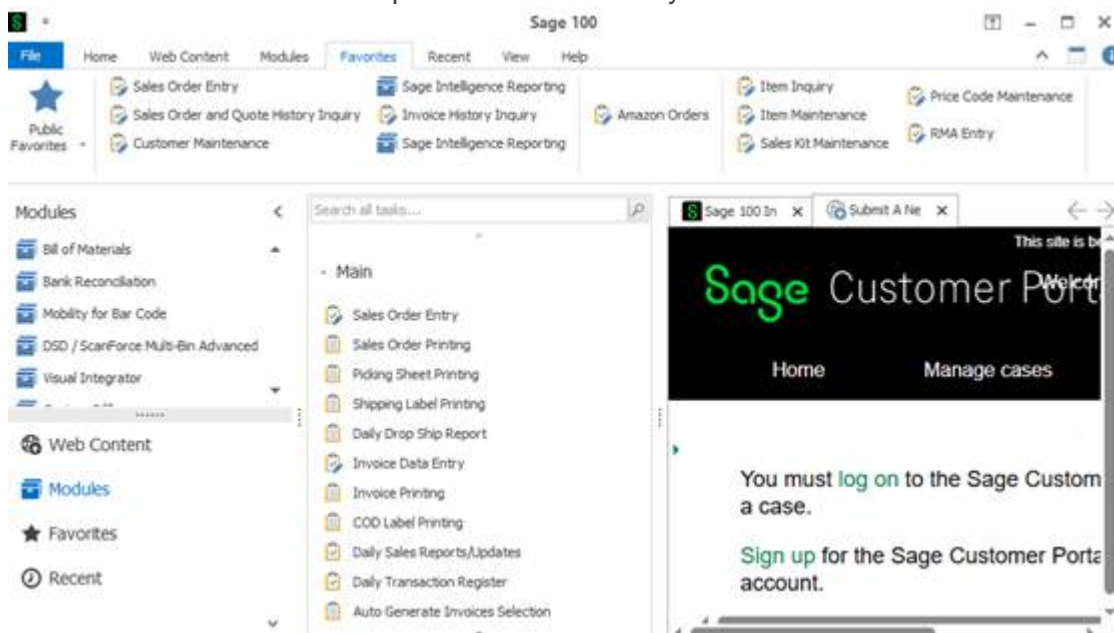


Deleting Quotes and Sales Orders

- There is a Utility in Sage to go through and delete Quotes that are expired by a certain date. Only people with Administrator role can do this. Jennifer asks Myron to do this from time to time.
- Under the Sales Order module open Sales Order Entry



* Sales Order Entry (LET) 5/8/2025

Order Number: 416771

Order Date: Order Type: Pick Date:

Customer No.: Cust PO: Pick Team:

Ship Date: Ship To Addr: Terms Code: Ship Via: FOB

Status: New Reason: Confirm To: E-mail: Get Print Sync Print

Whse: Batch Fax: Comment: Salesperson: Telephone: Date In Shipping:

Sales Tax Schedule: In MN Shipping: Ship Date Set: Use Metals Credits:

Print Order: Print Pick Sheets: No. of Ship Labels: 0

Quick Print Without Displaying Printing Window

ScanForce

Print Order Print Pick Recalc Price Item Price More Accept Cancel Delete

- Hit tab or enter
- Click Delete in the bottom right hand corner.
 - Note the cancel button is used for canceling any changes you have made in the sales order/quote. It will not delete the sales order.

* Sales Order Entry (LET) 5/8/2025

Order Number: 0416745

Order Date: 4/29/2025 Order Type: Quote Pick Date:

Customer No.: 0143345 Store Training Account: Cust PO: RFG-016 Pick Team:

Expire Date: Ship To Addr: Terms Code: 01 CREDIT CARD Ship Via: FOB

Status: Open Reason: Confirm To: E-mail: houler@actiontarget.com Get Print Sync Print

Whse: 000 MINNESOTA Batch Fax: Comment: Salesperson: HD HOUSE Telephone: 801-645-8947 Date In Shipping:

Sales Tax Schedule: AVATAX In MN Shipping: Ship Date Set: Use Metals Credits:

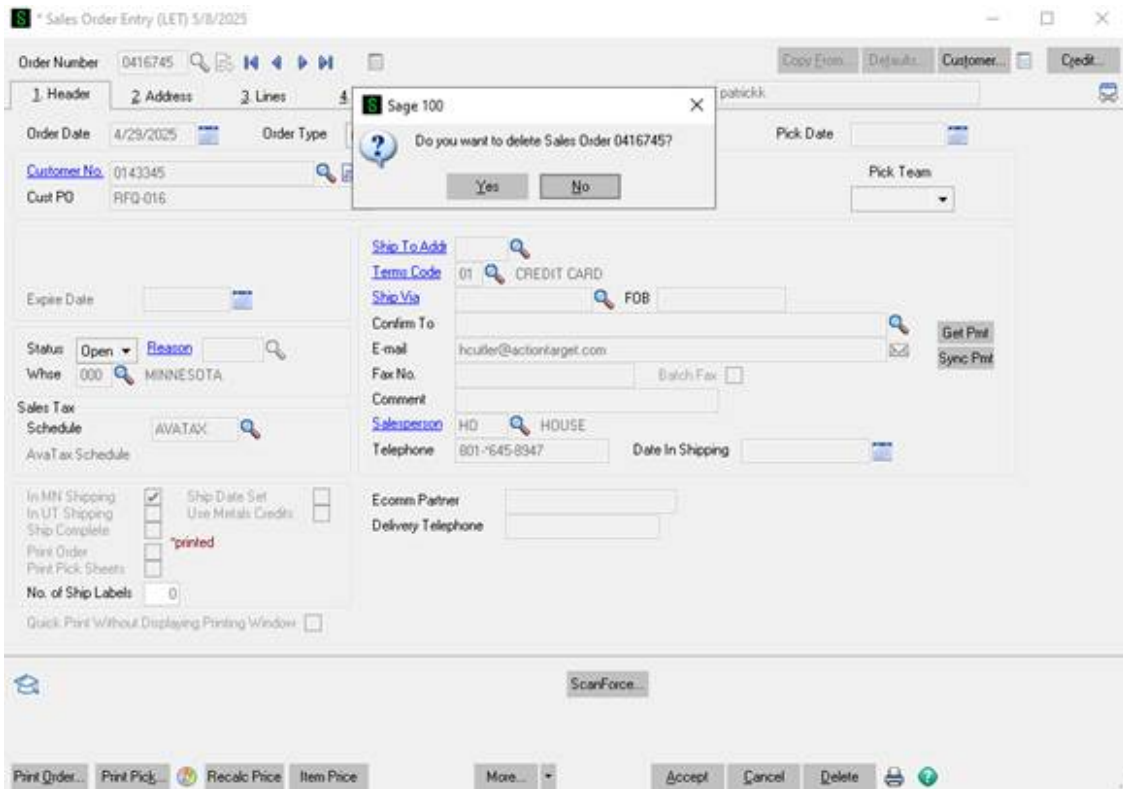
Print Order: Print Pick Sheets: No. of Ship Labels: 0

