



How to Purge Deleted Master Table Records

Purging Equipment or Inventory Master Table records via Data Table Utilities:

- Verify with your legal and accounting requirements before proceeding as some records should never be purged (i.e. vehicles involved in a fatal accident.)
- Deleting records must be done after running a period close while purging records can be done whenever.
- Purging a Master Table will only affect that Master Table file. Repair, fuel, and inventory transactions associated to the record being purged are unaffected.
- Users must have the Utilities access right for their CFAWin8 User ID in order to access Data Table Utilities.
- **All other users MUST be out of CFA when Data Table Utility changes are being made!**
- **Inquire from CFA on suggested steps for purging equipment numbers which will be reused.**

I. Delete Records:

1. *Mark a record Deleted by selecting the record and clicking Delete (red "x" icon)*
 - i. There **MUST BE** no transactions for the record in the current period

II. Verify Records To Be Deleted:

1. *Run either Equipment Id List – Condensed or Inventory Id List – Condensed report*
 - i. Set the "Servind" or "Part# Status" Select Filter to Deleted records only
 - ii. Run the report
 - iii. All records marked deleted in the associated master table will be purged
 - iv. Note the total records in the report

III. Purge Deleted Records:

1. *Verify a recent **Full Backup** of your CFAWin8 data exists before proceeding*
 - i. You may need to coordinate with your IT department
2. *Close all windows within CFAWin8*
3. *Access Tools -> Data Table Utilities*
4. *Select the Table Maintenance tab*
5. *Check the Purge field for the table you are going to purge*
 - i. EQPMAST = Equipment Table
 - ii. INVPARTMAST = Inventory Table
 - iii. Note the Total Records value
6. *Click Start (green-light icon)*



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7. A CFAWin8 message will appear: 'Purge' of 'XXXXXXX' will permanently remove all records flagged as 'Deleted'. It WILL ALSO remove records with the same 'XXXXXXX' from: (list of associated files). Related records in other data tables WILL NOT be adjusted, cleared, or deleted. Continue 'Purge'?
 - **NOTE:** If a message other than the one listed appears, **DO NOT PROCEED!** Contact CFA Software Support Services.
 - i. Click **Yes** to proceed with the purge.
 - If you clicked **Yes**, the following CFAWin8 message will appear: *Purge Deleted Records – XXXXXXXX successful. Click OK.*
 - ii. Click **No** to cancel the purge.
 - If you clicked **No**, the following CFAWin8 message will appear: *Purge Deleted Records – XXXXXXXX canceled by 'Username'. NOTE: The changes that you made cannot be saved.*
8. Verify the Total Records field reflects the difference between the Total Records before the purge and the total records set to Deleted from section II. Verify Records To Be Deleted.