

Archive/Purge Records in RentalPoint

Last Modified on 12/05/2023 2:02 pm EDT

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. RentalPoint 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

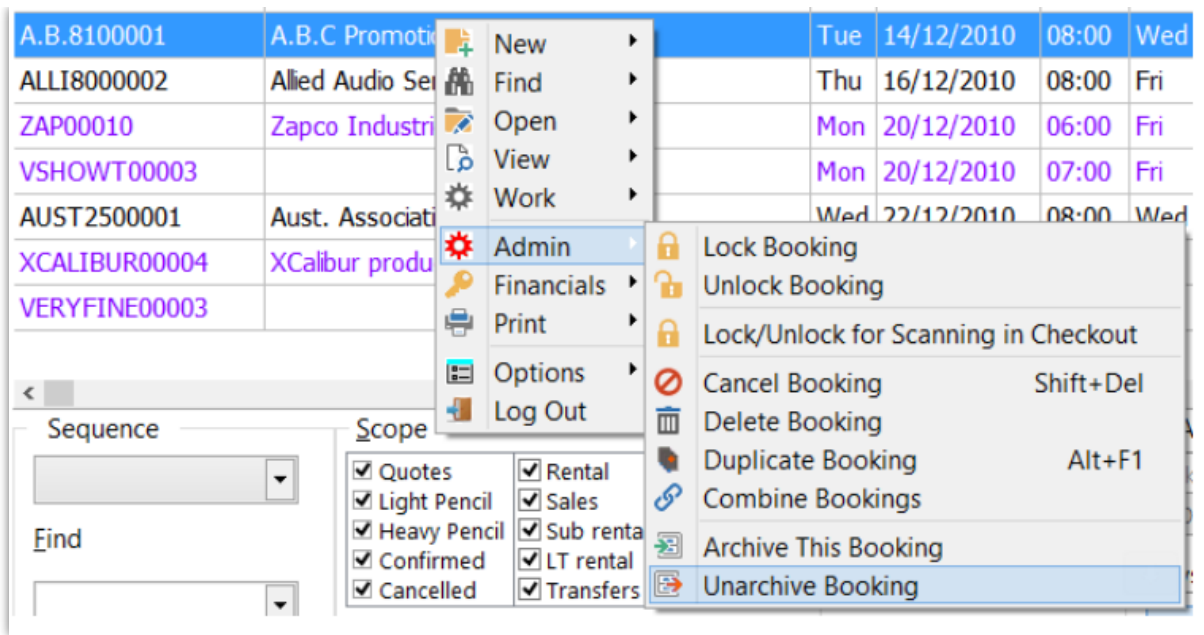
The screenshot shows a 'Scope' filter panel with various checkboxes for booking status and filters. The 'Data to View' section has two radio buttons: 'Current' and 'Archive'. A red arrow points to the 'Archive' radio button, which is selected. Other options include 'All dates', 'Back -90 days', 'Forward +365 days', and 'All Divisions'.

- 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)

The screenshot shows a booking grid with columns for booking ID, description, day, date, time, and status. A context menu is open over a row, showing options like 'New', 'Find', 'Open', 'View', 'Work', 'Admin', 'Financials', 'Print', 'Options', 'Log Out', 'Lock Booking', 'Unlock Booking', 'Lock/Unlock for Scanning in Checkout', 'Cancel Booking', 'Delete Booking', 'Duplicate Booking', 'Combine Bookings', 'Archive This Booking', and 'Unarchive Booking'. The 'Archive This Booking' option is highlighted. Below the grid, the 'Scope' filter panel is visible, with the 'Archive' radio button selected, indicated by a red arrow.

Booking ID	Description	Day	Date	Time	Status
XCALIBUR00003	XCalibur productions and Dry rentals	Mon	13/12/2010	08:00	Thu 16/12
DIOR8600003	Diors and Aldry Events	Tue	14/12/2010	08:00	Wed 15/12
A.B.8100001	A.B.C Promotions P/	Tue	14/12/2010	08:00	Wed 15/12
ALLI8000002	Allied Audio Services	Thu	16/12/2010	08:00	Fri 17/12
ZAP00010	Zapco Industries	Mon	20/12/2010	06:00	Fri 24/12
VSHOWT00003		Mon	20/12/2010	07:00	Fri 24/12
AUST2500001	Aust. Association Of	Wed	22/12/2010	08:00	Wed 22/12
XCALIBUR00004	XCalibur productions				
VERYFINE00003					

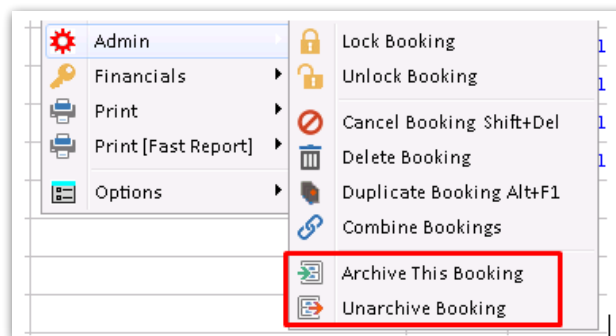
- Un-archive the booking



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 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.

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 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.

