

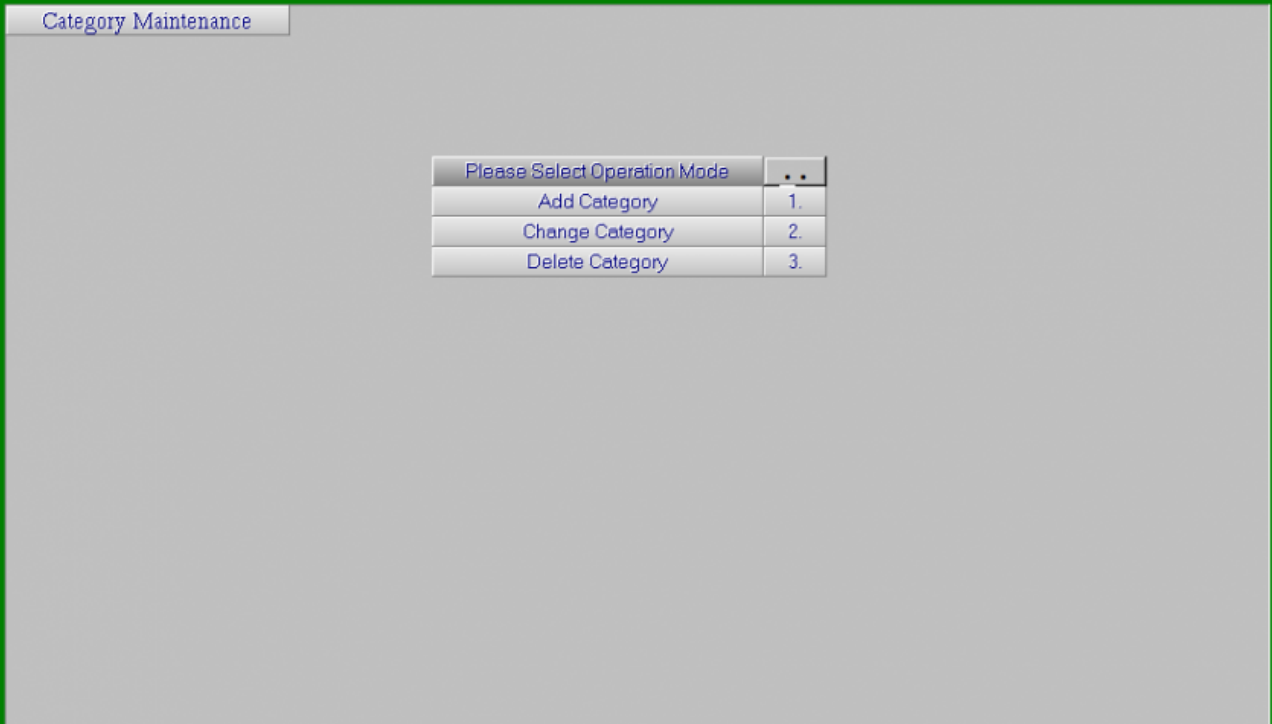
Deleting Categories

There are two options to delete a category. One essentially will just 'flag' a category as deleted, but the items within that category are still held on the system. The other option wipes all of the information (Category and Part) out of the system.

Flag Category For Delete

This will only mark the category as deleted. All parts will still exist, but the category/parts will not show in reporting.

1. Navigate to **6. Inventory > 1. Data Maintenance > 1. Master Files > 1. Category Master**
2. Select the **Delete Category** option



The screenshot shows a software interface for 'Category Maintenance'. A dialog box titled 'Please Select Operation Mode' is displayed in the center. It contains three options: 'Add Category' with a numeric keypad icon showing '1.', 'Change Category' with a numeric keypad icon showing '2.', and 'Delete Category' with a numeric keypad icon showing '3.'. The background of the main window is a light gray grid.

