

IBSWIN Data Purge Utilities

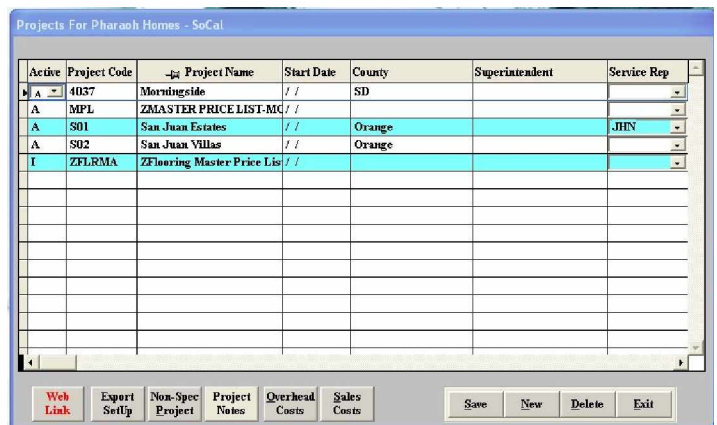
The purpose of this document is to review the available data purge utilities and suggested procedures to keep your IBSWIN software operating in an optimal manner. In addition, having old project / phase information in the database can have an impact on system performance. This is especially evident in the Options Plus module if your options and purchase order files have not been purged on a regular basis of old or inactive project / phases.

We are also going to review how projects can be “inactivated” to eliminate the numerous phases that build up over time. Inactivation, however, does not help performance by removing data from key data tables; it simply removes phases from the selection process.

****IMPORTANT**** with any of the purge utilities that are reviewed in this document, it is important that a complete “Backup” of your database is done through the “Tools” menu on your desktop prior to running them. This Backup utility allows you to create a “zip” compress copy of your database just in case you need to restore it. After running the “Purge” utilities, make sure you run the “Reindex” to finish the process.

Inactivating Projects – This will remove the inactive project / phases from all the pull down menus with exception of Customer Service Plus. See the screen below – from Setup – Inventory – Projects:

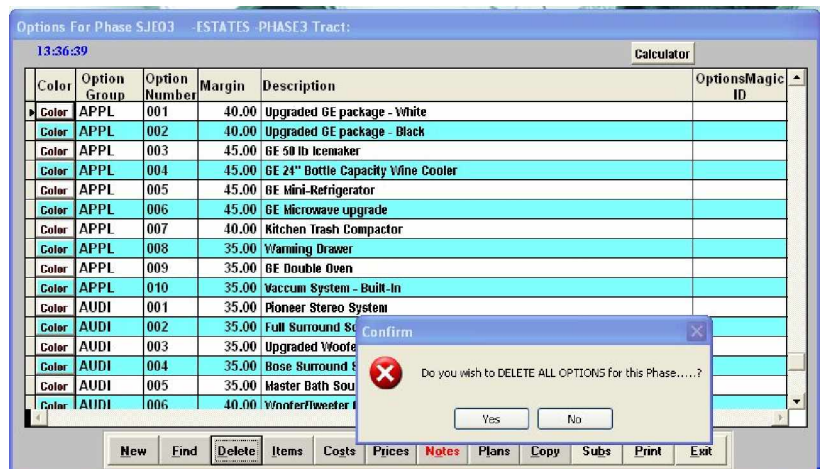
Note the “Active” column above. “A” indicates active – “I” indicates inactive. No data purging will occur.



Active	Project Code	Project Name	Start Date	County	Superintendent	Service Rep
A	4037	Morningside	/ /	SD		
A	MPL	ZMASTER PRICE LIST-MC	/ /			
A	S01	San Juan Estates	/ /	Orange		JHN
A	S02	San Juan Villas	/ /	Orange		
I	ZFLRMA	ZFlooring Master Price Lis	/ /			

Purging Options from completed phases - This is recommended for completed phases and will only clear out the options setup information for that phase, not buyer option order information. The option setup information table can get quite large over time since options are setup by phase. We recommend that you do this procedure on all phases when you are sure all buyers have completed the process (give yourself a 6 month cushion). Simply go into Setup – Options – Buyer Options – select the phase that you would like to delete – select the “Delete” key and select “No” to the first question to delete the selected option – select “Yes” now to Delete all Options for this phase

Do this for every inactive phase and this should improve the performance in most of the option order screens accessing this table.



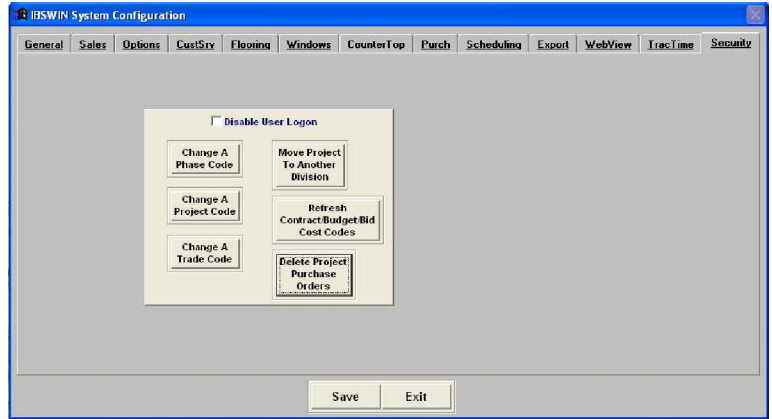
Color	Option Group	Option Number	Margin	Description	OptionsMagic ID
Color	APPL	001	40.00	Upgraded GE package - White	
Color	APPL	002	40.00	Upgraded GE package - Black	
Color	APPL	003	45.00	GE 50 lb icemaker	
Color	APPL	004	45.00	GE 24" Bottle Capacity Wine Cooler	
Color	APPL	005	45.00	GE Mini-Refrigerator	
Color	APPL	006	45.00	GE Microwave upgrade	
Color	APPL	007	40.00	Kitchen Trash Compactor	
Color	APPL	008	35.00	Warming Drawer	
Color	APPL	009	35.00	GE Double Oven	
Color	APPL	010	35.00	Vacuum System - Built-In	
Color	AUDI	001	35.00	Pioneer Stereo System	
Color	AUDI	002	35.00	Full Surround S	
Color	AUDI	003	35.00	Upgraded Woofe	
Color	AUDI	004	35.00	Bose Surround S	
Color	AUDI	005	35.00	Master Bath Sou	
Color	AUDI	006	40.00	WaterFilterer	

Confirm

Do you wish to DELETE ALL OPTIONS for this Phase....?

Yes No

Purging Purchase Orders by Project - The other major data table that can get extremely large over time is the purchase order table. We recommend that you purge purchase orders from old closed projects 6 to 12 months after the sales and options ordering activity has been completed. The only POs that will not be deleted with this purge are “customer service” POs. To select this purge utility go to Setup – Company Config – Edit – Select the “Security” Tab – Select “Delete Project Purchase Orders” and select the desired project. The screen on the following page is what you will see:



Purging Entire Projects or Phases – one of the other alternatives, typically if you are not using our Customer Service module is to use the “delete” button from either project screen or the phase screen. This will delete everything associated with that project and / or phase. Although we don’t recommend doing this if you are using customer service, it certainly is your call. Since homebuyers never really go away, it is important to maintain the customer service data and generally these data tables do not get as large as the ones previously mentioned.

To delete an entire phase, go to Setup – Inventory – Phases – select the division and project where this phase belongs – use your mouse to go to the desired phase – select the “Delete” button – screen below:

Entire projects can be deleted in a similar manner – be extremely careful with this...

