Delete Orders

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

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 or import a list of the orders that you need to delete.
- Specify additional criteria using order fields.
- Load the list of selected orders and further "cherry-pick" ones for deletion.

TaiRox Delete Orders selects Order Entry orders with the same mechanisms used by core modules when printing reports.

- Check order details while finalizing the deletion list.
- Press a Process button to complete the operation for all selected orders in one step.
- Optionally delete orders individually by selecting from the loaded list and pressing the Delete key.
- View a log of all deletions after processing.

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. This means that:

- You cannot delete a partially shipped order.
- You must uncheck the "Keep Transaction History" checkbox in O/E Options before running Delete Orders to delete completed orders with history.

Many users follow these steps for deleting orders:

- 1. Run Day End in Inventory Control.
- 2. Uncheck "Keep History" in OE Options.
- 3. Use Delete Orders.
- 4. Select the "Keep History" option again so the next Day End doesn't delete ALL order history!

Running Delete Orders

The Delete Orders icon appears under **TaiRox Productivity Tools > Order Entry Tools** on the Sage 300 desktop and can be copied to other menu locations.

🖸 Sage 300 - Sample Company Lim	ited							Administrator	- 0	×
Home										
> TaiRox CRM and Collections	Order Ent	Drder Entry Tools								
Accounts Payable Tools Accounts Receivable Tools Administrative Services Tools	Licensed to: Dealer: CC:	Don Thomson, TAIROX TAIROX SOFTWARE IN TAIROX SOFTWARE IN	SOFTWARE INC							
General Ledger Tools Inventory Control Tools Multi-Company Tools	Ē	E	E	E			E			
Order Entry Tools Payroll Tools	Extended Order Ent	Extended Shipment Entry	Extended O/E Invoice Entry	Extended CR/DK Note Entry	Ship Orders	Invoice Shipments	Update Orders	Update Shipments	Delete Ord	ers
Purchase Order Tools > US Payroll > Visual Process Flows	Delete Quotes	Complete Orders	Create O/E Credit Notes	Extended Ship-Via Codes	Sales History Inquiry	Shipment Picking Slips	Email Packing Slips	Customer Backorders		
Soge For Help, press F1								Session Da	te: 2023-09-07	

TaiRox Productivity Tools for Sage 300 © 2009-2025 TaiRox Software Inc. All rights reserved. The Delete Orders screen lets you select which orders you wish to delete by specifying a range of values for up to seven fields, including order numbers, order dates, customer numbers, order types, and any optional fields that you use for orders.

🛃 PTDEMO - Delete Orders			-		×
<u> </u>					
Order Range					
Select Orders By	From	То			
(None)					
(None) -					
(None) -					
(None) -					
(None) -					
(None) -					
(None) 🔻					
Additional Criteria		Field Settings	ļ	_oad	
Include [2] Order Number Order Type	Order Date Order Description		Custon	nor Num	Bil
	Order Date Order Description		Custon		. 0
·	_				+
Select All Select None]				
Process Log				<u>C</u> lose	

Selecting Orders for Deletion

Choose ranges of orders:

Order Range			
Select Orders By	From	То	
Order Number 🗸	Q	222222222222222222222222222222222222222	Q
Customer Number 🗸	Q	222222222222	Q
Order Date 👻	//	07/10/2019	**
(None)			
(None) -			
(None) -			
(None) 🔻			

 You can select orders by specifying a range of values for up to seven order and optional fields – such as a range of order dates, order numbers, customer numbers, or optional field values.

For instructions on importing a list of orders for deletion using the **File > Import** menu choice, see <u>Importing a List of Orders for Deletion</u>.

Use "Field Settings" to customize the list of fields for selecting orders:

Click the **Field Settings** button to change the fields that appear in the "Select Orders By" dropdown field selection list.

	Select Orders By	From	To
	Order Number (None)	•	Q 222222 Q
PTDEMO - Delete Orders Field Settin Purchase Order Number Salesperson 2 Salesperson 3 Salesperson 4 Salesperson 5 Al Salesperson 5 Al Salesperson 5 Al Salesperson 6 Default Location Code Tax Group Entered By Note Optional - Order Date Preferred Customer Temporary Customer User Warranty	Image: State in the state i	Up Down	Field Settings Load Customer Num Bill-To Name
		Canoor	

- The list of fields on the right are the fields that will appear in the Select 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 order dates:

 If you choose a range of orders by date, the default "To" date is set by a screen accessed through the Delete Orders > File > Settings menu choice:

PTDEMO - Delete Orders Settings	—
Number of Months Prior to Session Date to Delete Orders	
Save	Cancel

You can override the default in the Range fields.

Choose additional criteria if necessary:

If you want to select orders with a field that is NOT available on the Field Settings form, use Additional Criteria.

Z	DTDEMO	D-1-1- 0-1					×
F	🔍 Set Crite	eria - Orders					
R	Column	Territory	✓ Add	Delete			
S	Field	Territory			•		
	Criteria	= AK				ZZZZ	Q
	Or	-					
12							
12					-		
		1			•		
	Show Filte	r Clear Edit	Save	0	K Cancel		
		/	•				
	Additional (Criteria		Field Set	tings	oad	

- Click the Additional Criteria button to further restrict the orders 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 orders and choose which ones to delete:

• Click the Load button to display the selected list of purchase orders.

