



WHITE PAPER

TRIMIT Retention Policy 24.1

This document contains information regarding the Retention Policy functionality and extra remarks regarding deleting Data in TRIMIT 24.1 for Microsoft Dynamics 365 Business Central 2024, Wave 1 (W1).

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INTRODUCTION

The **TRIMIT Retention Policy** functionality is simply adding some specific TRIMIT Tables into the standard Retention Policy of BC during the installation of the **TRIMIT** App.

You can read more about the Retention Policy in Business Central in [Clean Up Data with Retention Policies - Business Central | Microsoft Learn](#)

In this document we also added some information regarding deleting the so-called **Media Orphans**. These are media files (pictures, E-Mail attachments, etc.) uploaded in the database, which do not have a connection anymore to other data in the database.

Deleting these **Media Orphans** can get rid of lots of consumed space in your database and can help improving the performance of the solution.

This however does not include the Pictures that might have been uploaded to the TRIMIT Masters, VarDim Type Variants or Master/Variants.

And a description of **Batch Delete ASI Documents**: deleting the Posted Portal Sales Document.

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 Retention Policy contains the following objects:

Codeunit	6036520	<i>trm TrimitApplInstall</i>
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Batch Delete ASI Documents contains the following objects:

Report	6038102	<i>trm Batch Delete ASI Documents</i>
Codeunit	6038129	<i>trm Batch Delete ASI Documents</i>

RETENTION POLICY

When installing the **TRIMIT** App some **Retention Policy** records will be created with default **Retention Period** and default Filters, but you can change them manually if desired. They will all not be enabled unless there is a special filter set.

Retention Policies					
+ New Manage Home Navigate Automate Fewer options Apply Manually Apply All					
Table Id #	Table Caption	Enabled	Manual	Retention Period	
405	Change Log Entry	☐	☐		
3905	Retention Policy Log Entry	☐	☐	SIX MONTHS	
5338	Integration Synch. Job	☐	☐	1 MONTH	
5339	Integration Synch. Job Errors	☐	☐	1 MONTH	
5395	Dataverse Entity Change	☒	☐	1 WEEK	
5772	Registered Whse. Activity Hdr.	☐	☐	1 YEAR	
6123	E-Document Mapping Log	☐	☐		
6124	E-Document Log	☐	☐		
6125	E-Doc. Data Storage	☐	☐		
6127	E-Document Integration Log	☐	☐		
7322	Posted Whse. Shipment Header	☐	☐	1 YEAR	
30114	Shopify Data Capture	☐	☐	1 MONTH	
30115	Shopify Log Entry	☐	☐	1 MONTH	
6036524	Batch Log	☐	☐	1 MONTH	
6036538	Replication Log	☐	☐	1 YEAR	
6036539	Replication Error Log	☐	☐	1 YEAR	
6036679	Intercompany Transact Log	☐	☐		
6037004	Std. Unit Cost Log	☐	☐		
6037180	Picture	☒	☐		
6038109	File Repository	☐	☐		
6038117	Portal Activity Log	☐	☐	1 YEAR	
6038169	B2B Relation Authorization	☐	☐		

You can run the deletion of data manually or by using a **Job Queue Entry**.

When you **Enable** a Retention Policy, the system will automatically create a **Job Queue Entry**:

Job Queue Entries										
+ New Edit List Delete Edit View Set Status to Ready Restart Run once (foreground) Set On Hold Show Error More options Ready ADMIN Codeunit 3997 Retention Policy JQ Retention Normal 10/7/2024 4:10 PM 0										
On Hold	BCBUILD100V8450\LOCALUSER	Report	1511	Delegate Approval Requests	Auto-created for sending of deleg...	Normal	9/26/2024 7:26 AM	☐	☒	1440
On Hold	BCBUILD100V8450\LOCALUSER	Codeunit	6700	O365 Sync. Management	Auto-created for retrieval of new d...	Normal	9/26/2024 7:27 AM	☐	☒	1440
Ready	ADMIN	Codeunit	1350	Telemetry Management		Normal	9/28/2024 12:00 AM	☐	☒	1440
Ready	ADMIN	Codeunit	461	Job Queue Cleanup Tasks		Normal	10/13/2024 12:00 AM	☒	☒	1440
On Hold	ADMIN	Codeunit	6038120	trm NAS ASI Posting Template	Nas Asi Posting Template	PORTALS		☐	☒	2

TRIMIT TABLES

TABLE 6036524 TRM BATCH LOG

This gets a **Retention Period** of 1 MONTH.

TABLE 6036538 TRM REPLICATION LOG

This gets a **Retention Period** of 1 YEAR.

