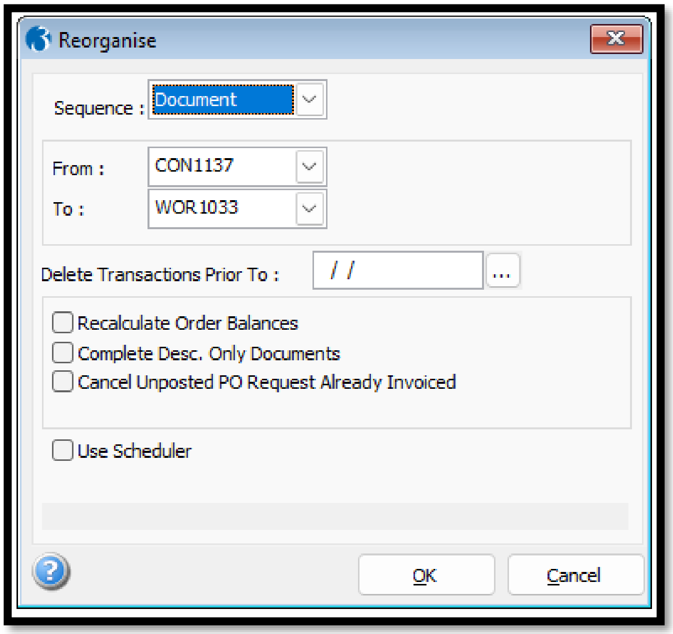
SOP - Reorganise

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 on the Utilities submenu to reorganise and reindex the files associated with the Invoicing and SOP modules, removing deleted and completed items. The process removes all items marked for deletion and deletes all documents that are eligible for deletion using the Delete Transactions Prior To date.



Sequence
An option that determines whether you want the reorganisation to be carried out for a range of customers or document numbers. You can then define the range in the From and To boxes.

Delete Transactions Prior To
The date that determines which documents, eligible for deletion, are removed. Only eligible documents dated *before* this date are processed.

Recalculate Order Balances
An option that determines whether the application recalculates all customers' order balances and the total order balance that appears when you use the Monitor Companies command in the System module. This option is available in case of computer failure during processing. For example, if you have a power failure while processing, the application may have recorded a transaction but not updated the balances.

Complete Description Only Documents
An option that determines whether documents with outstanding description-only lines are regarded as complete and eligible for removal.

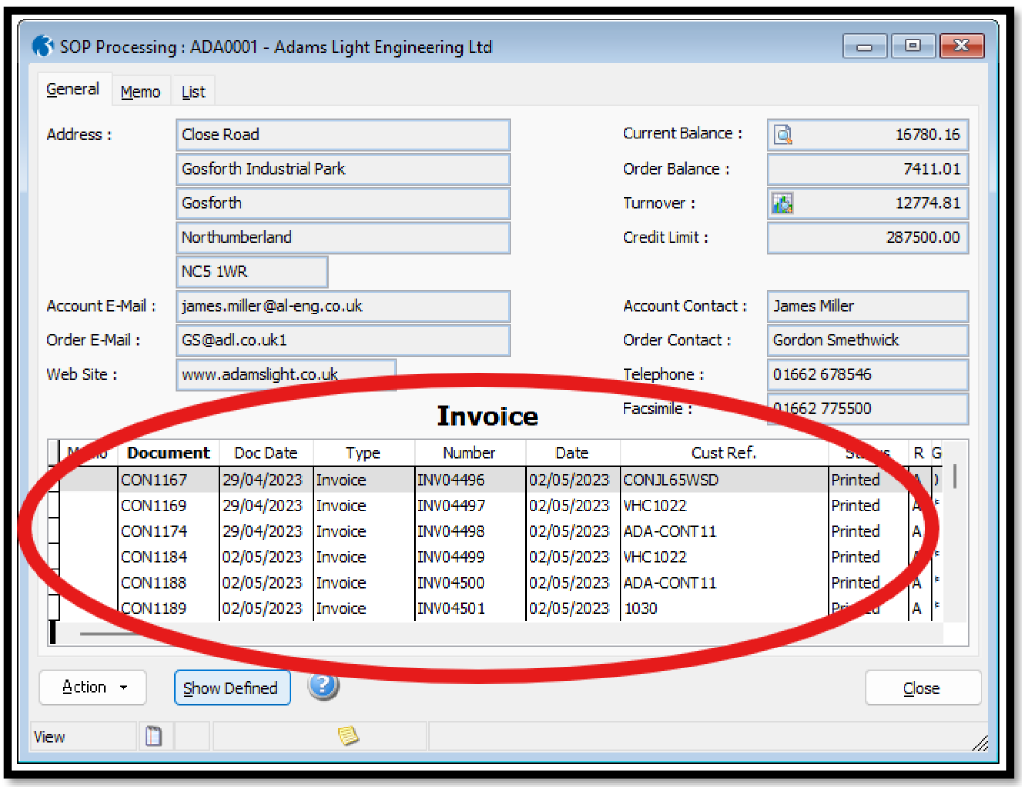
Cancel unposted PO request already invoiced
An option that determines whether purchase orders requested as a result of back-to-back order processing, that have already been invoiced, are cancelled. This only applies if you use the Purchase Orders and the Sales Order Processing modules.

