



## Coffee Break & Learn: Tip of the Week – June 8, 2017

### Unused Master Data? Run the Cleanup Wizard!

*Available starting SAP Business One 8.82*

#### Background

After several years of running SAP Business One, Jayson Butler (the manager of OEC Computers) has found that the company's database contains obsolete data. For example, he found several vendors from whom OEC Computers had stopped purchasing several years ago. He also found many sales items that have not been sold or produced in a few years. Jayson Butler would like to clean up OEC's unused master data in order to free up database space.

#### Cleanup Utility

Starting in SAP Business One version 8.82, you can use the Master Data Cleanup Wizard to remove or deactivate (make inactive) certain master data in Business One. When a cleanup run is complete, the selected data is permanently removed or deactivated from the database. Data with no underlying permanent transaction may be removed, whereas data with existing transactions (including closed or canceled documents) can only be deactivated.

The eight types of master data available for cleanup in the utility are:

- Items
- Business partners
- G/L accounts
- Project codes
- Distribution rules and cost centers
- Tax codes
- Employees

#### Preparation

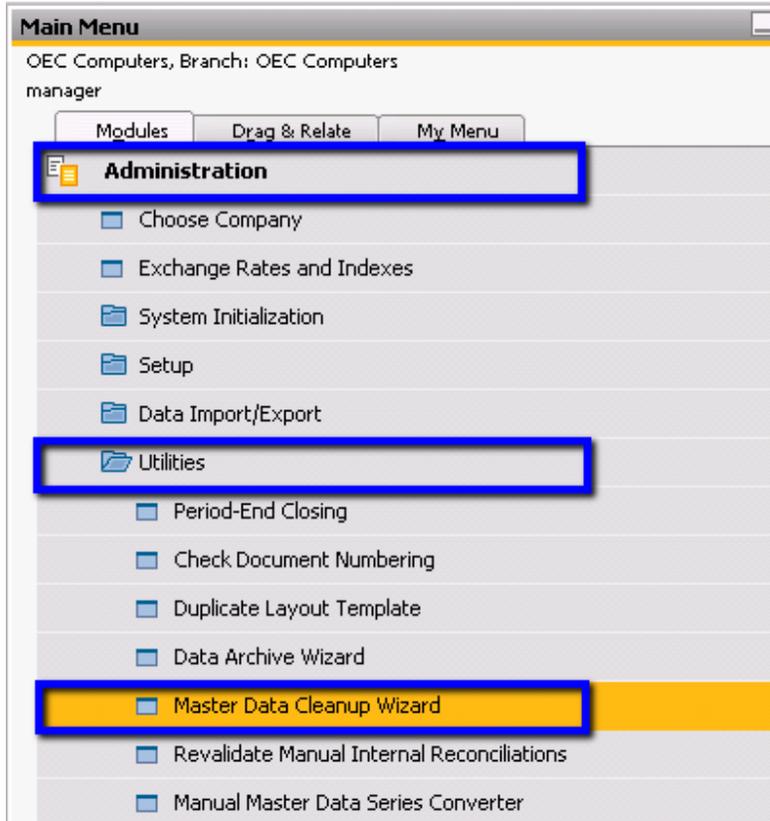
In order to prepare for a Master Data Cleanup Wizard run, you should:

1. Back up your company database. *Note: if you are a cloud customer, please send us a database backup request, and we will backup your database for you.*
2. Ensure no other users are connected to the SAP Business One application or database server.