Quick Print Without Displaying Printing Window

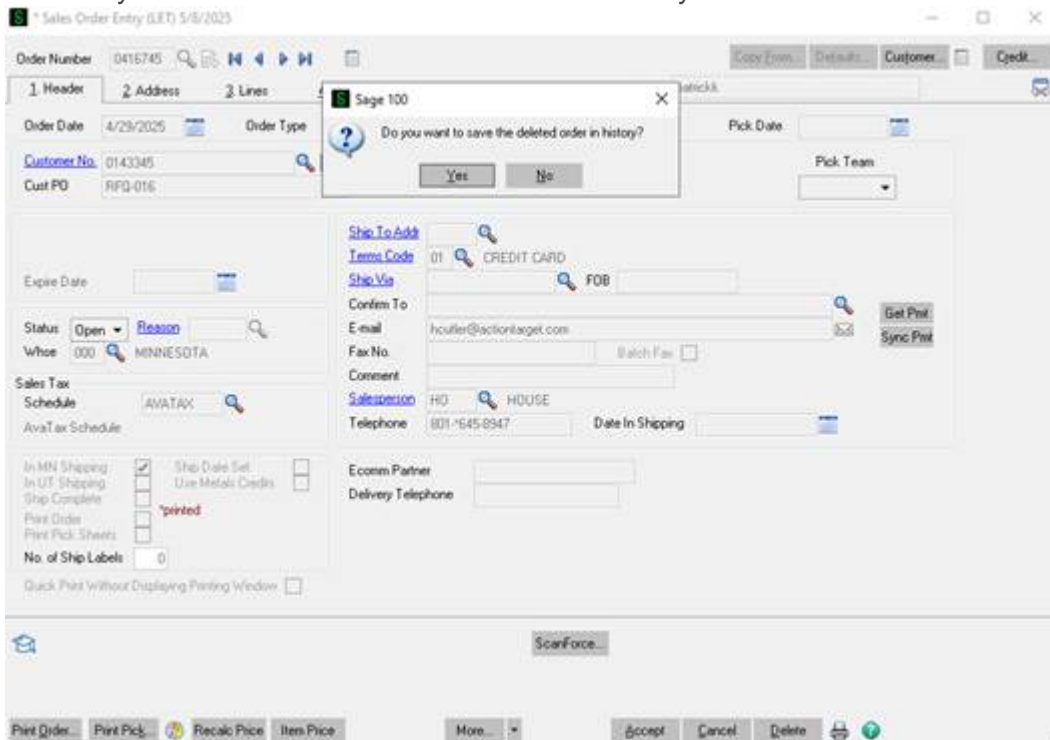
ScanForce

Print Order Print Pick Recalc Price Item Price More Accept Cancel Delete

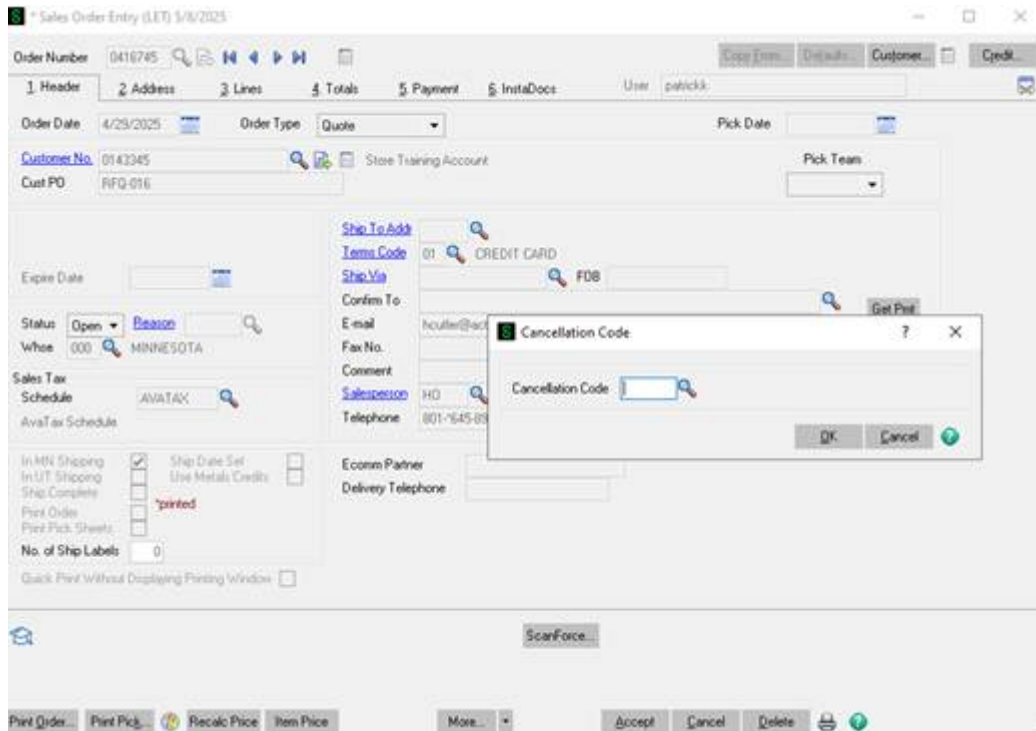
- Click Yes



- It will ask if you want to save the deleted order in history. Select Yes.



- You will then be promoted to select a cancellation code. Select the appropriate reason and click on OK.



- The order is now deleted. Double check by searching for the order number in Sales Order Entry. It should not pull up. If you search for the order in Sales Order and Quote History Inquire you will be able to see it and that it was deleted.

Revision #3

Created 15 September 2025 21:52:45 by Shane Withers

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