Fast Clear History

User Guide

Important Notice

TaiRox does not warrant or represent that your use of this software product will be uninterrupted or error-free or that the software product can be run with any versions of Sage 300 other than 2012 to 2025, or that the information in this document is completely accurate. TaiRox warrants that any media by which you have received this software is free from defects. TaiRox will replace any such defective media. TaiRox expressly disclaims all other warranties, representations, conditions and guarantees of any kind including, but not limited to, warranties for merchantability or fitness for a particular use.

Fast Clear History Overview

Fast Clear History is a SQL Server-specific utility that performs Sage 300 Clear History operations in a fraction of the time taken using the Sage 300 user interface forms. See Appendix B in this guide for differences between Fast Clear History and Sage 300 Clear History.

Fast Clear History also includes options that are not available in Sage 300 – for example, clearing unprinted posting journals.

Technical Notes

- You start Fast Clear History from the Windows Start List. It is not run from the Sage 300 desktop unless you manually add a shortcut.

  You can uninstall the program from Windows **Control Panel > Programs and Features** or from **Settings > Apps and Features**, depending on your version of Windows.

- The program must be run on a computer where Sage 300 or Workstation Setup has been installed.

- Before running Fast Clear History, you must ensure that I/C Day End has been run for each Sage 300 Company that you plan to work with.

Starting Fast Clear History and Logging On to SQL Server

Start Fast Clear History from the Windows start list.
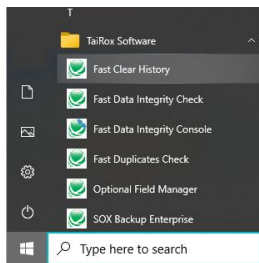
When launched, the program displays the Connect dialog box for logging in to SQL Server and specifying the company database that you are working with.
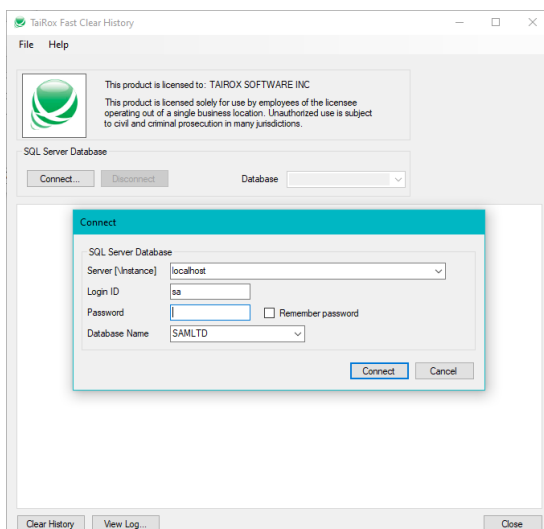
Enter in the name of the SQL Server\instance where the Sage 300 databases are stored, or choose it from the dropdown. Select the "<Browse for more>" choice to browse for servers.

- Use the Delete key to remove remembered servers from the list.

Enter a SQL Server login name and password.

- Click the "Remember Password" checkbox to save the password for this login.
- To forget a password, uncheck the Remember Password checkbox and the log in.

If the SQL login does not have sufficient rights to clear history, the following message will appear:
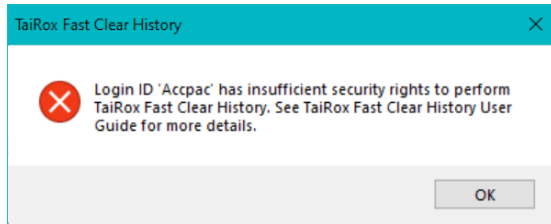
See [Appendix C: Server and Database Security Rights for Running Fast Clear History](#) for details.

Select the database you want from the dropdown list.

- The list will include all databases on the server to which the login ID has access.
- The login will fail if the login ID or password is invalid – or if the login ID has insufficient rights.

Click the Connect button to continue. Once you log in, you can select other Sage 300 companies installed on the same server without having to log in again.

To change companies, click the Connect button, and then select the company from the Database Name dropdown list.

Using Fast Clear History

Once connected, the main Fast Clear History form will display a separate tab for each Sage 300 module that is active in the company and that Fast Clear History supports. To proceed, visit each tab in turn, select the data that you want to clear, and then click the Clear History button.

- Date fields are initially set to the current date.

- Fiscal year-period fields are set to the year-period corresponding to the current date in the current company's fiscal calendar.

- All selections are initially unchecked.

