datel

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Deleting a Stock Item (Non-Manufacturing Sites)

Sage 200 Help Sheet

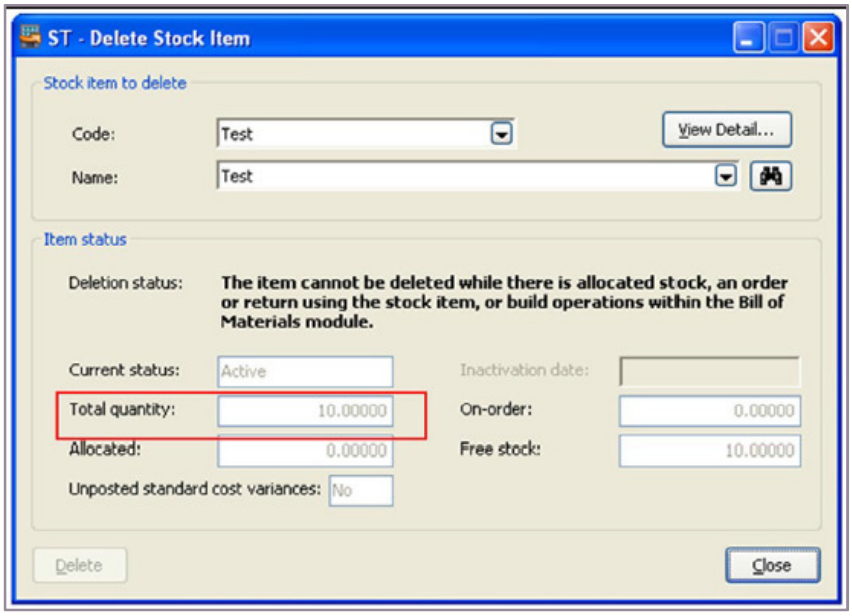
1. Deleting s Stock Item- Non Manufacturing Sites

1.1 Overview

A common call logged with Support is that a stock item cannot be deleted.

There are a number of reasons why this might be and you can perform the following checks to help determine what is preventing you from deleting a stock code.

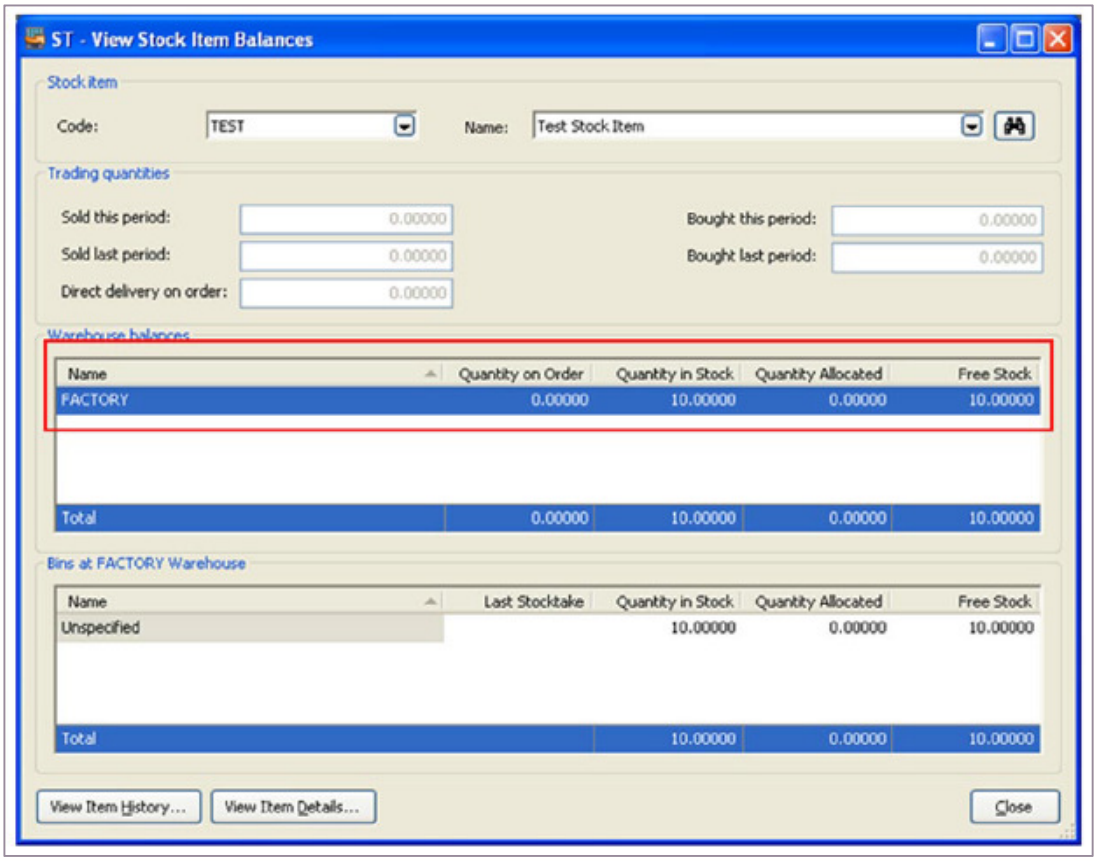
The following screenshot is one that you may be familiar with. When trying to delete a stock item you receive the message “The item cannot be deleted while there is allocated stock, an order or return using the stock item, or build operations within the Bill of Materials module".



