

How to replace and delete a partner?

1) Open the “Delete” window

This window appears when you try to delete a company that is used in existing records.

2) Review where the data is used

In the top table, you’ll see all places where the company is linked (e.g., invoices, purchases, shipments, etc.).

3) Find the field “Record ‘Clean R’ data move to”

This is a dropdown list where you must select the target company.

4) Select a company from the list

- Click on the dropdown field
- Start typing the company name (e.g., XXXXX)
- Choose the correct company from the suggestions

5) Double-check your selection

All data will be transferred to this company, and this action cannot be undone.

6) Click “Replace and delete”

Data will be moved to the selected company

The original company will be deleted

[DATAMOVE.png](#)

Revision #2

Created 2026-06-30 07:36:04 UTC by Admin

Updated 2026-07-13 09:52:59 UTC by Admin