

Mass Customer Number Delete User Guide

for use with Macola v7.5



Another outstanding Macola Utility brought to you by:

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Mass Customer Number Delete User Guide

Introduction

These programs are intended to facilitate a mass delete of the Customer Number in the appropriate files that contain a Customer Number field. All appropriate files in the Macola 7.5 Accounting & Distribution modules are updated.

Program Overview

There are three steps involved in the mass delete. The first step is to build a Customer Number Delete Table. The second step is to maintain the Delete table, ensuring that all customers selected for deletion may be deleted. A list of Customers to be Deleted or Customers Eligible for Deletion is available. The final step is to delete the selected Customer Numbers. A "push button" is provided to access each function of the program.

The program is run from the Run Utility option found under the Window option on the Progression main screen. You must be logged in to Macola as Supervisor in order to have access to this option.

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Installation

- ? Insert the ACSI Utility disk
- ? Launch Macola Progression Explorer
- ? Login as Supervisor
- ? Select System Manager
- ? Select Maintain
- ? Select System Utilities
- ? Select Install Enhancements and follow the instructions

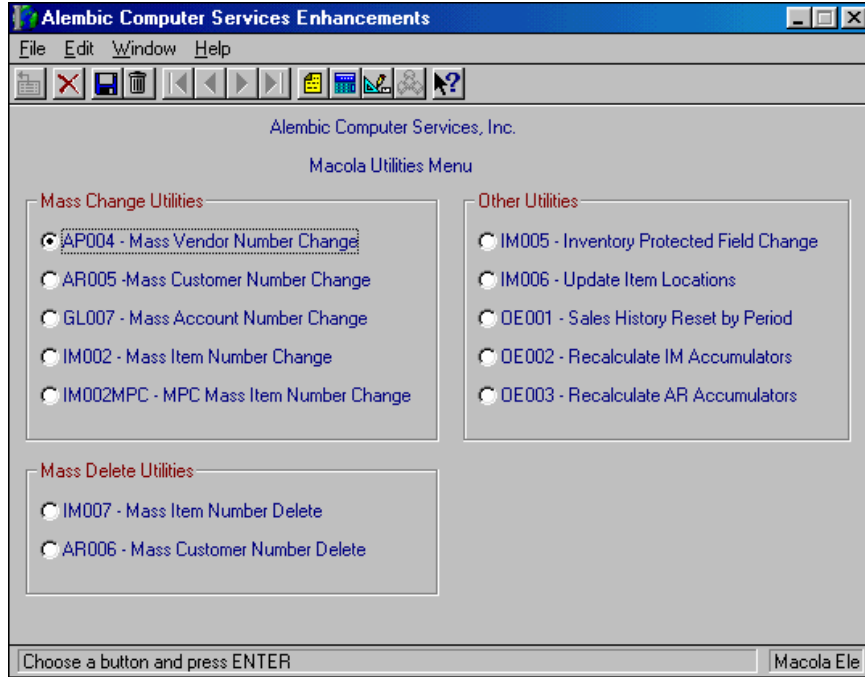
To Run the Enhancement

- ? Launch Macola Progression Explorer and login as Supervisor
- ? Select the Run Utility Program on the Window menu.
- ? Enter "**ACSIMENU.INT**" as the program to execute.
- ? Check the box for AR006 – Mass Customer Delete Change and click the blue disk or press Enter.
- ? If you are planning to run the Update option, be sure your data is backed up.

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ACSI Standard Enhancement Menu

A sample of the ACSI Standard Enhancements Menu is shown below.