1.2 Reason 1- Stock item balance is not zero

The screenshot above also illustrates the first reason why a stock item cannot be deleted i.e. the stock balance is not zero.

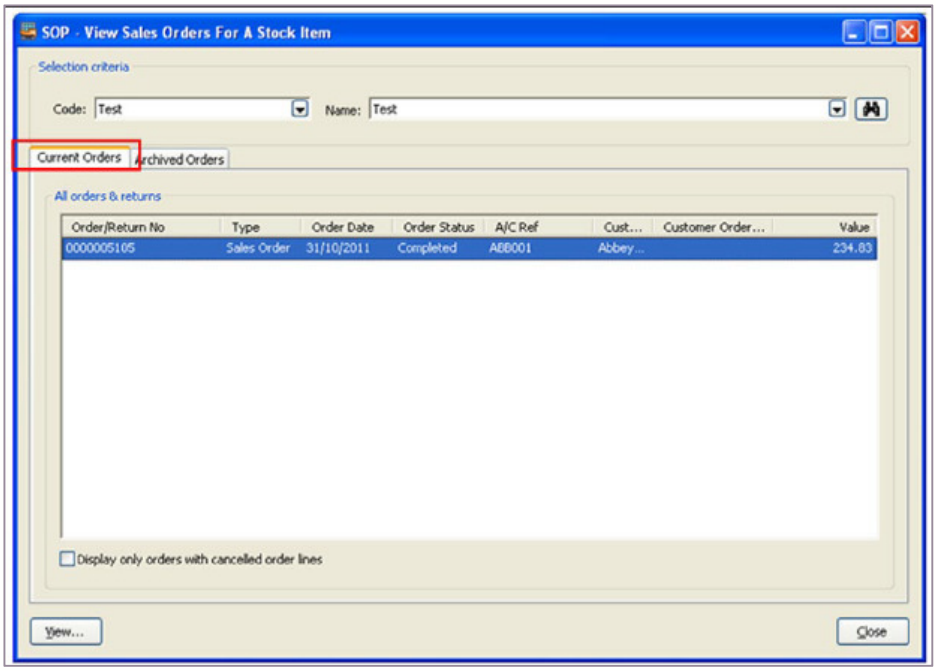
You can also check the View Stock Item Balances screen in Stock Control > Enquiries > View Stock Item Balances as illustrated in the following screenshot to check if there are any balances on the stock item.



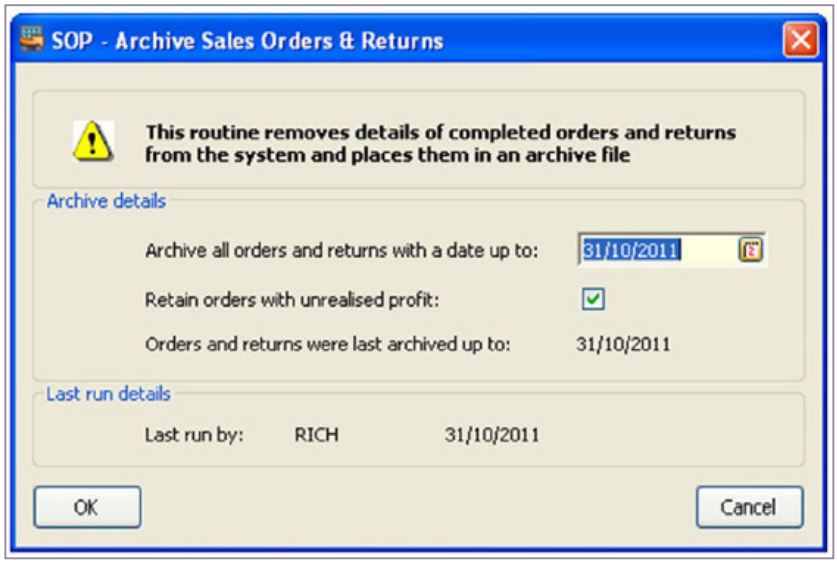
1.3 Reason 2- Current Sales Order(s) exist for the stock item

