



## Purging Purchase Orders

March 2011 – Retail Pro v8

The following documentation provides step-by-step details of deleting a bulk number of purchase orders in Retail Pro. Without proper maintenance, a list of purchase orders can easily become difficult to manager. Keeping the purchase order list trim will improve system & overall process performance when using the back office modules in Retail Pro.

It is recommended that a backup is verified before proceeding with these steps. These steps must be run when all other users are backed out of Retail Pro at your location. For a training video on this topic, please visit our website:

[http://www.bighairydog.com/video/Purging\\_Purchase\\_Orders.html](http://www.bighairydog.com/video/Purging_Purchase_Orders.html)

### Purging POs

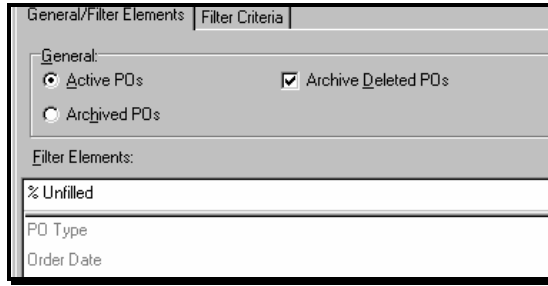
1. On any workstation at the main location, select **TOOLS** and then **MORE**. In the window that appears double-click on **DATA VERIFICATION SYSTEM**.



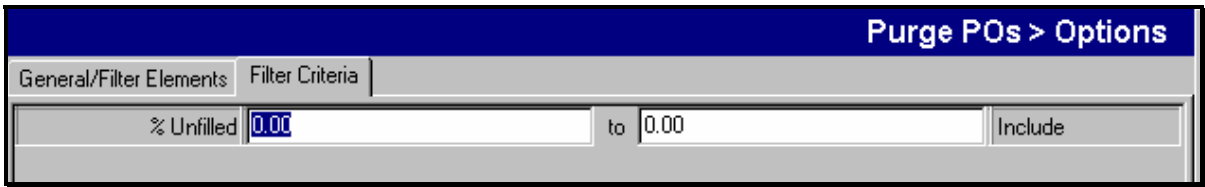
2. In the separate window that appears, select **MAINTENANCE**, then **PURGE** and **PURGE POs**.



- Confirm that the settings are set as below. *Active POs* should be chosen, *Archive Deleted POs* should be checked, and *% Unfilled* should be above the line in Filter Elements.



- Click the **FILTER CRITERIA** tab in the upper left of the screen, and set the unfilled percentage to filter for 0 to 0 percent unfilled POs (meaning only POs that have been completely received).

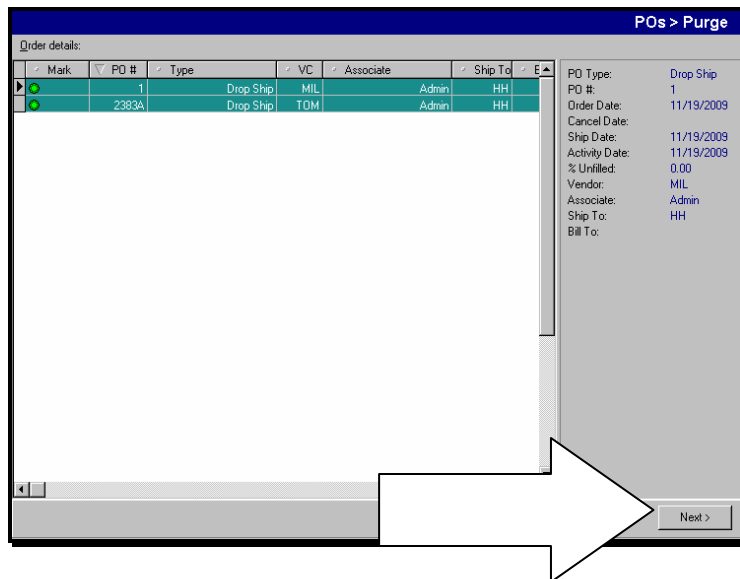


**NOTE:** Alternatively, you could filter by *Order Date* or *Ship Date* to remove any purchase orders prior to a certain date, regardless of the unfilled status.

- Click **START** in the upper right, and **YES** to save changes.

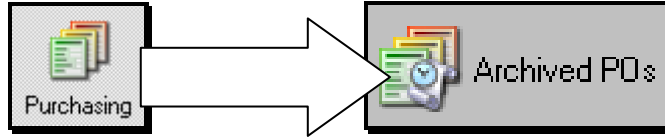


- An analysis window appears, showing all order documents that are about to be deleted. Confirm that the filter is correct, and click **NEXT** in the bottom right corner of the screen when you're certain these documents should be deleted. Select **YES** to proceed, and then **OK** when all changes have been made.



7. Close the Data Verification and go into your purchase order list. Delete any remaining POs manually.

8. From the main screen in Retail Pro, select **PURCHASING** and then **ARCHIVED POs**.



9. Select **PURGE POs** from the side toolbar.



10. Set the Date Range to be 90 days prior to the current date and then select **OK**. Archived Purchase Orders are deleted as well as this point.

