

Deleting an Inactive Account (and All History) From MACS

File these instructions in the MACS Software User's Manual

Requirements

Operating System: Any

MACS Version: 4.10 or higher

Module: Master Files, Database, and Knowledge of File Transfers

Situation

User wants to delete an inactive account (Customer, Manufacturer or Sales Rep) and all history associated with it from MACS. The following procedure is the only way to delete information completely from MACS.

To retain account information in MACS, make the manufacturer inactive (I) in field number 15 in Master File Maintenance [MF\4.6]. When running Sales Analysis reports, exclude inactive manufacturers by special selecting field number 15 and exclude inactive (I) accounts from the report. Sales Analysis reports run with MACS versions prior to 3.3 cannot exclude customers.

If there are duplicate accounts, there is no need to transfer data to Miscellaneous. In this case, combine data from one account to the other.

Important Note: MACS Software cannot assume responsibility for any errors incurred by the user. Before beginning, verify you have a complete and current backup of \MDATA.

Solution

The steps outlined below can be taken regardless of what the user wants to delete and substitutions should be made accordingly. For our example, we will be deleting a manufacturer.

1. Commissions Reconciliation users must to the steps below first. If you are not, proceed with *Step 2 Set up Miscellaneous Master Files*.
 - A. Print [7.11]LIST OPEN INVOICE for the account you will be deleting.
 - B. If unpaid invoices are in the Open Invoice file, create a session and post Commissions of zero dollars (\$0) to these invoices to remove them.
 - C. Isolate this commission information from the current month by assigning a prior year post date.
 - D. Add sessions to Month-To-Date.
 - E. Continue with Set-up Miscellaneous Master Files below.
2. Set up Miscellaneous Master Files
 - A. Add a miscellaneous Mfg. Code (i.e. ZZZ) to the Manufacturer Master File.

Make ONE selection based on your monthly cycle; do not complete more than one of the following:

- A. If needing Sales Analysis Reports to reflect the change BEFORE the next End-of-Month Update, run a [7.14] MID MONTH UPDATE, or if not ready to do a Mid-Month Update, Resummarize History Files [MF\4.20.11].
 - B. Complete an END OF MONTH UPDATE [7.13] if this is the normal time for you to do so. Be sure to close Calls, Orders, Sales, and Commission Paid as applicable.
5. Print a [11.1] SALES ANALYSIS REPORT for 24 months Format: **24A**
Use Sort **M1** if deleting a manufacturer, Sort **C1** if deleting a customer, or Sort **S1** if deleting a SalesRep.
- A. Print and verify sales using special selection for the account you are deleting as:
Manufacturer ZZZ (or the new code you assigned)
Customer ZZZZZZ (or the new code you assigned)
Salesman ZZ (or the new code you assigned)
 - B. Review to verify that NO information printed for any other manufacturer, customer, or SalesRep other than the Z codes (or the new code you assigned).

WARNING:

The following actions are OPTIONAL. If you choose to do step 6 and delete the inactive record, you will be deleting the record's associated sales history. Computer Utilities, Inc. and MACS Software Support are not responsible for any loss of data.

Recovery of deleted sales history is not covered under MACS/care Support.

6. Delete unwanted account summary records from history.
- When you are satisfied that all information has been transferred, a summary History record for Manufacturer ZZZ, Customer ZZZZZZ, and/or Salesman ZZ can be deleted from the YTD History File for each application that you are using in MACS.

From any MACS Menu, type **797 <RET>**.

When the FILE MAINTENANCE screen appears, type **MRHST <RET>**.

- A. When the HISTORY FILE screen appears, select OPTION (3) DELETE the summary record. There are up to three possible records you may choose to delete by entering the corresponding record number in FIELD 5 (HSTREC).

They are as follows: 3= Order Tracking 4 = Sales Invoicing 5 =
Commissions Paid

IDOL F-MAINT-F/M		History File Inquiry			
		DELETE			
1-Record I	H	20^Mfg Stat	39 Com\$ 3yr	56 Sls\$ Lst	
2-Mfg Code	zzz	21^Mfg Type	40 Amt3 Cur	57 Sls\$ Lst	
3-Cst Code	zzZZZZ	22 Mfg /Rel	41 Amt3 Cur	58 Sls\$ Lst	
4-Cst/ Loc		23 Xrf Sour	42 Amt3 Lst	59 Sls\$ Lst	
5-Hst Rec	4	24 Date Ths	43 Amt3 Prv	60 Sls\$ Lst	
6-Smn Code	zz	25 Sls\$ Ths	44 Amt3 3yr	61 Sls\$ Lst	
7 Actvy Dt		26 Com\$ Ths	45 Sls\$ Cur	62 Sls\$ Lst	
8 Actvy Dt		27 Amt3 Ths	46 Sls\$ Cur	63 Sls\$ Lst	
9 Updat MY		28 Sls\$ Cur	47 Sls\$ Cur	64 Sls\$ Lst	
10 Sys Flgs		29 Sls\$ Cur	48 Sls\$ Cur	65 Sls\$ Lst	
11^Cst Alph		30 Sls\$ Lst	49 Sls\$ Cur	66 Sls\$ Lst	
12^Cst St/R		31 Sls\$ Prv	50 Sls\$ Cur	67 Sls\$ Lst	
13^Cst Type		32 Sls\$ 3yr	51 Sls\$ Cur	68 Sls\$ Prv	
14^Cst ABC<		33 Sls\$ Lst	52 Sls\$ Cur	69 Sls\$ Cur	

D. Type the following values (refer to the screen on under Step 6C.):

FIELD 1 (RECORD I)	H	<RET>
FIELD 2 (MFG CODE)	ZZZ	<RET>
FIELD 3 (CST CODE)	ZZZZZZ	<RET>
FIELD 4 (CST/ LOC)	<i>(blank)</i>	<RET>
FIELD 5 (HST REC)	<i>(see 6.D for values*)</i>	<RET>
FIELD 6 (SMN CODE)	ZZ	<RET>

**The most common value will be 4 Sales Invoicing*

- E. A single record should appear on the screen. Review it. If all information is correct, type **Y** at the **DELETE RECORD (Y/N)?** prompt to delete the record.
- F. Delete the inactive record from the master file.
- G. If you are deleting an inactive customer, you need to [4.20.9] MAKE CUSTOMER DELETABLE. Type the original customer code when prompted and press **<RET>**.
 - 1. If you are deleting an inactive manufacturer or Sales Rep, you need to [4.20.10] MAKE MFGS & SMN DELETABLE. press **<RET>** .
 - 2. Go to master file maintenance and delete the inactive account record.

7. Deleting the Item Inventory for a Manufacturer (If applicable)

Once you are sure that all information transferred, you can delete the records.

- A. Run [4.20.5] MFG-ITEMNO TRANSFER PHASE I.
- B. Type the Manufacturer code at the prompt

The next prompt will ask you for the items to be moved. Press **<RET>** to move all items.

- C. Press **<F9>** to Delete the items.
- D. Press **Y** at ARE YOU SURE YOU WANT TO DELETE ALL OF THIS MANUFACTURER'S ITEMS? (Y/N)
- E. Verify that all the information is correct. Press **Y** if it is, **N** to correct it.
- F. Select your printer. The items will be deleted. Press **<RET>** to end.
- G. Run [4.20.6] MFG-ITEMNO TRANSFER PHASE II. Follow the prompts to delete the items.



Could you restore from a back-up today if you had to?



Could you restore from a back-up today if you had to?

This Memo and others are available at the website www.macsworld.com/macscare