



WHITE PAPER

## **TRIMIT CleanUp Methods 24.1**

This document contains information regarding the CleanUp Methods functionality in TRIMIT 24.1 for Microsoft Dynamics 365 Business Central 2024, Wave 1 (W1).

Version: 24.1  
Date: 14-06-2024

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# INTRODUCTION

Especially in the implementation phase of a project or while testing new customization, you want to be able to change/delete data when you copy a Sandbox, copy a Company, or do a Periodic Cleanup of data.

An example could be changing E-Mail Addresses of your Customers when you copy a Sandbox or Company:

You do not want to send Order Confirmations of test orders to your Customers.

That is why we developed the **TRIMIT CleanUp Methods**.

The audience for this document is the Consultant or very skilled User.

It will only describe the TRIMIT fields/functionality and not the standard Business Central fields/functionality.

Be aware of not changing settings and parameters in a live database without consulting the implementing partner.

The functionality described is the functionality as of **TRIMIT 24.1 for Business Central W1 BC24.X**.

The pictures in this White Paper are based on the demo database for **TRIMIT 24.1**, which is based on Microsoft Dynamics 365 Business Central 2024 Release Wave 1, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

# COMPONENTS

**TRIMIT CleanUp Methods** contains the following objects:

The tables     **6036578 trm CleanUp Method Header**  
                  **6036579 trm CleanUp Method Lines**

The pages       **6036577 trm CleanUp Methods**  
                  **6036578 trm CleanUp Method**  
                  **6036579 trm CleanUp Method Lines**

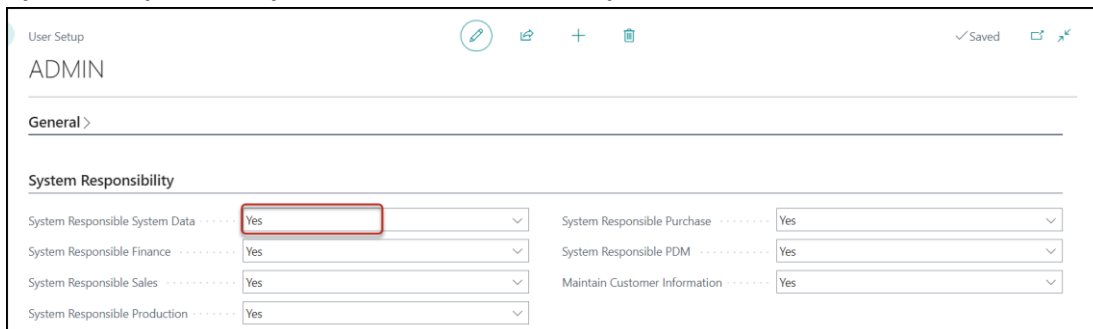
The codeunits **6036578 trm CleanUp Handling**

The enum       **6036510 trm CleanUp Method Types**

# SETUPS

## USER SETUP

To work with the **TRIMIT CleanUp Method**, the user needs to have the parameter **System Responsible System Data** in the **User Setup** set to **Yes**.



User Setup  
ADMIN

General >

System Responsibility

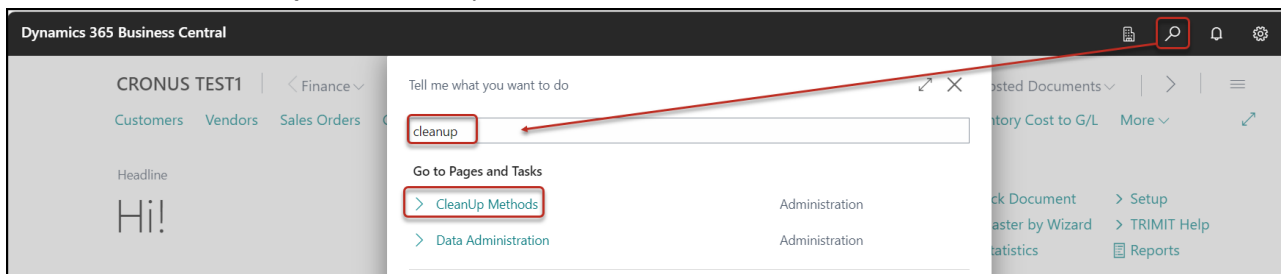
|                                |     |                               |     |
|--------------------------------|-----|-------------------------------|-----|
| System Responsible System Data | Yes | System Responsible Purchase   | Yes |
| System Responsible Finance     | Yes | System Responsible PDM        | Yes |
| System Responsible Sales       | Yes | Maintain Customer Information | Yes |
| System Responsible Production  | Yes |                               |     |

## PERMISSIONS

For all the possibilities of the **TRIMIT CleanUp Method**, the user needs to have the appropriate rights for the objects mentioned in [Components](#) and also for the Tables for which the data should be modified or deleted.

# CLEANUP METHOD

You can find the **CleanUp Methods** only via **Search**:



Dynamics 365 Business Central

CRONUS TEST1 | < Finance

Customers Vendors Sales Orders

Headline  
Hi!