TABLE 6036539 TRM REPLICATION ERROR LOG

This gets a **Retention Period** of 1 YEAR.

TABLE 6036679 TRM INTERCOMPANY TRANSACT LOG

The **trm Intercompany Transact Log** can only be deleted if the field **Next Step** = *Finished*.
Therefore, the **Retention Period** of 1 YEAR is set in the Card of the **Retention Policy** based on the Filter:

Retention Policy

✓ Saved

trm Intercompany Transact Log

Home

Navigate

More options

Apply Manually

General >

6036679

Intercompany Transact Log

Retention Policy >

Record Retention Policy

New Line

Delete Line

Table Filter Text

Retention Period

Keep Last Document Version

Enabled

Locked

→

Next Step: Finished

:

1_YEAR

☐

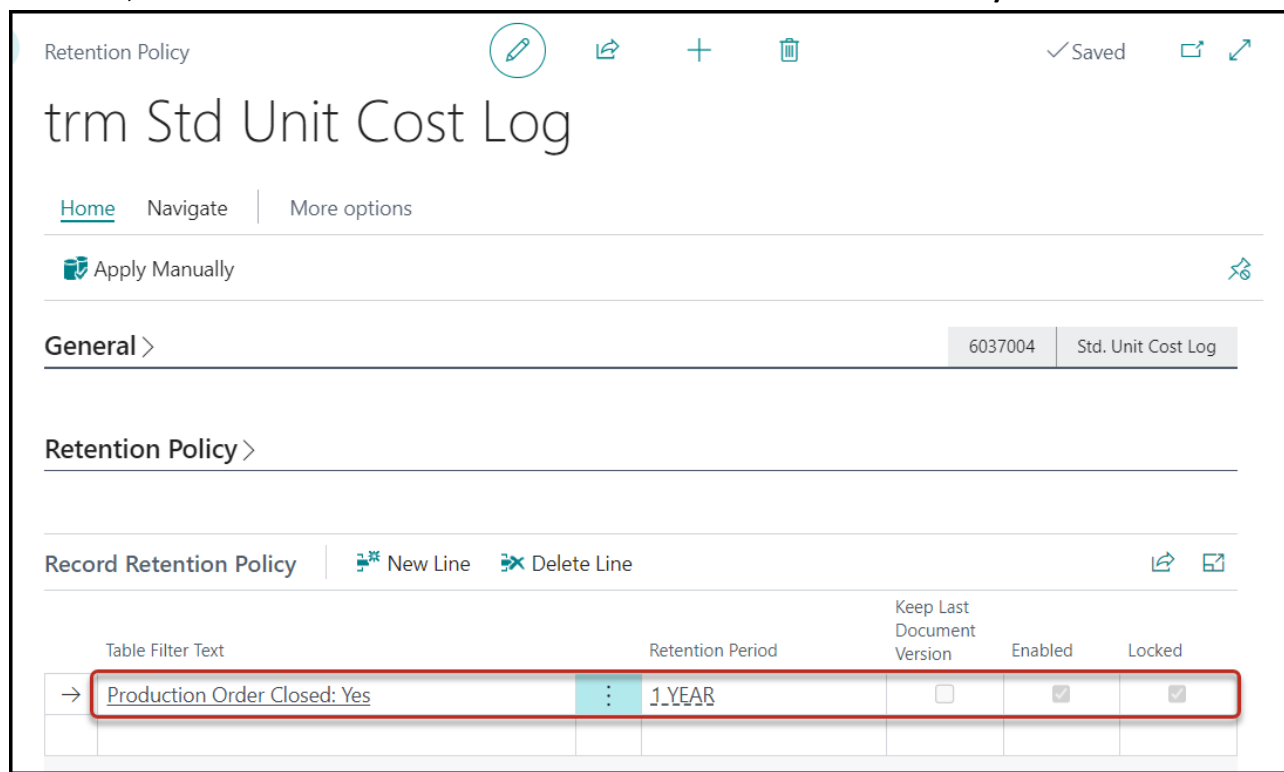
☒

☒

TABLE 6037004 TRM STD UNIT COST LOG

The **trm Std Unit Cost Log** can only be deleted if the field **Production Order Closed** = Yes.

