

Porder Reorganisation

This is a server-side process, which can be run straight away or scheduled to be run at a later time.

Use the Reorganise command to reorganise and re-index the files associated with the Purchase Order Processing application, removing deleted and completed items. The process removes all items marked for deletion.

Purchase orders and requisitions that have been satisfied may also be deleted subject to the date for historical clear down you enter. 'Satisfied' means they have been fully delivered and fully invoiced. However, if the Clear Undelivered Invoiced Orders option on P.Orders- Utilities - Set Options form is selected, the system will remove purchase orders that have been invoiced but not delivered.

If Minimum Order Value has been set to "No check" on the Set options form, all minimum order value fields will be set back to zero.

Box	Description
Delete Transactions Prior To	Transactions posted before this date will be removed.
Remove Denied Orders Prior To	If AP Automation is in use, purchase orders that have been previously denied authorisation can be removed from the system by selecting an appropriate date for cleardown. For example, to cleardown denied orders raised on or before 31/07/2025 enter a date of 01/08/2025.
Remove Orders Reported As an Error Prior To	If AP Automation is in use, purchase orders that were updated with an APA Status of "Error" after posting can be removed from the system by selecting an appropriate date for cleardown. For example, to cleardown orders with a status of "Error" on or before 31/07/2025 enter a date of 01/08/2025.
Clear Stock Quantities	Select to set all stock balances to zero and remove all stock transaction records from the database.

This is available only if your licence does not include the Stock Control application. In this situation stock balances and transactions should be cleared.

To Reorganise the Purchase Orders Files

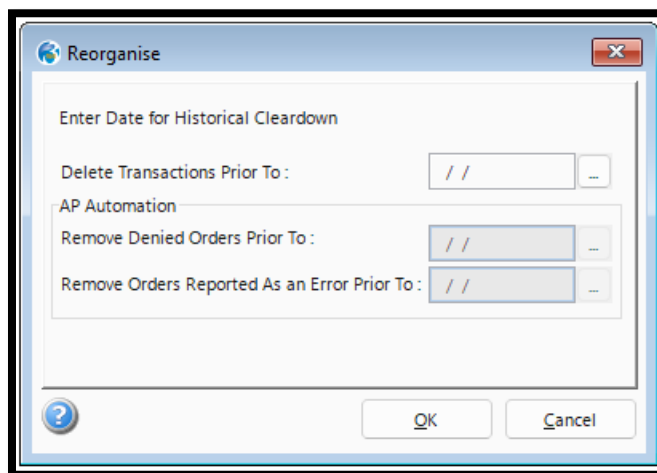
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1. Open the **P.Orders** folder and then click **Utilities** or click the **Supply Chain Management** tab on the Ribbon Bar and then click **P.Orders - Utilities**.
2. Click Reorganise.
3. In the Delete Transactions Prior To box, enter the date up to which you want to clear historical order records.
4. Click **OK** and then choose to run the process now or at a later time.



The image shows a Windows-style dialog box titled "Reorganise". It contains the following elements:

- A title bar with a question mark icon on the left and a close button (X) on the right.
- A label "Enter Date for Historical Cleardown".
- A text input field labeled "Delete Transactions Prior To:" followed by a date picker icon (three dots).
- A section header "AP Automation".
- A text input field labeled "Remove Denied Orders Prior To:" followed by a date picker icon.
- A text input field labeled "Remove Orders Reported As an Error Prior To:" followed by a date picker icon.
- A help icon (question mark in a circle) at the bottom left.
- "OK" and "Cancel" buttons at the bottom right.