

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.

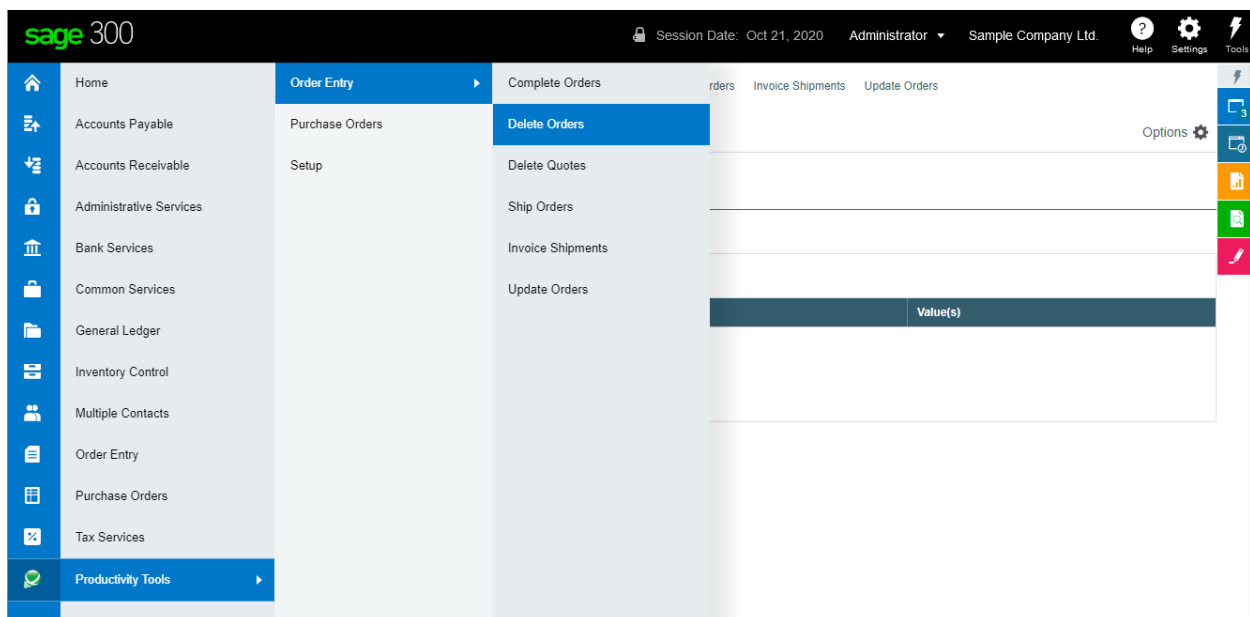
Important Note: Delete Orders uses Sage 300 objects to delete orders safely. If Sage 300 Order Entry will not delete an order, neither will Delete Orders. Once an order is shipped, it cannot be deleted.

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.

The screenshot shows the Sage 300 'Delete Orders' screen. The 'Selection Criteria' section is highlighted with a red box. It contains a table with the following data:

Field	Operator	Value(s)
Order Date	<=	10/20/2020

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.

Selection Criteria

- Choose the field for selecting orders.

Field

Select...

Select...

Order Number

Order Date

Customer Number

Bill-To Name

On Hold

Expected Ship Date

Date Requested

- 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.”

Operator

Select...

Select...

=

!=

>=

<=

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

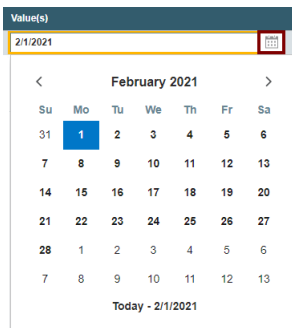
The following example selects orders for customers in groups that include the letters “US”.

Field	Operator	Value(s)
Customer Group Code	Contains	US

- **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 ×

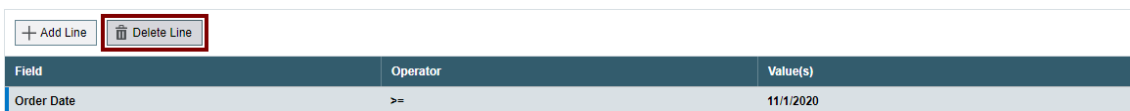
- Enter or choose the Value. For example, a date field provides a calendar, and other fields will provide a Finder button.



- 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:

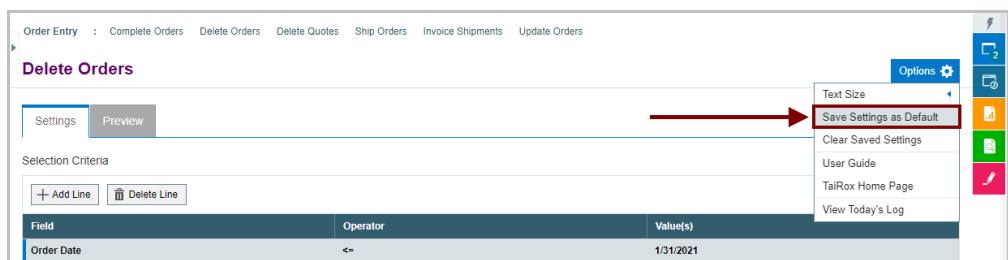
Field	Operator	Value(s)
Order Date	>=	11/1/2020
Order Date	<=	1/31/2021

- **To remove a line**, highlight it, then click the “Delete Line” button:



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.”

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.

	Order Number	Customer Number	Customer Name	Order Date	Order Type	On Hold	Description
<input type="checkbox"/>	ORD000000000001	1200	Mr. Ronald Black	1/15/2019	Active		Please ship ASAP
<input type="checkbox"/>	ORD000000000002	1210	ACME Plumbing	1/15/2019	Active		No backorder please
<input type="checkbox"/>	ORD000000000003	1105	Bargain Mart - Oakland	6/30/2020	Active		No backorder
<input type="checkbox"/>	ORD000000000006	NEW2	New Company	3/13/2013	Active		From CRM

- 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.

	Order Number	Customer Number	Customer Name
<input checked="" type="checkbox"/>	ORD000000000003	1105	Bargain Mart - Oakland
<input checked="" type="checkbox"/>	ORD000000000004	1200	Mr. Ronald Black
<input checked="" type="checkbox"/>	ORD000000000005	1200	Mr. Ronald Black
<input checked="" type="checkbox"/>	ORD000000000006	NEW2	New Company
<input checked="" type="checkbox"/>	ORD000000000007	BARMART	Bargain Mart Stores Inc.

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

	Order Number	Customer Number	Customer Name	Order Date	Order Type	On Hold	Description
<input checked="" type="checkbox"/>	ORD000000000003	1105	Bargain Mart - Oakland	6/30/2020	Active		No backorder
<input type="checkbox"/>	ORD000000000004	1200	Mr. Ronald Black	7/1/2020	Active		

Click the Process button to delete the selected orders:

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

Confirmation ✕

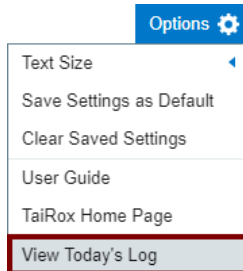
Are you sure you want to delete the selected orders?

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:

**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.



- 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)
=====
```

The Log lists:

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