# Archive/Purge Records in RentalPoint

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Archiving is a tool designed to improve performance and remove the clutter of non-relevant or old items in the RentalPoint system database.

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# **Archiving Bookings**

Archiving prevents the system from having to load hundreds or thousands of bookings in the main booking window. Rental *Point* has "predictive equipment scheduling" capabilities, in other words availability calculations that take these bookings into consideration. For example, to add a line of equipment to the equipment grid in the booking, the system must search through all the bookings for the product added and calculate the available quantity; if the product has components and/or accessories attached to it, then these also must be processed. Availability must also be checked when opening a booking, printing a pick list or booking hardcopy, opening the checkout window, displaying the shortage list etc.

So if there are 1000+ bookings on the main booking grid with 100+ items in each booking, this can add up quickly and take a lot of time to load.

Reports are unaffected by archiving, the same data will be available before or after an archive, the reports will load data from the current tables and from the archive tables.

#### Archiving should be run at least once a month.

### Where to find Archived Bookings

Archiving does not delete anything, it just moves records from one table to another.

After a booking is archived you can still:

- Use the data for statistics such as ROI and utilization
- See and list the archived bookings on the booking grid by selecting the 'archive' radio button as shown below

Scope					All o	dates	3
<ul> <li>✓ Quotes</li> <li>✓ Light Pencil</li> <li>✓ Heavy Pencil</li> </ul>	<ul> <li>Rental</li> <li>Sales</li> <li>Sub rental</li> </ul>	Booked Pull Out	<ul> <li>✓ Invoiced</li> <li>✓ Uninvoiced</li> <li>✓ Complete</li> </ul>	<ul> <li>✓ Not Requirec</li> <li>✓ Required</li> <li>✓ Assigned</li> </ul>	Back	For	ward 65 da 💌
Confirmed Cancelled	LT rental Transfers	Returned	Data to Vie		Days	Dates	Months
Division	All Divisions	-	<ul> <li>Current</li> </ul>	<ul> <li>Archive</li> </ul>	✓ AI	5	Refresh

- Print the archived booking using the Booking Hardcopy/Picklist
- View the archived booking using the Quick Look option
- Duplicate the archived booking (the duplicate will go to the current bookings grid)

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• Un-archive the booking

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### Archiving Individual Bookings

Every single Booking could be archived/Unarchived separately.

Right click on a booking -> Admin -> Archive/Unarchive



### Setting Criteria for Archiving in Bulk

Before running the archive process you should review the following settings to ensure the proper criteria is set for your business.

These criteria are located in the Operational parameters - #9 Archive Settings. Once configured, you will need to restart RentalPoint for the changes to take effect.

	Archive Settings
Archive Criteria First, determine if booking If this doesn't matter, set t eligible.	is need to be returned and/or invoiced before archive. he option to 'old enough', then all bookings are
Archive Criteria None (old enough) Returned Invoiced Both	Accounts #4 - Accounts Receivable is enabled. Bookings must be invoiced and fully paid before they are archived.
Days to Hold Before Archi Second, determine the nur they"re archived. The mini days. 120	ving mber of days to hold those bookings before mum amount of time to hold bookings is 14
Months to Keep in Archive Last, determine how many permanently deleting ther archive is 18 months. To p option from the main mer	e months you want to keep bookings in archive before n. The minimum amount of time to keep bookings in ermanently delete bookings you need to run the Purge nu.
36	✔ ОК

#### **Archive Criteria**

- If the accounts receivable in RentalPoint is in use then 'Archive Criteria' should be set to invoiced, if you are not invoicing through RentalPoint then set this parameter to old enough or returned.
- None (Old enough)

This criteria basically says that if a booking is old enough then it will be archived, so if 'days to hold before archiving' is set to 120 days, then the booking will archive if it is more than 120 days old regardless of whether it has been invoiced or returned.