A common mis-conception is that a stock item can be deleted as soon as any outstanding sales orders for it have been completed.

The following screenshot illustrates an example of an order that will prevent a stock item from being deleted. Although the order is complete it is still a 'Current Order'.



The system will only allow the stock item to be deleted once this order has been moved to the Archive Orders area. To do this, run the Archive SOP Orders and Returns program which can be found in Sales Order Processing > SOP Utilities > File Maintenance.

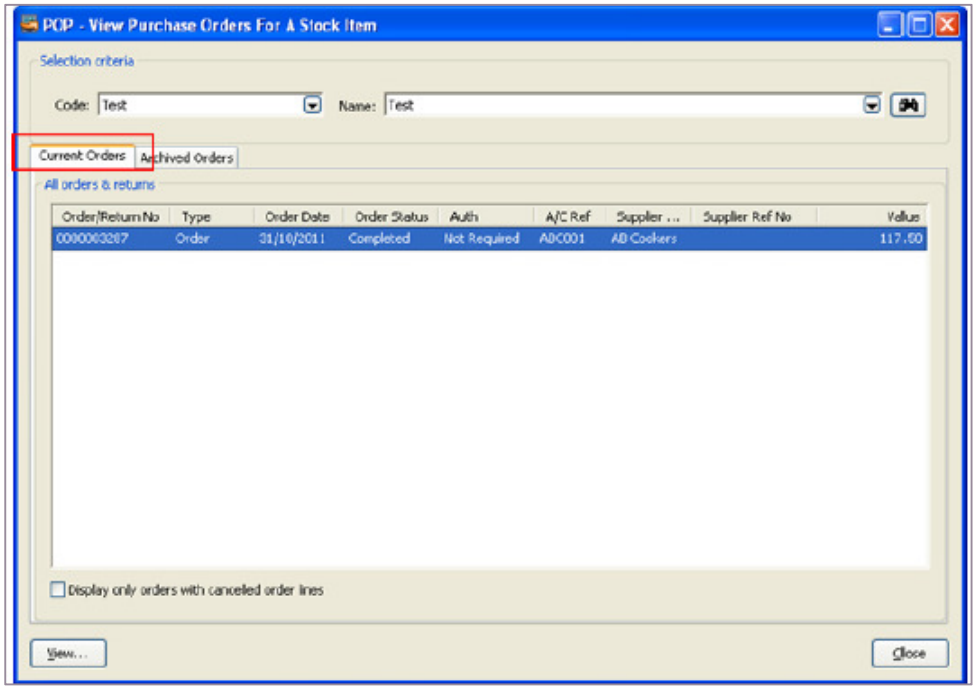


Please note: You have to run the archive of completed orders and returns up to a specified date. This means that you cannot selectively archive completed orders. So, if your completed order is dated today and you want to archive the order then you will have to archive all orders and returns that are completed up to today's date.

If you do not want to archive all completed orders and returns up to the date of the order in question then you will not be able to delete the stock item.

1.4 Reason 3- Current Purchase Order(s) exist for the stock item

For exactly the same reason as Sales Orders, stock items cannot be deleted if there are any Current Purchase Orders.



