Delete Quotes

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.
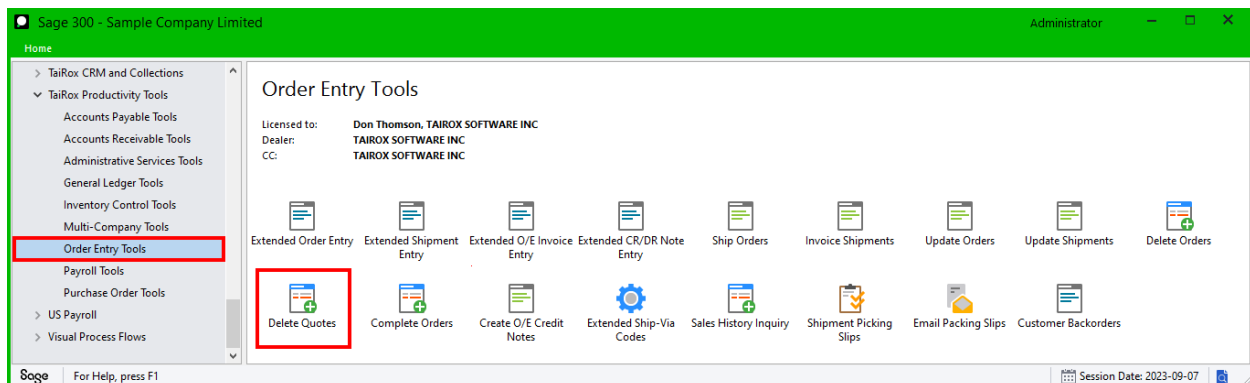
Important Note: Delete Quotes uses Sage 300 objects to delete quotes safely. If Sage 300 Order Entry will not delete a quote, neither will Delete Quotes.
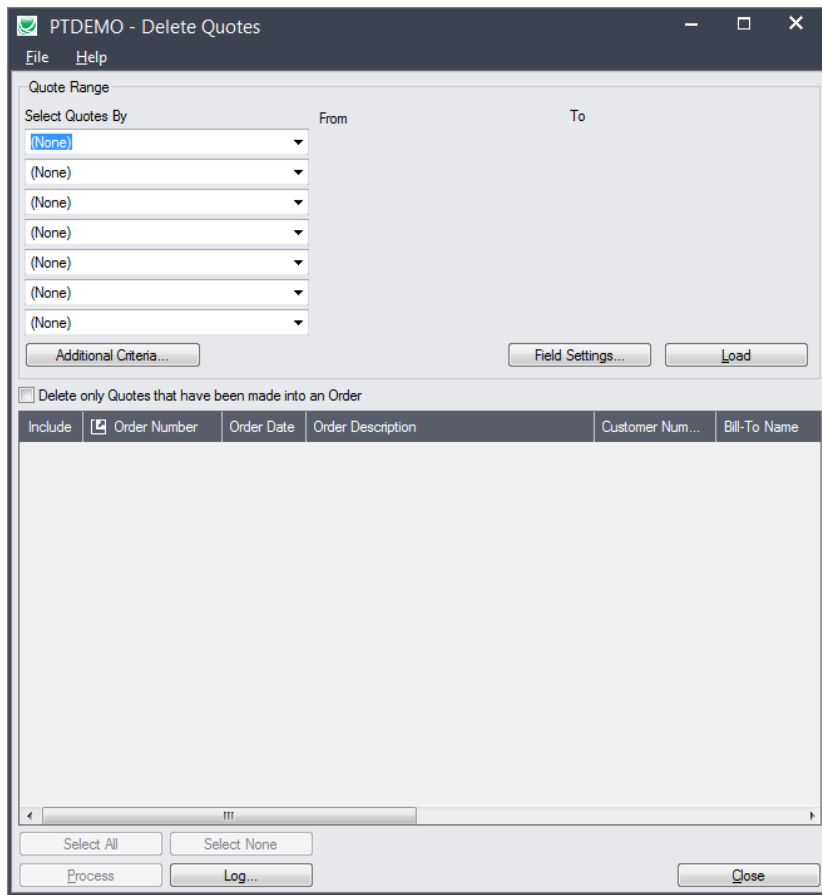
Delete Quotes lets you:

- Select ranges of quotes by order number, order date, customer number, and by any optional fields assigned to quotes and orders in OE – or import a list of the quotes that you need to delete.

  TaiRox Delete Quotes selects quotes with the same mechanisms used by core modules when printing reports.

- 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.

