

## DELETING HISTORY

One of the most valuable features of the Lakeshore software is the extensive history that is available for reporting and research. It's really a time saver to pull up and repeat that order you did for widgets last year for your customer.

However, at some point, old orders and other types of history become less valuable. Items on old orders may no longer be available or the vendor has gone out of business. And, do you really need to see the details of a check you wrote 10 years ago? Having a lot of history will take up disk space and slow down the pulling of reports and displays. So, at some point, that history needs to be purged from your files.

The amount of history you want to keep depends on your type of business and the type of data. For example, if you do primarily traditional advertising specialties, you may want to keep your order history longer than someone who primarily does fulfillment. And, your accounting-related history is tied to IRS requirements and will probably be on a completely different purging cycle.

You don't need to be dropping data every month but it is a good idea to schedule this type of maintenance at least once a year. You can do it as part of your year-end procedures or you can schedule it for another time of year when you might be less busy.

Each type of data file has its own routine to drop historical data. They are all listed on the following submenu:

Utility functions  
Drop old data

The delete for each type of history will ask for a cutoff date or book period. Some offer additional options. For example, the order history routine will let you delete only specific types of orders.

**IMPORTANT!!** The "drop history" routine **deletes** the data. It will no longer be available and cannot be retrieved. So do this step with caution.

Here are some general guidelines to follow:

- 1) **Print a back up copy of the information to be deleted.** This doesn't have to be on paper. You can create a PDF and store it on a CD or other safe storage device.
- 2) If you are deleting data from several files, you may want to **do a full back up** of your data and pull that back up out of your tape rotation so you have a permanent back up.
- 3) You can **assign a password** to the deletion of history and we **strongly** recommend you set one. This can keep you from accidentally getting into the routine as well as keep out someone who might not understand the ramifications of deleting large amounts of data.
- 4) **Allow plenty of time.** It may take awhile to do the deletions. Be sure to schedule plenty of time for this task.
- 5) When you are finished, **reorganize** the related file. The deletion process only flags a record as "deleted" so it is skipped when the file is read. However, to reclaim the file space, you need to run a "reorganization" of the file. There is a utility to do that. Go to

Utility functions  
File reorganization

Ask to reorganize a single file and pick the type of file from the drop down list.