Therefore, the **Retention Period** of **1 YEAR** is set in the Card of the **Retention Policy** based on the Filter:



Retention Policy

trm Std Unit Cost Log

Home Navigate More options

Apply Manually

General > 6037004 Std. Unit Cost Log

Retention Policy >

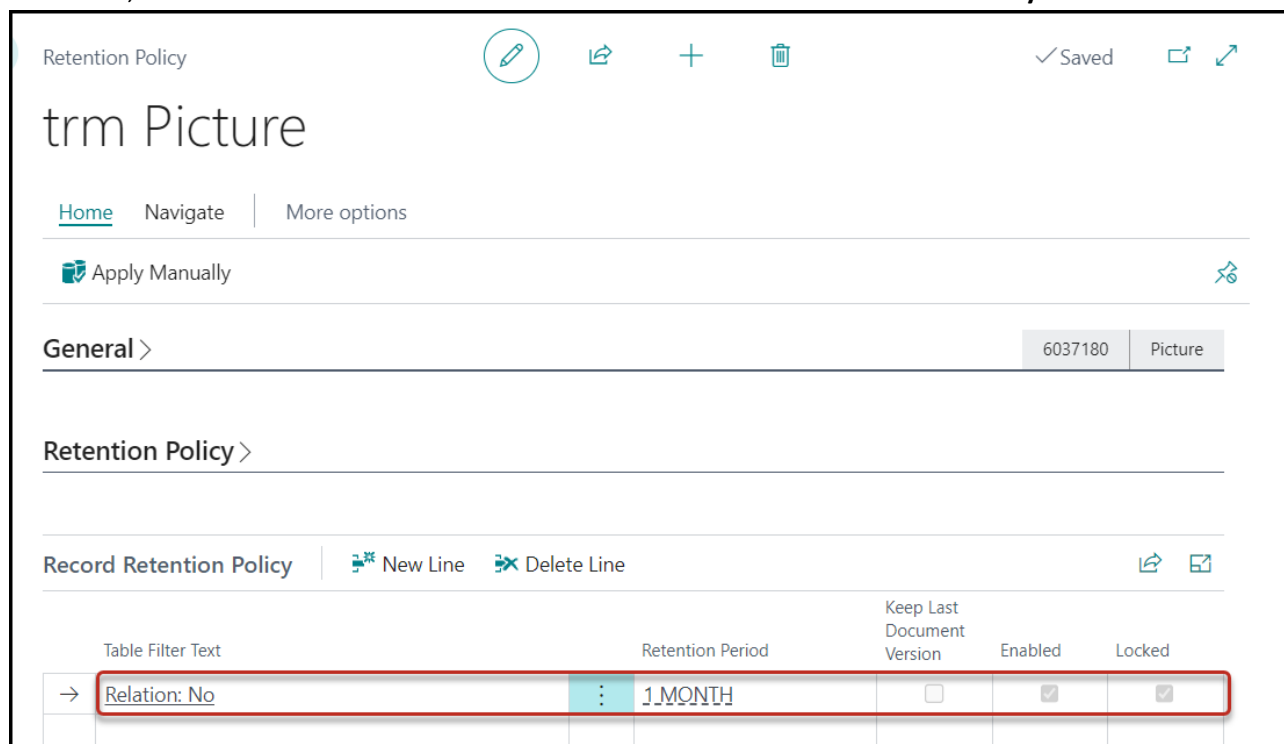
Record Retention Policy New Line Delete Line

Table Filter Text	Retention Period	Keep Last Document Version	Enabled	Locked
→ Production Order Closed: Yes	1_YEAR	☐	☒	☒

TABLE 6037180 TRM PICTURE

The **trm Picture** can only be deleted if the field **Relation** = No.

Therefore, the **Retention Period** of **1 MONTH** is set in the Card of the **Retention Policy** based on the Filter:



Retention Policy

trm Picture

Home Navigate More options

Apply Manually

General > 6037180 Picture

Retention Policy >

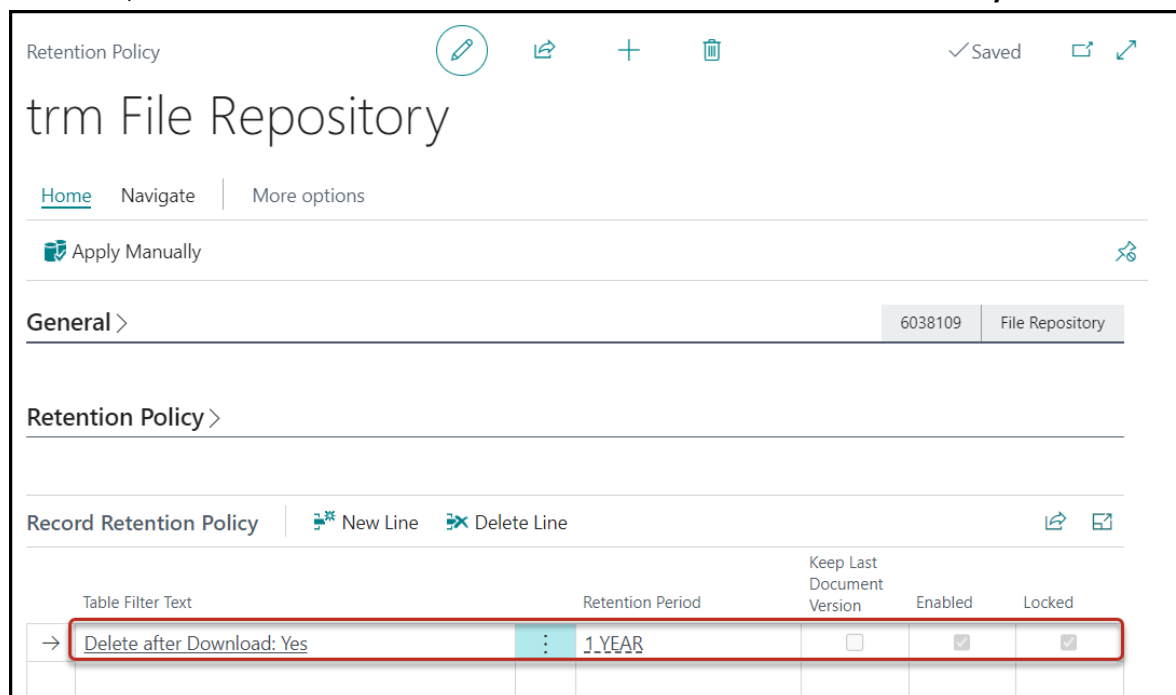
Record Retention Policy New Line Delete Line

Table Filter Text	Retention Period	Keep Last Document Version	Enabled	Locked
→ Relation: No	1_MONTH	☐	☒	☒

TABLE 6038109 TRM FILE REPOSITORY

The **trm File Repository** can only be deleted if the field **Delete After Download** = **Yes**.

Therefore, the **Retention Period** of **1 YEAR** is set in the Card of the **Retention Policy** based on the Filter:



Retention Policy

trm File Repository

Home | Navigate | More options

Apply Manually

General > 6038109 File Repository

Retention Policy >

Record Retention Policy | New Line | Delete Line

Table Filter Text	Retention Period	Keep Last Document Version	Enabled	Locked
→ Delete after Download: Yes	1 YEAR	☐	☒	☒

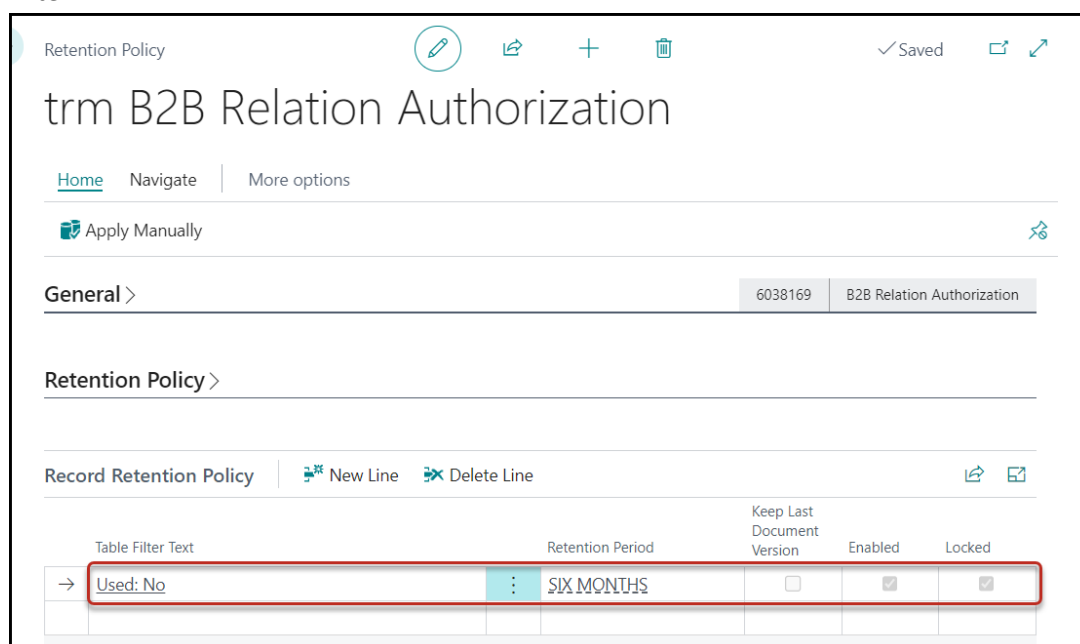
TABLE 6038117 TRM PORTAL ACTIVITY LOG

This gets a **Retention Policy** of **1 YEAR**.

