

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.

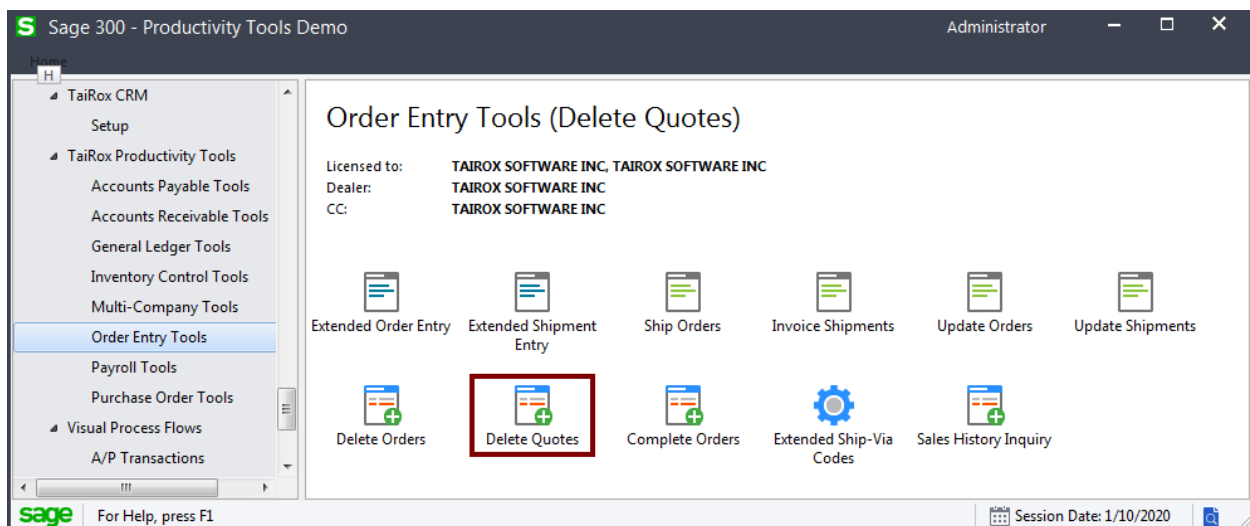
Important Note: Delete Quotes uses Sage 300 objects to delete quotes safely. If Sage 300 Order Entry will not delete an order, neither will Delete Quotes.

Delete Quotes lets you:

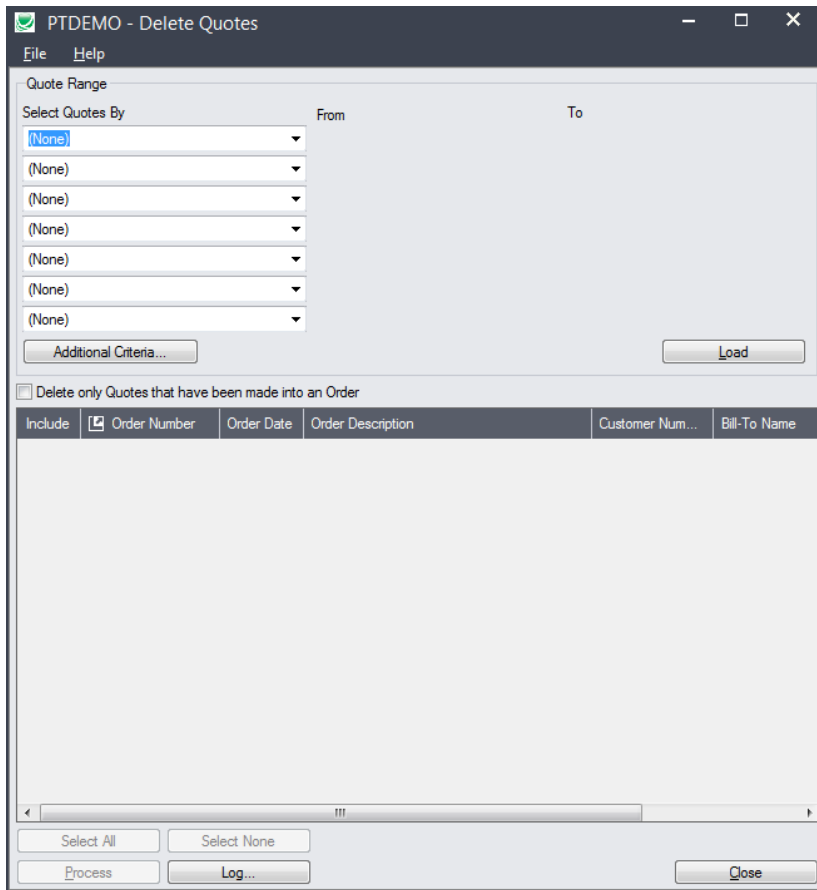
- Select ranges of quotes by order number, order date, customer number, and by any optional fields assigned to quotes and orders in OE.
TaiRox Delete Quotes selects quotes with the same mechanisms used by core modules when printing reports.
- Specify additional criteria using order fields.
- Optionally, 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.