120

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

✓ OK

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 be 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

- 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

RP Modify booking

Out 18/09/27 0800 In 18/09/28 0800 MYTEST00075 Location 0 - Toronto

Customer Calendar Venue Equipment Crew Notes Payments Attachments Other Details Status Followup

Payment

Payment Terms
30 day account

Payment Options
No Charge

Payment Method Surcharge %
0.00

Authorized By

Terms for Multiple Stage Invoicing
<none> Default

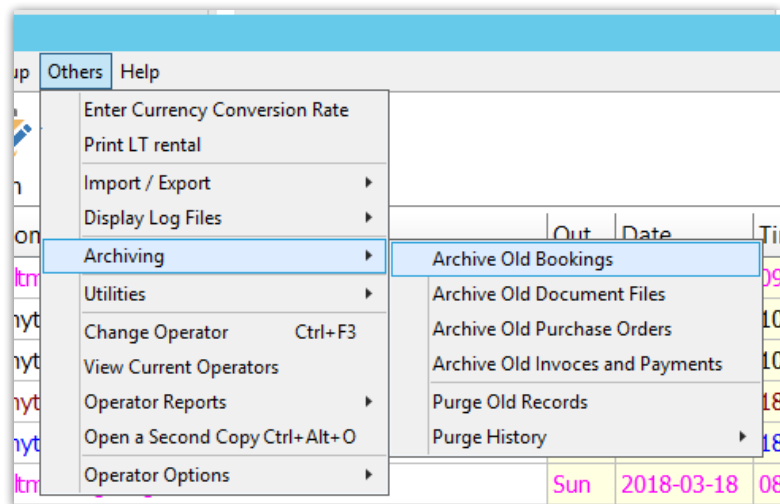
Balance
Total Price 150.00 Minus Pre-payments 0.00 Balance 150.00

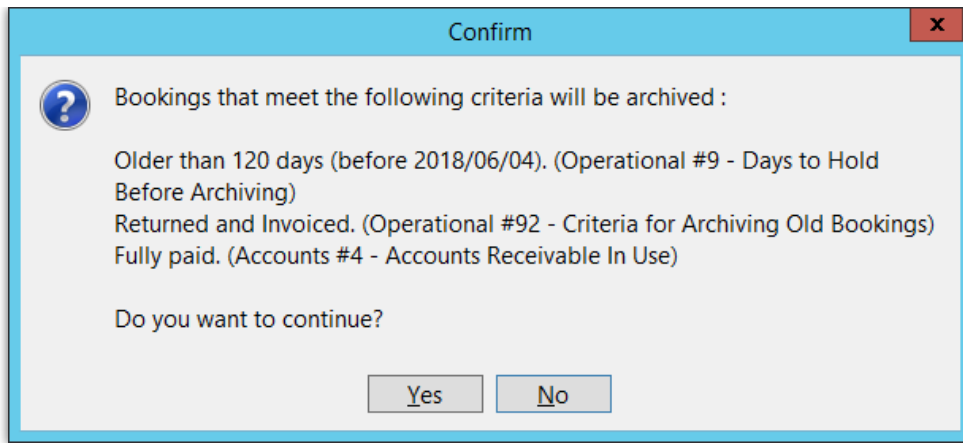
Enter a Pre-payment

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.





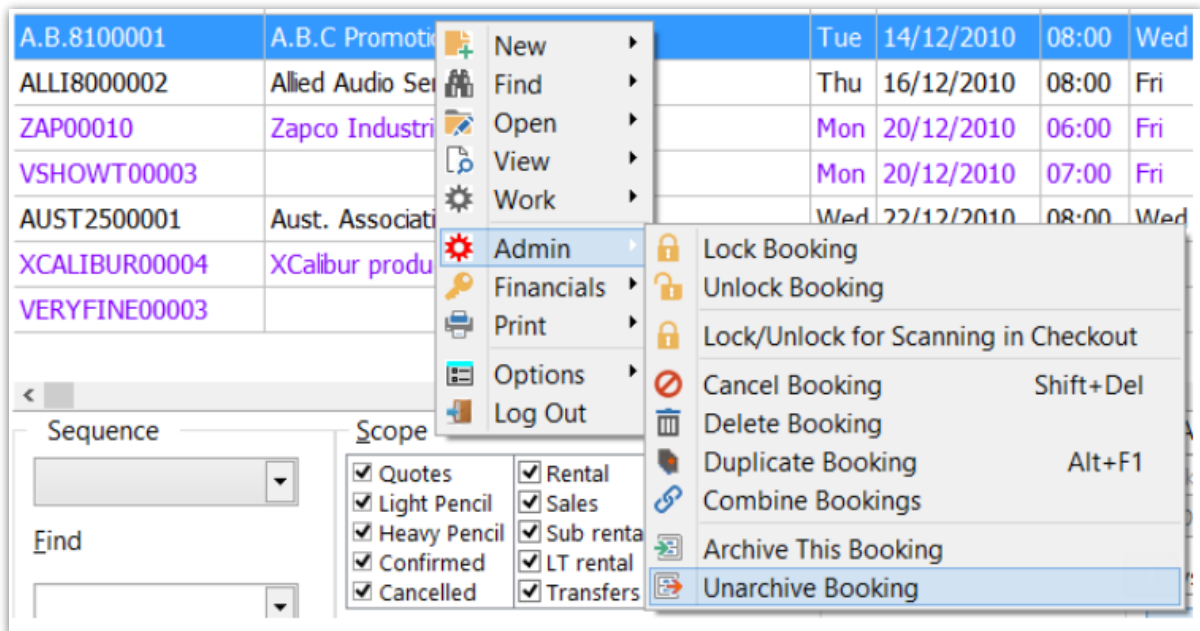
Once complete you can see which bookings were archived in the session by viewing the **Archiving Log** viewable from the **Others>Display Log Files** menu.