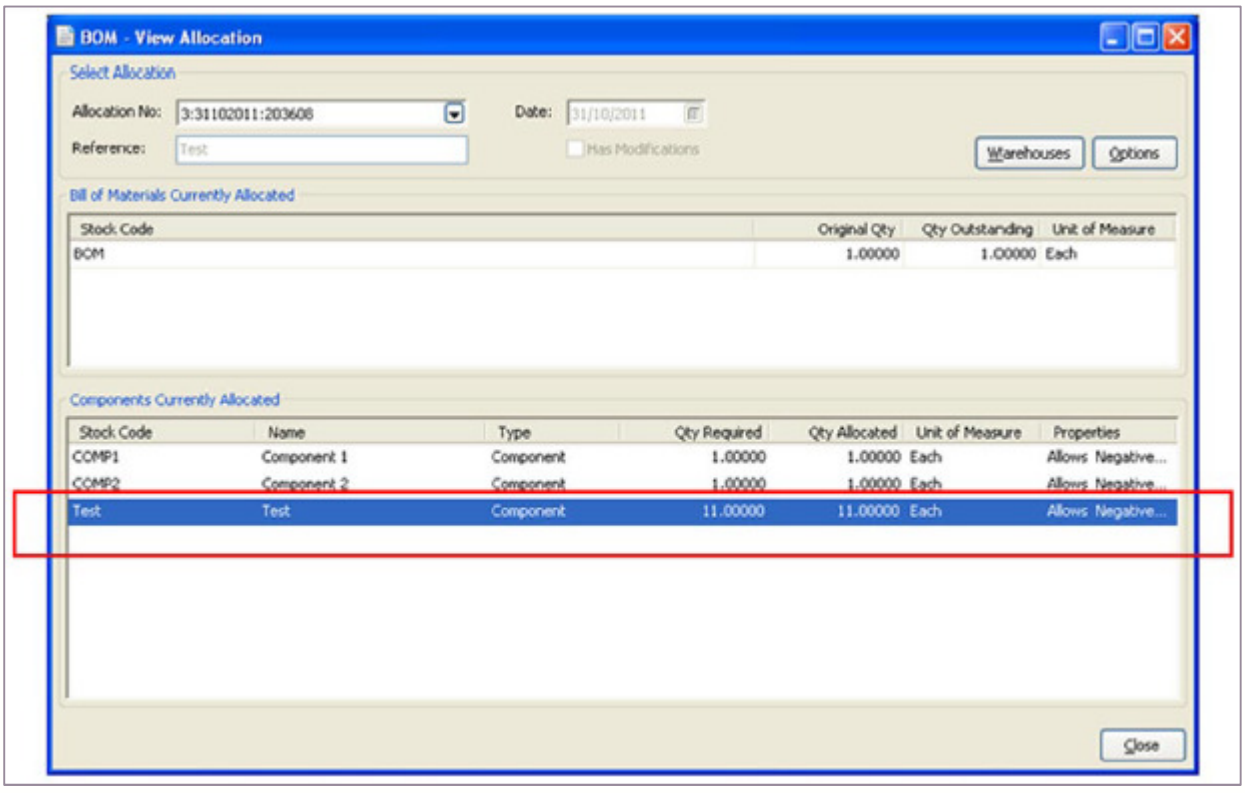
Similarly, you will have to archive any current orders (remember, you can only archive orders with a status of Complete) before you will be allowed to delete an item.

The same rules apply as archiving sales orders i.e. you can only archive up to a date and not individually. Archive routine can be found in Purchase Order Processing > POP Utilities > File Maintenance.

1.5 Reason 4- Allocations on a Bill of Material Build

In this help sheet, we are covering the deletion of stock items that are Component items.

If a stock item is currently allocated to a Bill of Material (BOM) in the Bill of Materials module as illustrated below then this will prevent it from being deleted.