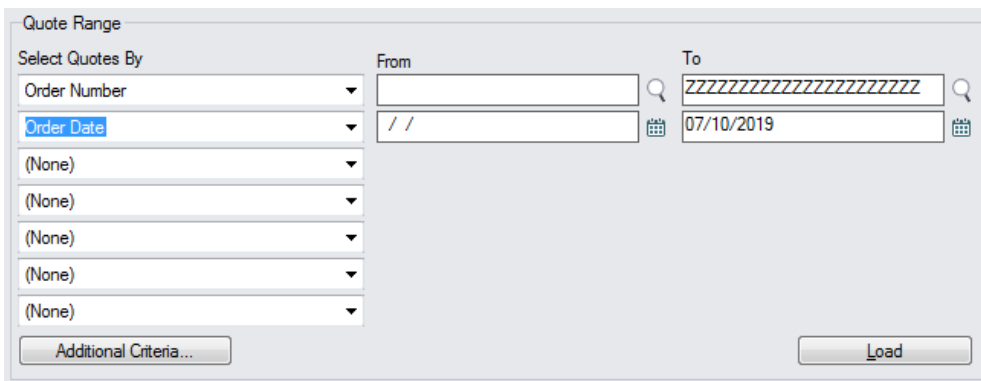


The Delete Quotes screen (below) lets you select which quotes you wish to delete by specifying a range of order numbers, order dates, customers, and any optional fields that you use for quotes.



Selecting Quotes for deletion

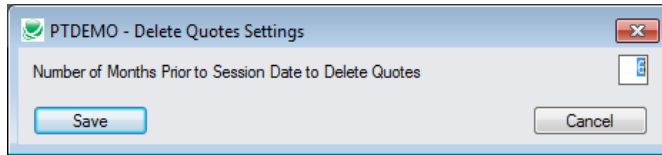
Choose ranges of quotes:



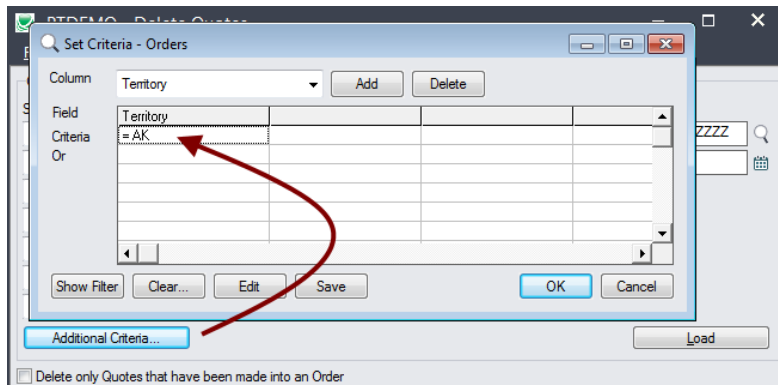
- You can specify ranges of quotes to restrict them by order numbers, order dates, customers, and by optional fields assigned to quotes.

Note regarding order dates:

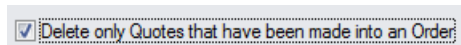
- If you choose a range of quotes by date, the default “To” date is set by a screen accessed through the **Delete Quotes > File > Settings** menu choice:



You can override the default in the Range fields.

Choose additional criteria:

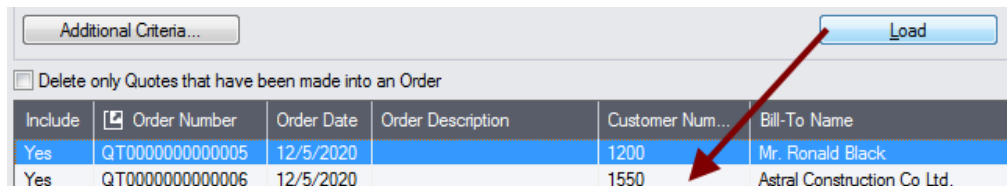
- Click Additional Criteria to further restrict the quotes retrieved for completion. Click OK to save.

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.



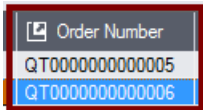
- Go back and adjust the ranges or additional criteria if necessary.
- Use the Select All and Select None buttons below the grid to set all quotes to Yes for Include or No to exclude.



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

Include	Order Number	Order Date	Order Description	Customer Num...	Bill-To Name
Yes	QT00000000000005	12/5/2020		1200	Mr. Ronald Black
No	QT00000000000006	12/5/2020		1550	Astral Construction Co Ltd.

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

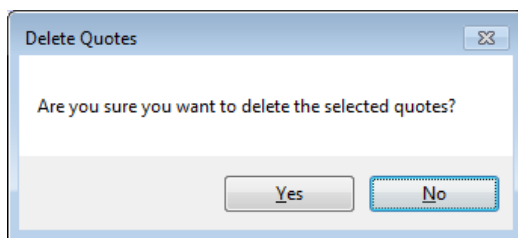


You can also delete a quote by selecting it and pressing the Delete key:

- You can also **delete** a quote from the Order Entry program 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 [ZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZ]
7/4/2020 3:10:42 PM
7/4/2020 3:10:42 PM     Deleting Order Number QT00000000000005...
7/4/2020 3:10:42 PM         Order Number QT00000000000005 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.