Addi	tional Criteria			Field Settings	Load	
Include	🖪 Order Number	Order Type	Order Date	Order Description	Customer Num	Bil
No	ORD0000000063	Active	6/30/2020	No backorder	1105	Ba
No	ORD0000000066	Active	2/5/2020		1200	Mr
No	ORD0000000067	Active	2/5/2020		1210	AC
No	ORD0000000068	Active	2/5/2020	—	1240	Th
No	ORD0000000069	Active	2/5/2020		1500	Cu
No	ORD00000000070	Active	2/5/2020		1200	Mr
No	ORD00000000071	Active	2/5/2020		1200	Mr
No	ORD00000000072	Standing	6/5/2020		1200	Mr
No	ORD00000000073	Standing	6/5/2020		1200	Mr
No	ORD00000000074	Future	12/5/2020		1200	Mr
No	ORD00000000075	Future	12/5/2020		1200	Mr

o Go back and adjust the ranges or additional criteria if necessary.

Importing a List of Orders for Deletion

• Choose File > Import from the Delete Orders menu.

🛃 SAMLTD - Delet	-	×	
File Help			
Customize	cellaneous Charge Lines 🗸		
Import	· · · · · · · · · · · · · · · · · · ·		
Close			

• Select the list of orders that you want to process.

🥏 Open							x
Computer + Local E	Disk (C	(c) ► Sage300 ► XL61A ► Documentation ►		- 4 9 S	earch Documentation		٩
Organize 💌 New folder					8== -	1	0
J TX66A	*	Name	Date modified	Туре	Size		-
J TX67A		🐌 ENG	11/18/2020 12:45	File folder			
		BillsOfMaterial.xlsx	11/12/2020 1:24 PM	Microsoft Excel W	9 KB		
		🖾 Customers.xlsx	11/12/2020 1:24 PM	Microsoft Excel W	10 KB		
UQ67A		🖾 Employees.xlsx	11/12/2020 1:24 PM	Microsoft Excel W	10 KB		=
UT75A		🔊 Items.xlsx	11/12/2020 1:24 PM	Microsoft Excel W	10 KB		-
	_	ItemSubstitutes.xlsx	11/12/2020 1:24 PM	Microsoft Excel W	10 KB		
		Crders.xlsx	11/18/2020 1:00 PM	Microsoft Excel W	9 KB		

 The program will import the list and load all relevant orders into the grid – setting all orders to "Include" – and display a message stating the number of orders that were successfully loaded, and the number of orders that could not be imported.

Include	🗳 Order Number	Order Type	Order Date	Order Description	Customer Num	Bil	
Yes	ORD0000000006	3 Active	6/30/2020	No backorder	1105	Ba	
Yes	ORD0000000006	6 Active	3/13/2013	From CRM	NEW2	Ne	
Yes	ORDOOD A	sage		- X	105	Ba	
Yes	ORD000	saye			210	AC	
Yes	ORD000 Mes	ade			100	Ba	
Yes	ORD000 Desi \Ord Use	RD000 Description: 6 Orders imported from 'C:\Sage300\XL61A\Documentation \Orders.xlsx'. 16 Orders could not be imported. Please see the Delete Orders User Guide for more details.					

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

For example, you cannot delete a partially shipped order.

All orders that can be deleted will be loaded into the grid at the botton of the screen. You can then confirm which orders you want to delete.

Choosing Orders from the Grid for Processing

 Use the Select All and Select None buttons below the grid to set all orders to Yes for Include or No to exclude.

Select All Select None

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

Include	🗳 Order Number	Order Type	Order Date	Order Description	Customer Num	Bil
Yes	ORD0000000063	Active	6/30/2020	No backorder	1105	Ba
No	ORD0000000066	Active	2/5/2020		1200	Mr
Yes	ORD00000000067	Active	2/5/2020		1210	AC

• Click the Order Number column heading to drill down on the selected order:

	Include	🖸 Order Number	Order Type	Order Date	Order Description	Customer Num	Bil
I	No	ORD00000000063	Active	6/30/2020	No backorder	1105	Ba
I	No	ORD00000000066	Active	2/5/2020		1200	Mr

You can also delete an order by selecting it and pressing the Delete key:

• You can also **delete** an order 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 order.

Click the Process button to delete the included orders:

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

Delete Orders
Are you sure you want to delete the selected orders?
<u>Y</u> es <u>N</u> o

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 orders were deleted:

7/4/2020	2:24:03	ΡM	Delete Orders started.
7/4/2020	2:24:03	ΡM	
7/4/2020	2:24:03	ΡM	Performed by user: ADMIN
7/4/2020	2:24:03	ΡM	
7/4/2020	2:24:03	ΡM	Order Range
7/4/2020	2:24:03	ΡM	Order Number From [ORD00000000060] To [ORD0000000075]
7/4/2020	2:24:03	ΡM	
7/4/2020	2:24:03	ΡM	Deleting Order Number ORD00000000067
7/4/2020	2:24:03	ΡM	Order Number ORD00000000067 deleted.
7/4/2020	2:24:03	ΡM	
7/4/2020	2:24:03	ΡM	Delete Orders complete.
7/4/2020	2:24:03	ΡM	

The Log lists:

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

File Format for Orders List

Delete Orders lets you delete orders based on an imported orders list.

Import files are Excel files.

You can find examples of import lists in directory "...\Sage300\XL61A\Documentation".

Orders List

Instead of specifying a range of orders and clicking the Load button, you can directly import a list of orders that you want to delete.

The Excel Spreadsheet order list is a single column with "ORDNUMBER" as the column heading in the first row.

	А
1	ORDNUMBER
2	ORD00000000071

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