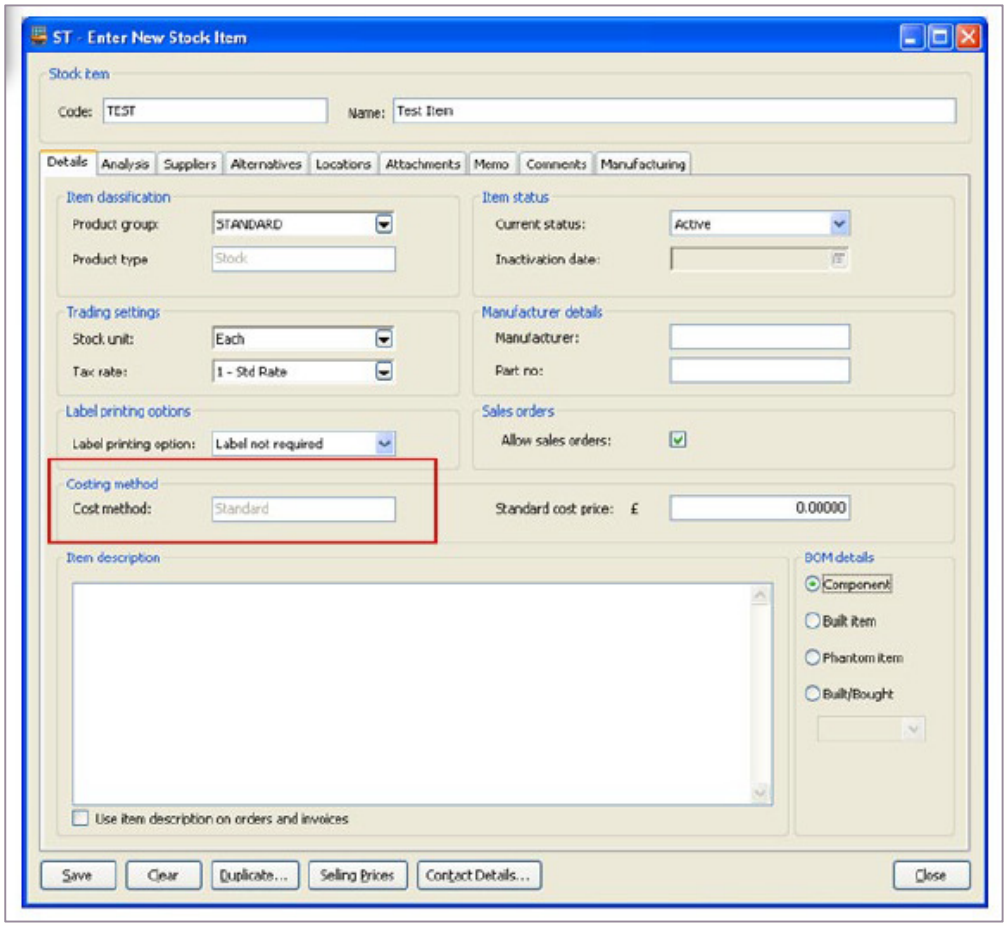
The stock item in this scenario would have to be unallocated or the build would have to be completed so that there would be no outstanding allocations of the stock item on any BOM Builds.

In addition to this, the stock item, which exists as a component on a BOM, would have to be deleted from any BOMs where it is used.

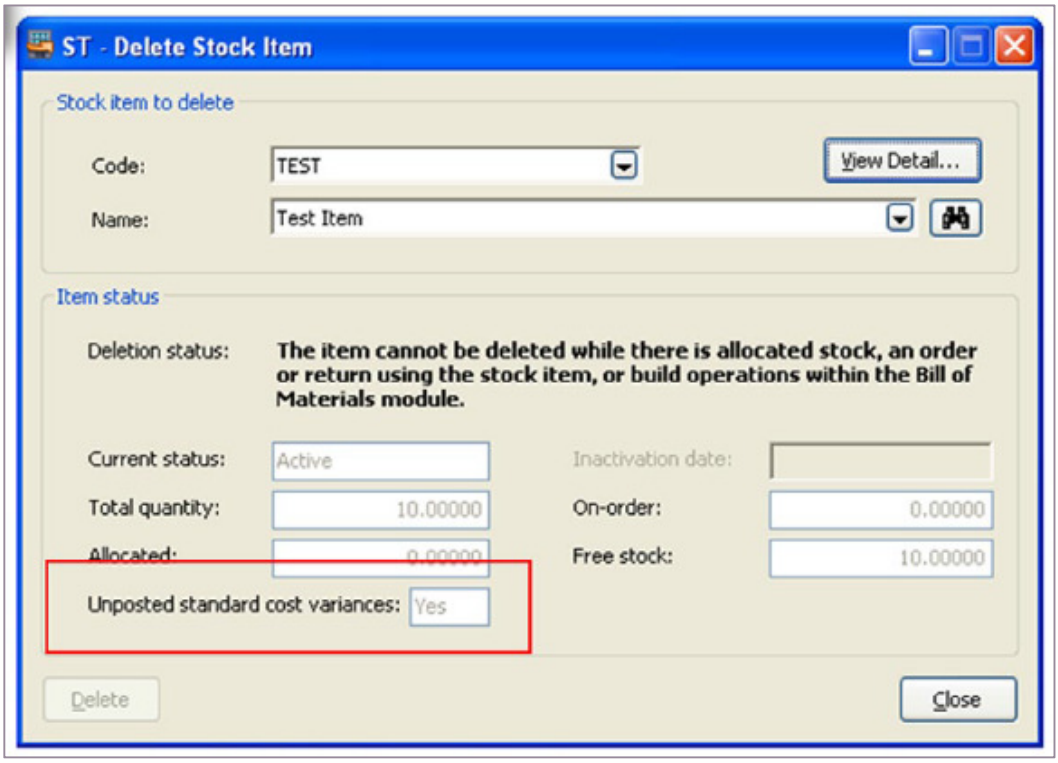
Only when this criterion has been satisfied can the stock item be deleted.