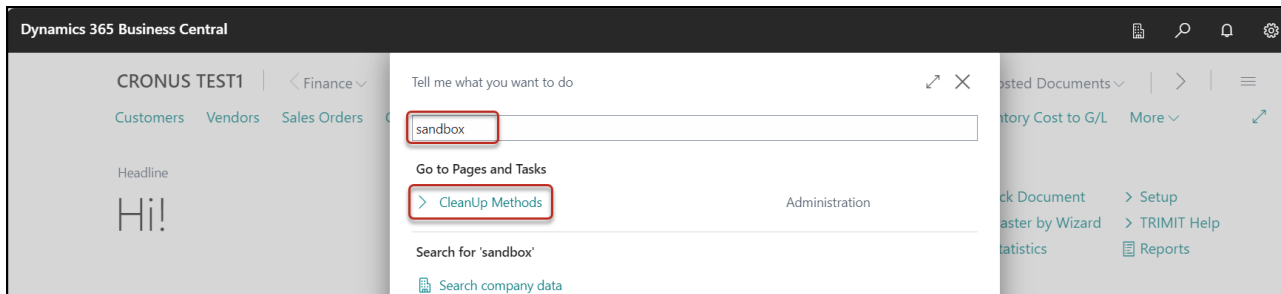
Tell me what you want to do

cleanup

Go to Pages and Tasks

- > CleanUp Methods Administration
- > Data Administration Administration

But also, if you would **Search** for **Sandbox**, you will find the **CleanUp Methods**.



Dynamics 365 Business Central

CRONUS TEST1 | < Finance

Customers Vendors Sales Orders

Headline  
Hi!

Tell me what you want to do

sandbox

Go to Pages and Tasks

- > CleanUp Methods Administration

Search for 'sandbox'

Search company data

| CleanUp Methods                                                                                                                                      |            |                                             |                          |                                     |                                     |
|------------------------------------------------------------------------------------------------------------------------------------------------------|------------|---------------------------------------------|--------------------------|-------------------------------------|-------------------------------------|
| <div> <div> <div>+</div> <div>New</div> </div> <div>Manage</div> </div> <div> <div>Actions</div> <div>Automate</div> <div>Fewer options</div> </div> |            |                                             |                          |                                     |                                     |
| <div> <div>Edit</div> <div>View</div> <div>Delete</div> </div>                                                                                       |            |                                             |                          |                                     |                                     |
| Type                                                                                                                                                 | Code ↑     | Description                                 | Active                   | Default Run Validation              | Run only in Sandbox                 |
| <a href="#">Copy Company</a>                                                                                                                         | COPY_EMAIL | Copy Company/Email changes                  | <input type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <a href="#">Periodic Cleanup</a>                                                                                                                     | DEL_ORD    | Delete Orders (Sales, Purchase, Production) | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| <a href="#">Copy to Sandbox</a>                                                                                                                      | SANDBOX    | Sandbox Copy                                | <input type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |

## FASTTAB GENERAL

You can click **+ New** to create a new **CleanUp Method**, or click on the **Type** to open the Card.

CleanUp Method

COPY\_EMAIL

Actions

Automate

General

Code

COPY\_EMAIL

Active

☐

Description

Copy Company/Email changes

Default Run Validation

☐

Type

Copy Company

Run only in Sandbox

☒

## DESCRIPTION OF THE FIELDS

### CODE

The unique Code for this **CleanUp Method**.

### DESCRIPTION

The Description of this **CleanUp Method**.

### TYPE

See [Type = Copy Company](#), [Type = Periodic Cleanup](#) and/or [Type = Copy To Sandbox](#) for more details of the three options you can choose.

### ACTIVE

A **CleanUp Method** must be set to **Active Yes**, before it will be taken into consideration.