- **All fields on each tab will be reset to their initial values if you select a new database.**
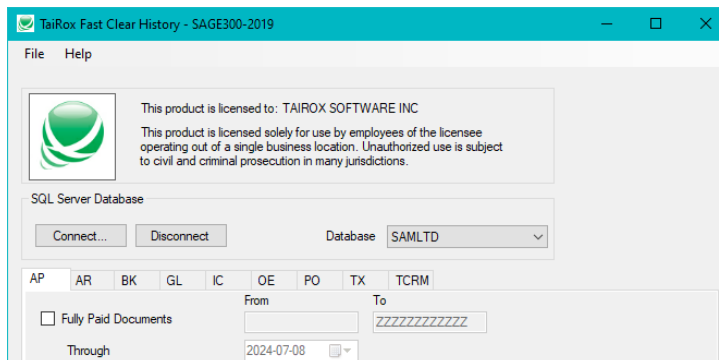
Select AP Clear History Options
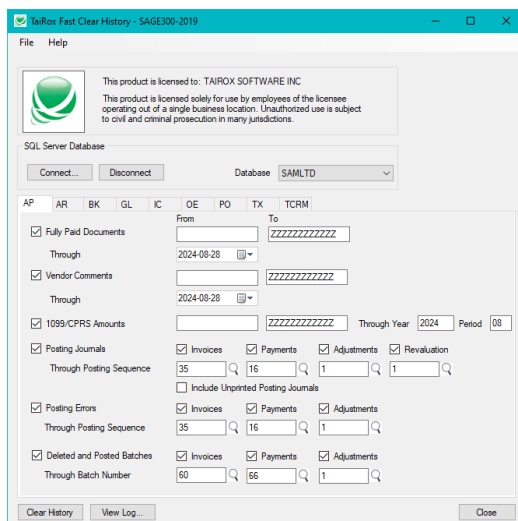
If you select Deleted and Posted Batches, the following message will appear, letting you know that you will not be able to drill down to batches if you delete them:
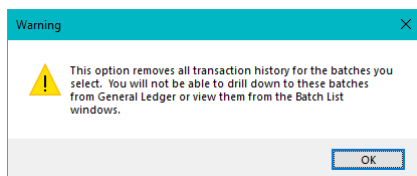

Use the Finder to see ranges of posting journals, errors, and batches

The Finder button appears on the AP, AR, BK and GL Fast Clear History tabs to let you see the range of posting sequences or batch numbers included for deletion – letting you clear posting data in a multistep process if you have a large amount of data to process.
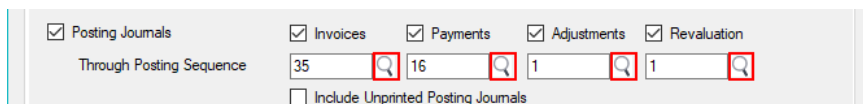

For example, click the Finder button beside the Invoices Posting Sequence number, and a message like the one appears:
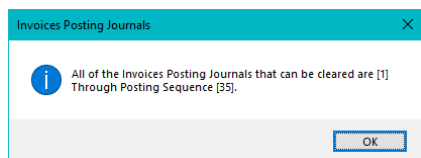
The message says that the current range of journals that can be cleared is from posting journal "1" to posting journal "35".

If you wanted to clear about 1/2 of the journals, you could specify "18" for the Through Posting Sequence to clear 1 – 18.

If you have a lot of batches and want to clear them as a multi-step process – say 1/3 at a time, you could specify Through Posting Sequence 12 for the first run, Through Posting Sequence 24 for the second run, and Through Posting Sequence 35 for the third run.
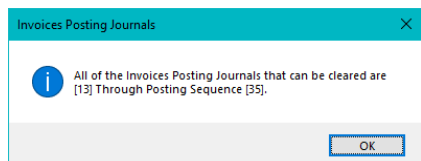

If you click the Finder button after the first run, the message will show you the new lower and upper limits for the range of posting journals.

Select AR Clear History Options

If you select Deleted and Posted Batches, the following message will appear, letting you know that you will not be able to drill down to batches if you delete them or reprint invoices or deposit slips.
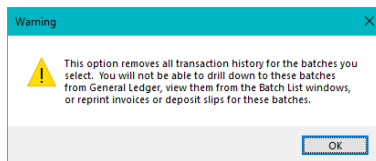
See Use the Finder to see ranges posting journals, posting errors and posted batches for information on viewing the upper and lower limits to ranges of posting data.