- Invoiced means that it must be invoiced and be old enough (if Accounts Receivable is in use set archive criteria to invoiced)
- Returned means that the booking must be marked as 'Returned' via checkout/return processing AND be old enough
- Both means that the booking must invoiced and returned. It also must be old enough
- •

#### Accounts Receivable

• If the accounts receivable parameter in RentalPoint is turned on, then the booking must be fully paid before it will qualify for archiving, to check that a booking is fully paid, open it and on the payments tab check that the balance is zero.

#### Zero Value Bookings

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• For zero value bookings, in order for them to archive, open the booking, click on the payment tab and in the payment terms drop down, select the 'no charge' option

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### **Executing the Archive Command**

Ensure you take a backup of your database before archiving. Click HERE for more information on backing up RentalPoint

To run the archive select **Archive Old Bookings** from the **Archiving** option in the **Others** main menu.

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ł	Оре	en a Second Copy Ct	rl+Alt+O		Purge History	r	•	
	Оре	rator Options	•			Sun	2018-03-18	T

	Confirm
?	Bookings that meet the following criteria will be archived :
	Older than 120 days (before 2018/06/04). (Operational #9 - Days to Hold Before Archiving) Returned and Invoiced. (Operational #92 - Criteria for Archiving Old Bookings) Fully paid. (Accounts #4 - Accounts Receivable In Use)
	Do you want to continue?
	<u>Y</u> es <u>N</u> o

Once complete you can see which bookings were archived in the session by viewing the **Archiving Log** viewable from the **Others>Display Log Files** menu.

Bookings that have invoices attached to them which have a balance associated with them will not be archived.

#### **Restore from Archive**

Once a booking is archived, it is moved into another area of the program called the Archive view. These bookings can no longer be directly accessed, but you can un-archive selected bookings.

To un-archive a booking from the archive grid select the booking line, right click and select the **Un-archive** option. The booking will then be placed in the current booking list.

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### **Duplicate from Archive**

You can also duplicate from the archive area and RentalPoint will create a new booking with the exact same information and you can also print an archived booking using the booking hardcopy option.

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ZAP00010	Zapco Industries		Open	•		Mon	20/12/2010	06:00	Fri	24/12
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### Archive Old Documents

Another archiving option is Archive Old Documents. This is useful for separating paperwork that is very old or no longer relevant. This moves the documents to another location for better organization. It is also of benefit for saving hard drive space on the main system, once archived the documents will still be accessible as the attachment display window will also search the archive folders when the user wishes to open an archived document.

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•	Enter Currency Conversion Rate Print LT rental	
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RP	Archive	Old Documents		<b>(</b>
Criteria				
Archive documents	more than	180	days old.	
🗌 Use entry date in	nstead of the	date the file wa	s last modified	
Source				
Source Folder	E:\RentalPo	ointV11_3\docs\		
Destination				
Destination Folder	E:\RentalPo	ointV11_3\Archiv	eDocs\	
Progress of files be	ing archived			
Filename				
		✓ Start	X Cancel	

#### Archive PO's

Archiving POs only deals with purchase POs and NOT cross rentals/hires. POs must be posted and received before they are considered for archive.

Archive a single received purchase order from the Purchase Order Grid via right click on the order-->admin-->archive



Batch archive from the Main Menu via Others --> Archiving ->Archive Old Purchase Orders

RP RentalPo	int 11.3.2.6													
Actions	Reports	Crystal Reports	Assets	Setup	Others	Help								
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					Ch	ange Operator	Ctrl+F3		1	Archive	Old Purcha	se Orde	rs	
					Vie	w Current Operators	carro		/	Archive	Old Invoce	es and Pa	ayments	

Operational Parameter #9 will determine the number of days to hold a received purchase order before it is archived.

