



Agency Order Archiving and Deleting

Purpose of this document

Using the archiving agency orders will provide the user the ability to view archived and deleted orders. The purpose of this document is to outline the workflow process for archiving and deleting agency orders.

Ceres Object release 5.00.00 is required for the functionality described in this document.

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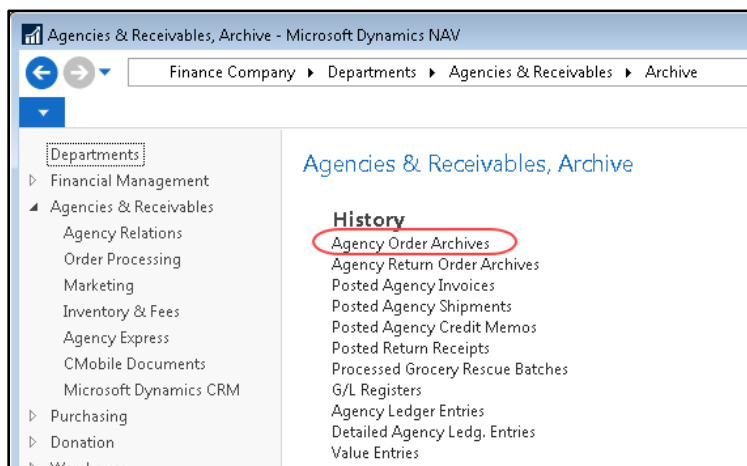
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General Workflow

1. If Archive Quotes & Orders is set to YES in Agencies & Receivables Setup, then orders will automatically be archived when deleted.

The screenshot shows the 'Agencies & Receivables Setup' window with the 'General' tab active. The 'Archive Quotes and Orders' checkbox is checked and highlighted with a red circle. Other settings include 'Discount Posting' set to 'No Discounts', 'Credit Warnings' set to 'Credit Limit', 'Default Posting Date' set to 'Work Date', and 'Default Quantity to Ship' set to 'Remainder'.

2. To view archived agency order documents go to Departments → Agencies & Receivables → Archive and then select Agency Order Archives.



- A list of archived orders will be displayed. Select the Order you wish to display and double-click (or right-click and choose View) on it to open the archived document.

Agency Order Archives - Microsoft Dynamics NAV

Finance Company > Departments > Agencies & Receivables > History > Agency Order Archives

HOME NAVIGATE

View Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

Manage View Show Attached Page

Departments

Financial Management

Agencies & Receivables

Agency Relations

Order Processing

Marketing

Inventory & Fees

Agency Express

CMobile Documents

Microsoft Dynamics CRM

Purchasing

Donation

Warehouse

Human Resources

Roadnet

Appian

Agency Order Archives

No.	Versi... No.	Date Archived	Time Archived	Archived By	Interacti... Exist	Sell-to Agenc...
AO-01134	1	6/20/2019	7:12:11 AM	ESOPRO\RXF	<input type="checkbox"/>	C1599
AO-01134	2	6/20/2019	7:12:13 AM	ESOPRO\RXF	<input type="checkbox"/>	C1599
AO-01135				WWH	<input type="checkbox"/>	1011A
AO-01137				RXF	<input type="checkbox"/>	B0129
AO-01137				RXF	<input type="checkbox"/>	B0129
AO-01138				RXF	<input type="checkbox"/>	B0129
AO-01138				RXF	<input type="checkbox"/>	B0129
AO-01140				WWH	<input type="checkbox"/>	A0442
AO-01143				JK	<input type="checkbox"/>	A1764
AO-01143				JK	<input type="checkbox"/>	A1764

Copy Cell

Filter to This Value Alt+F3

Find Ctrl+F

View Ctrl+Shift+R

Copy Rows Ctrl+Shift+C

Paste Rows Ctrl+Shift+V

Choose Columns...

Choose Header Height

- If an order has been deleted, it will display in both the Posted Agency Invoices and the Agency Order Archives Lists.
- In the Posted Agency Invoices List, the order will show as a Deleted Document:

AO-01164-1 · Hope House, Inc.

General

No.: AO-01164-1 Order No.: AO-01164

Parent Agency No.: 559 User ID: ESOPRO\CJW

Agency: Hope House, Inc. Last Modified By: ESOPRO\CJW

Contact: Gary Ashmore Last Modified Date: 10/25/2019

Agency PO No.: Shopper Name:

Fund No.: UR Mobile Pantry: ☐

Due Date: 10/25/2019 Reason Code:

Closed: Yes

Show more fields

Lines

Line Find Filter Clear Filter

Type	No.	Description	Location Code	Bin Code	Pallet No.	Lot No.	SI
		Deleted Document					M

6. In the Agency Order Archives list, the order will show the original header and line(s) of the document at the time it was deleted:

AO-01164 · Hope House, Inc. · 1

General

No.:

AO-01164

Sell-to Agency No.:

B0558

Sell-to Contact No.:

Sell-to Agency Name:

Hope House, Inc.

Sell-to Address:

Do Not Disclose

Sell-to Address 2:

Sell-to City:

Sell-to State / ZIP Code:

MO

Sell-to ZIP Code:

Sell-to Contact:

Gary Ashmore

Posting Date:

10/16/2019

Order Date:

10/25/2019

Document Date:

10/25/2019

Requested Delivery Date:

Promised Delivery Date:

External Document No.:

Responsible person Code:

Campaign No.:

Branch Code:

Status:

Open

Lines

Line

Find

Filter

Clear Filter

Type	No.	Description	Location Code	Quantity	Unit of Measur...	Tax Group Code	Line Amount Excl. Tax	Line Discou
Item	10019	Coffee	KAN	5	CASE		60.80	

Related Topics

1. Agency Overview
2. Agency Order Overview
3. Agency Express Managing Web Orders