TABLE 6038169 TRM B2B RELATION AUTHORIZATION

The **trm B2B Relation Authorization** can only be deleted if the field **Used** = **No**.

Therefore, the **Retention Period** of **SIX MONTHS** is set in the Card of the **Retention Policy** based on the Filter:



Retention Policy

trm B2B Relation Authorization

Home | Navigate | More options

Apply Manually

General > 6038169 B2B Relation Authorization

Retention Policy >

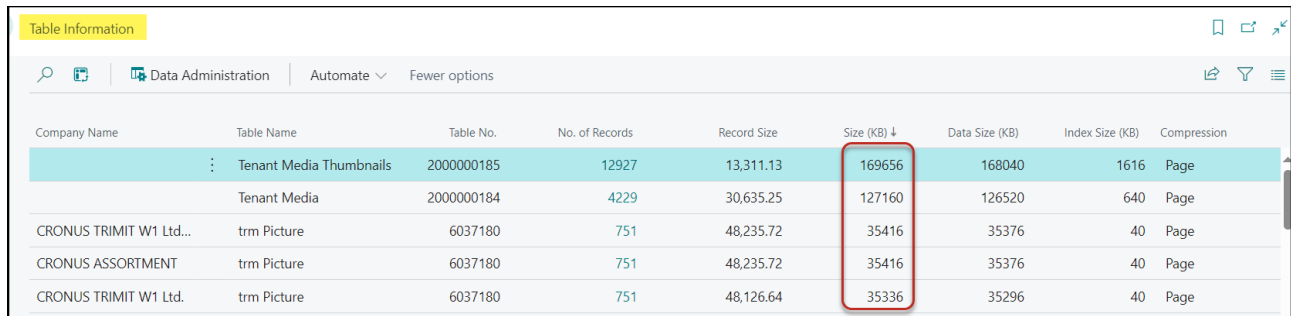
Record Retention Policy | New Line | Delete Line

Table Filter Text	Retention Period	Keep Last Document Version	Enabled	Locked
→ Used: No	SIX MONTHS	☐	☒	☒

DELETING THE MEDIA ORPHANS

With thanks to [Cleaning up Media Orphans with the Data Administration tool in Business Central \(waldo.be\)](#)

In the **Table Information** (via **Tell me Table Information**), you can see all the Tables in the database and if you sort them based on the **Size (KB)**, you can also see, that the **Tenant Media Thumbnails** and **Tenant Media** are the biggest Tables.



Company Name	Table Name	Table No.	No. of Records	Record Size	Size (KB) ↓	Data Size (KB)	Index Size (KB)	Compression
	Tenant Media Thumbnails	2000000185	12927	13,311.13	169656	168040	1616	Page
	Tenant Media	2000000184	4229	30,635.25	127160	126520	640	Page
CRONUS TRIMIT W1 Ltd...	trm Picture	6037180	751	48,235.72	35416	35376	40	Page
CRONUS ASSORTMENT	trm Picture	6037180	751	48,235.72	35416	35376	40	Page
CRONUS TRIMIT W1 Ltd.	trm Picture	6037180	751	48,126.64	35336	35296	40	Page

Or in other words: you will see that an abundant amount of data is lost on Media.

Pictures, E-Mail Attachments, etc., it could virtually be any kind of value in any Media-datatype-field that you upload to the system.

If you are not careful - these tables are typically big, so they take a lot of space in the database.

Also, these "BLOBs" are not saved in the table itself anymore, but referenced from a **Tenant Media** Table, which would contain the BLOB.

Example:

The Master Table has a picture. This picture is saved as a BLOB in the **Tenant Media** Table and referenced with its GUID to the Master Table. That is in a nutshell - there is a tad more to it, but it comes down to having all these BLOBs in one or two Tables (also the **Tenant Media Thumbnails** Table, as you can see in the screenshot), and that is it. And that is why this Table stands out in the **Table Information** page.

So, what happens when there are records in the **Tenant Media** Table, but there are NO references anymore to ANY Record in ANY Table of ANY Extension. In this case, the record just consumes database space, and will never ever anymore be referenced from any kind of Record. Not ever. Ever!

That is when we speak of **Media Orphans**. They take space and are **completely useless**.

Useless space, and if it happens, a LOT of it. So ..

Since quite some versions, it is easier to detect Media Orphans in code, thanks to:

- [Media.FindOrphans\(\) Method - Business Central | Microsoft Learn](#)
- [MediaSet.FindOrphans\(\) Method - Business Central | Microsoft Learn](#)

The methods simply provide a list with guids, one item is one Orphan.

