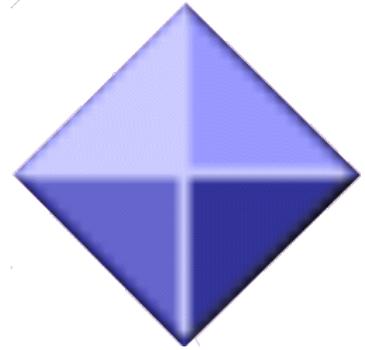


# Purge History Utility

Version 6.9.0

By Musick International, Inc.



## Overview

Have a large Sage 300 database that has 10, 20 or 30 years of history. Need to remove the history quickly and completely? Purge History Utility is the product for you.

Account Type	Checked
AP	<input checked="" type="checkbox"/>
AR	<input checked="" type="checkbox"/>
Bank	<input checked="" type="checkbox"/>
GL	<input checked="" type="checkbox"/>
IC	<input checked="" type="checkbox"/>
OE	<input checked="" type="checkbox"/>
PO	<input checked="" type="checkbox"/>
Tax	<input checked="" type="checkbox"/>
CP	<input checked="" type="checkbox"/>
UP	<input type="checkbox"/>

Purge History Utility will remove all detail transactions, posting journals, audit lists, batch lists, IC history, PO history, item valuation, paid invoices in AP and AR, GL posted transactions and the tax audit list. All OE invoices, shipments and orders are removed based on the order header order date. All PO invoices, receipts and orders are removed based on the PO order header order date.

### **Compatibility**

Compatible with Sage 300 2022, 2021, 2020, 2019, 2018, 2017, 2016, 2014, 2012, v6.0. All of the core modules are supported: Accounts Payable, Accounts Receivable, General Ledger, Inventory Control, Order Entry, Purchase Orders, Project Job Costing, Bank Services and Tax Services.

### **Installation**

Download and install the latest release of either FixIT or DataCHECK. In the folder where FixIT is installed (default is C:\FixITcc), run the install program "PurgeHistoryInstall.exe". We recommend running the install and application using "Run As Administrator".

### **Connect FixIT or DataCHECK**

The Purge History requires the database connection to be created in FixIT or DataCHECK. Start FixIT and verify the connection to the company. If the company is not listed on the "Validate" screen, select the "Locate" icon on the left toolbar. Change to "Locate Data using FixIT Path" as the default and click "New" to add a new connection to the company database. "Apply" the changes and verify the database is available.

### **Running the Purge History**

Before running the Purge History, verify the company database is available in FixIT. Launch the PurgeHistory.exe from "Start" – "Programs" – "Musick International, Inc" – "Purge History".

Purge History v6.9.0 2022-01-18

Company: [SAMLTD] Sage 2022 Sample Company Limited

# Years to Keep: 7 Current Fiscal Year: 2023

Purge History up to & including: 2016 2016-06-30

Purge History	Application	Checked
<input checked="" type="checkbox"/>	AP	✓
<input checked="" type="checkbox"/>	AR	✓
<input checked="" type="checkbox"/>	Bank	✓
<input checked="" type="checkbox"/>	GL	✓
<input checked="" type="checkbox"/>	IC	✓
<input checked="" type="checkbox"/>	OE	✓
<input checked="" type="checkbox"/>	PO	✓
<input checked="" type="checkbox"/>	Tax	✓
<input checked="" type="checkbox"/>	CP	✓
<input type="checkbox"/>	UP	☐

Use Settings File Select All Select None

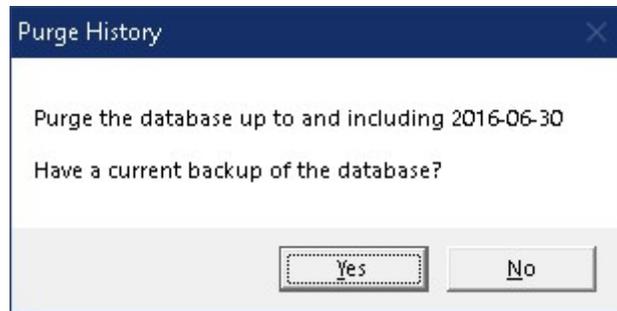
Purge History Exit

Select the company from the drop down list at the top of the screen. If your company is not in the list, verify the company database is available in FixIT or DataCHECK.