### DEFAULT RUN VALIDATION

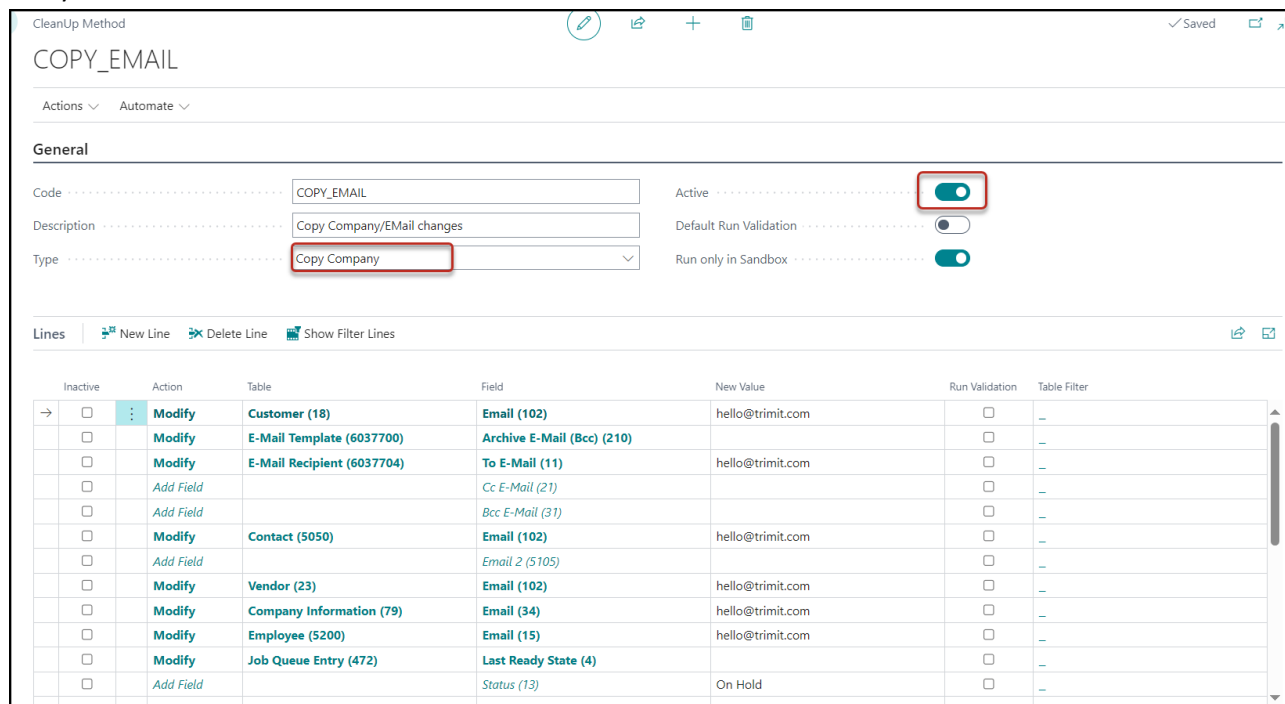
If **Type** is *Copy Company* or *Copy to Sandbox* the field will by default be set to *No* and is not applicable.

If **Type** is *Periodic Cleanup* the field will by default be set to *Yes*, which means that while changing or deleting data based on the **Lines** of the CleanUp Method, the regular Validation will take place.

## TYPE = COPY COMPANY

The **Lines** you will create will influence the data if you copy a Company in the same Database.

Suppose you want to copy a live Company to a Test Company, but do not want to send (by accident) E-Mails to the Customers or Vendors based on the E-Mail Addresses in the live Company and no Job Queue Entry should be run.



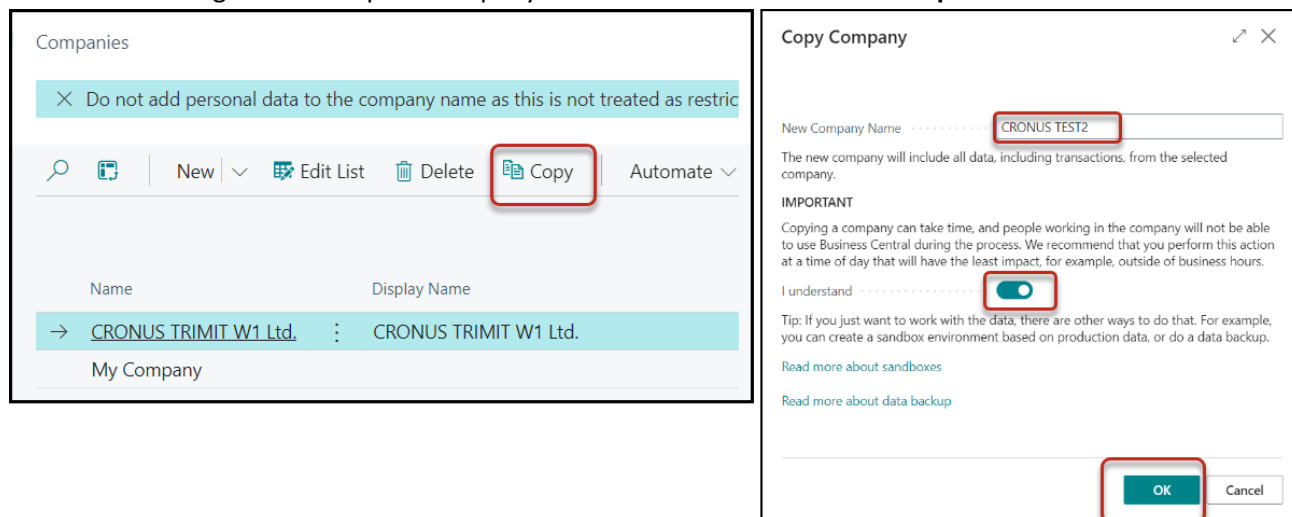
The screenshot shows the 'CleanUp Method' configuration for 'COPY\_EMAIL'. The 'General' section includes the following fields:

- Code:** COPY\_EMAIL
- Description:** Copy Company/E-Mail changes
- Type:** Copy Company (highlighted with a red box)
- Active:** ☒ (highlighted with a red box)
- Default Run Validation:** ☐
- Run only in Sandbox:** ☒

