range of purchase order fields, including PO numbers, order dates, vendors, currencies, expected arrival dates, locations, PO types, completion status and any optional fields that you use with purchase orders.
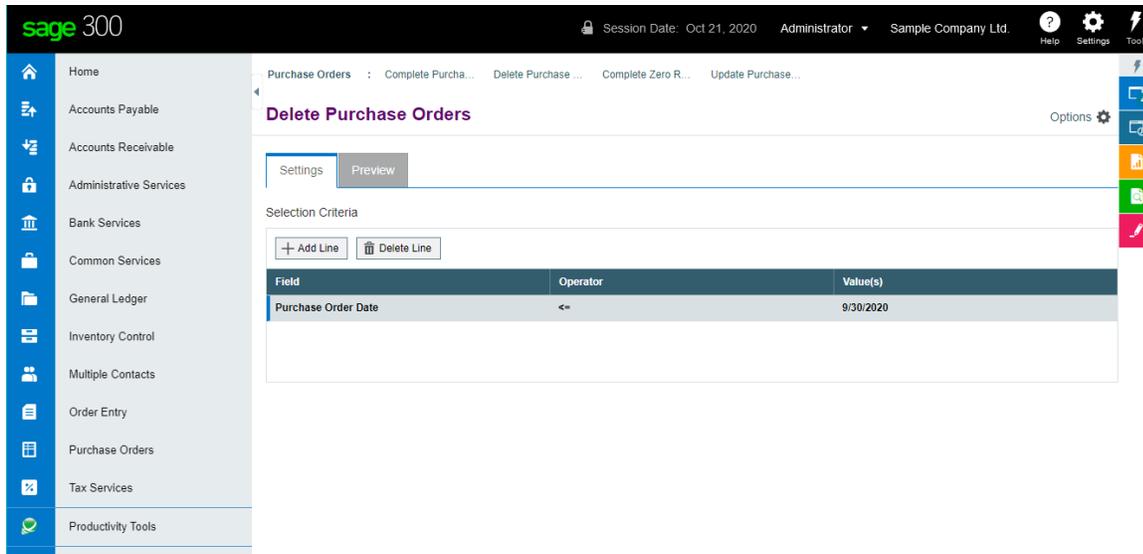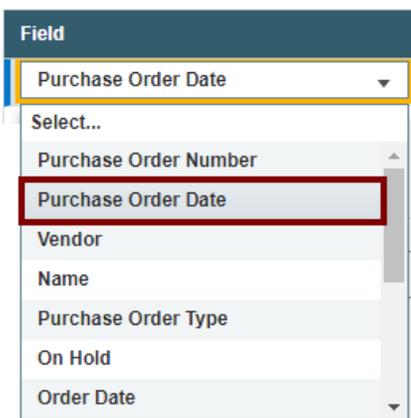
Selecting Purchase Orders for deletion

Choose field values and ranges of purchase orders:

- Click the "Add Line" button to specify a new field value or range of values.
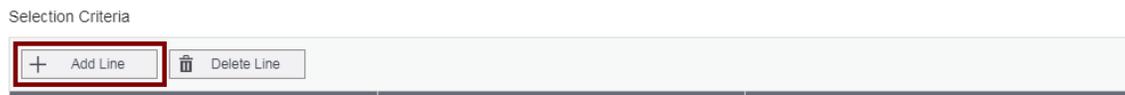
- Choose the field for selecting purchase orders.

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

Operator

Operator
Select... ▼
Select...
=
!=
>=
<=

- 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 POs with ship-to locations that include the letters "US".

Field	Operator	Value(s)
Ship-To Location	Contains	US

- o **The "Is One Of" operator appears for fields with a specific list of values** – such as Purchase Order Type or optional fields with a list of values. It lets you specify more than one value – as below.

Field	Operator	Value(s)
Purchase Order Type	Is One Of	Active × |
		Active
		Standing
		Future
		Blanket

- Enter or choose the Value. For example, a date field provides a calendar, and other fields will provide a Finder button.

Value(s)

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.

- Click the Options button to display the list of options.

- Select "Save Settings as Default." The program displays the following message:

To clear the default settings:

- Select "Clear Saved Settings" from the Options menu.

View selected POs on the Preview tab and choose which ones to delete:

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

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

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

- Click the PO Number to drill down on a purchase order:

	PO Number	Vendor Number	Vendor Name	PO Date	PO Type	Total
☑	PO000000004	6010	J. D. Garner Enterprises	1/8/2019	Active	34254.78
☐	PO000000013	1500	Gould Manufacturing Ltd.	11/11/2019	Active	190.91
☑	PO000000017	1540	Hart Batteries	1/23/2020	Active	5060.69

Click the Process button to delete the selected 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.

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

> ✓ 1 purchase 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 PO selection criteria and the POs that were deleted.
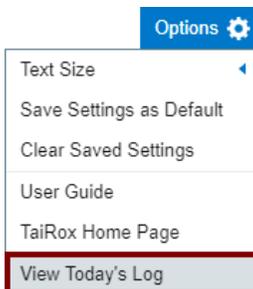
- The log looks like this:

The Log lists:

- The user and the settings selected.

- Each purchase order that was deleted.