Mass Delete Unused Customer Accounts

This program allows customer accounts with no current or recent historic transactions to be deleted.

All related customer information is deleted including scratchpad notes, delivery addresses and telephone directory records.

Wholegoods or serial items that belong to the customer are reassigned to a specific customer account number so that the historical machine information can be retained, the default is 999999 although this can be changed to an existing account number.

The program runs against the current company only. If a customer has asked for their details to be removed the program needs to be run against any copy companies as well.

The "Proposed" option produces a report only and should be run first to verify the accounts to be deleted.

An entry is written to the system audit to show the account numbers deleted.

A .CSV file can be produced for both the Proposed and Actual options to show the accounts to be deleted.

Options

Select the accounts requiring deletion using the selection options.

Report Type
Select as required.

- **Proposed**
  Produces a report only of accounts that can be deleted.

- **Actual**
  Produces the report and carries out the account deletion.

Retention in Months
Accounts with transactions within the specified number of months will not be deleted. The default is 84 months and this is the minimum length of time permitted.

- If yes, the customer cannot be deleted
- If no, the customer can be deleted regardless of any purge parameters that exist

Customers
Select a range of customers to check.

The default is 'All' external customer and prospect accounts. Internal accounts and inter depot transfer accounts are excluded from the program.

Include Analysis Codes
Enter up to 5 Market Analysis Codes to check. Customers with any of the specified codes will be included in the deletion check.

AND/OR
- And select to check both the include and exclude codes
- Or select to check the account has either the include or the exclude codes entered

Exclude Analysis Code

Enter up to 5 Market Analysis Codes to check. Customers with any of the specified codes will be excluded from the deletion check.

Market analysis codes can be used to mark accounts to be retained, for example new accounts created then the exclude option used to ensure the accounts are not deleted.

Delete Accounts with Tracking Records

Select 'Yes' to allow deletion of customer accounts that have tracking records which would prevent deletion. The exception is accounts with only the tracking record written when the account was first created. If this is the only tracking record for the account it will be deleted even if this option is set to 'No'.

Account for Unlinked Wholegoods

Deletion of a customer account leave behind wholegood records or serial parts that belonged to that account. Enter an account number here to link those records to the specified account. The suggested account is 999999. This can be changed as required. The account does not have to exist on the Sales Ledger.

Once all parameters have been entered, select "OK" to continue.

Proposed

A report will be produced to show each account in the range with a purge type of "Retain" or "Delete".

- **Retain**
  The purge type of retain will be displayed if the account cannot be deleted, together with a description to show the reason the account cannot be deleted for example:

  - Deletion not Allowed - Customer has Current Transactions
  - Deletion not Allowed - Customer has History Transactions (within the entered retention)
  - Deletion not Allowed - Customer has Invoice History (within the entered retention)
  - Deletion Not Allowed - Tracking Records Found
  - Deletion Not Allowed - On Work In Progress
  - Deletion Not Allowed - Wholegood Advice Outstanding

- **Delete**
  Account will be deleted when run in Update mode.

After the printed report a message will be displayed to show the total number of accounts checked and how many could be deleted if run in Update mode.

Total Customer Count xxx,
Proposed Customer Accounts to Delete xxx

Continue 'Yes' will create a CSV file showing the list of accounts. 'No' will exit the program without further action.

Actual

This will delete the selected customers from the Current Company Only. Any copy companies need the same process run separately.

Ensure the Proposed option has been used to verify the accounts to be deleted before running the update.

A report will be produced as for the Proposed option to show the accounts to be deleted.

Total Customer Count xxx,
Actual Customer Accounts to Delete xxx

Continue 'Yes' will delete the specified accounts and produce a .CSV file of the accounts deleted, 'No' will exit the program.

A record will be added to the System Audit to show the accounts deleted.