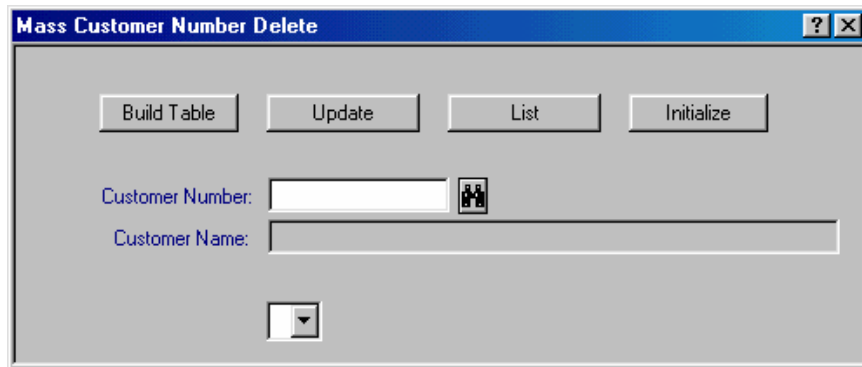
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Push Buttons

- ? Build Table – This function creates the table of inactive customers. The table will contain two types of customers. Inactive customers that will be deleted and inactive customers with something in Macola that will prevent them from being deleted. Enter the Last Sales Date and whether customer with a Last Sale Date should be included. The program will process the Customer file to determine the inactive customer.
- ? Update – Clicking this button will remove the Customer Numbers that are eligible for deletion from the appropriate files.
- ? List – Clicking this button will display “Customer To Delete” and “Inactive Customer Not Eligible” Check boxes. Select the desired list. Press Enter or click on the blue save disk on the tool bar to print the list.
- ? Initialize - This function will clear out the Customer Number Delete table.

A sample of the main screen is shown below.



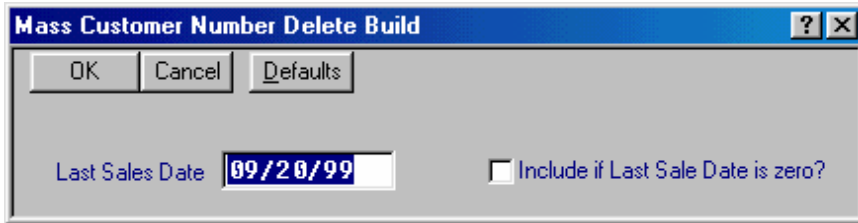
The screenshot shows a window titled "Mass Customer Number Delete" with a blue header bar containing a help icon (?) and a close icon (X). The main area is light gray and contains four buttons: "Build Table", "Update", "List", and "Initialize". Below the buttons are two input fields: "Customer Number:" with a text box and a small icon of three people, and "Customer Name:" with a longer text box. At the bottom center, there is a small dropdown menu with a downward arrow.

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Building the Customer Number Delete Table

When the **Build Table** option is selected, you will be prompted for the Last Sales Date and whether customers with a Last Sale Date of zero should be included. Enter the information and press enter or click on the OK push button to execute the build. Each time you execute the build, the Customer Number Delete Table will be initialized and rebuilt.

A sample of the Build screen is shown below.



Mass Customer Number Delete Build

OK Cancel Defaults

Last Sales Date 09/20/99 Include if Last Sale Date is zero?

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Building the Customer Number Delete Table

The Customer File is scanned from beginning to end each time this process is run. The primary key of the file is displayed as the file is being processed so that you can monitor progress.

For each Customer record, the Last Sales Date will be checked. If the Customer Last Sales Date is not zero, and is before or equal to the Last Sales Date entered, a Customer Number Delete record will be created. If the Customer Last Sales Date is zero and the Include Zero Last Sales Dates option was selected, a Customer Number Delete record will be created. The Customer Number Delete Table contains the Customer Number, a Delete Flag, and a flag for every reason a Customer Number may not be deleted.

The Customer Number will be checked to verify there is nothing in Macola to prevent the Customer from being deleted. For each reason found to prevent a customer from being deleted the appropriate flag will be set to Yes, and the Delete Flag will be set to No.

The following table lists the files that will be checked to verify a customer may be deleted.

File	Condition Preventing Deletion
AR Open Item	Contains records for the Customer Number
AR Cash Transaction	Contains records for the Customer Number
AR Sales Transaction	Contains records for the Customer Number
AR Service Transaction	Contains records for the Customer Number
OE Order Header	Contains records for the Customer Number
OE RMA Header	Contains records for the Customer Number

When the Build has finished, the Customer Number Delete Table will contain one record for each Customer Number that is eligible to be deleted. Each record will also have a flag set for each reason the customer cannot be deleted.