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

Restore from Archive

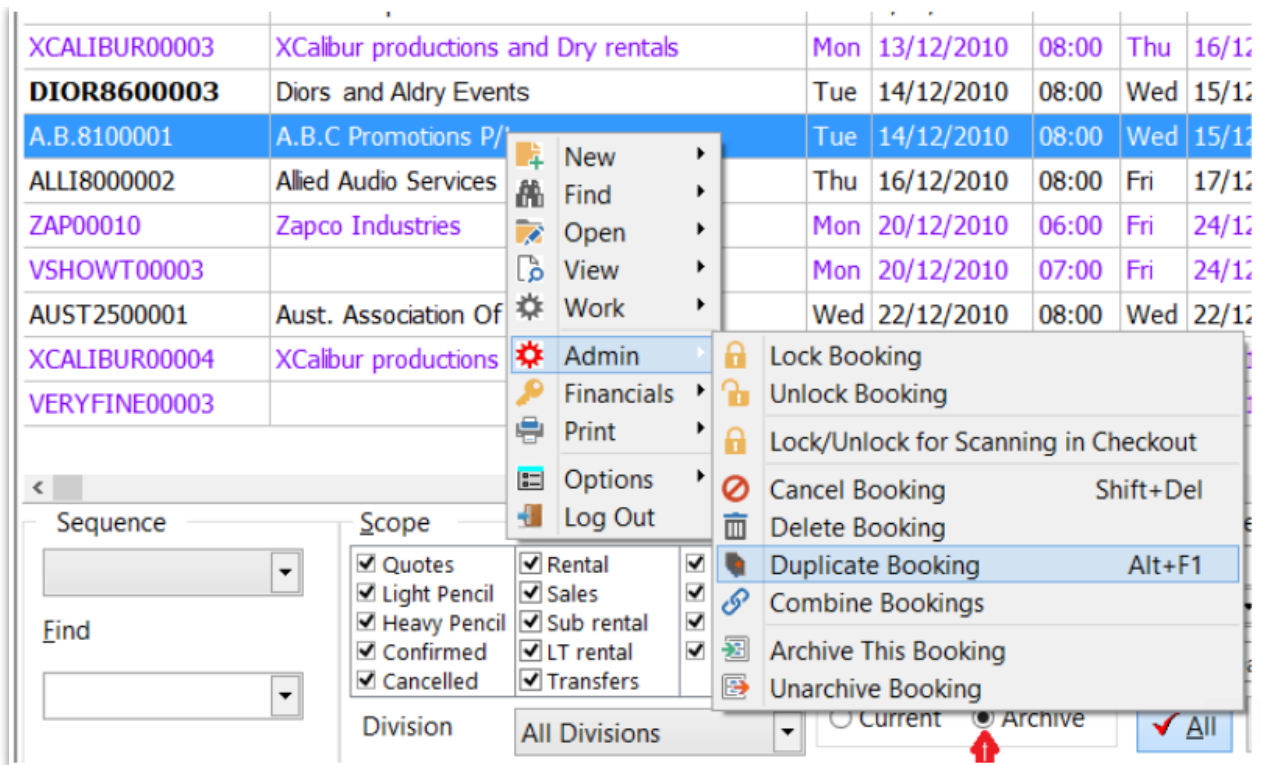
Once a booking is archived, it is moved into another area of the program called the Archive view. These bookings can no longer be directly accessed, but you can un-archive selected bookings.

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.



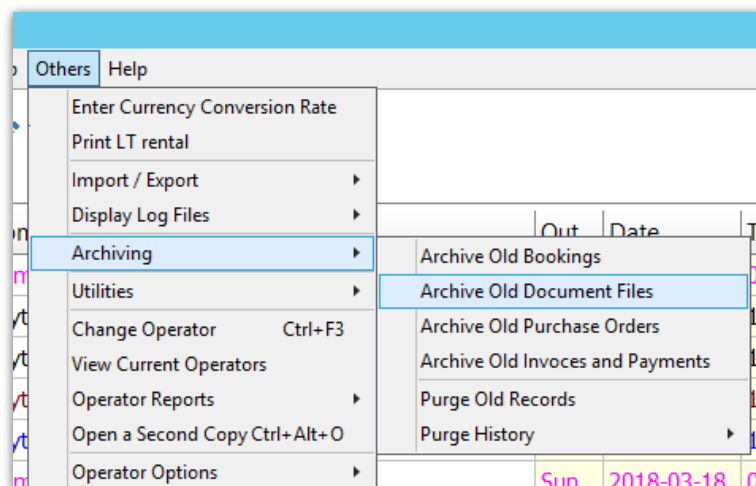
Duplicate from Archive

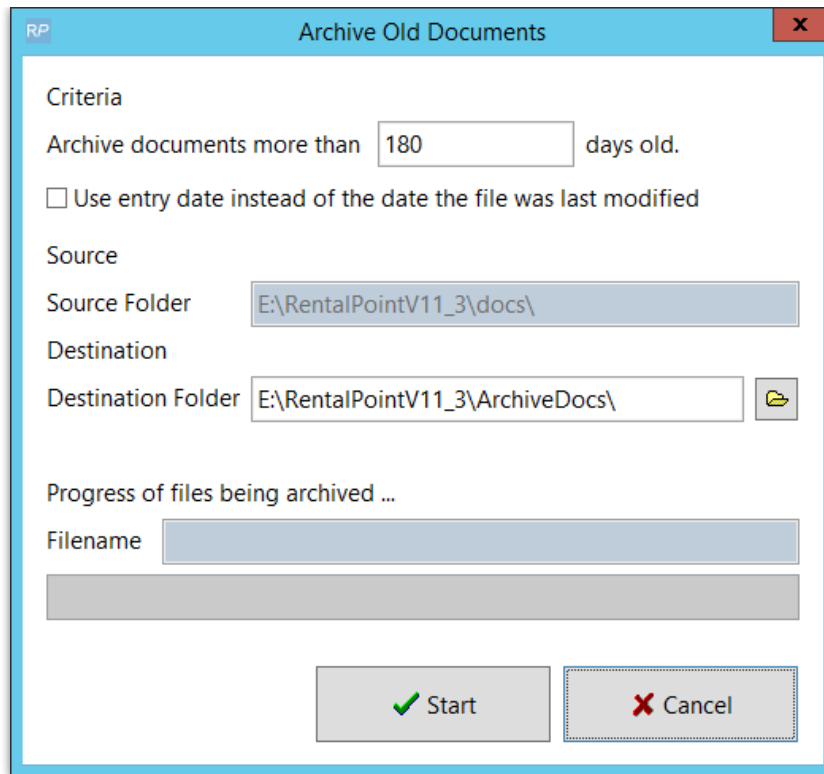
You can also duplicate from the archive area and RentalPoint will create a new booking with the exact same information and you can also print an archived booking using the booking hardcopy option.



