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.
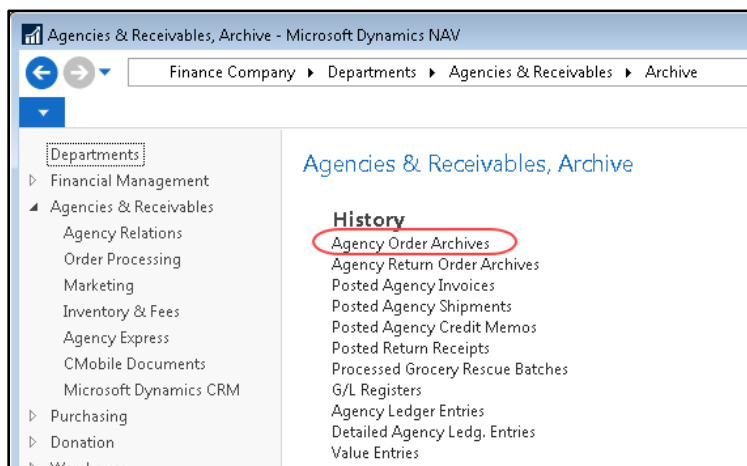
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General Workflow

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

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

3. 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.

4. If an order has been deleted, it will display in both the Posted Agency Invoices and the Agency Order Archives Lists.

5. In the Posted Agency Invoices List, the order will show as a Deleted Document:

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:

Related Topics

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