What Happens When I Purge or Delete Information in RetailEdge?

Blog · https://retailedge.com/docs/what-happens-when-i-purge-or-delete-information-in-retailedge

RetailEdge allows you to keep all your customer, sales history, inventory quantity data, etc. active from whenever you started using the program. We have customers who have been using the program for over 20 years, have all their data in their computers and have never removed any of it.RetailEdge’s data does not take up a lot of space. If you have the storage capacity on your computers, you should keep what you need (most modern computers have more than what you need).
However, sometimes it can be useful to clear out the clutter and get rid of (purge or delete) some of your old information. For instance, there might be:

1. vendors you no longer carry,
2. product you will never carry again,
3. customers that have not come into the store for 10 years and have moved away, or
4. departments or classes that are no longer relevant because you have restructured your inventory.

What happens to the data when I delete it?

When you delete an item from a list or manager screen, we just deactivate it (hide it from view) so that you can’t see it in the managers or lists. This can make looking at your items and searching for items in your Inventory Manager, faster and easier.
Deleting items can also speed up and clean up many of your reports, since the report generator does not have to sort through so much data. But when you delete an item, the data is still there, so that sales histories are still available for the item.

How Do I Delete Items from RetailEdge

From the Lists and Managers.

Pressing Delete Button

All the managers and lists have a Delete button. Simply select the item you want to delete, and the item will disappear and be deactivated.
Don’t worry too much about making a mistake. RetailEdge checks to see if the item being deleted is active in some way. For instance:

1. Departments, Vendors and Classes can't be deleted if they are associated with an inventory item.
2. Inventory items can’t be deleted if they are on Open Orders, Layaways or Saved Sales
3. Customers who have a Layaways, Open Order or House Charge (Account) balances can’t be deleted either.

By Purging

Some Purges allow you to “delete” or adjust many items at once. For instance, the **Customers** and **Inventory Items** purges can:

1. Remove all Items that have not had any Action since a particular date
2. Remove all customer that have not had any Action since a particular date

Again, these purges will not physically delete the data, but will remove the purged items from the lists. We check for all the criteria that we would check if you are deleting the items from the Managers and Lists. This purge just allows you to delete more items or customers at one time.

Some Purges Do Physically Remove/Delete Data

Some purges do remove or modify the data. These are listed below with a quick description of what each one does.

Log Files

RetailEdge keeps log files on almost every action taken in the program. This can be useful for troubleshooting if there is a problem. But if you don’t have need for this information after a few months, it can be a good idea to purge this data to free up room on your hard drive. RetailEdge will

warn you and ask you to delete this information if the file is getting too old or too large.

Customer Loyalty Dollars

Customer loyalty dollars can be purged to get rid of old loyalty dollars issued before a specific date. This can be useful if your loyalty dollars expire. Loyalty dollars are a log of adjustments, customer rewards program issuance and spending and can be viewed for a customer in the Customer Manager. Since it is a log and we might only be deleting a portion of the available balance, a Purge will create an adjustment record to the file to account for the amount being purged.

Customer Gift Cards

Customer Gift Cards are stored in a log file and the purge is like the Customer Loyalty Dollars purge above.

Customer Store Credit Balances

Customer Store Credit Balances are stored in a log file and the purge is like the Customer Loyalty Dollars above. You can quickly see these adjustments in the lower half of the Customer Manager.

Inventory Quantity Log

Inventory quantities are also an adjustment log of sales, receiving, adjustments, and edits. You can see this information on the Qty History tab on the Inventory Manager. This file can become very large over time for some items. Think about the number of sales for a cup of coffee in a coffee shop. Every time RetailEdge reports on the inventory quantity, it needs to summarize this data. Over time this process will become slower because of the summary calculation.
An Inventory Quantity Log file purge will get rid of all these individual adjustments and replace them with one summary value. This will speed up viewing and reporting on inventory quantities.

Credit Card Data

RetailEdge does not store Credit Card Data in the program. This purge is not something that would be used any more. RetailEdge’s out of scope processing options no longer allow storing of this information as it is using a more secure tokenization method so that no credit card data is being stored on your system.

Sales History Files

Sales History Files are the one purge that really does get rid of data. This purge can be useful for businesses that do a large number of transactions with a large number of items on a transaction. Think about a multiple lane grocery store or liquor store. These types of businesses generate a lot of data. If you think you no longer need this information (e.g., all sales older than 3 years old), then consider purging it.

Run Reports

Before purging data, you should run any relevant reports. So, in the case of the Sales History Purge, you should print a sales report for any data that you will be purging.

Make a Backup

Before making any large change to your data, you should always make a backup. This can be done from the Tools | Backup menu item. Purges can remove or change a lot of data quickly. As discussed above, a lot of times we are just hiding the information. But if you do a purge and the results are not what you expected that backup file will take you back to where you were before the purge.