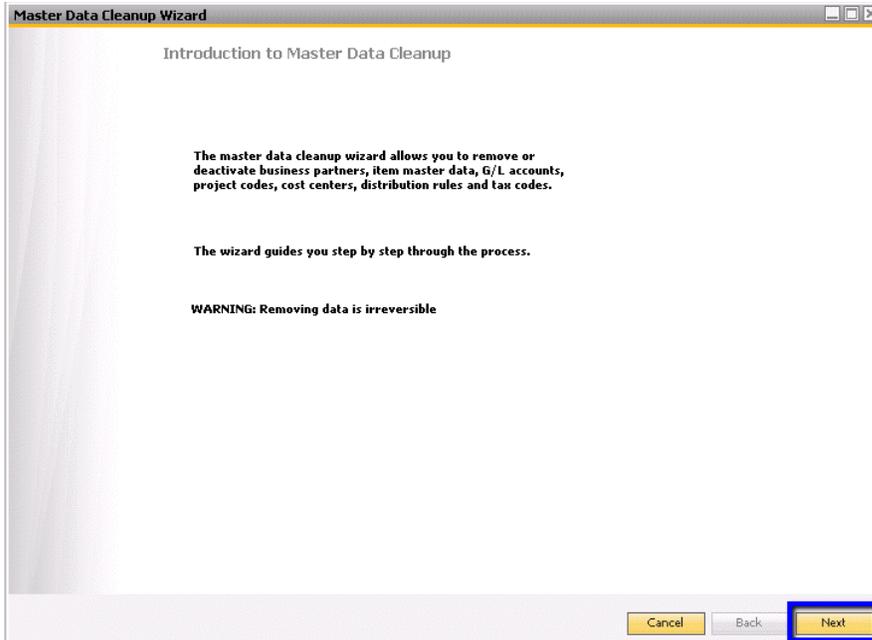
3. Close all open windows in the Business One Application.

### Master Data Cleanup Wizard

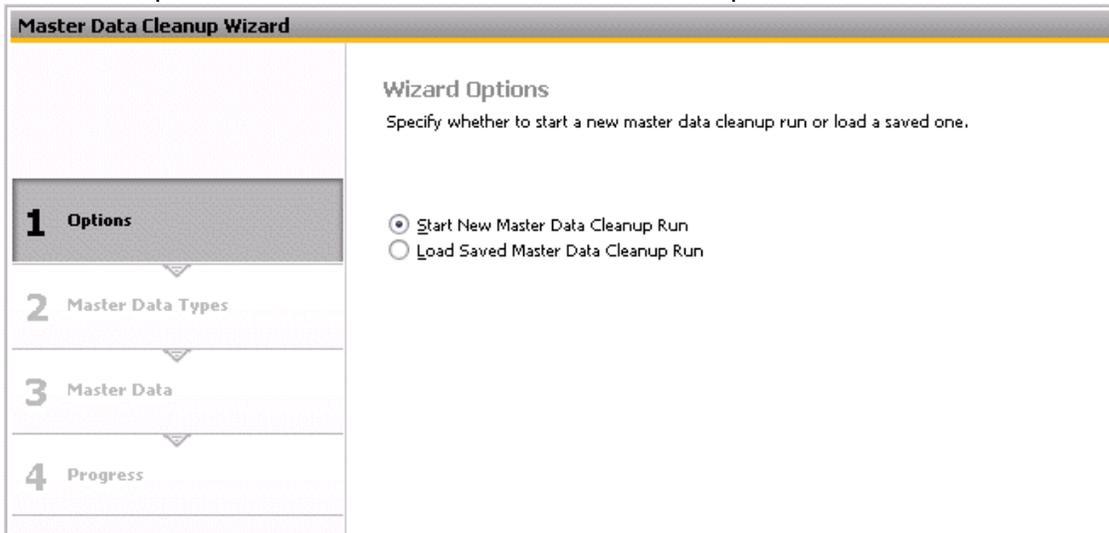
1. From the SAP Business One Main Menu, go to Administration > Utilities > Master Data Cleanup



2. You will see an introduction to the master data cleanup. Click Next.



3. The Wizard gives you the option to start a new master data cleanup run or load a saved master data cleanup run. Select 'Start New Master Data Cleanup Run'.



4. In the Master Data Types window, enter a Master Data Cleanup Name and data type selections. You will have the option of saving these selected parameters for a future cleanup run. The default cleanup name will be database will be *Database name\_Data Cleanup Wizard run sequential no.\_run date*. When you select Business Partners or Employees, you will have the option to:
  - a. Remove BP/Employee
  - b. Deactivate BP/Employee
  - c. Delete BP/Employee Content

**Master Data Cleanup Wizard**

**Master Data Cleanup Selection**  
Select master data to be cleared.

**1 Options**

**2 Master Data Types**

**3 Master Data**

**4 Progress**

Master Data Cleanup Name: BODemoUS\_Sandbox2\_2\_20170602

**Master Data**

- Item Master Data
- Business Partners
- G/L Accounts
- Project Codes
- Distribution Rules and Cost Centers
- Tax Codes
- Employees

When you are satisfied with the selected parameters, click next.