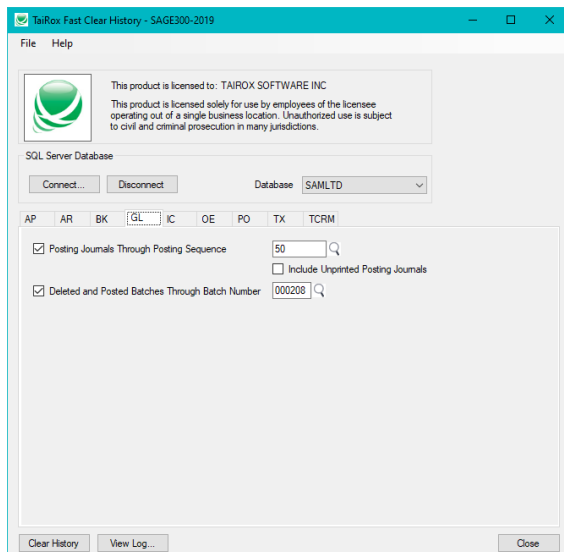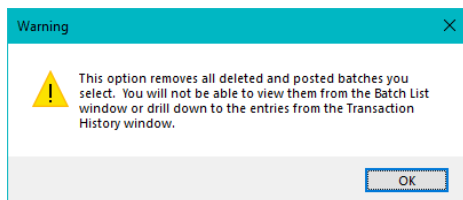# Select BK Clear History Options

Note: If you have greyed out options on the screen – as above – it means that there are no entries or journals to clear.

See Use the Finder to see ranges posting journals, posting errors and posted batches for information on viewing the upper and lower limits to ranges of posting data.

Select GL Clear History Options

If you select Deleted and Posted Batches, the following message will appear, stating that you will not be able to view batches from the Batch List or drill down to entries from the Transaction History window.

See Use the Finder to see ranges posting journals, posting errors and posted batches for information on viewing the upper and lower limits to ranges of posting data.
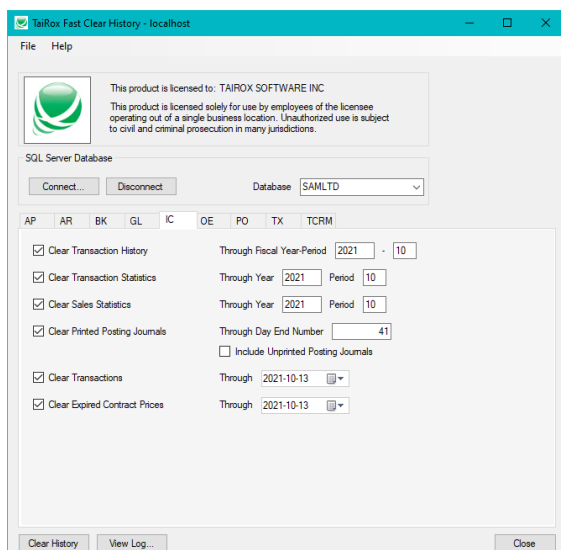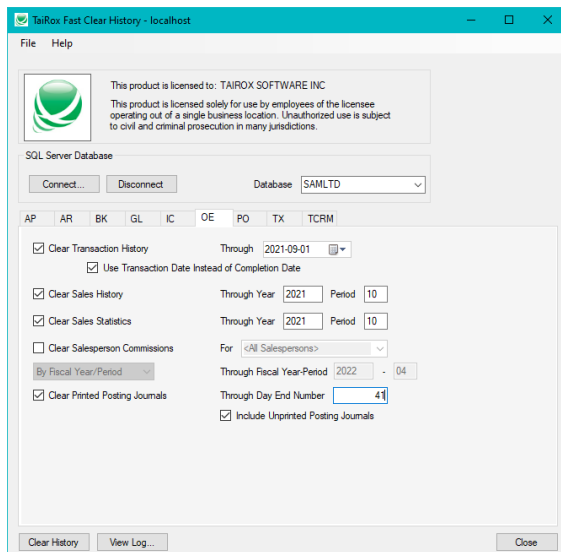
Select IC Clear History Options

Select OE Clear History Options

You can clear transaction history by completion date or by transaction date. Sage 300 only clears by completion date.

Clearing by transaction date is useful because many companies leave orders incomplete for quite a while, then periodically clean up and complete orders that will never ship. Since the cleanup can happen long after the order date, the completion date is disconnected from the actual order period.