The 'Lines' section shows a table with the following data:

| Inactive                 | Action    | Table                      | Field                      | New Value        | Run Validation           | Table Filter |
|--------------------------|-----------|----------------------------|----------------------------|------------------|--------------------------|--------------|
| <input type="checkbox"/> | Modify    | Customer (18)              | Email (102)                | hello@trimit.com | <input type="checkbox"/> | --           |
| <input type="checkbox"/> | Modify    | E-Mail Template (6037700)  | Archive E-Mail (Bcc) (210) |                  | <input type="checkbox"/> | --           |
| <input type="checkbox"/> | Modify    | E-Mail Recipient (6037704) | To E-Mail (11)             | hello@trimit.com | <input type="checkbox"/> | --           |
| <input type="checkbox"/> | Add Field |                            | Cc E-Mail (21)             |                  | <input type="checkbox"/> | --           |
| <input type="checkbox"/> | Add Field |                            | Bcc E-Mail (31)            |                  | <input type="checkbox"/> | --           |
| <input type="checkbox"/> | Modify    | Contact (5050)             | Email (102)                | hello@trimit.com | <input type="checkbox"/> | --           |
| <input type="checkbox"/> | Add Field |                            | Email 2 (5105)             |                  | <input type="checkbox"/> | --           |
| <input type="checkbox"/> | Modify    | Vendor (23)                | Email (102)                | hello@trimit.com | <input type="checkbox"/> | --           |
| <input type="checkbox"/> | Modify    | Company Information (79)   | Email (34)                 | hello@trimit.com | <input type="checkbox"/> | --           |
| <input type="checkbox"/> | Modify    | Employee (5200)            | Email (15)                 | hello@trimit.com | <input type="checkbox"/> | --           |
| <input type="checkbox"/> | Modify    | Job Queue Entry (472)      | Last Ready State (4)       |                  | <input type="checkbox"/> | --           |
| <input type="checkbox"/> | Add Field |                            | Status (13)                | On Hold          | <input type="checkbox"/> | --           |

If the **CleanUp Method** is **Active**, and you now would Copy the Company via **Companies**, the fields for Email will then be changed in the copied Company based on the **Lines** in the **CleanUp Method**. I.e.:



The screenshot shows the 'Copy Company' dialog box. The 'New Company Name' field is set to 'CRONUS TEST2' (highlighted with a red box). The 'I understand' checkbox is checked (highlighted with a red box). The 'OK' button is highlighted with a red box.

The 'Companies' section shows a list of companies with the following data:

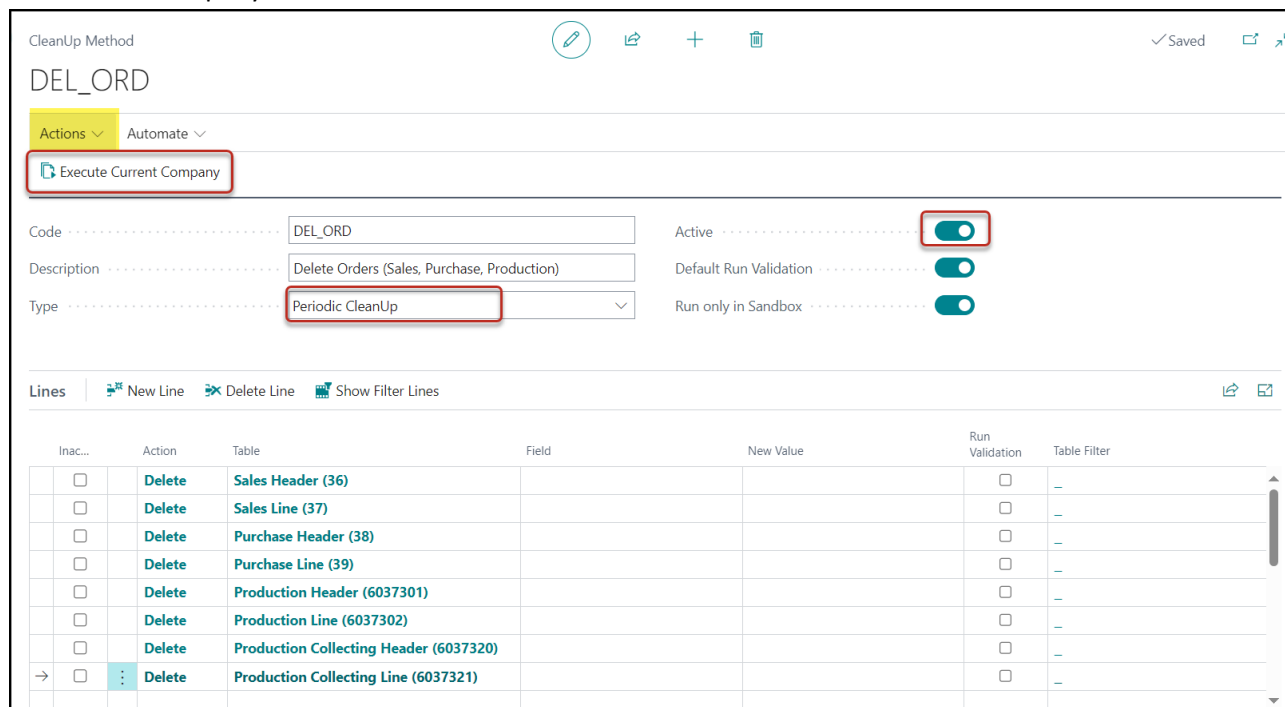
| Name                    | Display Name          |
|-------------------------|-----------------------|
| → CRONUS TRIMIT W1 Ltd. | CRONUS TRIMIT W1 Ltd. |
| My Company              |                       |