Instead of looking at the **Table Information**, you can also look at the **Data Administration** (via **Tell me Data Administration**) which can also show you the **Growth % (30D)** – the growth percentage in the last 30 Days. The shown data is stored in a buffer, so to see the latest numbers you need to click **Refresh**, but this makes it much quicker as the **Table Information** which needs to calculate the numbers when opening the page:

Data Administration					
× Use the Refresh action to update the data on the page. For large databases this can take a while. Refresh Schedule background refresh Don't show again					
Data Administration Guide Refresh Actions Related Fewer options					
Table Size					
Table Name	Company Name	No. of Records	Data Size (KB) ↓	Last Period Size (30D)	Growth % (30D)
Tenant Media Thumbnails	(Cross-Company Data)	12992	168296	114356	47.00
Tenant Media	(Cross-Company Data)	4250	126680	87961	44.00
trm Picture	CRONUS TRIMIT W1 Ltd. ORG	751	35376	0	0.00
trm Picture	CRONUS TRIMIT W1 Ltd.	756	35376	0	0.00
trm Picture	CRONUS ASSORTMENT	751	35376	0	0.00
Data Sensitivity	(Cross-Company Data)	173414	7616	0	0.00
trm Track Record ID	CRONUS TRIMIT W1 Ltd.	18680	4280	0	0.00
trm Track Record ID	CRONUS DATA TEST	18402	4168	0	0.00
Company Size					
Company Name					Size (KB) ↓
(Cross-Company Data)					314264
CRONUS TRIMIT W1 Ltd.					113584
CRONUS ASSORTMENT					98592
CRONUS TRIMIT W1 Ltd. ORG					96712
CRONUS DATA TEST					55080
CRONUS International Ltd.					22728
CRONUS International Ltd. ORG					20640
My Company					1696
Total (KB)					723296

In the **Data Administration**, you can cleanup also the **Media Orphans**:

Data Administration

✕ Use the Refresh action to update the data on the page. For large databases this can take a while. [Refresh](#) | [Schedule background refresh](#) | [Don't show again](#)

[Data Administration Guide](#)

[Refresh](#)

Actions ▾

Related ▾

Fewer options

 Schedule Background Refresh

Data Cleanup >

Date Compression >

Other >

Document Archives >

Invoiced Documents >

Marketing >

Cost Accounting >

Miscellaneous >

Table Size

Table Name

[Tenant Media Thumbnails](#)

Tenant Media

trm Picture

trm Picture

trm Picture

Data Sensitivity

trm Track Record ID

trm Track Record ID

Company Size

Company Name

(Cross-Company Data)

CRONUS TRIMIT W1 Ltd.

CRONUS TRIMIT W1 Ltd.

CRONUS ASSORTMENT

(Cross-Company Data)

CRONUS TRIMIT W1 Ltd.

CRONUS DATA TEST

No. of Records

12992

4250

Delete Phys. Inventory Ledger...

Delete Expired Components...

Delete Service Email Queue...

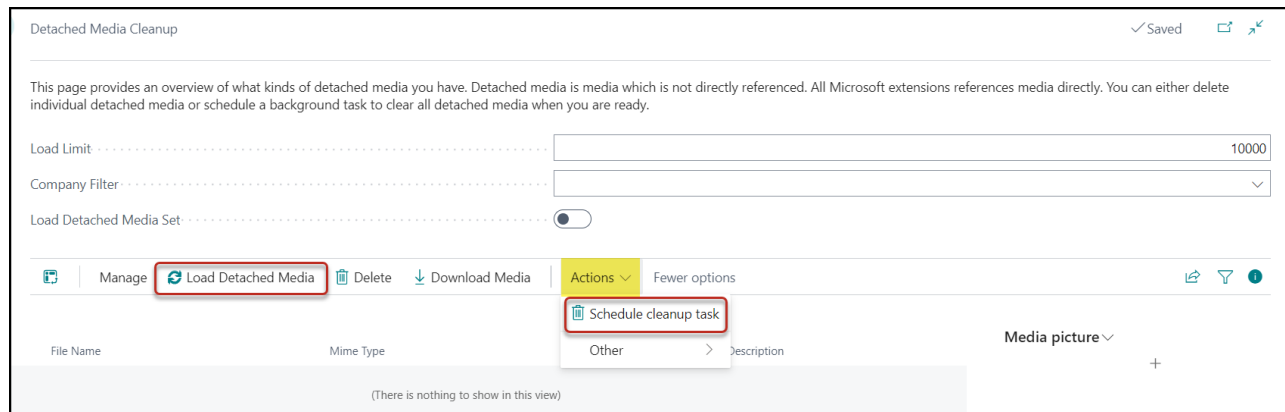
Delete Service Document Log...

Delete Service Item Log...