5. For master data type, selection, you will see a Cleanup Selection screen. Select the range and click Search.

**Master Data Cleanup Wizard**

**Item Master Data Cleanup Selection**  
Select item range to be cleared. You can select and move data rows more than once.

**1 Options**

**2 Master Data Types**

**3 Master Data**

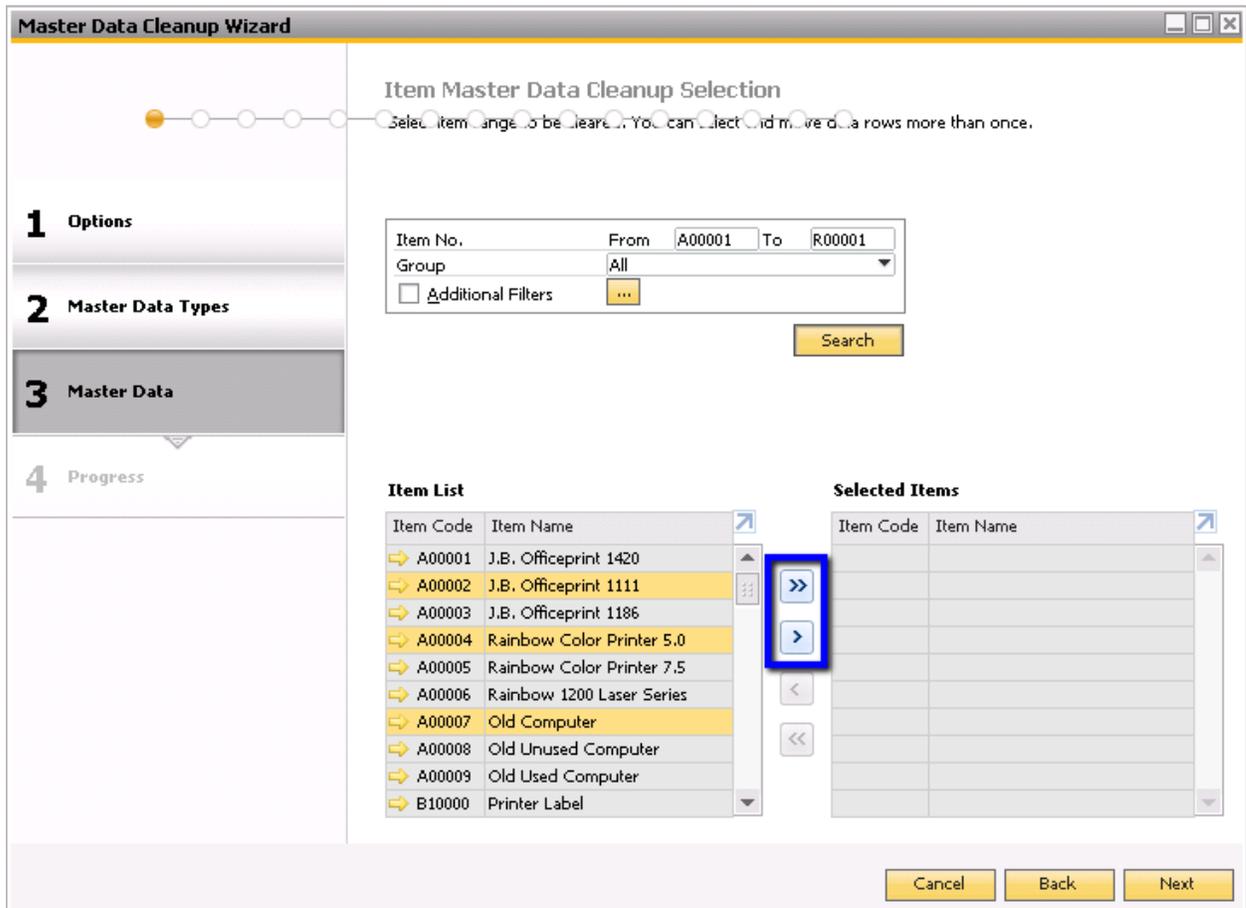
Item No. From: A00001 To: R00001

Group: All

Additional Filters

**Search**

Clicking Search will generate a list within the specified range. You can select one or several and move to the Selected list by using the single > arrow, or move all in the list using the double >> arrow.



Once you are satisfied with the selected list, click Next.