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.

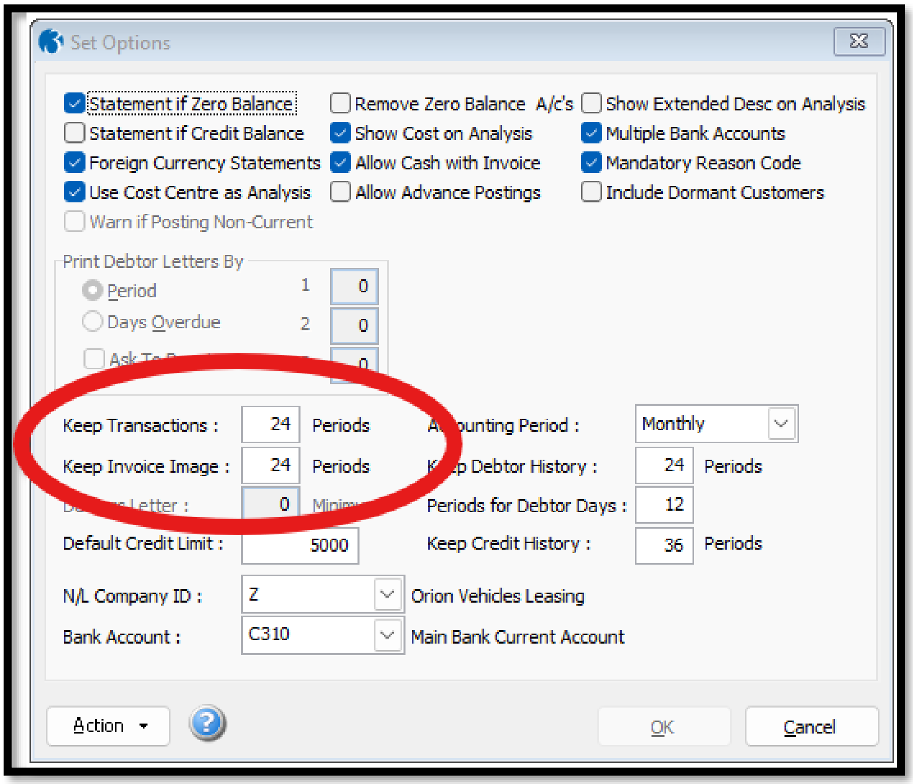
To Reorganise the Invoicing and SOP files

Important: First print any reports you need and take a backup of your data files before running the Reorganise.

The data removed is located in the screen below and will include Quotations, Proformas, Order, Delivery, Invoice and Credits.

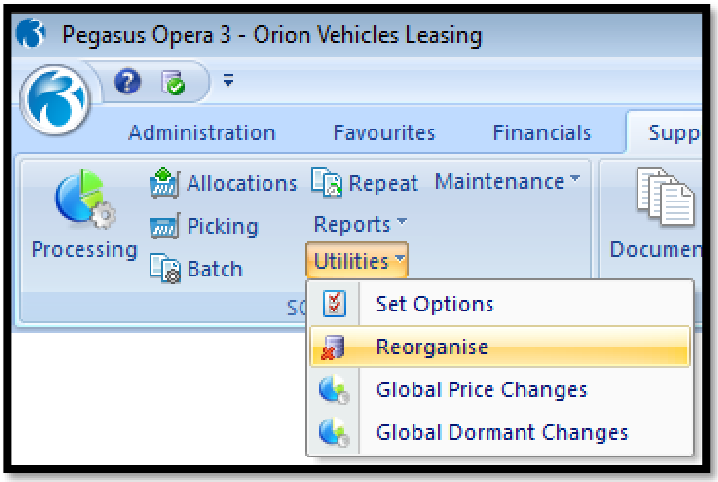


Note that this will not remove any Sales ledger Invoice or Credit notes as this ledger is self-tidying at period end depending on your Sales ledger set options. So if you want to keep these documents ensure you have se the required time in here.

