

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:

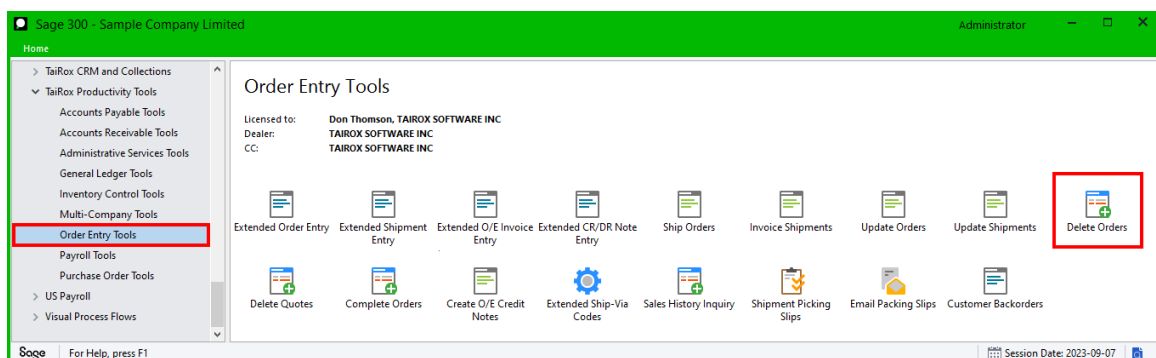
- You cannot delete a partially shipped order.
- You must uncheck the “Keep Transaction History” checkbox in O/E Options before running Delete Orders to delete completed orders with history.

Many users follow these steps for deleting orders:

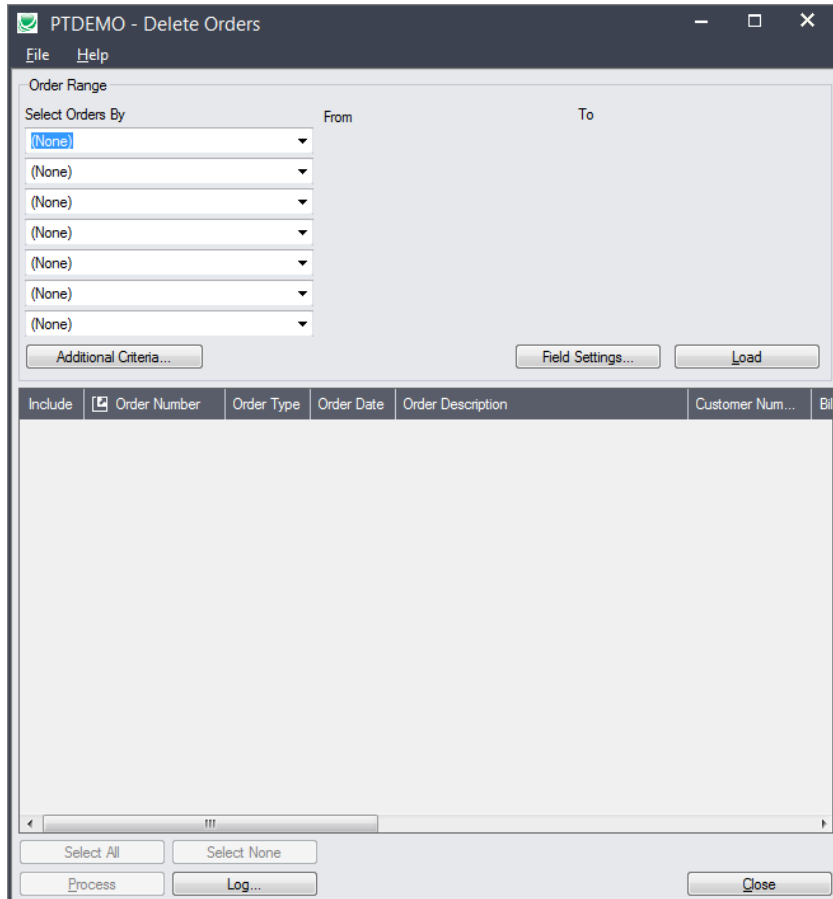
1. Run Day End in Inventory Control.
2. Uncheck “Keep History” in OE Options.
3. Use Delete Orders.
4. Select the “Keep History” option again so the next Day End doesn't delete ALL order history!

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.



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.



