


Deleting Old Sales and Purchase Orders

There comes a time when old Sales Order and Purchase Orders are not used anymore. These documents can sometimes make the Year End process long, cause the processing screen to hang or eve have a corrupt document that needs to be fixed.

It can be avoided by deleting old documents that are not used anymore.

Deleting Sales Order

- Select Process > Customer
- Select the drop down on the top left-hand side and select Sales Order

This icon  can also be used to access customer processing.

- At the bottom of the screen select **Delete/ Insert**, if there is no Sales Order this button will be greyed out.
- Select **Delete Whole batch**

- The following screen will come up

- **Until Excepted Delivery Date:** This date can be manually changed when a Sales Order was processed, if the date was not changed it will default to the actual date used on the document

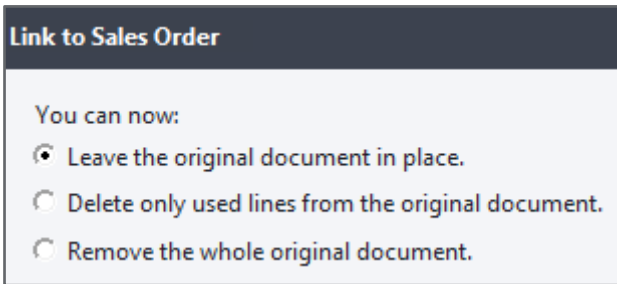
Not sure what date was used, select cancel on this screen and select the magnifying glass on top of the screen

Customer Accounts/Description	Amount	Date	Reference	Printed	Delivery Date
C001 - Account Customer	1,140.00	01/01/2017		No	01/01/2017
C001 - Account Customer	1,368.00	02/02/2018		No	02/02/2018
C001 - Account Customer	1,140.00	04/02/2017		No	04/02/2017

Example: If you selected 02/02/2018 as the until expected delivery date, all documents before and including that date will be deleted

Open the screen again, if you want to delete Sales Orders based on their delivery date, select the date, then select **Delete**

- **Only Delete Fully Linked Documents:** When Sales Orders are linked to Invoices and the option to Leave the original document in place was selected, it would not have removed the Sales Order from the system

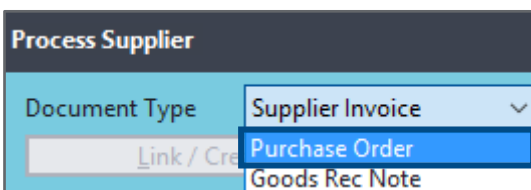



Selecting the option to **Delete Fully Linked Documents**, will delete all the Sales Orders that have been linked to Invoices

- Select **Delete** to remove all the old Sales Orders
- Select the magnifying glass on top of the processing screen to ensure all the old Sales Orders have been deleted.

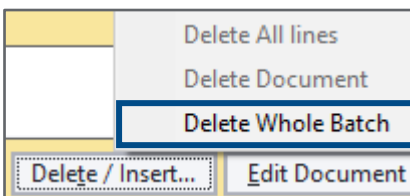
Deleting Purchase Orders

- Select Process > Suppliers
- Select the drop down on the top left-hand side and select Purchase Order



This icon  is also used to access supplier processing.

- At the bottom of the screen select **Delete/ Insert**, if there is no Purchase Order this button will be greyed out.
- Select **Delete Whole batch**



- The following screen will come up

- Until Excepted Delivery Date:** This date can be manually changed when a Purchase Order was processed, if the date was not changed it will default to the actual date used on the document

Not sure what date was used, select cancel on this screen and select the magnifying glass on top of the screen

Supplier Accounts/Description	Amount	Date	Order	Printed	Delivery Date
SUP001 - supplier	570.00	02/02/2018		No	02/02/2018
SUP001 - supplier	1,140.00	01/01/2017		No	01/01/2017

Example: If you selected 02/02/2018 as the until expected delivery date, all documents before and including that date will be deleted

Open the screen again, if you want to delete Purchase Orders based on their delivery date, select the date, then select **Delete**

- Only Delete Fully Linked Documents:** When Purchase Orders are linked to GRN or Supplier Invoice and the option to **Leave the original document in place** was selected, it would not have removed the Purchase Order from the system

Selecting the option to **Delete Fully Linked Documents**, will delete all the Purchase Orders that have been linked to Invoices

- Select **Delete** to remove all the old Purchase Orders
- Select the magnifying glass on top of the processing screen to ensure all the old Purchase Orders have been deleted.