| E-Mail Template Recipient List              |                                    |                         |           |            |                          |                          |                            |                    |      |  |
|---------------------------------------------|------------------------------------|-------------------------|-----------|------------|--------------------------|--------------------------|----------------------------|--------------------|------|--|
| In original company                         |                                    |                         |           |            |                          |                          |                            |                    |      |  |
| + New Edit List Delete Card Extra Addresses |                                    |                         |           |            |                          |                          |                            |                    |      |  |
| Recipient No.<br>↑                          | Relation Name                      | To E-Mail               | Cc E-Mail | Bcc E-Mail | Alt. Output<br>File Type | Alt. Output<br>Report ID | Alt. Output Report<br>Name | Extra<br>Addresses | Info |  |
| → ...                                       | Used if specific not found         | %7                      |           |            |                          |                          |                            | 0                  |      |  |
| 2000                                        | The Fashion Store UK               | purchase@cronuscorp.net |           |            |                          |                          |                            | 0                  |      |  |
| 2010                                        | The Shoe Store Europe              | purchase@cronuscorp.net |           |            |                          |                          |                            | 0                  |      |  |
| 2020                                        | Sportswear A/S                     | purchase@cronuscorp.net |           |            |                          |                          |                            | 0                  |      |  |
| 2030                                        | The Surf Shop Ltd.                 | purchase@cronuscorp.net |           |            |                          |                          |                            | 0                  |      |  |
| 3000                                        | The Furniture Shop UK              | purchase@cronuscorp.net |           |            |                          |                          |                            | 0                  |      |  |
| 3010                                        | Office Supplies & Furniture Eur... | purchase@cronuscorp.net |           |            |                          |                          |                            | 0                  |      |  |
| 3020                                        | OCH BETT KÖK                       | purchase@cronuscorp.net |           |            |                          |                          |                            | 0                  |      |  |

| E-Mail Template Recipient List              |                                    |                  |           |            |                          |                          |                            |                    |      |  |
|---------------------------------------------|------------------------------------|------------------|-----------|------------|--------------------------|--------------------------|----------------------------|--------------------|------|--|
| In copied company                           |                                    |                  |           |            |                          |                          |                            |                    |      |  |
| + New Edit List Delete Card Extra Addresses |                                    |                  |           |            |                          |                          |                            |                    |      |  |
| Recipient No.<br>↑                          | Relation Name                      | To E-Mail        | Cc E-Mail | Bcc E-Mail | Alt. Output<br>File Type | Alt. Output<br>Report ID | Alt. Output Report<br>Name | Extra<br>Addresses | Info |  |
| → ...                                       | Used if specific not found         | hello@trimit.com |           |            |                          |                          |                            | 0                  |      |  |
| 2000                                        | The Fashion Store UK               | hello@trimit.com |           |            |                          |                          |                            | 0                  |      |  |
| 2010                                        | The Shoe Store Europe              | hello@trimit.com |           |            |                          |                          |                            | 0                  |      |  |
| 2020                                        | Sportswear A/S                     | hello@trimit.com |           |            |                          |                          |                            | 0                  |      |  |
| 2030                                        | The Surf Shop Ltd.                 | hello@trimit.com |           |            |                          |                          |                            | 0                  |      |  |
| 3000                                        | The Furniture Shop UK              | hello@trimit.com |           |            |                          |                          |                            | 0                  |      |  |
| 3010                                        | Office Supplies & Furniture Eur... | hello@trimit.com |           |            |                          |                          |                            | 0                  |      |  |
| 3020                                        | OCH BETT KÖK                       | hello@trimit.com |           |            |                          |                          |                            | 0                  |      |  |

## TYPE = PERIODIC CLEANUP

**Type** *Periodic Cleanup* can be used to modify fields, but also to delete total Tables for testing purposes in the current Company.



CleanUp Method

DEL\_ORD

Actions Automate

Execute Current Company

Code DEL\_ORD

Description Delete Orders (Sales, Purchase, Production)