If you select Clear Salesperson Commissions, the following message will appear, warning you to print the Salesperson Commission report and pay commissions before deleting commission history.

Select PO Clear History Options

If your company uses the Purchase Orders module stand-alone (without the Inventory Control module), the following option will also appear:

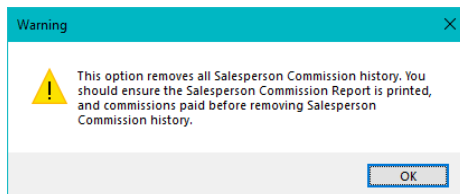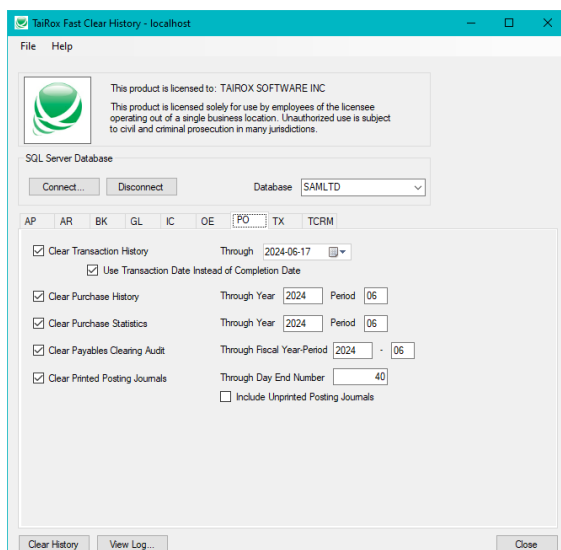As with Order Entry, you can clear transaction history by completion date or by transaction date. Sage 300 only clears by completion date. Clearing by transaction date is useful for companies that leave orders incomplete for quite a while, then periodically clean up and complete orders.

Select TX Clear History Options

Select TaiRox CRM and Collections (TCRM) Clear History Options

Note that this tab appears only if you are using TaiRox Collections or TaiRox CRM and Collections.

Click the Clear History Button to Proceed

Click the Clear History button once you have selected the historical data sets that you want to be cleared and the processing options specific to each.

The following message appears, forcing you to confirm that you have backed up your data, understand what the program does, and that you do, in fact, want to proceed.
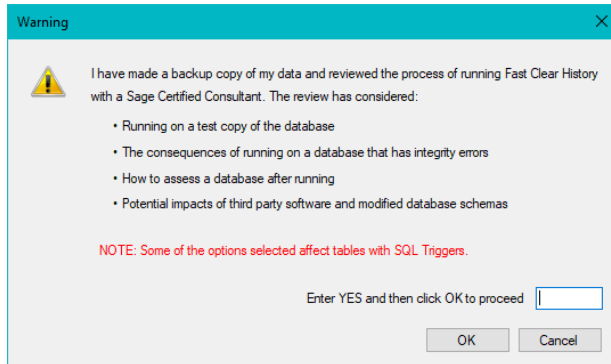
The text in red will only appear if one or more of the tables affected by your selections have any SQL triggers (for more information, see Appendix A: SQL Triggers).

To proceed, type "YES" in the field and then click the OK button. (You must type capital letters.)

During the clearing operation a meter will indicate which table is currently being processed.

The following message will appear when the operation is complete:
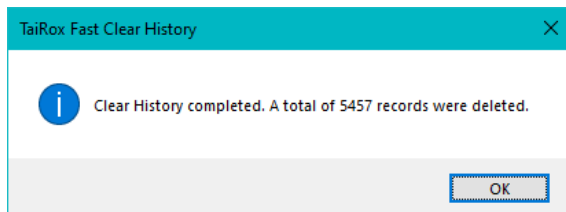
View the Log File

Once the operation is complete you may view the results by clicking on the View Log… button. This will open the folder containing the log files.

Note: Log file names include the server name, database name, and date. Multiple operations for the same database on the same day will be in a single log file, with the most recent operation being at the end of the log.

You can specify the folder where the log files are created using the **File > Settings** menu choice.
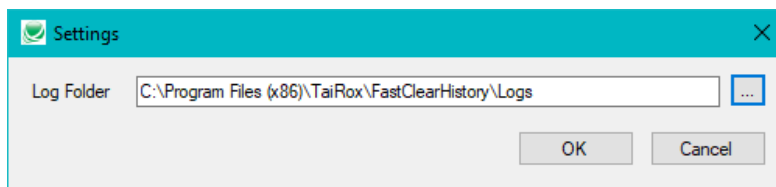
Why Can't Fast Clear History Clear all the Data I Want?

