

Visual Streamline FAQ

Is it possible to purge old data from Streamline?

There are purge utilities and below is some general information.

We have developed some routines within the Streamline application to purge certain datasets by date. Each set of data can be purged to a different date, but most sites pick a specific date (usually a year-end) and purge all the sets to the same point in time.

The purge routines can remove data from the following areas:

Historical A/P

Historical A/R

Completed Sales Orders

Completed Purchase Orders

Closed or Expired Quotes

Expired Contracts

Service Work Orders

Customer RA

...And a few others

As mentioned, each set can be purged individually to different dates, with a few restrictions. Note that the G/L is NOT affected.

One thing to remember is that these routines PURGE the data, as opposed to ARCHIVING it. Once removed, it is difficult if not impossible to reinstate it into your live environment.

As such, prior to purging we recommend that you make an off-line copy of the company's database in the event you ever needed to refer back to the old data.

These routines need to be run when others are not processing, so after hours and over the course of however many evenings / weekends it takes to complete the processes.

It is difficult to estimate how long the routines will actually run as it all depends on the volume of the data, speed/age of the server, etc. some of the larger datasets such as Historical Sales Orders need to be run in smaller batches (a couple of years at a time) to avoid conflict with scheduled backups, etc.

You or someone else at your site who has appropriate authority and RIGHTS to access the routines can be trained on how to execute them. If you are interested in this or having them run for you let us know.