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.

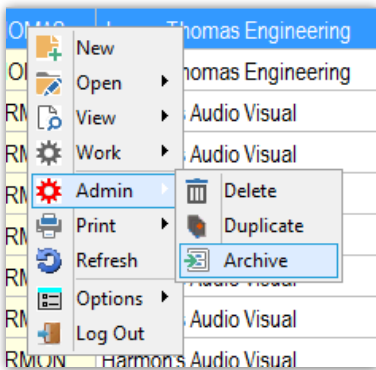




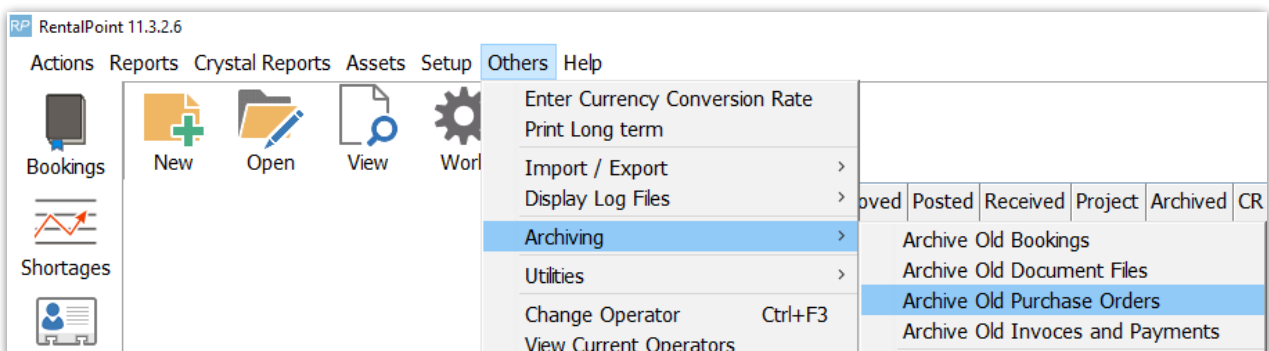
Archive PO's

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

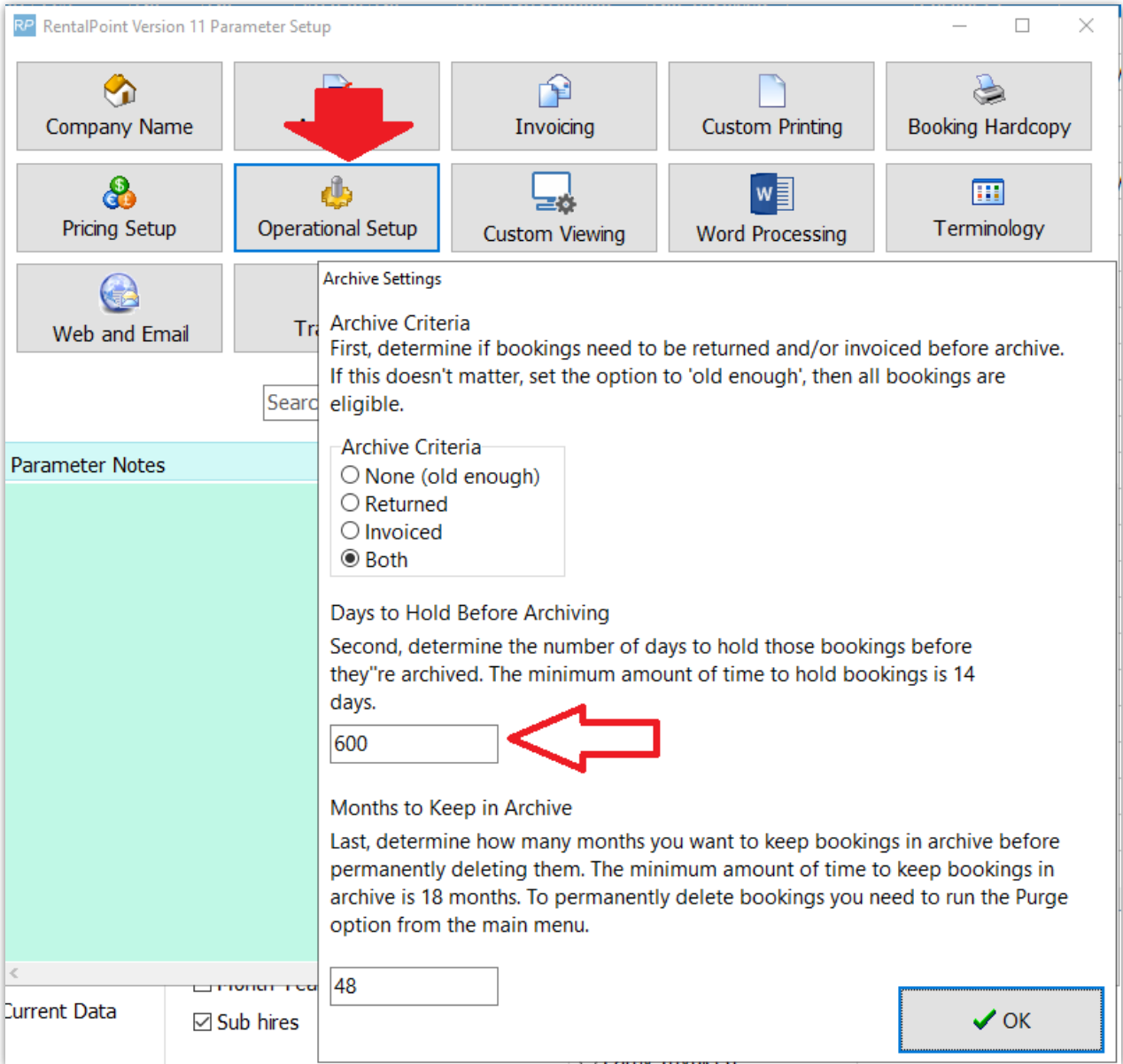
Archive a single received purchase order from the Purchase Order Grid via right click on the order-->admin-->archive