RP RentalPoint Version	n 11 Parameter Setu	р			– 🗆 X
Company Nam	Company Name		<b>i</b> Invoicing	Custom Printing	کی Booking Hardcopy
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	View Current Operators			Archive Old In	ivoces a	nd Pay	/ments	
	Operator Reports	۲		Purge Old Red	cords			
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t	Operator Options	۲	un	2018-03-18	08:00	Wed	2018-03-21	

RP	Archive Invoices 📃 🗖 🗙						
Select the da invoices. Arch viewed by ind Invoices and	Select the date range or customer to archive fully paid invoices. Archived invoices and payments can still be viewed by including the 'Archived' option in the Invoices and Payments window.						
Date Scope ✓ Enable Date Scope							
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	✓ OK X Cancel						

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	93	16/05/05	MYTEST00007	80.00	Invoice			80.00			<ul> <li>All dates</li> </ul>
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Payment Amount Applied Settlement Discount											
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All am	ounts shown	in USD.									Cancel / Close

# Purge Old Records

To purge records means to remove/delete them from the RentalPoint database. Ensure you take a backup of your database before purging. Click HERE for more information on backing up RentalPoint

Dnly records that have been in archive for X months will qualify for purging
 If products, customers, or PO's are used on bookings they cannot be purged (since the information is still needed). First purge the booking, then purge the products etc.

Access the Purge option here...

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npn		Open a Second Copy Ctrl+Alt+O		Purge Credit Cards and Customer Fields			elds	
stor		Operator Options	۲	Purge History				

### **Purge Parameters**

Records are archived before purging (see archiving options illustrated in the above segments). Purge criteria is located in the Operational parameter #9 along with Archive Settings. Once configured, you will need to restart RentalPoint for the changes to take effect.

Archive Settings							
Archive Criteria First, determine if bookings need to be returned and/or invoiced before archive. If this doesn't matter, set the option to 'old enough', then all bookings are eligible.							
<ul> <li>Archive Criteria</li> <li>None (old enough)</li> <li>Returned</li> <li>Invoiced</li> <li>Both</li> </ul>							
Days to Hold Before Archiving Second, determine the number of days to hold those bookings before they"re archived. The minimum amount of time to hold bookings is 14 days.							
Months to Keep in Archive Last, determine how many months you want to keep bookings in archive before permanently deleting them. The minimum amount of time to keep bookings in archive is 18 months. To permanently delete bookings you need to run the Purge option from the main menu.							
36	✓ ОК						

### The Purge Window

1. Choose the record type to purge from the drop down list available (Bookings, Customers, Projects, Purchase Orders, Products, Vendors)

2. You may set 'Purge Records Older than X Months' to any number greater than or equal to the #months set in Operational Parameter #9

3. Enter the top number of records you want to see displayed before the actual purge takes place

4. Click List Records to see a list of records that will be purged if you choose to proceed

5. Once the list is displayed, use the select/unselect buttons to select the records you want to purge.

• Eg: 'Select All', then 'Remove Selected' will purge all records in the list

6. Alternatively, if you want to proceed with the purge for only select bookings, then click on the 'Remove box' to the left of each booking you want to purge; once you've selected your bookings,

#### click 'Remove Selected'

RP		1. Purge Old Re	ecords	- <b>D</b> X					
Select Re	Select Record Type Bookings Change Record Type 4.								
Purge Re	Purge Records Older 48 Months 🔶 2.* WARNING - Please create a new backup of your database before purging records. This								
Show To	Show Top 2500 Records 3. and be taken immediately before the purge is run.								
6. 🕞 :	6.								
Remove	Booking No.	Organisation	Return Date	^					
	FREECAN00001	Freescale Semiconductor Canada Inc.	04/14/14						
	FREE00001	Freescale Semiconductor Inc	04/14/14	04/14/14					
	FISK00001	Fisker Automotive Corporate Office & Headqua	arters 04/21/14						
	OTIS00001	Otis Elevator Company	04/28/14	04/28/14					
	OTIS00002	Otis Elevator Company	04/28/14						
	CHESABAR00002	Chesapeake Bar Association Inc	04/28/14						
	TIDEWATR00002	Tidewater Builders Association Inc	04/28/14						
	WOOLPERT00002	WOOLPERT LABS	04/28/14						
	CHESABAR00001	Chesapeake Bar Association Inc	06/05/14						
	ALTMAN00003	BRISTOL-MYERS SQUIBB	06/05/14						
BRIST00022 BRISTOL-MYERS SQUIBB			05/28/14						
	CHESABAR00004	Chesapeake Bar Association Inc	05/28/14						
		l		~					

