

TaiRox Productivity Tools User Guide

Summary - Delete Quotes

Delete Quotes eliminates the time-consuming steps involved in deleting old or complete Order Entry quotes from the Sage 300 Order Entry module.

In many business situations, 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 can be a time-consuming task because each quote has to be called up in Order Entry and deleted individually.

Overview - Delete Quotes

TaiRox Delete Quotes selects Order Entry quotes with the exact mechanisms used by core modules when printing reports. After selection, the selected quotes can be “cherry-picked” for deletion. Pressing a Process button completes the operation in one-step.

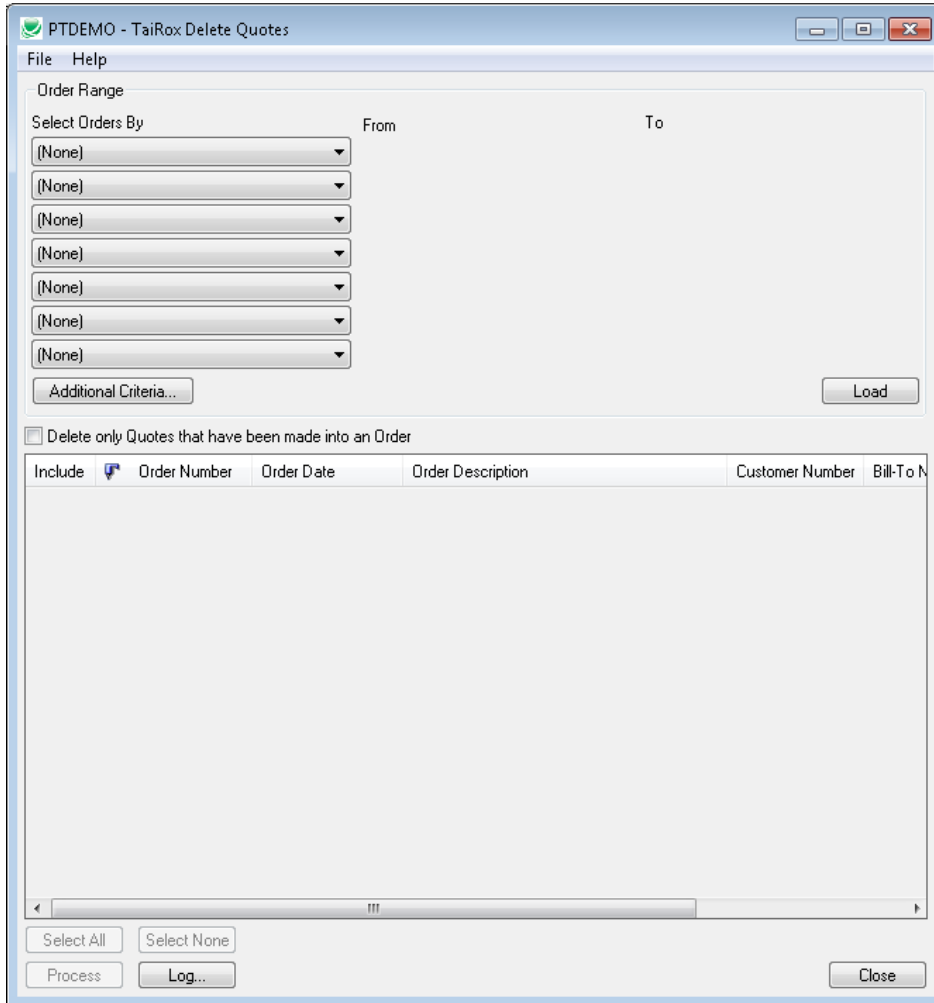
Running Delete Quotes

Once the TaiRox Productivity Tools are installed and activated, the Delete Quotes icon will be shown from the TaiRox Productivity Tools menu on the Sage 300 desktop (and can be copied to other menu locations).

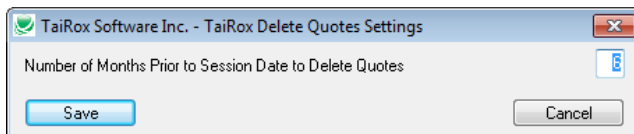
TaiRox Productivity Tools User Guide

Running Delete Quotes (continued)

Launching the program will present a screen that allows you to select quotes for deletion using various ranges, in a style identical to that used by core modules. A checkbox controls selection of only those Quotes that have been turned into orders.



