

How to Delete Multiple Records



Data deletion will be conducted from the lowest level in the hierarchy

【Delete sort of order】

- ① Sales
- ② Activity
- ③ Process



-Client Information-

- ④ Job
- ⑤ Recruiter
- ⑥ Contract
- ⑦ Client



-Person information-

- ④ Resume
- ⑤ Person



If the deletion is conducted from the higher level of the hierarchy with linked data available, there will be an error:

Client Delete Result

Start Time: 2014/11/04 11:14
End Time: 2014/11/04 11:14
Number of records deleted: 0
Number of records failed: 3

ID	Cause
10012	Record has related records and cannot be deleted
10013	Record has related records and cannot be deleted
10014	Record has related records and cannot be deleted

1) Select Records

Client List (5) Add New Client Bulk Action [Customize View](#)

Contact(0) Negotiation(0) Success For Sale(1) Lost(0)

Sample Client 05

Sample Client 04

Sample Client 03

Sample Client 01

Sample Client 02

Bulk Delete can be performed in the List View of each global menu item.

- Bulk Delete can be performed using these 3 patterns:**
 - 1. All Items (Matching Search Criteria)**
 The count of the target items is the “●●” in the “Client List(●●)” located at the upper left corner of the screen
 ※ In our example, the target count is 5.
 - 2. Displayed Items**
 The default number of displayed items in List View screen is 50. Those 50 items are the target records.
 When the “more” link at the bottom of the page is clicked, an additional 50 items will be displayed.
 Therefore, the number of bulk delete target records also increases at the same time.
 - 3. Selected Items**
 The target items are the records with checks.

Client Name	N/A Catherine Porters	Phase	Success For Sale
Memo	Sample Memo	Phase Date	2014/05/16 00:00:00

- ※ There is a possibility that the screen image might change.
- ※ In this manual, the default menus displayed are the default settings.
To change the global menu display settings, please refer to the document “How to Customize the Global Menu”.

2) Bulk Delete Action

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Client Recruiter Job Person Resume Sales Process Activity

Client List (5) Add New Client **Bulk Action** [Customize View](#)

Contact(0) Negotiation(0) Success For Sale(1) Lost(0)

<input checked="" type="checkbox"/>	Sample Client 05	Client Name	Sample Client 05	Phase	
		Address (Client)	Sample Address (Client)	Phase Date	
		Client Owner	N/A Catherine Porters		
		Memo	Sample Memo		
		Sublist			
<input checked="" type="checkbox"/>	Sample Client 04	Client Name	Sample Client 04		
		Address (Client)	Sample Address (Client)		
		Client Owner	N/A Catherine Porters		
		Memo	Sample Memo		
		Sublist			
<input checked="" type="checkbox"/>	Sample Client 03	Client Name	Sample Client 03	Phase	
		Address (Client)	Sample Address (Client)	Phase Date	
		Client Owner	N/A Catherine Porters		
		Memo	Sample Memo		
		Sublist			
<input type="checkbox"/>	Sample Client 01	Client Name	Sample Client 01	Phase	
		Address (Client)	Sample Address (Client)	Phase Date	
		Client Owner	N/A Catherine Porters		
		Memo	Sample Memo		
		Sublist			
<input type="checkbox"/>	Sample Client 02	Client Name	Sample Client 02	Phase	Success For Sale
		Address (Client)	Sample Address (Client)	Phase Date	2014/05/16 00:00:00
		Client Owner	N/A Catherine Porters		

Update Client
Update Contract
Export Client
Export Contract
Delete Client
Delete Contract

After checking the target records, click the Bulk Action to display the menu and select "Delete Client".