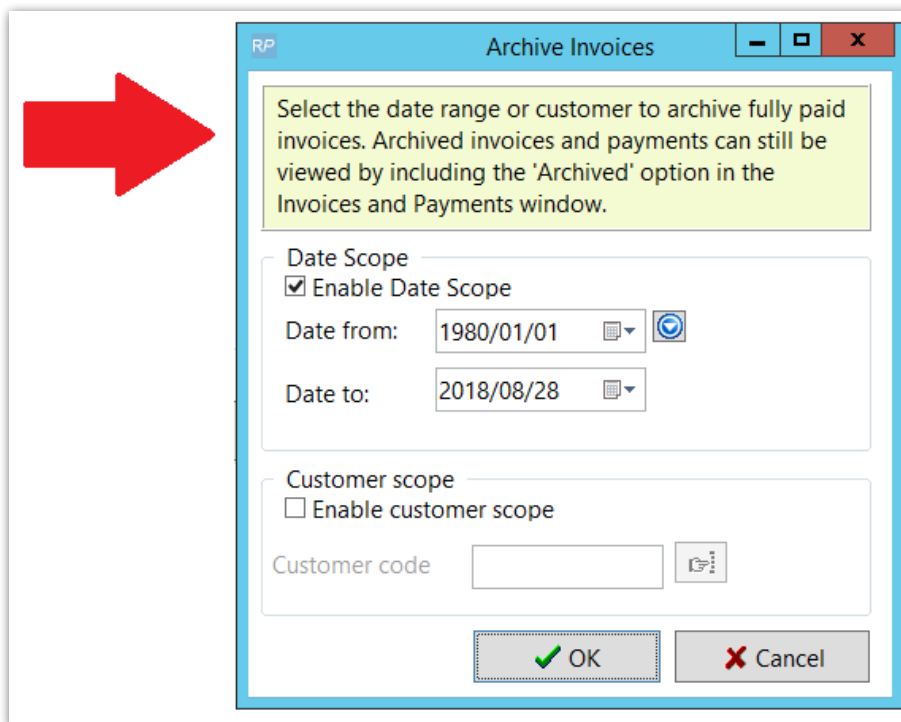
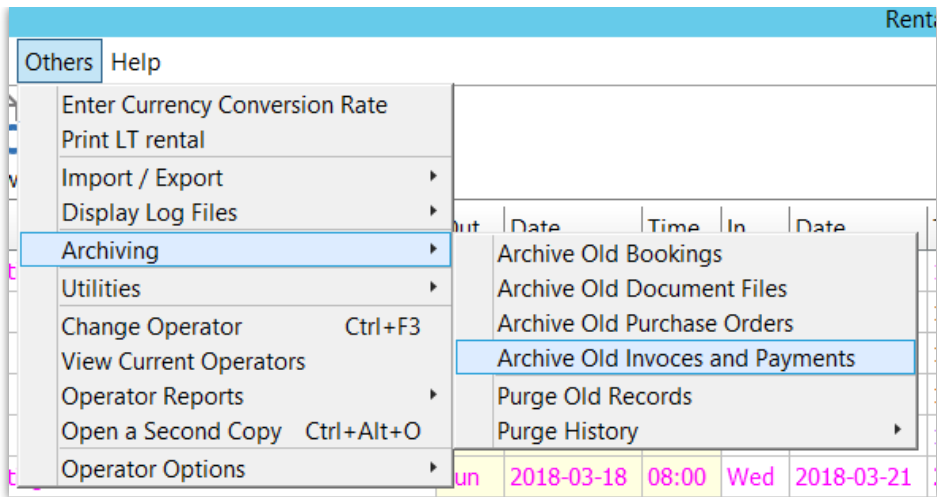
Batch archive from the Main Menu via Others --> Archiving ->Archive Old Purchase Orders



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



Archive Invoices



Account Payment - MYTEST - mytest

Payment Details | **Invoices and Payments** | Security Deposits

Account Balances

90 days+	60 days	30 days	Current	Total Due	Payments (last 30 days)
582,142.50	452.53	0.00	-9,917.71	572,677.32	10,370.24

Tag	Invoice No.	Date	Ref.	Amount	Type	Amount Credited	Credit Date	Outstanding	Check/Card #	Pay Type
0		17/03/23		100.00	Pre-Payment					Check
		17/07/27		9,870.24	Pre-Payment					Check
		17/03/23		100.00	Pre-Payment					Check
		17/03/23		100.00	Pre-Payment					Check
		17/03/23		100.00	Pre-Payment					Check
		17/03/23		100.00	Pre-Payment				10120	Check
<input type="checkbox"/>	91	16/04/28	MYTEST00008	129.76	Invoice			129.76		
<input type="checkbox"/>	92	16/05/04	MYTEST00008	64.88	Invoice			64.88		
<input type="checkbox"/>	93	16/05/05	MYTEST00007	80.00	Invoice			80.00		
<input type="checkbox"/>	94	16/05/05	MYTEST00007	120.00	Invoice			120.00		
<input type="checkbox"/>	95	16/05/05	MYTEST00007	132.85	Invoice			132.85		
<input type="checkbox"/>	100	16/05/26	MYTEST00004	64.55	Invoice			64.55		

Scope

- Invoices
- Credits
- Pre-payments
- Payments

Start Date: --/--

End Date: --/--

Age to Display

- Last 12 months
- Last 6 months
- Last 3 months
- Select dates
- All dates

Include Archived

Sort By

- Invoice No.
- Invoice Date

Re-apply Reverse Credit Convert Delete Properties Options

Memo Orig. Deposit Date 17/03/23

Current Payment Status

Payment Amount	Amount Applied	Settlement Discount
0.00	0.00	0.00

All amounts 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

 Only 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...