The software will offer another opportunity to cancel the purge before proceeding - purged records cannot be restored

Warning						
Purged records cannot be restored, please ensure you have a current backup of your database.						
Do you have a current database backup?						
<u>Y</u> es <u>N</u> o						

### Purge Credit Card and Custom Fields

This purge option will remove stored data from the selected contact and customer fields in the database

- Users must have 'Purge old data' operator privilege to use this option
- Fields selected, operator & dates are logged to purgelog (See your <rpdata folder>\logs\purgelog.txt
- Individual bookings, contacts & customers with purged fields are logged to a csv file

This PC > Sy	/stem (C:) ► R	P-Data → Data → CSVLogs				~
	Name	*	Date modified	Туре	Size	
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		Duran Credit Cred Date			x	1
		Purge Credit Card Deta	IIIS			
✓ Purge Credit Cards f	rom Bookings			Purge Fields		
Return date before		23-03-13				
urge contact fields						
Last activity before		23-03-13				
✓ Purge Credit Cards f	rom Contacts					
Drivers License No.		Field Test 6				
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Field Test 2						
Field Test 4						
Field Test 5						
)urge customer fields						
Purge Credit Cards f	rom Customers					
MOBILE		Custom Date 2	Custom Fiel	d 16	<b></b>	
Custom Field 1		Custom True/False 1	<b>1</b>			
Custom Field 2		Custom True/False 2				Н
Custom Field 3		Custom True/False 3				
Custom Field 4		Custom True/False 4				1
Custom Field 5		Custom True/False 5				
Custom Field 6		Custom True/False 6				H
Custom Field 7		Custom True/False 7				
Custom Field 8		Custom True/False 8				H
Custom Field 9		Custom True/False 9				1
Custom Field 10		Custom True/False 10				H
Custom Field 11		Custom Integer 1				
Custom Field 12		Custom Integer 2				H
Custom Field 13		Custom Integer 3				
Custom Field 14		Custom Integer 4				
						101

# Purge History

Purged records are written to a 'Purge History' Excel file accessible as follows:

		RentalPoint 11.3.2.7
Others Help		
Enter Currency Conversion Rate Print Cycle billed Import / Export		
Display Log Files	ta Tima In Data Tima	
Archiving •	Archive Old Bookings	
Utilities •	Archive Old Document Files	
Change Operator Ctrl+F3 View Current Operators	Archive Old Purchase Orders Archive Old Invoces and Payments	
Operator Reports	Purge Old Records	
Open a Second CopyCtrl+Alt+O	Purge History	Bookings
Operator Options		Customers
		Contacts
		Invoices/Credits
		Payments
		Products
		Assets
		Projects
		Purchase Orders

#### OR from the Purge Window

RP			Purge Old Records						
Select Re	Select Record Type Purchase Orders 🔽 Change Record Type								
Purge Re Show Toj	cords Older -	48 Months * WARNIN 2500 Records and be ta	NG - Please create a new backup of your database before purging records. This in a different location than your regular backup to ensure it won't get overwritten ken immediately before the purge is run.						
<b>d</b> :	Select All	X Unselect All	View Log Trecord(s) displayed	J.					
Remove	PO Number	Vendor	Date Expected	-					
	7	Harmon's Audio Visual	05/15/14						
	8	Harmon's Audio Visual	05/15/14						
•	9	Harmon's Audio Visual	05/15/14						
	10	Harmon's Audio Visual	05/15/14						
•	2	Harmon's Audio Visual	05/15/14						
•	3	Christie Digital Systems USA, Inc.	05/15/14						
	4	Altman Lighting Inc.	05/15/14						
	5	James Thomas Engineering	05/15/14						
	6	Harmon's Audio Visual	05/19/14						
	11	Harmon's Audio Visual	08/08/14						
	12	Harmon's Audio Visual	08/08/14						
	13	Harmon's Audio Visual	08/08/14						
				$\sim$					