3) Target Options

The screenshot displays the PORTERS HR-Business Cloud interface. At the top, the header includes the PORTERS logo, a trial expiration notice ('Trial expires in 594 days'), and user information ('Catherine Porters'). A navigation bar contains tabs for Client, Recruiter, Job, Person, Resume, Sales, Process, and Activity. The main content area is titled 'Client List (2)' and includes buttons for 'Add New Client' and 'Bulk Action'. Below this, there are filters for 'Contact(0)', 'Negotiation(0)', 'Success For Sale(1)', and 'Lost(0)'. A table lists several client entries, each with a 'Sublist' button and a dropdown menu. A modal dialog box titled 'Client - Delete All' is open, prompting the user to 'Select the delete target'. Three radio button options are provided: 'All Items(matching search criteria)', 'Displayed Items', and 'Selected Items'. The 'Selected Items' option is selected and highlighted with a blue box. A callout bubble points to this option with the text: 'In this example, we will choose "Selected Items" from the options. Then click the "Start" button.' At the bottom of the dialog, there are 'Start' and 'Cancel' buttons.

Client - Delete All

Select the delete target

- All Items(matching search criteria)
- Displayed Items
- Selected Items

In this example, we will choose "Selected Items" from the options. Then click the "Start" button.

Start Cancel

4) Confirmation

The screenshot displays the PORTERS HR-Business Cloud interface. At the top, the user is logged in as Catherine Porters. The main navigation bar includes 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Sales', 'Process', and 'Activity'. The current view is 'Client List (2)'. A table lists several client entries, including 'Sample Client 01' through '05'. A 'Bulk Action' dropdown menu is open, and the 'Delete All' option is selected. This triggers a 'Client - Delete All' dialog box. Inside this dialog, there are radio buttons for 'All Items (matching search criteria)', 'Displayed Items', and 'Selected Items'. A smaller confirmation dialog is overlaid on top, asking 'Do you want to delete?' with 'Yes' and 'No' buttons. A callout bubble points to the 'Yes' button with the text: 'In the confirmation dialog, click the "Yes" button to continue with the delete operation. ✂Caution: Delete action can't be undone.'

Client Name	Sample Client 05	Phase
Address (Client)	Sample Address (Client)	Phase Date
Client Owner	N/A Catherine Porters	

Client Name	Sample Client 04	Phase
Address (Client)	Sample Address (Client)	Phase Date
Client Owner	N/A Catherine Porters	

Client Name	Sample Client 03	Phase
Address (Client)	Sample Address (Client)	Phase Date
Client Owner	N/A Catherine Porters	

Client Name	Sample Client 01	Phase
Address (Client)	Sample Address (Client)	Phase Date
Client Owner	N/A Catherine Porters	
Memo	Sample Memo	

Client Name	Sample Client 02	Phase
Address (Client)	Sample Address (Client)	Phase Date
Client Owner	N/A Catherine Porters	
Success For Sale		2014/05/16 00:00:00

5) Delete Start

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Client Recruiter Job Person Resume Sales Process Activity

Client List (2) Add New Client Bulk Action Customize View

Contact(0) Negotiation(0) Success For Sale(1) Lost(0)

Client Name	Sample Client 05	Phase	
Address (Client)	Sample Address (Client)	Phase Date	
Client Owner	N/A Catherine Porters		
Memo			

Sublist

Client Name	Sample Client 04	Phase	
Address (Client)			
Client Owner			
Memo			

Sublist

Client Name	Sample Client 03	Phase	
Address (Client)			
Client Owner			
Memo			

Sublist

Client Name	Sample Client 01	Phase	
Address (Client)	Sample Address (Client)	Phase Date	
Client Owner	N/A Catherine Porters		
Memo	Sample Memo		

Sublist

Client Name	Sample Client 02	Phase	Success For Sale
Address (Client)	Sample Address (Client)	Phase Date	2014/05/16 00:00:00
Client Owner	N/A Catherine Porters		

Client - Delete All

Delete operation started. You can check status from Notice area.

Click the "OK" button.