- Following the Cleanup Selection screen for each data type, you will see a Cleanup Recommendations screen. Pay special attention to the Action and Remarks columns. If a data has permanent underlying transactions, it is not possible to remove. If you originally chose to remove the data type, the system will then recommend you to deactivate that nonremovable data instead.

**Master Data Cleanup Wizard**

**Item Master Data Cleanup Recommendations**

The following list contains items for removal or deactivation. Change the selection if required.

1 Options      Action: Original Recommendation

2 Master Data Types

3 Master Data

4 Progress

#	Item Code	Item Name	Last Transaction Date	Action	Remarks
1	<input checked="" type="checkbox"/> A00001	J.B. Officeprint 1420	06/10/2017	Deactivate	Nonremovable
2	<input checked="" type="checkbox"/> A00002	J.B. Officeprint 1111	05/31/2017	Deactivate	Nonremovable
3	<input checked="" type="checkbox"/> A00003	J.B. Officeprint 1186	05/31/2017	Deactivate	Nonremovable
4	<input checked="" type="checkbox"/> A00004	Rainbow Color Printer	05/26/2017	Deactivate	Nonremovable
5	<input checked="" type="checkbox"/> A00005	Rainbow Color Printer	05/24/2017	Deactivate	Nonremovable
6	<input checked="" type="checkbox"/> A00006	Rainbow 1200 Laser Si	05/23/2017	Deactivate	Nonremovable
7	<input checked="" type="checkbox"/> A00007	Old Computer		Remove	
8	<input checked="" type="checkbox"/> A00008	Old Unused Computer		Remove	
9	<input checked="" type="checkbox"/> A00009	Old Used Computer	06/02/2017	Deactivate	Nonremovable
10	<input checked="" type="checkbox"/> B10000	Printer Label	05/31/2017	Deactivate	Nonremovable
11	<input checked="" type="checkbox"/> C00001	Motherboard BTX	05/31/2017	Deactivate	Nonremovable
12	<input checked="" type="checkbox"/> C00002	Motherboard MicroAT	05/24/2017	Deactivate	Nonremovable
13	<input checked="" type="checkbox"/> C00003	Quadcore CPU 3.4 GHz	10/18/2016	Deactivate	Nonremovable
14	<input checked="" type="checkbox"/> C00004	Tower Case with Pow	05/24/2017	Deactivate	Nonremovable
15	<input checked="" type="checkbox"/> C00005	WLAN Card	05/24/2017	Deactivate	Nonremovable
16	<input checked="" type="checkbox"/> C00006	Gigabit Network Card	11/09/2012	Deactivate	Nonremovable

Cancel    Back    Next

If you choose to delete the content of either BP or Employee Data types, you will have the option of choosing which content to delete:

### Business Partner Cleanup Recommendations

The following list contains business partners and their contacts. Select business partners and contact candidates for content deletion.

Action Content Deletion  
 BP Content ...  
 Contacts Content ...

#	BP Code	BP Name	Cont...	Cont...	Cont...	Cont...	Last Transaction Date	Action
1	<input checked="" type="checkbox"/> ▼ ↘ C20000	Maxi-Teq					06/10/2017	Delete
2	<input checked="" type="checkbox"/>		Amanda				06/10/2017	Delete
3	<input checked="" type="checkbox"/>		Max Teq				06/10/2017	Delete
4	<input checked="" type="checkbox"/> ▼ ↘ C21000						06/02/2017	Delete
5	<input checked="" type="checkbox"/> ▼ ↘ C22000							Delete
6	<input checked="" type="checkbox"/> ▼ ↘ C23000							Delete
7	<input checked="" type="checkbox"/> ▼ ↘ C23900	Parameter Technolog					10/18/2016	Delete
8	<input checked="" type="checkbox"/>		Daniel Br				10/18/2016	Delete
9	<input checked="" type="checkbox"/>		Jodi Hur				10/18/2016	Delete
10	<input checked="" type="checkbox"/> ▼ ↘ C24000							Delete
11	<input checked="" type="checkbox"/> ▼ ↘ C25000							Delete
12	<input checked="" type="checkbox"/> ▼ ↘ C30000	Microchips					11/19/2012	Delete
13	<input checked="" type="checkbox"/>		Judy Bro				11/19/2012	Delete
14	<input checked="" type="checkbox"/>		Megan J				11/19/2012	Delete
15	<input checked="" type="checkbox"/> ▼ ↘ C40000	Earthshaker Corporat					12/13/2016	Delete
16	<input checked="" type="checkbox"/>		Bob Mck				12/13/2016	Delete