Delete Detached media...

Delete Duplicated Guided Experience Item...

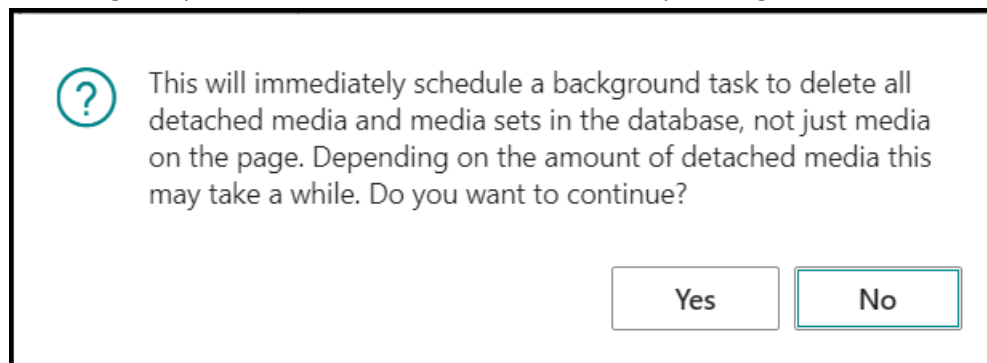
It will open a page, where you can click **Load Detached Media** and get an overview of all your **Media Orphans**:



You can even see the **Media picture**, **Download Media**, and **Delete** individual File Names.

Now, for deletion, we would advise to not do it one by one, or all in the client, but to schedule a cleanup task, to run it in background via **Actions, Schedule Cleanup Task**.

You will get a question, which needs to be confirmed by clicking **Yes**.



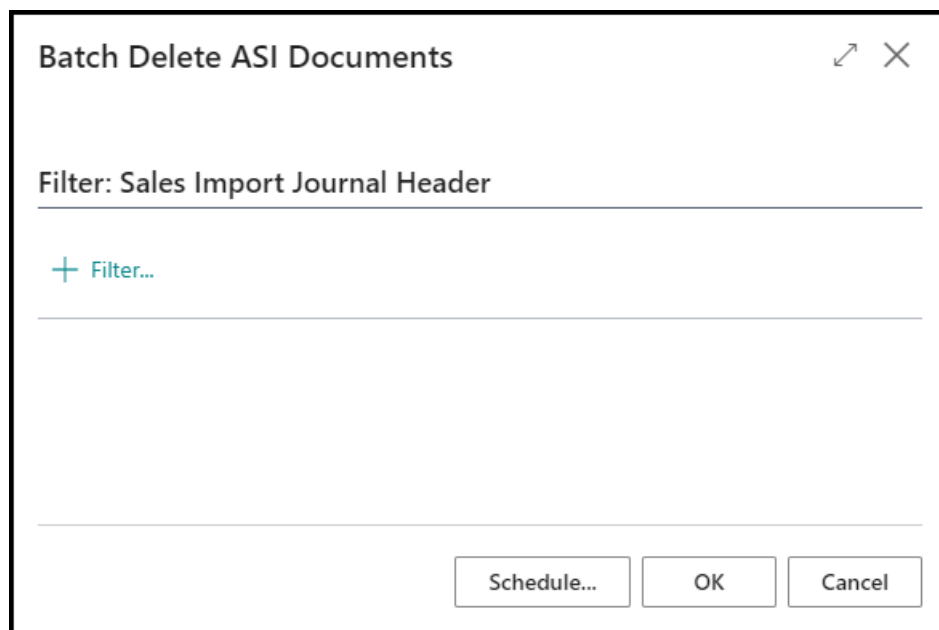
And there you go - Orphaned Media: Solved! 

BATCH DELETE ASI DOCUMENTS

Sales Orders entered on the TRIMIT Portals, can be 'posted' directly into the regular Sales Quote or -Orders if the field **Instant ASI Posting** in the Partner Portal is set to *Yes*.

However, if the **Instant ASI Posting** is set to *No*, the Sales Order of the TRIMIT Portal will be written in the **Portal Sales Documents**, after which a user needs to 'post' them, and they can be shown in the **Posted Portal Sales Documents**.

With the **Batch Delete ASI Documents** you are able to delete the records of the **Posted Portal Sales Documents**: the Sales Orders entered on the TRIMIT Portal and 'posted' to the regular Sales Quote or – Order.