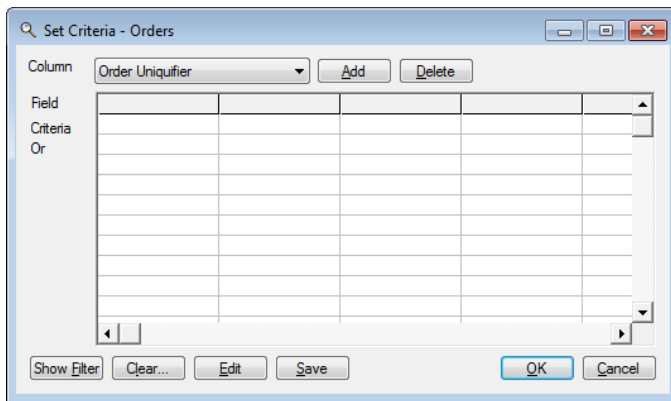
When a range of Quote Dates is used, the default values are controlled by settings accessed through the File menu:



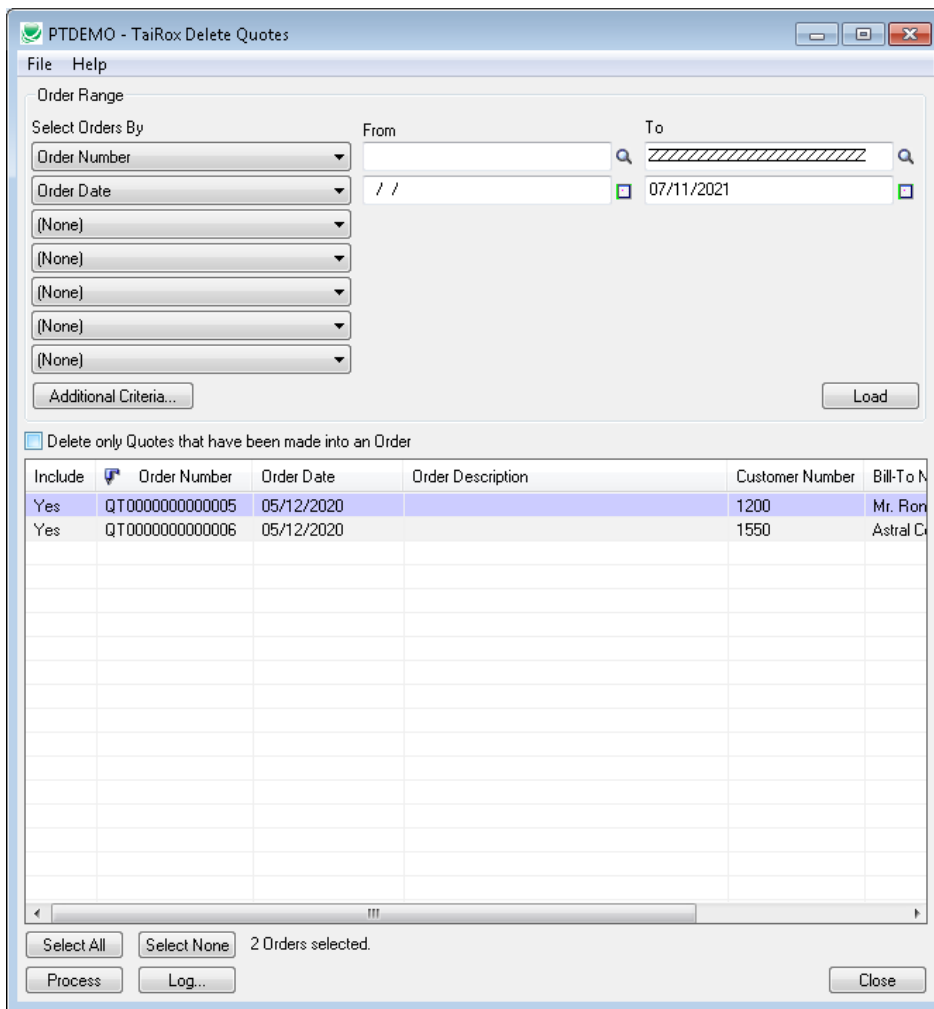
TaiRox Productivity Tools User Guide

Running Delete Quotes (continued)

Additional criteria can be used for more sophisticated selections:



When the Load button is pressed quotes that match the selection criteria will be displayed, with full drill-down support:



The selected quotes can be selected / de-selected on an individual basis (“cherry-picked”). The Process button will now delete the selected quotes.