Type Periodic CleanUp

Active

Default Run Validation

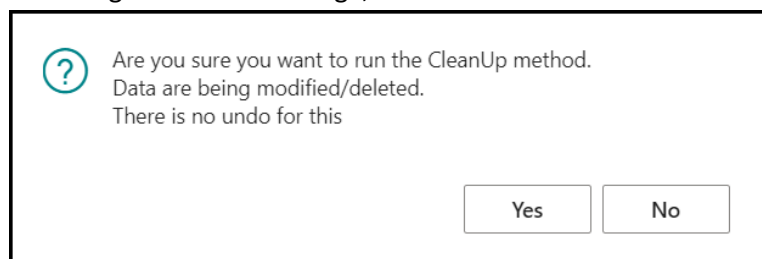
Run only in Sandbox

Lines New Line Delete Line Show Filter Lines

| Inac...                  | Action | Table                                  | Field | New Value | Run Validation           | Table Filter |
|--------------------------|--------|----------------------------------------|-------|-----------|--------------------------|--------------|
| <input type="checkbox"/> | Delete | Sales Header (36)                      |       |           | <input type="checkbox"/> | -            |
| <input type="checkbox"/> | Delete | Sales Line (37)                        |       |           | <input type="checkbox"/> | -            |
| <input type="checkbox"/> | Delete | Purchase Header (38)                   |       |           | <input type="checkbox"/> | -            |
| <input type="checkbox"/> | Delete | Purchase Line (39)                     |       |           | <input type="checkbox"/> | -            |
| <input type="checkbox"/> | Delete | Production Header (6037301)            |       |           | <input type="checkbox"/> | -            |
| <input type="checkbox"/> | Delete | Production Line (6037302)              |       |           | <input type="checkbox"/> | -            |
| <input type="checkbox"/> | Delete | Production Collecting Header (6037320) |       |           | <input type="checkbox"/> | -            |
| <input type="checkbox"/> | Delete | Production Collecting Line (6037321)   |       |           | <input type="checkbox"/> | -            |

After you have entered the **Lines**, you can use **Actions, Execute Current Company** to execute the Cleanup in the current Company.

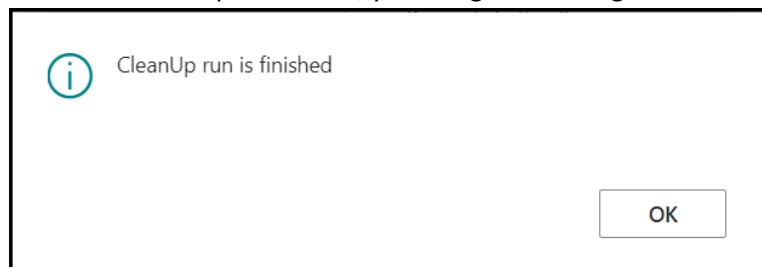
You will get an extra Message, which needs to be confirmed:



Are you sure you want to run the CleanUp method.  
Data are being modified/deleted.  
There is no undo for this

Yes No

When the Cleanup is finished, you will get a message as well:



CleanUp run is finished

OK

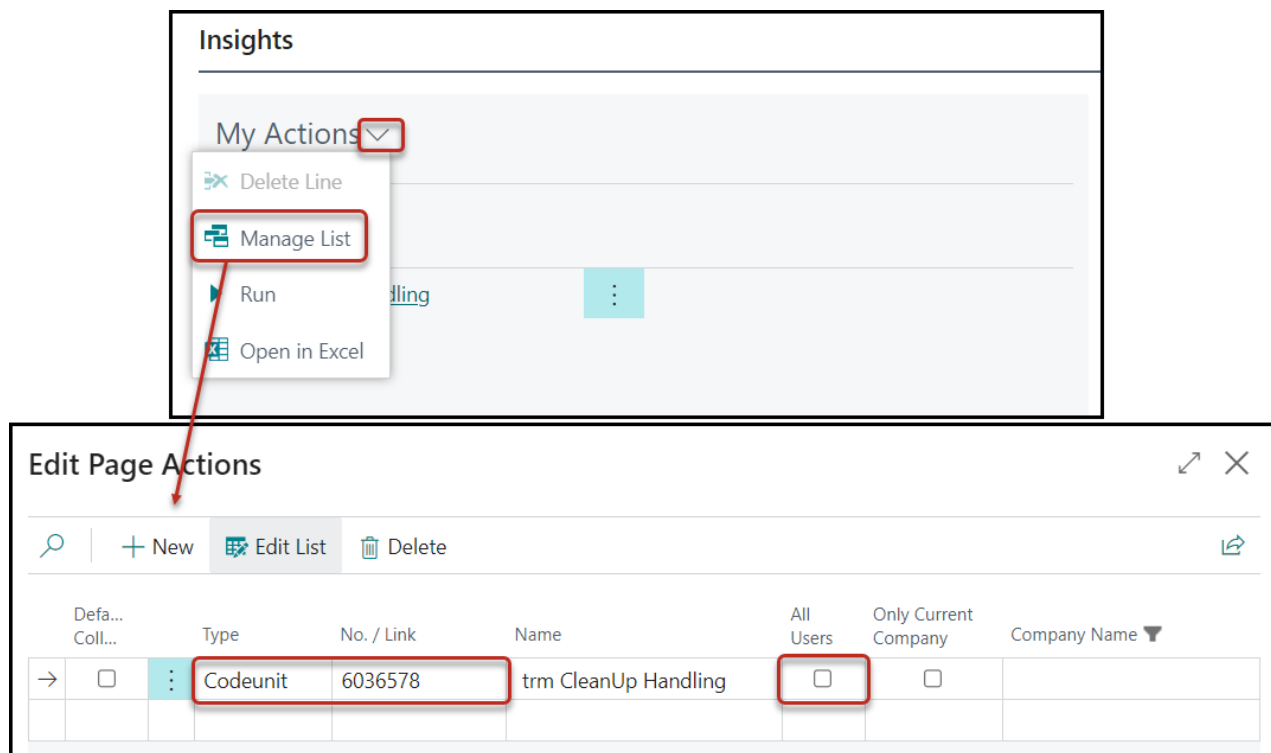
And the field **Active** will be set to *No* again.

