



## How to Purge Deleted Transaction Header Records

### Purging Repair Order or Purchase Order Header records via Data Table Utilities:

- **ALL** detail lines **MUST BE** deleted before the header can be marked as deleted.
- Posted detail lines on Repair Orders or Purchase Orders can't be deleted.
- Purging a Header Table will only affect that Header Table file. Master Table records 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!**

#### I. Delete Detail Lines:

1. Click the gray rectangle on the far left of the detail line to highlight the row in black
2. Click Delete (red "x" icon) to remove the line
3. Repeat steps 1 & 2 until all detail lines are removed from the order

#### II. Delete Orders:

1. Select the header record and click Delete (red "x" icon)

#### III. Verify Orders To Be Deleted:

1. Sort by the Repair Order or Purchase Order Status field
2. Count the Orders marked as Deleted
  - i. Orders without detail lines will not display in any reports

#### IV. Purge Deleted Orders:

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. ROHEADER = Repair Order Header Transaction Table
  - ii. POHEADER = Purchase Order Header Transaction Table
  - iii. Note the Total Records value
6. Click Start (green-light icon)
7. A CFAWin8 message will appear: 'Purge' of 'XXXXXXX' will permanently remove all records flagged as 'Deleted'. 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 III. Verify Orders To Be Deleted.