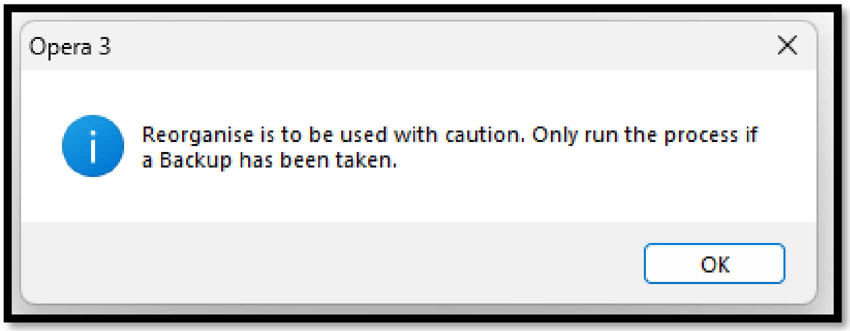


Open the Sales Order Processing or Invoicing folder and then click Utilities or click the Supply Chain Management tab on the Ribbon Bar and then click either Sales Order Processing - Utilities or Invoicing - Utilities.

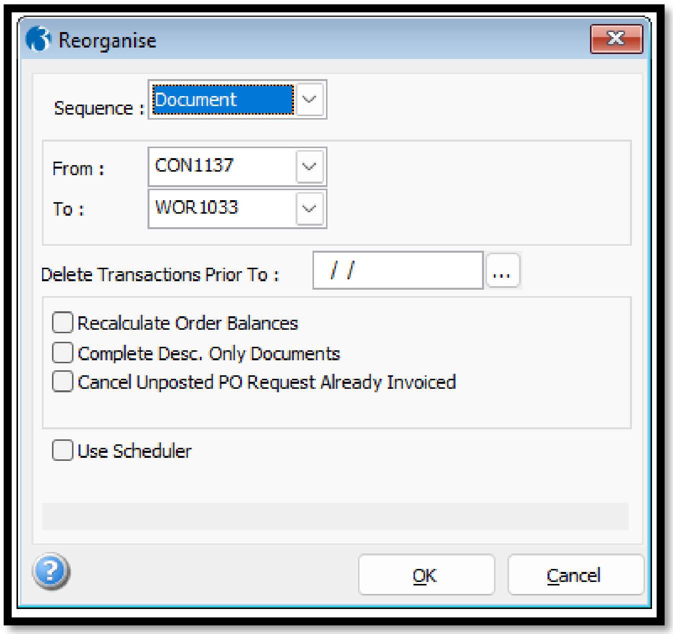
Click Reorganise.



You will be reminded to have taken a backup or of the company data.
It is very important that you do as data will be lost.
Click OK to continue.



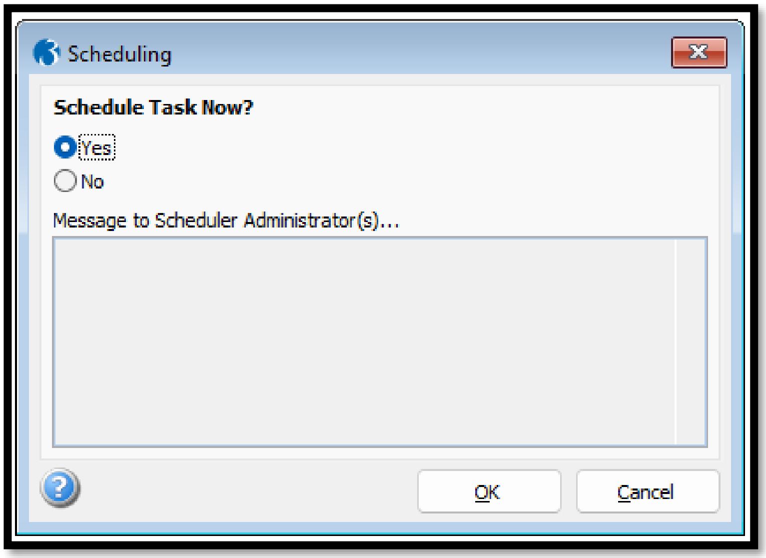
In the boxes provided, specify the criteria for the process.



