

AVM-2000 - Purge & Archive Instructions

CTI's Purge & Archive feature will remove old records you may not want to keep from your AVM-2000 system.

The Purge & Archive function "moves" the records you select into an archive file in case you want to refer to them at a later date.

Please review the details below **before** using the Purge & Archive feature of the AVM-2000.

- The Purge/Archive function will **delete** specific files you select in advance from the AVM-2000 software system for a specific date range and move them to an archive file. You will need to choose a "Purge" Date. All records prior to this date will be purged.
- This function is **irreversible!** All files purged and archived can **never** be accessed again with the AVM-2000 software!
- You will have options for purging the files listed below. Each time you use the purge and archive function, the archived DBF files will be placed in a new directory/folder onto the C:\ drive of the computer/workstation where the purge/archive is performed – not the server. The archived DBF files may be opened and viewed in MS Excel, etc., but they CANNOT be imported back to the AVM-2000 program. All files purged and archived can never be accessed again with the AVM-2000 software!

- Purging the file types below will remove ALL records prior to the date you have entered:

• Inventory History	• Log Book Stickers
• Customer Adjustments	• W & B – Fixed
• Customer Credit Memos	• W & B – Rotary
• Vendor Adjustments	• Warranty Applications
• 337's	• Warranty Claims
• 8130's	•

- Purging the following file types requires choosing the "status" of records you wish to purge:

• Customer History	• Work Orders
• Vendor History	• Invoices
• Quotes	• PO's & Expenses

- **Customer History** – allows purging ALL records prior to the date entered (by removing the checkmark) OR purging only records which have been "Closed/Cleared" (Payments have been posted to the account to cover the open Invoices and the items have been Cleared using the Customer Payments function.)
- **Vendor History** - allows purging ALL records prior to the date entered (by removing the checkmark) OR purging only records which have been "Closed/Cleared" (Payments have been posted to the account to cover the open PO's & Exps. and the items have been Cleared using the Vendor Payments function.)
- **Quotes** - allows purging ALL records prior to the date entered (by removing the checkmark) OR purging only records where the Status field is marked "Completed"

- **Work Orders** - allows purging ALL records prior to the date entered (by removing the checkmark) OR purging only records that have been CLOSED
- **Invoices** - allows 1) purging ALL records prior to the date entered (by removing BOTH checkmarks) OR 2) purging records which have been "Posted"; but NOT "Cleared" (by removing the CLEARED checkmark) OR 3) purging records which have been "Cleared" (leave ALL checkmarks). (CLEARED indicates that payments have been posted to the account to cover the open Invoices and the items have been Cleared using the Customer Payments function.)
- **PO's & Expenses** - allows 1) purging ALL records prior to the date entered (by removing BOTH checkmarks) OR 2) purging records which have been "Posted"; but NOT "Cleared" (by removing the CLEARED checkmark) OR 3) purging records which have been "Cleared" (leave both checkmarks). (CLEARED indicates that payments have been posted to the account to cover the open PO's & Expenses and the items have been Cleared using the Vendor Payments function.)

NOTE: Depending on the number of files you will be purging, you may wish to leave the purge running overnight. This could take several hours to be completed for large systems.

Please follow the step-by-step instructions below to properly purge and archive your AVM-2000 data. It is important to proceed carefully with each instruction to prevent unwanted difficulties with your AVM-2000 data.

Before performing the purge and archive, you will need to do a complete backup of your AVM-2000 data. (You may use the Backup Utility included in the AVM-2000, under the Admin Menu > Utilities > Backup Data. This function will allow you to backup to a zip or tape cartridge; another directory on your computer; another computer on your network; or to floppy disks.) You may also copy the entire AVM-2000 folder (on the Server for multi-user versions) to a zip cartridge or tape, etc.

CTI CANNOT BE RESPONSIBLE FOR ANY DATA LOST DURING THE PURGE/ARCHIVE.

It is your responsibility to backup your AVM-2000 data and verify that the backup data is okay.

- 1) All other users must be out of the AVM-2000 before you begin.
- 2) Perform a COMPLETE BACKUP of the entire AVM2000 directory
- 3) Go to the Admin > Utilities > Purge/Archive menu option
- 4) Click the ANALYZE button
- 5) Select a date to purge everything prior to
- 6) Place a checkmark next to each of the types/status of files that you wish to purge
- 7) Type the name of the file into the text field to the right of the checkbox (Example: Inventory History files to be purged must have a checkmark in the checkbox, and you must type **Inventory History** in the text field to the right of the checkmark) Text turns green when entry is accepted.
- 8) Repeat step 7 above for all files you wish to purge and archive
- 9) Click the Purge Now button located next to the Purge Date
- 10) Once complete, you can check the "Log" to see which files were purged, and how many records in each file were purged.

Please contact CTI with any questions or concerns that you may have with the Purge and Archive function.