OK

6) Delete Icon

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Client Recruiter Job Person Resume Sales Process Activity

Client List (2) Add New Client Bulk Action ▼ [Customize View](#)

Contact(0) Negotiation(0) Success For Sale(1) Lost(0)

<input checked="" type="checkbox"/>	Sample Client 05	Client Name			
		Address (Client)			
		Client Owner			
		Memo			
		Sublist			
<input checked="" type="checkbox"/>	Sample Client 04	Client Name		Phase	
		Address (Client)	Sample Address (Client)	Phase Date	
		Client Owner	N/A Catherine Porters		
		Memo	Sample Memo		
		Sublist			
<input checked="" type="checkbox"/>	Sample Client 03	Client Name	Sample Client 03	Phase	
		Address (Client)	Sample Address (Client)	Phase Date	
		Client Owner	N/A Catherine Porters		
		Memo	Sample Memo		
		Sublist			
<input type="checkbox"/>	Sample Client 01	Client Name	Sample Client 01	Phase	
		Address (Client)	Sample Address (Client)	Phase Date	
		Client Owner	N/A Catherine Porters		
		Memo	Sample Memo		
		Sublist			
<input type="checkbox"/>	Sample Client 02	Client Name	Sample Client 02	Phase	Success For Sale
		Address (Client)	Sample Address (Client)	Phase Date	2014/05/16 00:00:00
		Client Owner	N/A Catherine Porters		

List View is displayed.
The records are not yet deleted at this point. The selected records are still present in the list.

When bulk delete operation is in progress, the action icon is displayed at the upper right corner of the screen.
The color of the icon when the action is in progress is orange.

7) Confirm Results

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Client Recruiter Job Person Resume Sales Process Activity

Client List (2) Add New Client Bulk Action

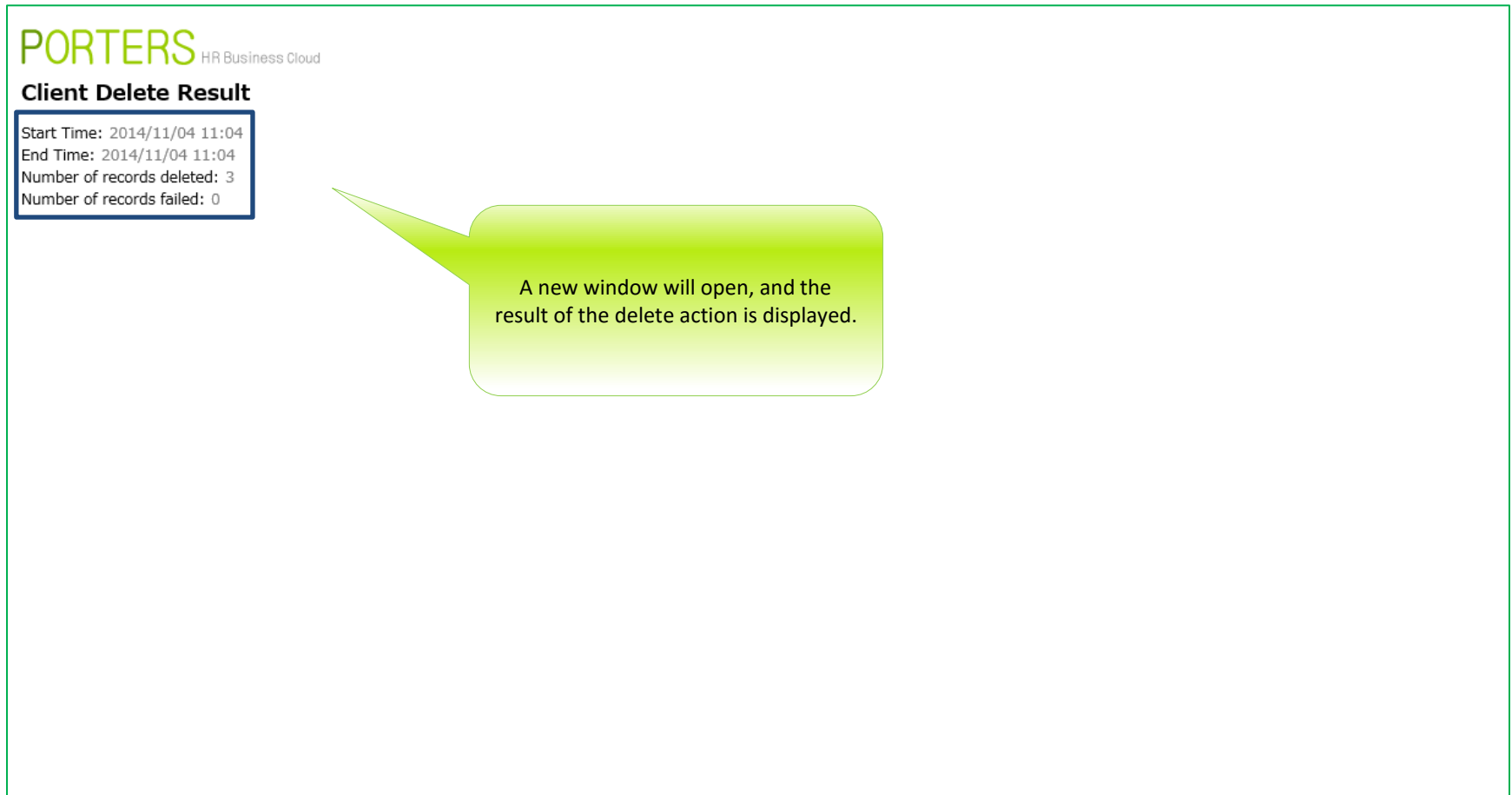
Contact(0) Negotiation(0) Success For Sale(1) Lost(0)

