
OverNet Computer Services

Mechanic helpdesk query

Bulk Deleting Customers

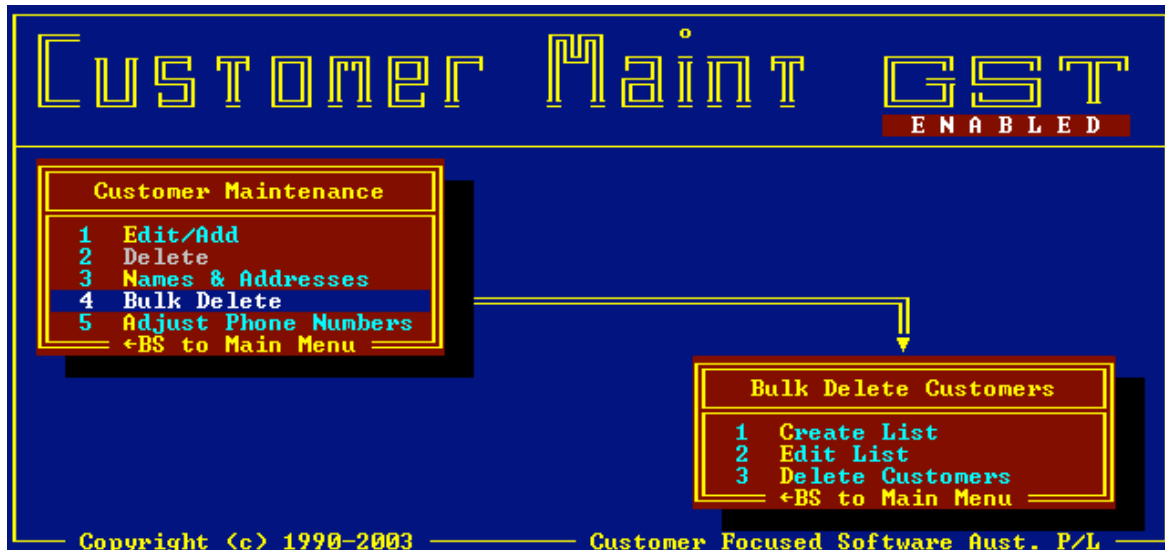
The following procedure outlines bulk deleting customers, this will only allow you to delete customers that have not had any transactions entered against them, i.e. a customer with a posted invoice will not show for deletion. Perform a back up before continuing, as the following procedure cannot be reversed.



From the main menu, select maintenance (5)



From the maintenance menu, select customers (6)



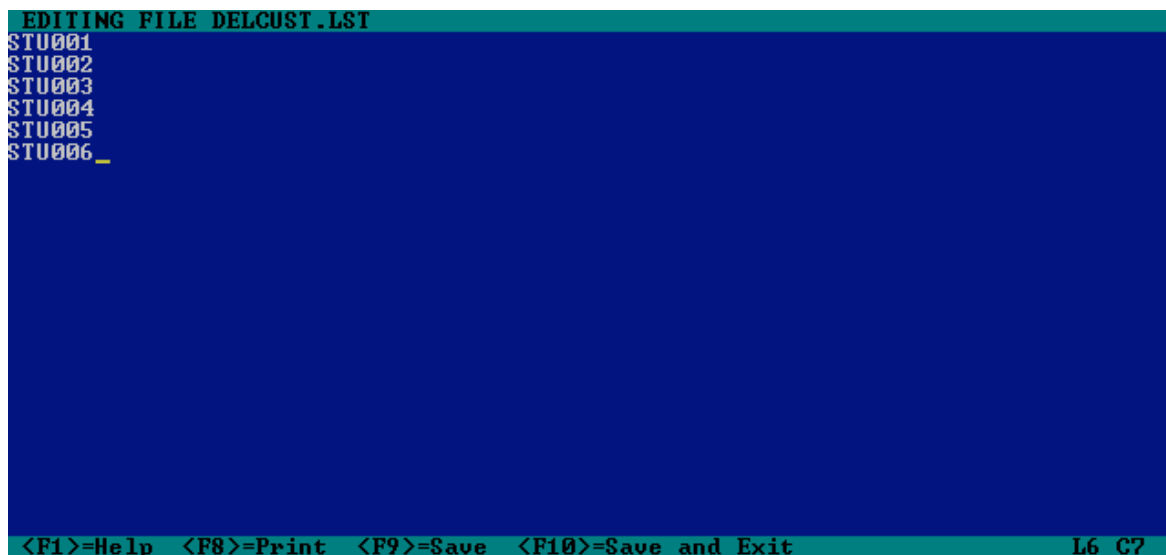
From the customer maintenance menu, select bulk delete (4)