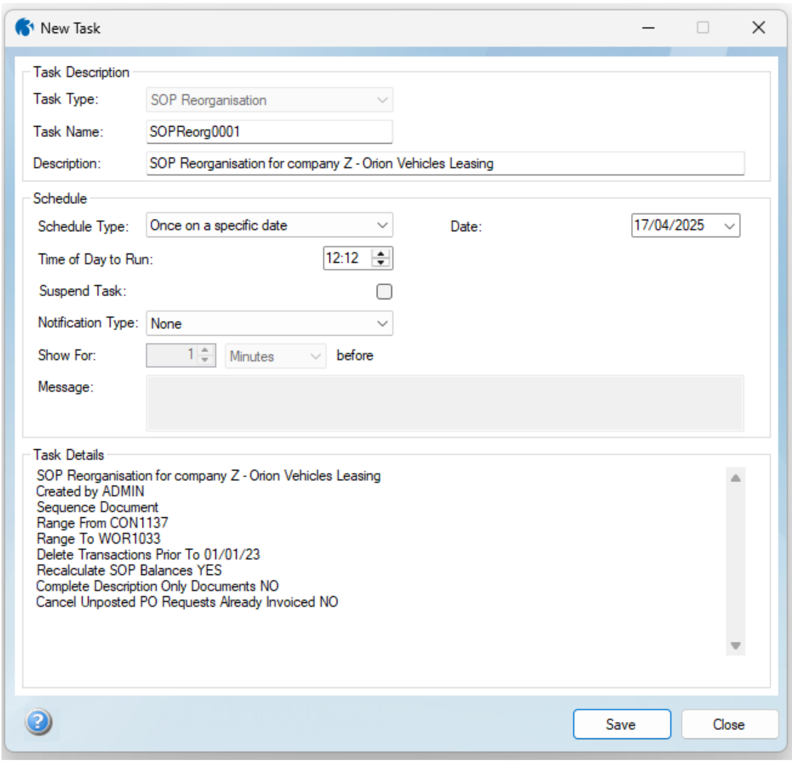
Click OK and then choose to run the process now or at a later time.

If you choose Scheduler, you will then be prompted to configure it.

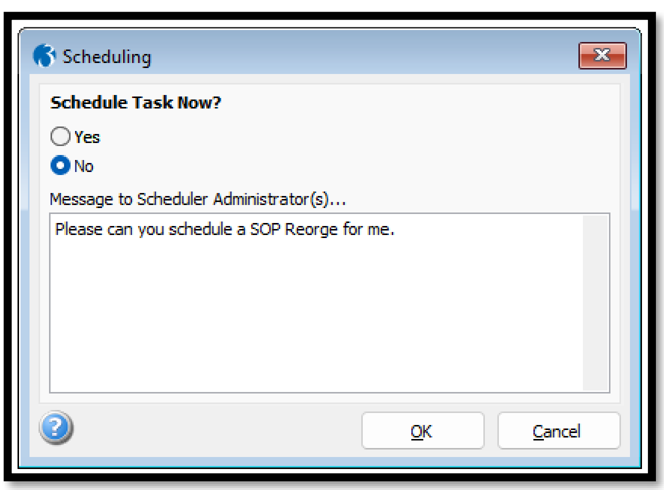
Select Yes.

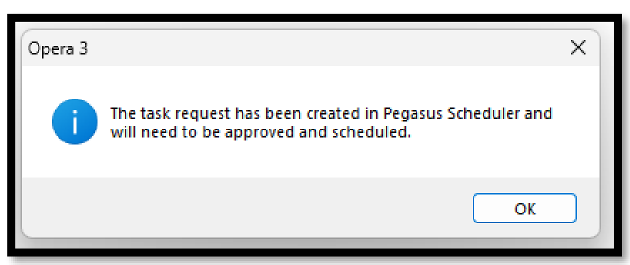


Configure as required and select Save.



Or you can ask the Administrator of scheduler to configured for you.
If this level of security has been set up on your Opera 3 System.





The Administrator will be notified, and the request will be held in the Scheduler task centre to be accepted and saved.