The main reason that Fast Clear History leaves old data is because it may still be required, or it is linked to documents that are still active. The program will not delete data if deletion could cause data integrity errors.

For example, to delete an entity like an invoice, not only does the invoice have to be fully paid, but the payment document that has paid that invoice must be fully applied. Similarly, the program won't delete incomplete orders, because deletion can throw inventory quantities out of balance. In other words, all links to an entity to be cleared must also be clearable.

Note that if you have greyed out options on the Fast Clear History screen, it means that there are no entries or journals to clear.

Also note the following points on clearing data.

Most Modules

- Clears unprinted posting journals only if you select the Include Unprinted Posting Journals checkbox on each tab.

Bank Services

- Only clears a transaction if all its details can be cleared.

Inventory Control

- Does not clear receipt labels or anything related to serial numbers or lots.

Order Entry

- Does not clear history for orders that have not been completed, or for invoices, credit notes, and debit notes that have not been printed.

General Warnings for using Fast Clear History:

- Back up your data before running Fast Clear History. You cannot undo changes.

- Fast Clear History permanently deletes Posting journals and invoice batches. They cannot be recovered.

- If you select Deleted and Posted Batches, you will not be able to view batches from batch lists or drill down to entries from the Transaction History window. In A/R, you will not be able to reprint invoices or deposit slips.

- Be sure to print the Salesperson Commission report and pay commissions before deleting commission history.

Appendix A: SQL Triggers

Sage 300 tables do not natively have any SQL triggers.

> **Important Note:** If your specific implementation includes the use of triggers, it means that we will not have tested for your unique setup.
>
> You should have someone familiar with the SQL triggers on any tables affected by Fast Clear History determine how best to proceed.

Depending on what the triggers do, it may be best to disable them when running Fast Clear History.

Appendix B: Differences between Sage 300 Clear History and TaiRox Fast Clear History

Most Modules

- **Sage 300** lets you clear printed posting journals for a subset of transaction types.
- **Fast Clear History** clears the printed posting journals for all transaction types as well as lets you clear unprinted posting journals.

Bank Services

- **Sage 300** will partially clear transactions by clearing only those details that can be cleared, doing so involves extremely costly calculations.
- **Fast Clear History** will only clear a transaction if all of its details can be cleared.

Inventory Control

- **Sage 300** lets you clear sales statistics for a subset of items.
- **Fast Clear History** clears sales statistics for all items.
  Fast Clear History does not clear receipt labels or anything related to serial numbers or lots.

Order Entry

- **Sage 300** lets you clear transaction history by completion date only.
- **Fast Clear History** clears transaction history by completion date or transaction date (which is especially useful when orders are periodically cleaned up and completed long after order entry).
- **Sage 300** lets you clear sales history for a range of customers or items.
- **Fast Clear History** clears sales history for all customers or items.
- **Sage 300** clears ALL salesperson commissions for a range of salespersons.
- **Fast Clear History** clears commission data for a single salesperson or all salespersons up to a specific date or to the end of a specific fiscal year and period.

Purchase Orders

- **Sage 300** lets you clear transaction history by completion date only.
- **Fast Clear History** clears transaction history by completion date or transaction date.
- **Sage 300** lets you clear purchase history for a range of vendors.
- **Fast Clear History** clears purchase history for all vendors.
- **Sage 300** lets you clear payables clearing audit data for a range of account sets.
- **Fast Clear History** clears it for all account sets.

Appendix C: Server and Database Security Rights for Running Fast Clear History

The SQL login for Fast Clear History needs sufficient rights to create temporary tables and stored procedures.

Error Messages for Insufficient Rights

Fast Clear History checks the user security rights when you log into SQL Server to ensure you have sufficient rights to clear Sage 300 records. The program displays the following error message if the login rights are not sufficient:
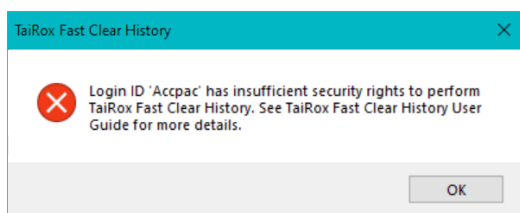
If an error occurs due to user rights while clearing history, you will see the following message in the dialog displayed when Fast Clear History finishes, advising users to view the log.