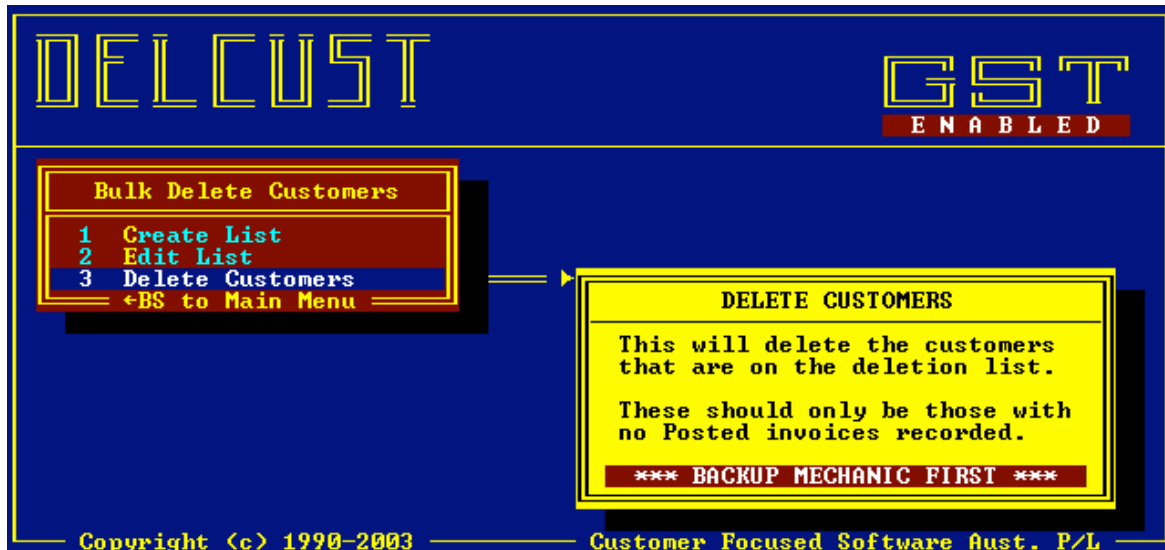
The first option is to have Mechanic create a list of all customers that have not had any transactions. This is done by selecting create list (1)
When Mechanic has created the list press F10 to continue.



It is recommended that you edit the list and review all the customers on the list before deleting them. This is done by selecting edit list (2)



In the edit list screen you can see all the customers ready for deletion. After reviewing them, take out the customers that you want to keep. REMEMBER: This is a list of customers that will be deleted. Once you are satisfied with the list, press F10 to save it.



To delete the customers on the edit list select delete customers (3)

NOTE: If any of these customers had vehicles owned by them, we should now delete their vehicles or change the vehicles to be owned by a new owner or a special "NO OWNER" customer code. The following screen shows a list of such vehicles can be generated by using the Vehicle Orphan report, (program 5,6,6).

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Operation Starting.
Owner [SMITH D    ] for vehicle [KWN019    ] not found.
Owner [BROWNS ADAM] for vehicle [MYA752_   ] not found.
Operation Complete.
Press any key to continue...

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