For this, you need to have the field **System Responsible System Data** in the **User Setup** set to *Yes*.

## TYPE = COPY TO SANDBOX

For a Cloud installation, the CleanUp Method **Lines** you will create will influence the data immediately when you copy a Sandbox.

For a On-premises installation, you need to run Codeunit **6036578 trm CleanUp Handling** after you copied the Sandbox to a new Sandbox. This can be done by adding this Codeunit to the **My Actions** FactBox in one of the TRIMIT Role Centers. Make sure it is NOT for *All Users*. This Codeunit will then execute the CleanUp Method **Lines**.



The screenshot shows two parts of the TRIMIT interface. The top part shows the 'My Actions' dropdown menu with options: 'Delete Line', 'Manage List', 'Run', and 'Open in Excel'. The 'Manage List' option is highlighted with a red box. The bottom part shows the 'Edit Page Actions' table with columns: 'Defa... Coll...', 'Type', 'No. / Link', 'Name', 'All Users', 'Only Current Company', and 'Company Name'. The table contains one row with the following values: 'Codeunit', '6036578', 'trm CleanUp Handling', and 'All Users' is checked. The 'All Users' checkbox is highlighted with a red box.

| Defa... Coll... | Type     | No. / Link | Name                 | All Users                           | Only Current Company     | Company Name |
|-----------------|----------|------------|----------------------|-------------------------------------|--------------------------|--------------|
| →               | Codeunit | 6036578    | trm CleanUp Handling | <input checked="" type="checkbox"/> | <input type="checkbox"/> |              |

Or you can add a Line in PowerShell to Invoke the Codeunit 6036578:

`Invoke-navContainerCodeunit -Codeunitid 6036578 etc.`

## LINES

Some examples:

| Lines                                  |           |                            |                            |                  |                          |              |
|----------------------------------------|-----------|----------------------------|----------------------------|------------------|--------------------------|--------------|
| New Line Delete Line Show Filter Lines |           |                            |                            |                  |                          |              |
| Inactive                               | Action    | Table                      | Field                      | New Value        | Run Validation           | Table Filter |
| <input type="checkbox"/>               | Modify    | Customer (18)              | Email (102)                | hello@trimit.com | <input type="checkbox"/> | —            |
| <input type="checkbox"/>               | Modify    | E-Mail Template (6037700)  | Archive E-Mail (Bcc) (210) |                  | <input type="checkbox"/> | —            |
| <input type="checkbox"/>               | Modify    | E-Mail Recipient (6037704) | To E-Mail (11)             | hello@trimit.com | <input type="checkbox"/> | —            |
| <input type="checkbox"/>               | Add Field |                            | Cc E-Mail (21)             |                  | <input type="checkbox"/> | —            |
| <input type="checkbox"/>               | Add Field |                            | Bcc E-Mail (31)            |                  | <input type="checkbox"/> | —            |
| <input type="checkbox"/>               | Modify    | Contact (5050)             | Email (102)                | hello@trimit.com | <input type="checkbox"/> | —            |
| <input type="checkbox"/>               | Add Field |                            | Email 2 (5105)             |                  | <input type="checkbox"/> | —            |
| <input type="checkbox"/>               | Modify    | Vendor (23)                | Email (102)                | hello@trimit.com | <input type="checkbox"/> | —            |
| <input type="checkbox"/>               | Modify    | Company Information (79)   | Email (34)                 | hello@trimit.com | <input type="checkbox"/> | —            |
| <input type="checkbox"/>               | Modify    | Employee (5200)            | Email (15)                 | hello@trimit.com | <input type="checkbox"/> | —            |
| <input type="checkbox"/>               | Modify    | Job Queue Entry (472)      | Last Ready State (4)       |                  | <input type="checkbox"/> | —            |
| → <input type="checkbox"/>             | Add Field |                            | Status (13)                | On Hold          | <input type="checkbox"/> | —            |

| Lines                                  |        |                                        |             |                 |                                     |              |
|----------------------------------------|--------|----------------------------------------|-------------|-----------------|-------------------------------------|--------------|
| New Line Delete Line Show Filter Lines |        |                                        |             |                 |                                     |              |
| Inac...                                | Action | Table                                  | Field       | New Value       | Run Validation                      | Table Filter |
| <input type="checkbox"/>               | Delete | Sales Header (36)                      |             |                 | <input type="checkbox"/>            | —            |
| <input type="checkbox"/>               | Delete | Sales Line (37)                        |             |                 | <input type="checkbox"/>            | —            |
| <input type="checkbox"/>               | Delete | Purchase Header (38)                   |             |                 | <input type="checkbox"/>            | —            |
| <input type="checkbox"/>               | Delete | Purchase Line (39)                     |             |                 | <input type="checkbox"/>            | —            |
| <input type="checkbox"/>               | Delete | Production Header (6037301)            |             |                 | <input type="checkbox"/>            | —            |
| <input type="checkbox"/>               | Delete | Production Line (6037302)              |             |                 | <input type="checkbox"/>            | —            |
| <input type="checkbox"/>               | Delete | Production Collecting Header (6037320) |             |                 | <input type="checkbox"/>            | —            |
| <input type="checkbox"/>               | Delete | Production Collecting Line (6037321)   |             |                 | <input type="checkbox"/>            | —            |
| → <input type="checkbox"/>             | Modify | Customer (18)                          | Email (102) | hello@trimt.com | <input checked="" type="checkbox"/> | —            |

## DESCRIPTION OF THE FIELDS

### INACTIVE

A checkmark in **Inactive** of a Line, will not be executed.

