CLEARING/COMPRESSING CLIENT DATA

Before using the 'compress' or 'remove old years function' it is best to save a copy of your client data to an archive folder. Use these instructions to copy your client information to a new folder (use step 1 and step 2, situation 1)

ARCHIVING CLIENT DATA

Here is the easiest way to do this:

Step 1) Create a new folder on your network and name it something logical like 'PCSW archive' or something similar.

Step 2)

Situation 1) You want to KEEP a copy of the client in the active files AS WELL as saving for historical purposes:

- Use file, copy, copy client advanced.
- Click on the file that you want to copy in the left hand 'source' box.
- Type a client number in the client number box in the center of the screen (this can be the same if you are copying to a different location)
- Change the destination location on the right side of the screen to be the folder that was set up in step 1
- Click OK

Situation 2) You want to MOVE the client to the archive folder and REMOVE it from your active client list:

- Use file, change client id/relocate client
- Select the client from the list on the left side of the screen
- Change the destination to be the new folder created in step 1
- Put a client code in the new client number box (this can be the same if you are copying to a new location)

After you are SURE that you have your client data properly archived you have two options:

1) Compress client g/l data: Go to Transactions, Transaction Utilities, Compress G/L transactions. This will remove g/l detail and leave entries that will preserve period balances for historical purposes.

2) Remove old Years: Go to utilities, Remove Old Years. Select a new 'initial balance date' and then click OK. This will totally remove all data before that date.

   NOTE: If your transaction numbers are very large there is a utility for renumbering transactions at Transactions, transaction utilities, renumber transactions.