- Optionally delete quotes individually by selecting from the loaded list and pressing the Delete key.

- View a log of all deletions after processing.

Running Delete Quotes

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

The Delete Quotes screen (below) lets you select which quotes 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 quotes.
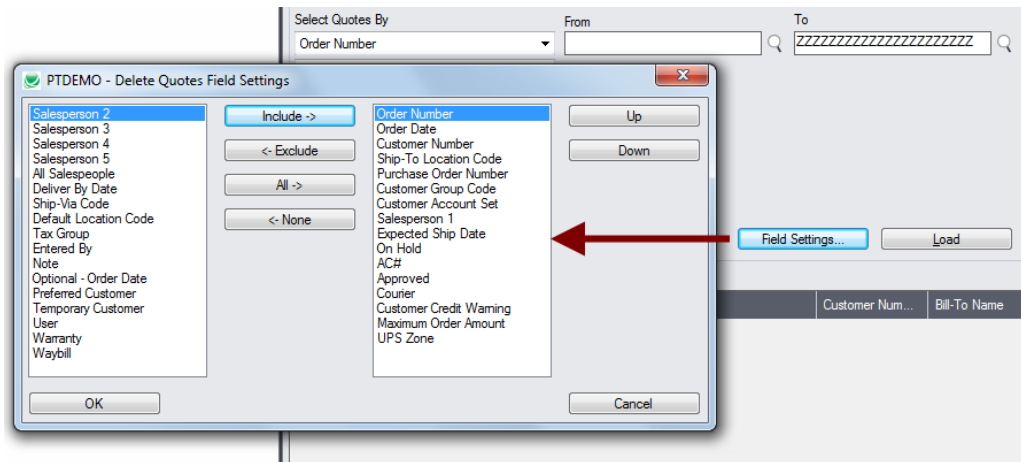
Selecting quotes for deletion

Choose ranges of quotes:

- You can select quotes 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 quotes for deletion using the **File > Import** menu choice, see Importing a List of Quotes for Deletion.

Use "Field Settings" to customize the list of fields for selecting quotes:
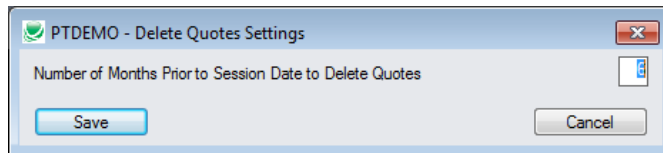
Click the **Field Settings** button to change the fields that appear in the "Select Quotes By" dropdown field selection list.

- The list of fields on the right are the fields that will appear in the Select Quotes By dropdown.
- To add a field to the dropdown list, select it in the list on the left, and click the Include button.
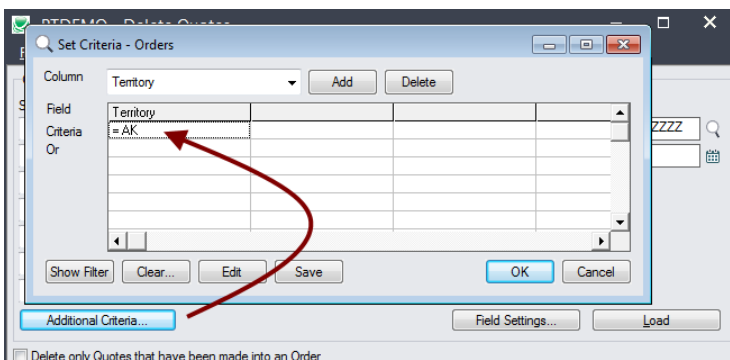
Note regarding order dates:

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

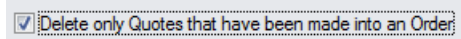You can override the default in the Range fields.

Choose additional criteria if necessary:

To select quotes from a field that is NOT available on the Field Settings form, use Additional Criteria.

- Click the Additional Criteria button to further restrict the quotes 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.
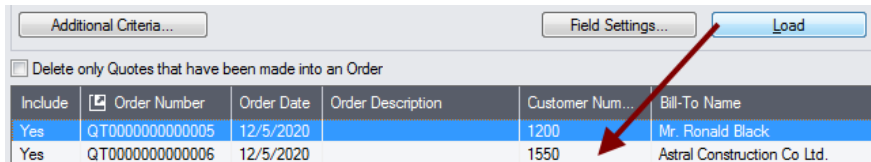- Click OK to save.

Select quotes that have been made into an order:

- Select this checkbox if you want to include ONLY quotes that have been made into orders.