Selecting Orders for Deletion

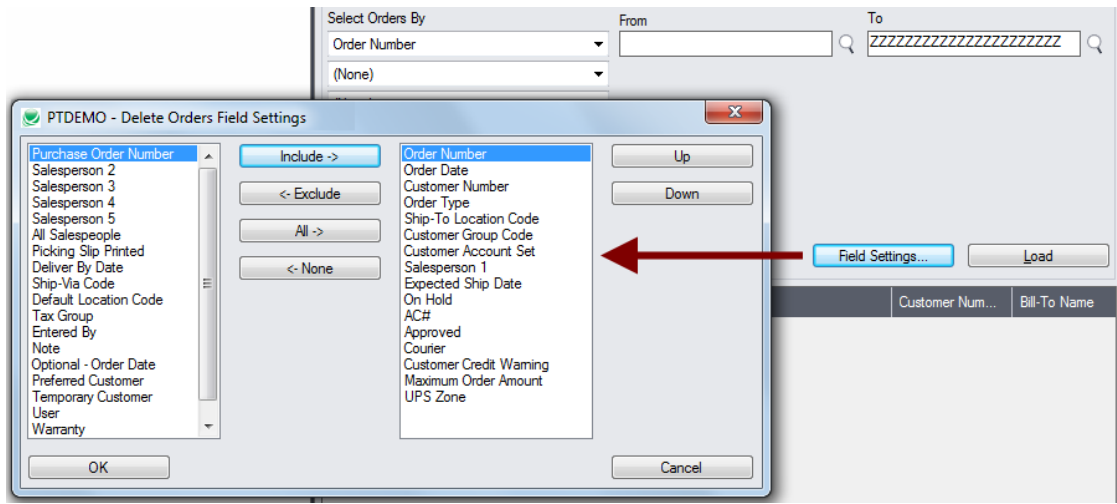
Choose ranges of orders:

- 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 [Importing a List of Orders for Deletion](#).

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

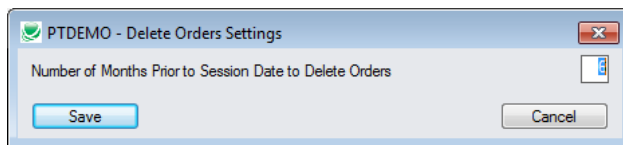
Click the **Field Settings** button to change the fields that appear in the “Select Orders By” dropdown field selection list.



- 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:

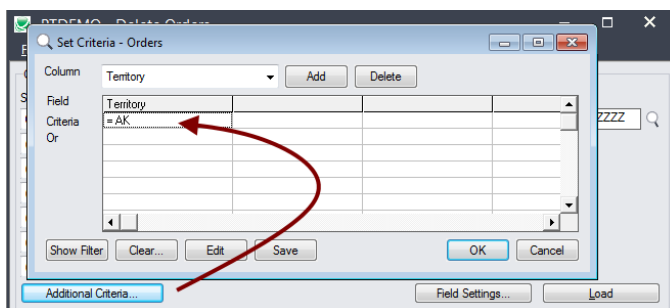
- If you choose a range of orders by date, the default “To” date is set by a screen accessed through the **Delete Orders > File > Settings** menu choice:



You can override the default in the Range fields.

Choose additional criteria if necessary:

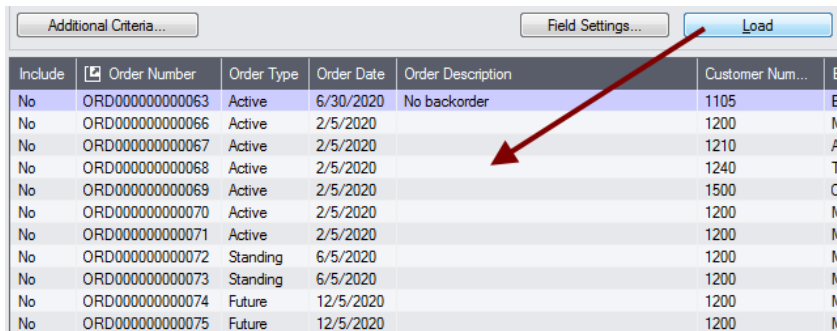
If you want to select orders with a field that is NOT available on the Field Settings form, use Additional Criteria.



- 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.

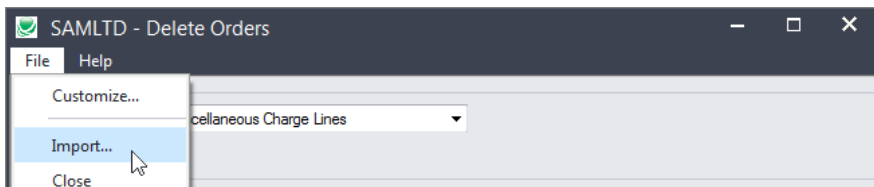


Include	Order Number	Order Type	Order Date	Order Description	Customer Num...	Bill
No	ORD000000000063	Active	6/30/2020	No backorder	1105	Be
No	ORD000000000066	Active	2/5/2020		1200	Mr
No	ORD000000000067	Active	2/5/2020		1210	AC
No	ORD000000000068	Active	2/5/2020		1240	Th
No	ORD000000000069	Active	2/5/2020		1500	Cl
No	ORD000000000070	Active	2/5/2020		1200	Mr
No	ORD000000000071	Active	2/5/2020		1200	Mr
No	ORD000000000072	Standing	6/5/2020		1200	Mr
No	ORD000000000073	Standing	6/5/2020		1200	Mr
No	ORD000000000074	Future	12/5/2020		1200	Mr
No	ORD000000000075	Future	12/5/2020		1200	Mr