Sample of purged booking

			Time II	- ID-+- 17	Circa Development Tra	••	Dete
6	<b>∄ ਨਾ</b> ੇਾ ∓					PurgedBoo	kings.csv - Excel
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Pa	tin board	$\begin{bmatrix} Calibri & 11 & A^* & A^* \\ B & I & \underline{U} & \bullet \end{bmatrix} \xrightarrow{\bullet} \begin{bmatrix} A^* & A^* \\ \bullet \end{bmatrix} \xrightarrow{\bullet} \xrightarrow{\bullet} \xrightarrow{\bullet} \xrightarrow{\bullet} \xrightarrow{\bullet} \xrightarrow{\bullet} \xrightarrow{\bullet} \xrightarrow{\bullet}$		▼ 🖶 Wrap Text Ξ 🗄 Merge & Cer	General	▼ .00 →.0	Conditional Form Formatting ▼ Tab
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A1	L 🔻 i	× ✓ f <sub>*</sub> Booking no					
	А	В	С	D	E	F	G H
1	Booking no	Description	Return Date	Purged by	Date Purged		
2	FREECAN00001	Freescale Semiconductor Canada	04/14/14	RP	02/11/19		
2							

#### Purged PO's

<b></b>	· · · ·														late fields
1	H	ۍ <del>ر</del> کې										Pur	gedPOs.	csv - Excel	
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1	1   PC	D#	Descriptio	n			Date Expe	Purged by	Date Purg	ed					
2	2	7	Harmon's	Audio V	/isual		05/15/14	RP	02/11/19						
1 3	3	8	Harmon's	Audio V	/isual		05/15/14	RP	02/11/19						
4	4	9	Harmon's	Audio V	/isual		05/15/14	RP	02/11/19						
1	5	10	Harmon's	Audio V	/isual		05/15/14	RP	02/11/19						
6	5	2	Harmon's	Audio V	/isual		05/15/14	RP	02/11/19						
7	7	3	"Christie E	Digital S	ystems USA	Inc"	05/15/14	RP	02/11/19						
4.															

# Purge Log

A log of all purges run against the database is available from the 'Display log files' menu

, [	Others Help				
	Enter Currency Conversion R Print Cycle billed	ate			_
w	Import / Export		Þ		
Γ	Display Log Files		۲	Error Log	
H	Archiving		F	Archiving Log	_
H	Utilities		۶.	Purge log	) 
C	Change Operator Ctr	Ctrl+F3		Stock Take Log	•
L	View Current Operators			Road case log	6
П	Operator Reports			Performance Log 3	;
Π	Open a Second CopyCtrl+A	lt+O		User Actions Log	;
H	Operator Options		F	License Tracking Log	
F		Mon	10	Startup Log	0
Ŀ		MON	щ	Hotel Master billing log	ð
L	1	Wed	10	Asset log B	6
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	PurgeLog.txt - Notepad
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11.3.2.7 - 02-11-19 @ 17:26:16 - RP	- Start purge of Booking records
11.3.2.7 - 02-11-19 @ 17:26:18 - RP	- Finish purge of Booking records
11.3.2.7 - 02-11-19 @ 17:29:08 - RP	- Start purge of PO records
11.3.2.7 - 02-11-19 @ 17:29:09 - RP	- Finish purge of PO records