#### Business Partner - Delete Content

Select Fields to be Deleted

#	Field Name	Delete
1	Name	<input checked="" type="checkbox"/>
2	Foreign Name	<input type="checkbox"/>
3	Telephone 1	<input type="checkbox"/>
4	Telephone 2	<input type="checkbox"/>
5	Mobile Phone	<input type="checkbox"/>
6	Fax	<input type="checkbox"/>
7	E-Mail	<input type="checkbox"/>
8	Pay-To Address	<input type="checkbox"/>
9	Ship-to Address	<input type="checkbox"/>
10	Remarks	<input type="checkbox"/>

OK Cancel

Action Content Deletion  
 BP Content ...  
 Contacts Content ...

Cont...	Cont...	Last Transaction Date
		06/10/2017
		06/10/2017
		06/10/2017
		06/02/2017
		10/18/2016
		10/18/2016
		10/18/2016
		11/19/2012
		11/19/2012
		11/19/2012
		12/13/2016
		12/13/2016

When you are satisfied with your selections, click Next.

7. In the Save & Execute Options screen, you have the option to execute immediately or to save the selection parameters and exit. Click Next.

The screenshot shows the 'Master Data Cleanup Wizard' window. On the left, a vertical sidebar contains four steps: '1 Options', '2 Master Data Types', '3 Master Data', and '4 Progress'. The '4 Progress' step is highlighted with a grey background. Above the sidebar, a progress indicator shows three circles, with the first one filled. The main area is titled 'Save & Execute Options' and contains the text: 'Choose "Execute" to remove or deactivate master data. Choose "Save" to save your predefined parameters for future use.' Below this text are two radio buttons: 'Execute' (which is selected) and 'Save Parameter Set and Exit'. At the bottom right of the window are three buttons: 'Cancel', 'Back', and 'Next'.

8. The next screen contains the progress bar. Click Next to begin.

The screenshot shows the 'Master Data Cleanup Wizard' window. The sidebar on the left is identical to the previous screen, with '4 Progress' highlighted. The progress indicator now shows the second circle filled. The main area is titled 'Progress Bar' and contains the text: 'Displays progress of master data cleanup'. Below this is the instruction: 'To begin the process, choose the "Next" button.' A horizontal progress bar is shown, currently empty. Below the progress bar is a list of three steps: '1. Starting Master Data Cleanup', '2. Clearing Master Data', and '3. Finishing Master Data Cleanup'. At the bottom right of the window are three buttons: 'Cancel', 'Back', and 'Next'.

9. After the Master Data Cleanup has finished running, you will see the Master Data Cleanup Summary, which will display the total number cleaned up (removed, deactivated, content deleted).

The screenshot shows the 'Master Data Cleanup Wizard' window. On the left is a navigation pane with four steps: 1 Options, 2 Master Data Types, 3 Master Data, and 4 Progress. The 'Progress' step is currently selected. The main area displays the 'Master Data Cleanup Summary' with the instruction 'See below for the main results of the cleanup'. Below this is a table with the following data:

#	Master Data	Total	Removed	Deactivated	Content Deleted
1	Items	3	2	1	0
2	Business Partners	5	4	1	0
3	Accounts	1	0	1	0
4	Projects	1	0	1	0
5	Cost Centers	1	0	1	0
6	Sales Tax Codes	1	0	1	0
7	Employees	1	0	1	0

At the bottom of the window are three buttons: 'Cancel', 'Back', and 'Next'.

Click Next.

10. You will have finished the cleanup run.

The screenshot shows the 'Master Data Cleanup Wizard' window displaying a 'Congratulations!' message. The text reads: 'Master data cleanup completed successfully'. At the bottom of the window are three buttons: 'Cancel', 'Back', and 'Finish'.

Click Finish.

## Summary

The Master Data Cleanup Wizard can be used to remove or deactivate unused data, as well as remove the contents of business partner and employee master data. This is particularly useful in cases when you want to remove or deactivate a large number of data, such as when a master data import was done incorrectly or when an entire range of items becomes obsolete or out of style. Previously executed cleanup runs will be available for you to view in the Master Data Cleanup Wizard.

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