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Maintaining the Customer Delete Table

The program allows you to add, change, or delete records in the Customer Number Delete Table. To begin, enter the Customer Number. The Customer Number must be a valid Customer Number.

If the Customer Number is a valid Customer Number, the Customer Number Delete file will be checked. If the Customer Number is in the Delete file, the Customer Name will be displayed. A "Remove Customer" drop-down list will be displayed. Answer Yes and press ENTER to remove the Customer Number from the Delete file. Answer No and press ENTER to leave the Customer Number in the Delete file.

If the Customer Number is not in the Delete file, an "Add Customer" drop-down list will be displayed. Answer Yes and press ENTER to add the Customer Number to the Delete file. Answer No and Press ENTER to leave the Customer Number out of the Delete file.

When adding a Customer Number to the Delete file, the validation procedures described in the Build section of this User Guide will be performed on the Customer Number. If the Customer Number fails any of the validation procedures, the Customer number will not be added to the Customer Number Delete file. A message will be displayed indicating each validation procedure the customer failed.

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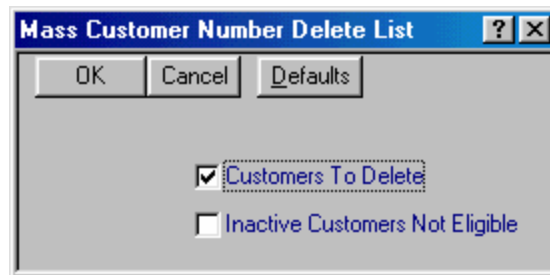
Printing a List of the Customers to be Deleted

When the **List** option is selected, the program displays “Customer To Delete” and “Inactive Customers Not Eligible” check boxes. Select the desired list and press Enter or click on the OK push button to view or print the list.

The “Customers To Delete” option will print a list of the customers that will be deleted when the Update option is selected.

The “Inactive Customers Not Eligible” option will print a list of customers without a Last Sales Date after the Last Sales Date entered, but that have something in Macola that will prevent the customer from being deleted. The reasons a customer cannot be deleted will be printed on the list.

A sample of the Customer Number Delete List screen is shown below.



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Updating Data Files

When the **Update** option is selected, the Customer Numbers on the "Customers To Be Deleted" list will be deleted from the following files.

File Name	Description
ARALTADR	Alternate Address File
ARCOMDUE	Commissions Due File
ARCUSADT	Customer Audit File
ARCUSFIL	Customer File
AROPNHST	Open Item History File
ARRECDST	Recurring Invoice Distribution File
ARRECINV	Recurring Invoice File
ARSRVHST	Service Invoice History File
OEBOLFIL	Bill of Lading File
OEBOLORD	Bill of Lading Order File
OECUSITM	Customer Item File
OEPRCFIL	Price Code File
OESHPLDT	Ship Lead Time File

The Customer Numbers will be deleted in two procedures. The first procedure is to delete the Customer Number in the files that have the Customer Number as a key field. The second step is to delete the Customer Numbers in the files that do not have the Customer Number as a key field.

To delete the Customer Numbers from the files with the Customer Number as a key field, the Customer Number Delete file will be processed. If the Customer Number Delete Flag is "N", the Customer Number Delete record will be skipped. If the Delete Flag is "Y", the Customer Number will be deleted from the files with the Customer Number as a key field.

After the Customer Number Delete file has been processed, the files that do not have the Customer Number as a key field will be processed. The table on the following page lists the files that do not have a key of the Customer Number.

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Updating Data Files

File Name	Description
ARCOMDUE	Commissions Due File
ARSRVHST	Service Invoice History File
OEBOLFIL	Bill of Lading File
OEBOLORD	Bill of Lading Order File

Every record in the above files will be processed. For each record, the Customer Number Delete file will be checked to determine if a Customer Number Delete record exists for the Customer Number. If a Customer Number Delete record with a Delete Flag of "Y" is found, the record will be deleted. If an Customer Number Delete record is not found, or the Delete Flag is "N", the record will not be deleted.

To allow you to monitor progress, the program will display the Customer Number that is currently being processed.

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