Others Help

- Enter Currency Conversion Rate
- Print LT hire
- Import / Export
- Display Log Files
- Archiving
 - Archive Old Bookings
 - Archive Old Document Files
 - Archive Old Purchase Orders
 - Archive Old Invoices and Payments
 - Purge Old Records
 - Purge Credit Cards and Customer Fields
 - Purge History
- Utilities
- Change Operator Ctrl+F3
- View Current Operators
- Operator Reports
- Open a Second Copy Ctrl+Alt+O
- Operator Options

Web Address Phone 1 Salesperson

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.

<p>Archive Criteria</p> <p><input type="radio"/> None (old enough)</p> <p><input type="radio"/> Returned</p> <p><input type="radio"/> Invoiced</p> <p><input checked="" type="radio"/> Both</p>	<p>Accounts #4 - Accounts Receivable is enabled. Bookings must be invoiced and fully paid before they are archived.</p>
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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.



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'

The screenshot shows the 'Purge Old Records' dialog box. It includes a 'Select Record Type' dropdown set to 'Bookings', a 'Purge Records Older' field set to '48 Months', and a 'Show Top' field set to '2500 Records'. A 'Change Record Type' button is visible. A red warning box contains the text: 'WARNING - Please create a new backup of your database before purging records. This should be in a different location than your regular backup to ensure it won't get overwritten and be taken immediately before the purge is run.' Below the fields are buttons for 'Select All', 'Unselect All', 'View Log', and 'Remove Selected'. A table of records is displayed below the buttons, with columns for 'Remove', 'Booking No.', 'Organisation', and 'Return Date'. The 'Remove Selected' button is highlighted with a red arrow labeled '5'. Other red arrows point to the 'Select Record Type' dropdown (1), the 'Purge Records Older' field (2), the 'Show Top' field (3), the 'Select All' button (6), and the 'Change Record Type' button (4). The text '44 record(s) displayed.' is shown on the right side of the dialog.

Remove	Booking No.	Organisation	Return Date
<input type="checkbox"/>	FRECAN00001	Freescale Semiconductor Canada Inc.	04/14/14
<input type="checkbox"/>	FREE00001	Freescale Semiconductor Inc	04/14/14
<input type="checkbox"/>	FISK00001	Fisker Automotive Corporate Office & Headquarters	04/21/14
<input type="checkbox"/>	OTIS00001	Otis Elevator Company	04/28/14
<input type="checkbox"/>	OTIS00002	Otis Elevator Company	04/28/14
<input type="checkbox"/>	CHESABAR00002	Chesapeake Bar Association Inc	04/28/14
<input type="checkbox"/>	TIDEWATR00002	Tidewater Builders Association Inc	04/28/14
<input type="checkbox"/>	WOOLPERT00002	WOOLPERT LABS	04/28/14
<input type="checkbox"/>	CHESABAR00001	Chesapeake Bar Association Inc	06/05/14
<input type="checkbox"/>	ALTMAN00003	BRISTOL-MYERS SQUIBB	06/05/14
<input type="checkbox"/>	BRIST00022	BRISTOL-MYERS SQUIBB	05/28/14
<input type="checkbox"/>	CHESABAR00004	Chesapeake Bar Association Inc	05/28/14