Load the list of selected quotes and choose which ones to delete:

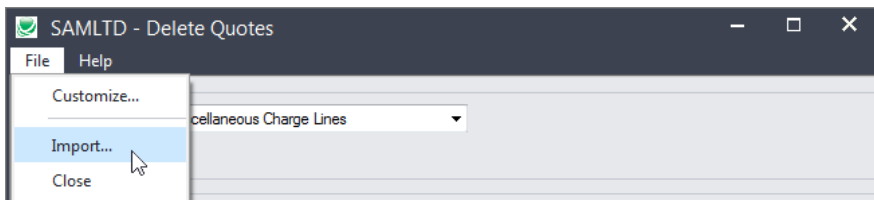- Click the Load button to display the selected list of quotes.

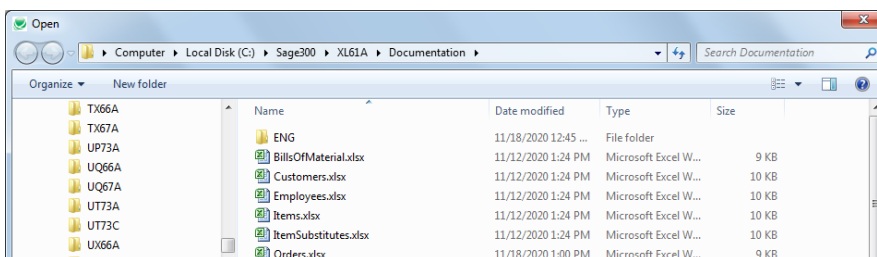 o Go back and adjust the ranges or additional criteria if necessary.

Importing a List of Quotes for Deletion

Important: If you want to only delete quotes that have been made into an order, you must choose that option *before* importing the list of quotes.
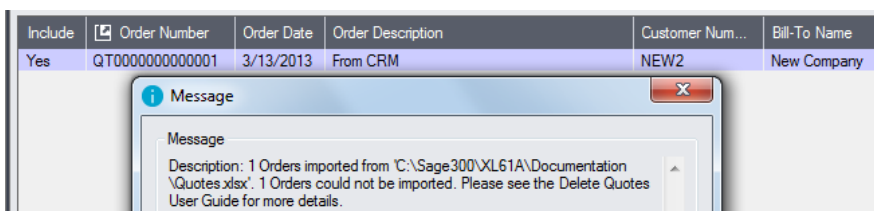
- Choose **File > Import** from the Delete Quotes menu.

- Select the list of quotes that you want to process.

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

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. 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.

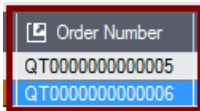# Choosing Quotes from the Grid for Processing

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

- Double-click in the Include column to "cherry-pick" from the quotes selected:

- Click the Order Number column heading to drill down on the selected quote:
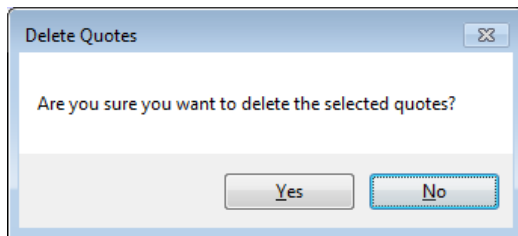

You can also delete a quote by selecting it and pressing the Delete key:

- You can also **delete** a quote 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 quote.

Click the Process button to delete the included 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.

Click the Log button to confirm which quotes were deleted:

```
7/4/2020 3:10:42 PM Delete Quotes started.
7/4/2020 3:10:42 PM
7/4/2020 3:10:42 PM Performed by user: ADMIN
7/4/2020 3:10:42 PM
7/4/2020 3:10:42 PM Quote Range
7/4/2020 3:10:42 PM     Order Number From [] To [ZZZZZZZZZZZZZZZZZZZZZZ]
7/4/2020 3:10:42 PM
7/4/2020 3:10:42 PM     Deleting Order Number QT0000000000005...
7/4/2020 3:10:42 PM         Order Number QT0000000000005 deleted.
7/4/2020 3:10:42 PM
7/4/2020 3:10:42 PM Delete Quotes complete.
7/4/2020 3:10:42 PM
===============================================================================
```

The Log lists:

- The user and the range settings.

- Each quote that was deleted.

File Format for Quotes List

Delete Quotes lets you delete quotes based on an imported quotes list.

Import files are Excel files.

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

Quotes List

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

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

	A
1	ORDNUMBER
2	QT0000000000001
3	QT0000000000002

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