1.6 Reason 5- Unposted Standards Cost Variances

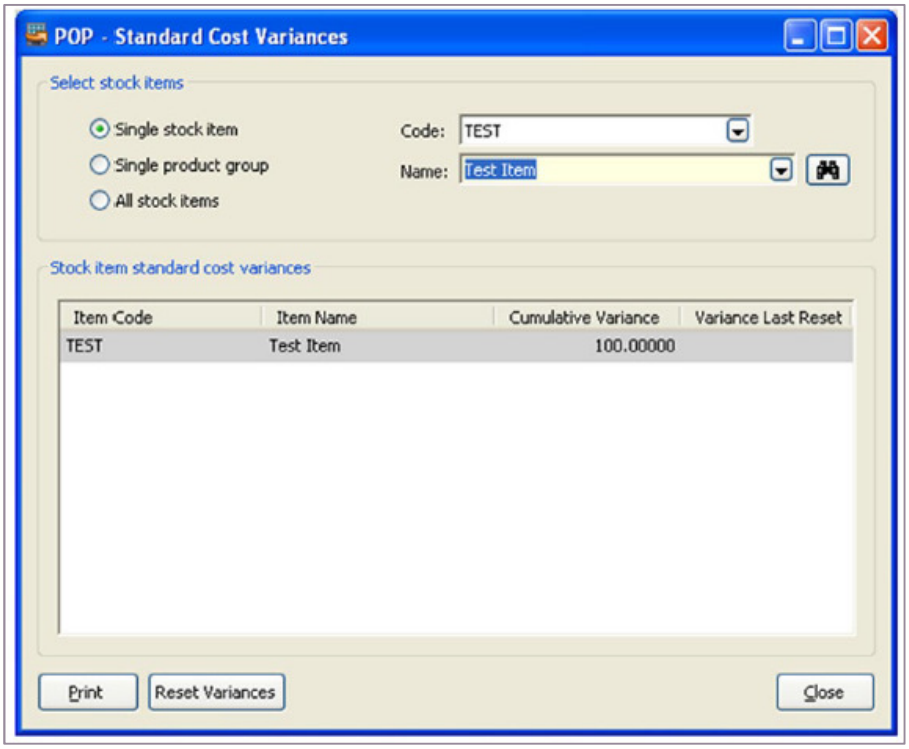
Do you use the "Standard Cost" costing method for any of your stock items that you are trying to delete? If not then this step can be skipped.