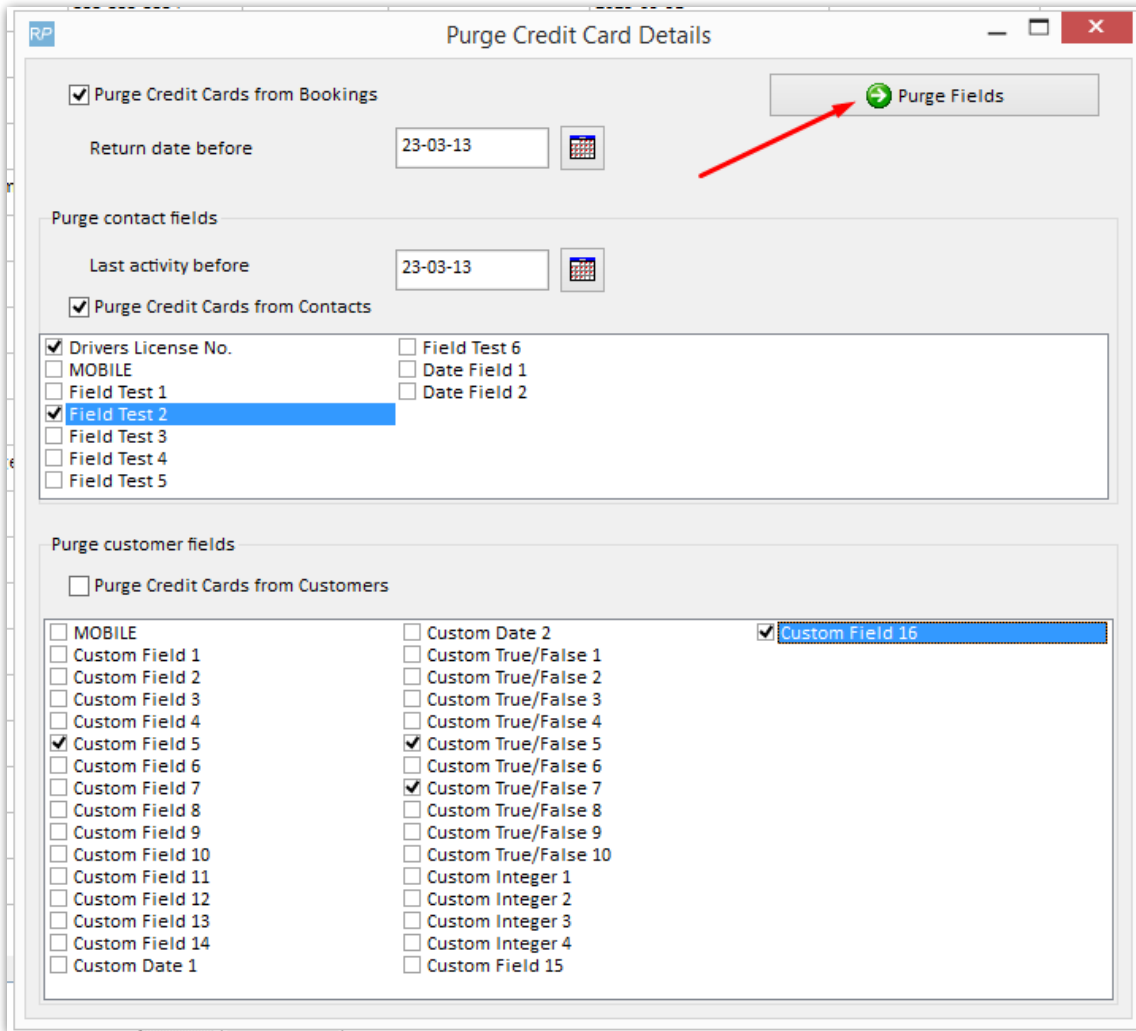
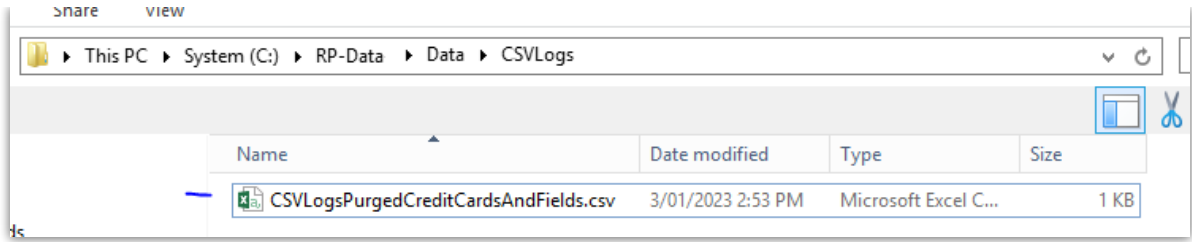
The software will offer another opportunity to cancel the purge before proceeding - purged records cannot be restored

A warning dialog box with a yellow warning icon. The text reads: 'Purged records cannot be restored, please ensure you have a current backup of your database. Do you have a current database backup?' Below the text are two buttons: 'Yes' and 'No'.

Purge Credit Card and Custom Fields

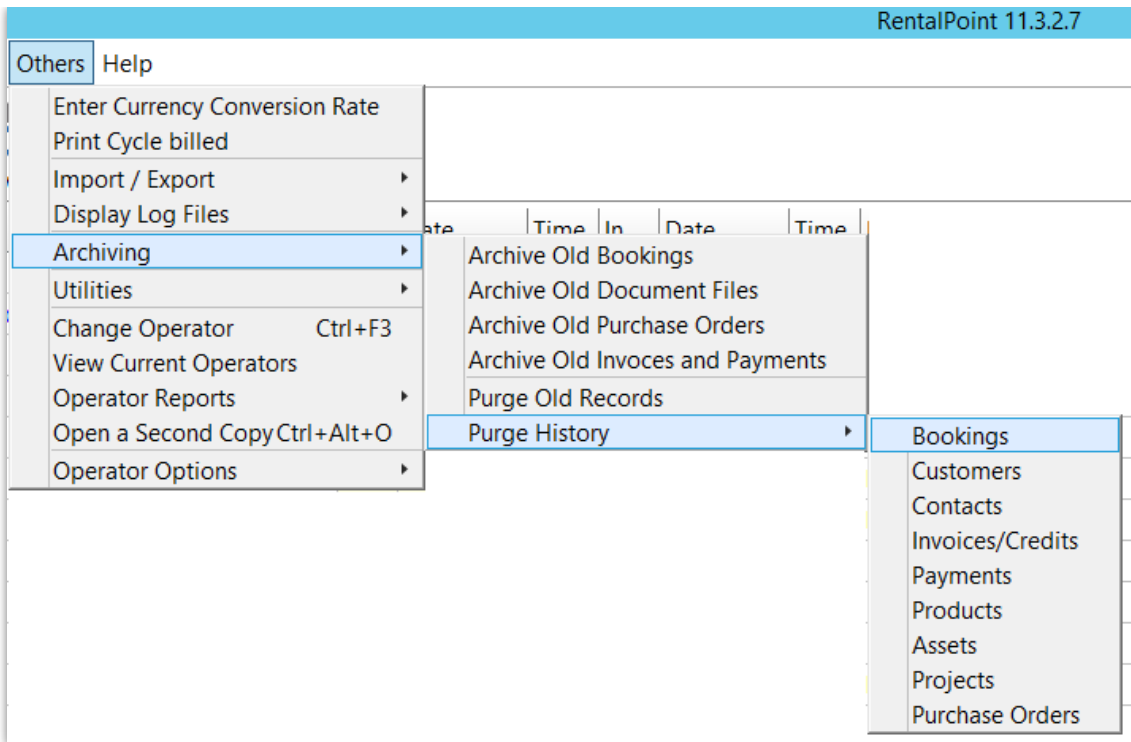
This purge option will remove stored data from the selected contact and customer fields in the database