### ACTION

You can choose between the following three options:

|           |                                                                                                                                                                                                               |
|-----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Modify    | If you want to change data of a Field in the Table Number that you will fill in Field <b>Table</b> .                                                                                                          |
| Add Field | If you want to change additional Fields in the Table Number that you will fill in Field <b>Table</b> and have entered in a previous Line with <b>Action Modify</b> .                                          |
| Delete    | With the <b>Action Delete</b> you are able to delete complete records the Table Number that you will fill in Field <b>Table</b> . This can also be the total content of a Table if no <b>Filters</b> are set. |

### TABLE

You need to fill the **Table** for which you want to change the data of some fields if you chose the **Action Modify** or for which you want to delete complete records if you chose the **Action Delete**.

You cannot enter a **Table** if you choose **Action Add Field**.

After selecting/entering the Number of the Table, the Name of the Table will be shown + the chosen Table Number.

I.e., you enter 18 or choose 18 in the lookup, in the field **Table** you will see *Customer (18)*.

## FIELD

For the **Action** *Modify* or *Add Field* you need to enter the Field Number that you want to change. After selecting/entering the Number of the Field, the Name of the Field will be shown + the chosen Field Number.

I.e., for **Table 18**, you enter **Field 102** or choose *102* in the lookup and in the field **Field** you will see *Email (102)*.

## NEW VALUE

If you want to change the content of the **Field**, you can enter the **New Value**.

If you leave **New Value** blank, the content of the **Field** will be deleted.

## RUN VALIDATION

This field will by default be set based on the **Default Run Validation** of the Header of the CleanUp Method, but can be changed if **Action** is *Periodic CleanUp*, to Validate the **New Value**.

## NOTE

If you want to use **Action Delete** the **Run Validation** should be set to *No*.

Otherwise, when i.e., deleting Sales Headers, you might get error messages if the Sales Order is *Released*.



Status must be equal to 'Open' in Sales Header: Document Type=Order, No.=0100001. Current value is 'Released'.

[Share details](#) ▾

Was this information helpful? [Yes](#) [No](#)

OK

## FILTER

You can set Filters if the **Action** is *Modify* or *Delete* for all the fields of the **Table**.

By clicking on the field **Filter**, a new **Filter Page** will open in which you can set the Filters for the **Table**.

I.e., if **Table** is set to *18*, you will see:

Filter Page



Filter: Customer

[+ Filter...](#)

Filter totals by:

[+ Filter...](#)

OK

Cancel

## PROCESS

### WHEN YOU COPY A COMPANY:

After the Company has been copied the system will go through all the **CleanUp Methods** of **Type Copy Company** and **Active Yes** and execute the **Lines** to change the data in the new Company.

After all the **Lines** have been executed of a **CleanUp Method**, the field **Active** will be set to **No**.

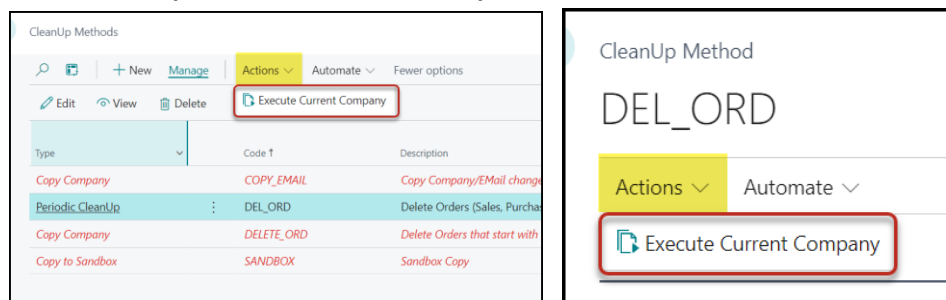
Therefore: when you want to copy a Company and make use of the **CleanUp Methods**, you need to check before if the field **Active** is set to **Yes**, otherwise it will not be executed.

### WHEN YOU COPY A SANDBOX:

After the Sandbox has been copied you run the Codeunit **6036578** in the new Sandbox and this will go through all the **CleanUp Methods** of **Type Copy to Sandbox** and **Active Yes** and execute the **Lines** to change the data in the new Company.

### WHEN YOU EXECUTE THE PERIODIC CLEANUP:

In the **CleanUp Methods** List or **CleanUp Method** Card:



This will execute the **Lines** of the specific **CleanUp Method** to delete/change the data in the current Company.

After all the **Lines** have been executed of a **CleanUp Method**, the field **Active** will be set to **No**.

Therefore: when you want to use the **CleanUp Method** of **Type Periodic CleanUp**, you need to check before if the field **Active** is set to **Yes**, otherwise it will not be executed.