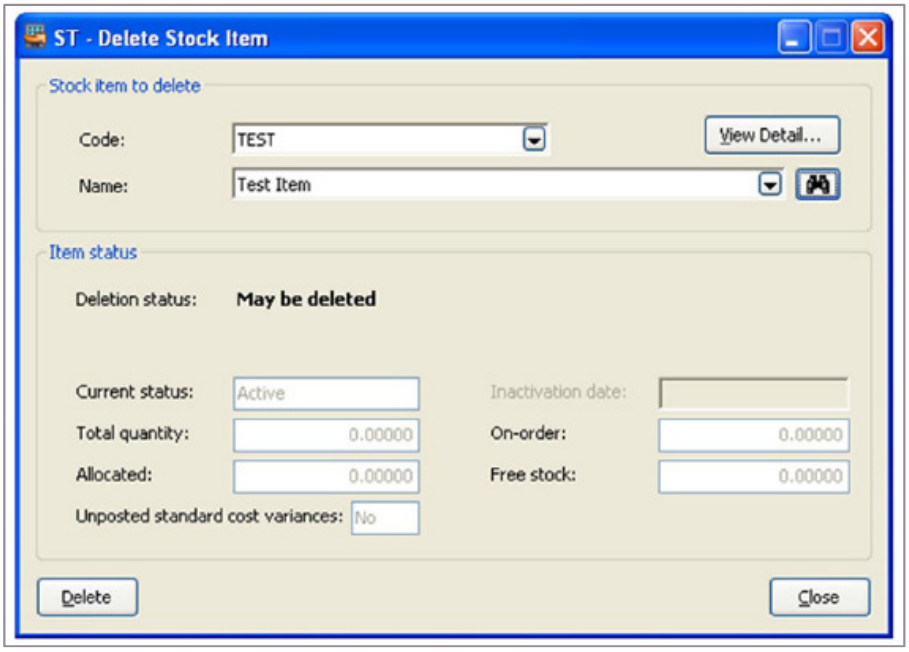
If you do use Standard Costing then unposted standard cost variances could be preventing you from deleting a stock item. When attempting to delete a stock item, it should be immediately identifiable whether there are such postings. The following screenshot highlights where this can be seen.



Unposted standard cost variances can be posted by going to Purchase Order Processing > POP Maintenance > Standard Cost Variances. To post, click on Reset Variances.



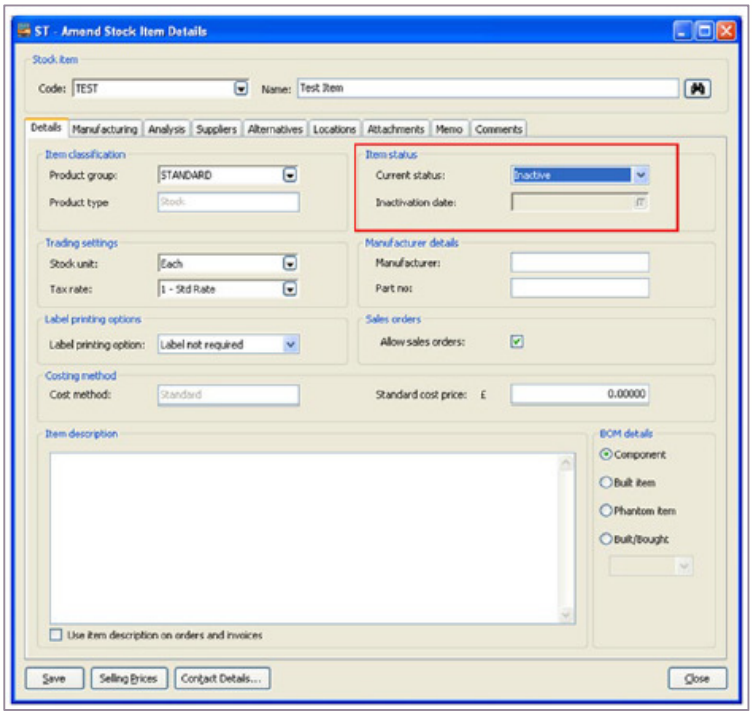
Once all of the above criteria have been satisfied then you will be able to delete a stock item. You will notice that the deletion status will be “May be deleted”.



1.7 Alternative to Deletion

If, for whatever reason, you cannot delete a stock item then you can change the status of it on the Stock Item record to Inactive as illustrated below.

This will prevent the item from being available for selection when entering any stock movements, sales and purchase orders.


ST - Amend Stock Item Details
Stock item
Code: TEST
Name: Test Item
Details
Manufacturing
Analysis
Suppliers
Alternatives
Locations
Attachments
Memo
Comments
Item classification
Product group: STANDARD
Product type: Stock
Item status
Current status: Inactive
Inactivation date:
Trading settings
Stock unit: Each
Tax rate: 1 - Std Rate
Manufacturer details
Manufacturer:
Part no:
Label printing options
Label printing option: Label not required
Sales orders
Allow sales orders:
Costing method
Cost method: Standard
Standard cost price: £ 0.00000
Item description
BOM details
Component
Built item
Phantom item
Built/Bought
Use item description on orders and invoices
Save
Selling Prices
Contact Details...
Close