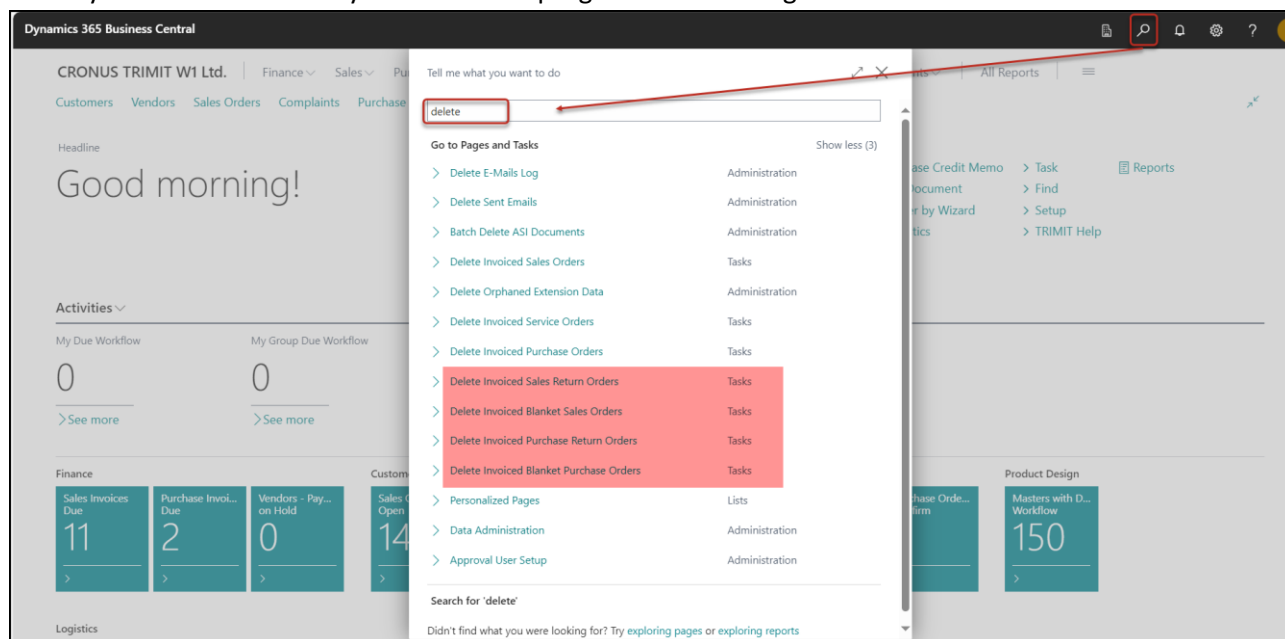


The dialog box titled "Batch Delete ASI Documents" features a close button (X) and a refresh button (circular arrow) in the top right corner. Below the title bar, there is a filter input field containing the text "Filter: Sales Import Journal Header". Underneath this field is a button labeled "+ Filter...". At the bottom of the dialog, there are three buttons: "Schedule...", "OK", and "Cancel".

You can set Filters, and after clicking **OK**, the records will be deleted.

DELETE DATA NOT SUPPORTED BY TRIMIT

When you search for *Delete* you see several programs for deleting data.



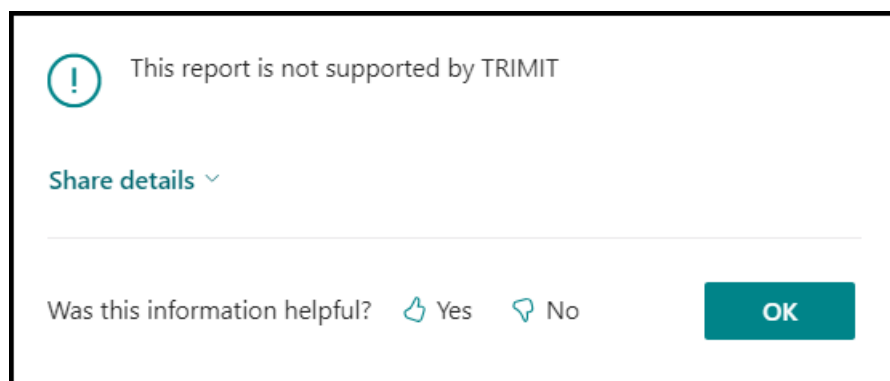
Unfortunately, not all these programs have the possibility to add extra code via Subscribers to make sure that also TRIMIT related data will be deleted as well, like i.e., the VarDim Order information.

This is the case for the Invoiced Sales Blanket Order, Invoiced Sales Return Order, Invoiced Purchase Blanket Order and Invoiced Purchase Return Order.

If we should allow you to delete this data, some TRIMIT specific data would still remain in the database.

That is why we decided not to enable these Delete programs.

You will get an error message in case you would run these programs and there are records that could be deleted.



Until Microsoft will add extra Subscribers, this seemed to us the best solution to prevent inconsistencies in the data.