- 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

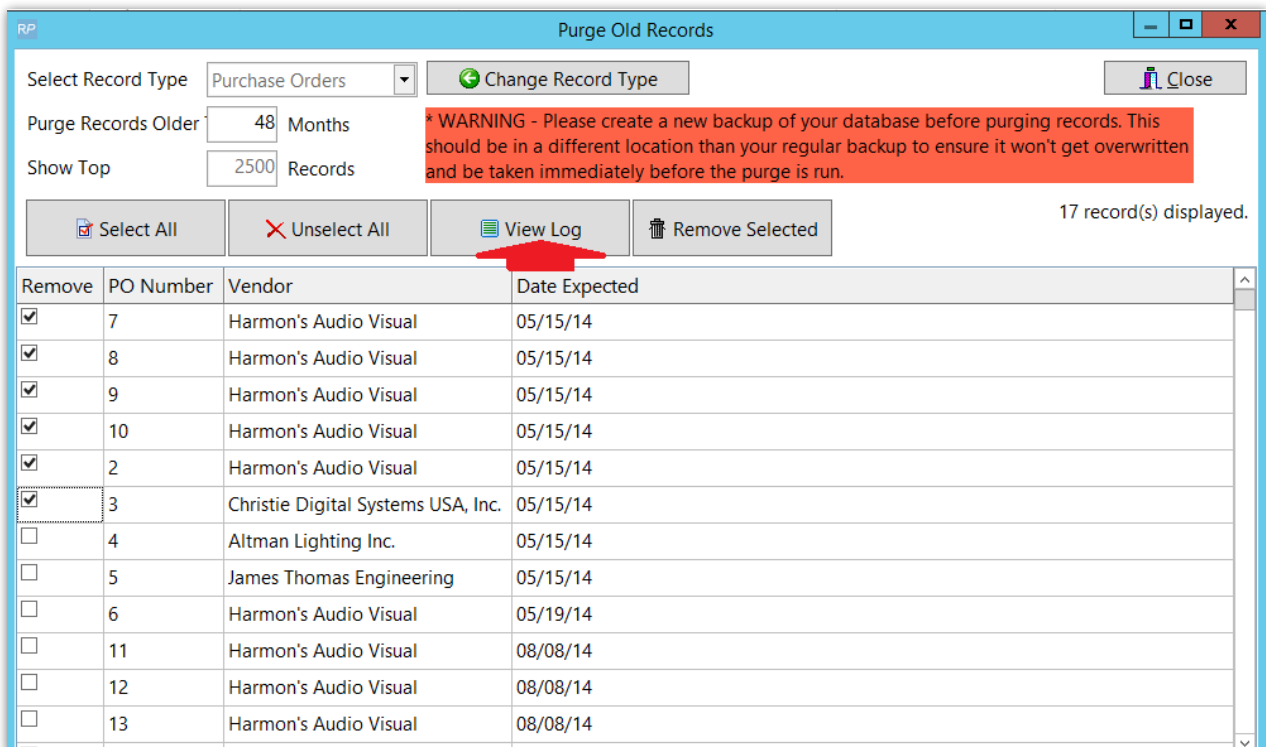


Purge History

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



OR from the Purge Window



Sample of purged booking

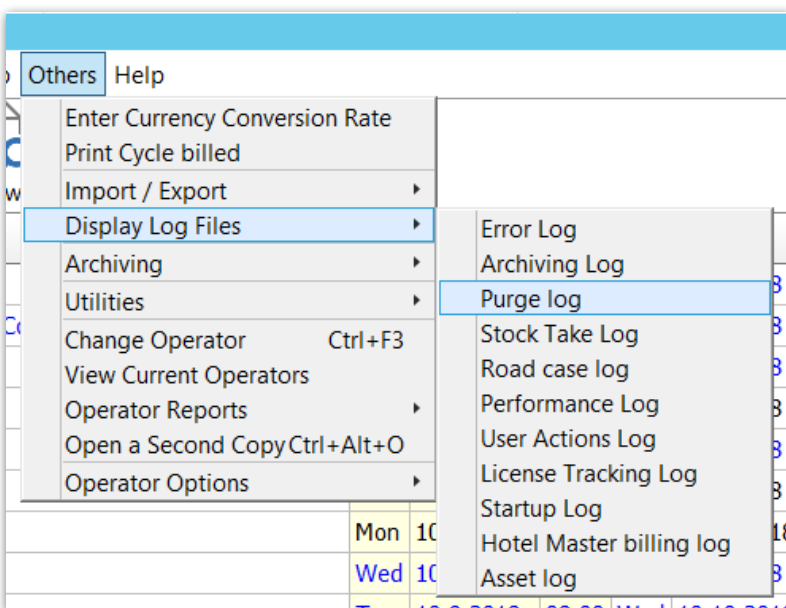
Booking no	Description	Return Date	Purged by	Date Purged
FREECAN00001	Freescale Semiconductor Canada	04/14/14	RP	02/11/19

Purged PO's

PO #	Description	Date Expe	Purged by	Date Purged
7	Harmon's Audio Visual	05/15/14	RP	02/11/19
8	Harmon's Audio Visual	05/15/14	RP	02/11/19
9	Harmon's Audio Visual	05/15/14	RP	02/11/19
10	Harmon's Audio Visual	05/15/14	RP	02/11/19
2	Harmon's Audio Visual	05/15/14	RP	02/11/19
3	"Christie Digital Systems USA Inc"	05/15/14	RP	02/11/19

Purge Log

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




```
PurgeLog.txt - Notepad
File Edit Format View Help
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
```