<input checked="" type="checkbox"/>	Sample Client 05	Client Name	Sample Client 05	Phase	
		Address (Client)	Sample Address (Client)	Phase Date	
		Client Owner	N/A Catherine Porters		
		Memo	Sample Memo		
		Sublist			
<input checked="" type="checkbox"/>	Sample Client 04	Client Name	Sample Client 04	Phase	
		Address (Client)	Sample Address (Client)	Phase Date	
		Client Owner	N/A Catherine Porters		
		Memo	Sample Memo		
		Sublist			
<input checked="" type="checkbox"/>	Sample Client 03	Client Name	Sample Client 03	Phase	
		Address (Client)	Sample Address (Client)	Phase Date	
		Client Owner	N/A Catherine Porters		
		Memo	Sample Memo		
		Sublist			
<input type="checkbox"/>	Sample Client 01	Client Name	Sample Client 01	Phase	
		Address (Client)	Sample Address (Client)	Phase Date	
		Client Owner	N/A Catherine Porters		
		Memo	Sample Memo		
		Sublist			
<input type="checkbox"/>	Sample Client 02	Client Name	Sample Client 02	Phase	Success For Sale
		Address (Client)	Sample Address (Client)	Phase Date	2014/05/16 00:00:00
		Client Owner	N/A Catherine Porters		

Client - Bulk Delete Complete
 Start time 2014/11/04 11:04
 End time 2014/11/04 11:04
[Confirm results](#)

Once the action is completed, the color will change. Click the icon, then in the list, click "Confirm results" link to check the result.

8) Result Page



PORTERS HR Business Cloud

Client Delete Result

Start Time: 2014/11/04 11:04
End Time: 2014/11/04 11:04
Number of records deleted: 3
Number of records failed: 0

A new window will open, and the result of the delete action is displayed.

9) Result Page with Errors

PORTERS HR Business Cloud

Client Delete Result

Start Time: 2014/11/04 11:14
End Time: 2014/11/04 11:14
Number of records deleted: 0
Number of records failed: 3

ID	Cause
10012	Record has related records and cannot be deleted
10013	Record has related records and cannot be deleted
10014	Record has related records and cannot be deleted

In case Bulk Delete fails, error information is displayed in the result page. Once the cause of the error is fixed, please perform bulk delete again.

※In this case, there are related records that should be deleted first.