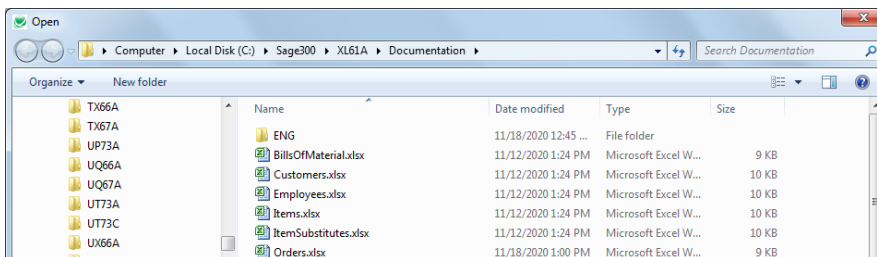
- Go back and adjust the ranges or additional criteria if necessary.

Importing a List of Orders for Deletion

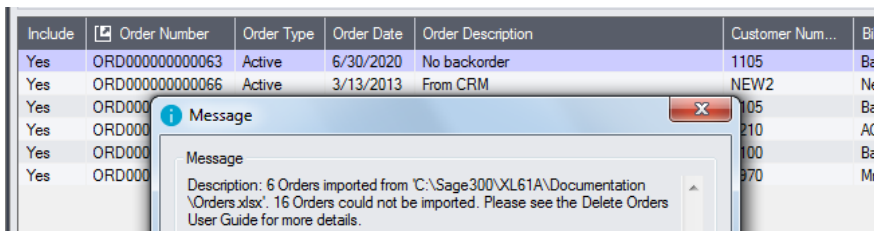
- Choose **File > Import** from the Delete Orders menu.



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



- 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...	Bill
Yes	ORD000000000063	Active	6/30/2020	No backorder	1105	Be
Yes	ORD000000000066	Active	3/13/2013	From CRM	NEW2	Ne
Yes	ORD000000000067	Active			105	Be
Yes	ORD000000000068	Active			210	AC
Yes	ORD000000000069	Active			100	Be
Yes	ORD000000000070	Active			970	Mr

Message
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 bottom 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.



- Double-click in the Include column to “cherry-pick” from the order selections:

Include	Order Number	Order Type	Order Date	Order Description	Customer Num...	Bill
Yes	ORD0000000000063	Active	6/30/2020	No backorder	1105	Be
No	ORD0000000000066	Active	2/5/2020		1200	Mr
Yes	ORD0000000000067	Active	2/5/2020		1210	AC

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

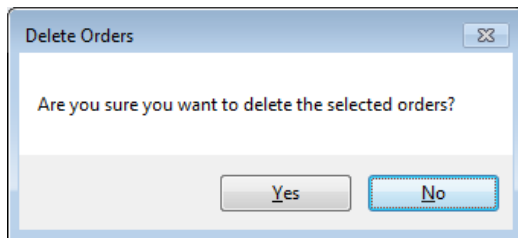
Include	Order Number	Order Type	Order Date	Order Description	Customer Num...	Bill
No	ORD0000000000063	Active	6/30/2020	No backorder	1105	Be
No	ORD0000000000066	Active	2/5/2020		1200	Mr

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.



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 PM Delete Orders started.
7/4/2020 2:24:03 PM
7/4/2020 2:24:03 PM Performed by user: ADMIN
7/4/2020 2:24:03 PM
7/4/2020 2:24:03 PM Order Range
7/4/2020 2:24:03 PM   Order Number From [ORD0000000000060] To [ORD0000000000075]
7/4/2020 2:24:03 PM
7/4/2020 2:24:03 PM Deleting Order Number ORD0000000000067...
7/4/2020 2:24:03 PM   Order Number ORD0000000000067 deleted.
7/4/2020 2:24:03 PM
7/4/2020 2:24:03 PM Delete Orders complete.
7/4/2020 2:24:03 PM
=====

```

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.

	A
1	ORDNUMBER
2	ORD000000000071

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