3. Enter the category you wish to delete and you will be prompted with the question **Is this the right record?** Press **Y**

Category		TST		Delete Category Mode	
1	Description	AMS TEST CAT		38	Pricing by Price Point N (Y/N)
3	GST/PST Level	1 / 1		39	Owning Branch 01
5	Category Type	P (P/L)		41	Use Purchase Qty N (Y/N)
6	Buyer Vendor/DC			42	Default Class
8	Default Gross Margin %	30.00		44	Use Serial Numbers
		Br #	Account #	General Ledger Distribution Accounts	
9	Sales	1	5000	SALES - PARTS Pressing ENTER will Default To	
12	Inventory	1	1400	INVENTORY - PARTS Sales Parameter File	
15	Cost of Sales	1	6000	PURCHASES - PARTS Settings	
18	Levy/Eco Fee	1	2999	LEVY~PAYABLE	
21	Discount	0	0		
24	Default Purchase Vendor				
26	Price Book Vendor	STAND		Standard Motor Products	
28	Catalog Vendor Code				
30	Product Reporting Group				
32	Chaining Sequence	C			
33	Numeric Squeeze	Y			
34	GP% Minimum	.0			
35	GP% Maximum	.0			
36	Sell in Tenths	N (Y/N)		45	Levy Text
37	Stocking Line	Y (Y/N)		46	Levy Tax Codes 0 0 (GST/PST) 47 End User Only N
Is this the right record? Y_					

- The category has now been flagged for delete. This means it will be hidden from reporting and physical counts.

Deleting Entire Category, Including Parts

This option deletes the entire category, parts and all

Before deleting all items, you should confirm that none of the items within the category are on order and that none are on packing slips.. This can cause an issue if a PO with these items is received at a later date. Also, it is recommended (but not required) that you do a physical count to remove all on hands for a proper paper trail

If a category has only been flagged for delete, it has not been removed from the system. Revisiting this menu and opting to change a category will allow you to 'un-flag' the category. If you decide, after flagging a category for delete, that you want to fully remove the data you will need to follow the '**Unflagging A Deleted Category**' instructions

- Navigate to **9. System Utilities > 6. Inventory > 3. Entire Category Delete**
- Enter the category you wish to delete and 'Y' to confirm it is the correct category

Delete Entire Line

Category TST

1	Description	AMS TEST CAT		
2	FST Level	1		
3	SST Level	1		
4	Type	P		
5	Overhead	30.00		
6	Sales	1	5000	SALES - PARTS
9	Inventory	1	1400	INVENTORY - PARTS
12	Cost Of Sales	1	6000	PURCHASES - PARTS

Correct category? Y_

- You will then be presented with 3 additional questions.
 - **Absolutely Positive?** - Press **Y** to proceed
 - **Any on packing slips?** - Press **N** to proceed
 - **Any in purchasing?** - Press **N** to proceed
- There is one final confirmation presented. '**Y** will remove category'. Press **Y** here to process the full delete of category and items

Delete Entire Line

Category TST

1	Description	AMS TEST CAT		
2	FST Level	1		
3	SST Level	1		
4	Type	P		
5	Overhead	30.00		
6	Sales	1	5000	SALES - PARTS
9	Inventory	1	1400	INVENTORY - PARTS
12	Cost Of Sales	1	6000	PURCHASES - PARTS

'Y' will remove category Y_

Unflagging A Deleted Category

- Navigate to **6. Inventory > 1. Data Maintenance > 1. Master Files > 1. Category Master**

2. Select the **Change Category** option.

Category Maintenance

Please Select Operation Mode	
Add Category	1.
Change Category	2.
Delete Category	3.

3. Enter the category you wish to delete and you will be prompted with the question **MARKED 'DELETE'! IGNORE?** Press **Y** to un-flag the category. Press F1 to accept your changes and the category will be reactivated.

Category		TST	Change Category Mode	
1	Description	.....	38	Pricing by Price Point . (Y/N)
3	GST/PST Level	. / .	39	Owning Branch ..
5	Category Type	. (P/L)	41	Use Purchase Qty . (Y/N)
6	Buyer Vendor/DC	.....	42	Default Class ..
8	Default Gross Margin %	.....	44	Use Serial Numbers .
General Ledger Distribution Accounts				
9	Sales	..	Pressing ENTER will Default To	
12	Inventory	..	Sales Parameter File	
15	Cost of Sales	..	Settings	
18	Levy/Eco Fee	..		
21	Discount	..		
24	Default Purchase Vendor	.....	
26	Price Book Vendor	.....	
28	Catalog Vendor Code	.....	
30	Product Reporting Group	.....	
32	Chaining Sequence	.		
33	Numeric Squeeze	.		
34	GP% Minimum	.....	
35	GP% Maximum	.....	
36	Sell in Tenths	. (Y/N)	45	Levy Text ..
37	Stocking Line	. (Y/N)	46	Levy Tax Codes . (GST/PST)
MARKED 'DELETE'! IGNORE? Y_			47	End User Only .

Revision #2

Created 19 July 2019 10:25:56 by Jim

Updated 15 September 2021 23:56:01 by Jim