Enter the “# Years to keep”. This will automatically select the last period of the fiscal year and the last end date of the year in the Sage Fiscal Calendar.

The “Purge History” options will allow selection of the applications to be included in the purge. A checked box indicates the respective application will be purged. An un-checked box for an application will be ignored. For example, to exclude the AR from being purged, un-check the box next to “AR”. Note: Accounts Payable and Accounts Receivable will only purge paid invoices.

Once selection is complete, click "Purge History" to initiate the purge.



The Purge History permanently removes records from the database and this process cannot be undone. Verify you have a valid backup before continuing. If a valid backup has been made, click “Yes” to continue.

The Purge History will spin through the database and remove all the historical records up to and including the year/date “Purge History up to & including”.

Once the process has completed, the following message will display:



Click 'OK' to clear this message.

Notepad will launch a report with results of the Purge History. Please review the report.

A screenshot of a Notepad window. The title bar reads "PurgeHistory\_SAMLTD\_[SAMLTD] Sage 2022 Sample Company Limited \_2022-01-19 11:54-23.Log - Notepad". The menu bar includes "File", "Edit", "Format", "View", and "Help". The text content of the report is as follows:  
Company: [SAMLTD] Sage 2022 Sample Company Limited  
Purge History upto & including fiscal year: 2016 and/or fiscal year end date: 2016-06-30  
  
Starting Purge History: 2022-01-19 11:54:23 AM  
  
Clear AP Started: 2022-01-19 11:54:23 AM  
Clear AP Invoice Batches Count: 2487 - new count: 2487 - cleared: 0 - 0.00% savings  
Clear AP Payment/Adj Batches Count: 292 - new count: 292 - cleared: 0 - 0.00% savings  
Clear AP Transactions Count: 3432 - new count: 3432 - cleared: 0 - 0.00% savings  
Clear AP Vendors Count: 0 - new count: 0 - cleared: 0  
Clear AP Posting Journals 1 Count: 0 - new count: 0 - cleared: 0  
Clear AP Posting Journals 2 Count: 6010 - new count: 6010 - cleared: 0 - 0.00% savings  
Clear AP Posting Journals 3 Count: 0 - new count: 0 - cleared: 0  
Clear AP Posting Journals 4 Count: 0 - new count: 0 - cleared: 0  
Clear AP Finished: 2022-01-19 11:54:24 AM  
  
Clear AR Started: 2022-01-19 11:54:24 AM  
Clear AR Invoice Batches Count: 5300 - new count: 5300 - cleared: 0 - 0.00% savings  
Clear AR Receipt/Adj Batches Count: 569 - new count: 567 - cleared: 2 - 0.35% savings  
Clear AR Refund Batches Count: 6 - new count: 6 - cleared: 0 - 0.00% savings  
Clear AR Transactions Count: 6063 - new count: 6063 - cleared: 0 - 0.00% savings  
Clear AR Receipt Trans Count: 238 - new count: 238 - cleared: 0 - 0.00% savings  
Clear AR Customers Count: 0 - new count: 0 - cleared: 0  
Clear AR Posting Journals Count: 15189 - new count: 15189 - cleared: 0 - 0.00% savings  
Clear AR Statements Count: 0 - new count: 0 - cleared: 0  
Clear AR Finished: 2022-01-19 11:54:26 AM  
  
The status bar at the bottom shows "Ln 1, Col 1", "100%", "Windows (CRLF)", and "UTF-8".

### **Verify the Database**

There are factors (such as data corruption) beyond the control of the Purge History. We do our best to anticipate and trap various issues, but a quick validation of the Sage 300 data will ensure the database was purged as specified. Run the Sage 300 Data Integrity Check as well as various reports to verify the accuracy of the database.



Thank You for selecting Musick International, Inc.

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