



WHITE PAPER

CleanUp Methods

TRIMIT version: **25.1**

Date: **June 17, 2025**

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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 25.1 for Business Central W1 BC26.X**.

The pictures in this White Paper are based on the demo data for **TRIMIT 25.1**, which is based on Microsoft Dynamics 365 Business Central 2025 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

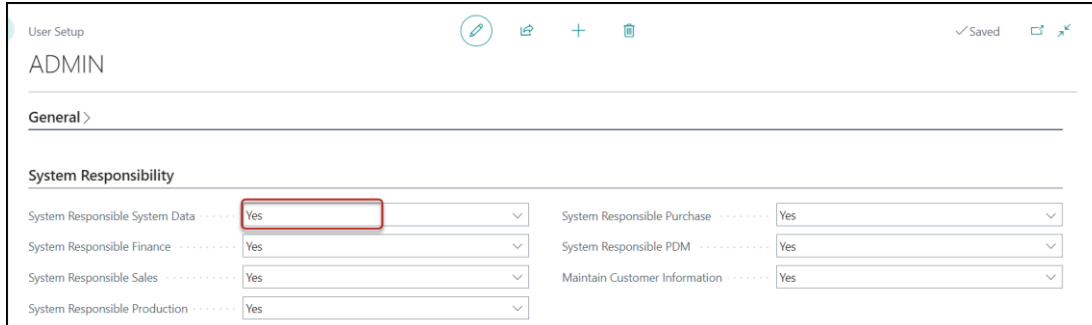
The enum

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		

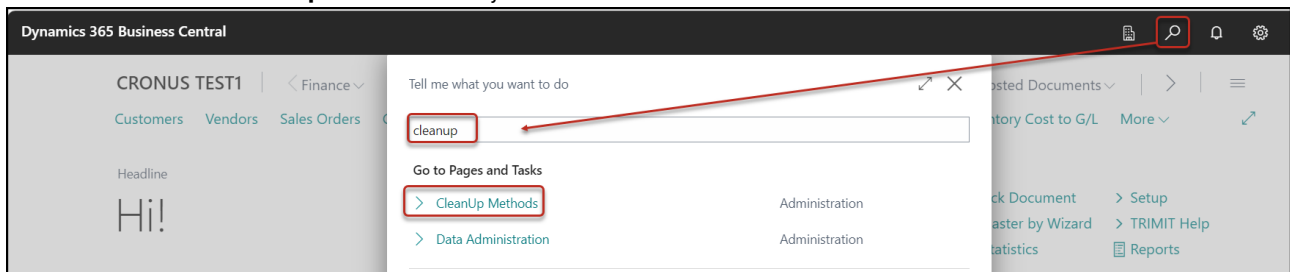
Permissions

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 the *Edit* or *Delete* right for the Tables for which the data should be modified or deleted.

But there are possibilities for small customization to avoid this permission issue; See [Customization](#).

CleanUp Method

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



Dynamics 365 Business Central

CRONUS TEST1 | < Finance

Customers Vendors Sales Orders

Headline
Hi!

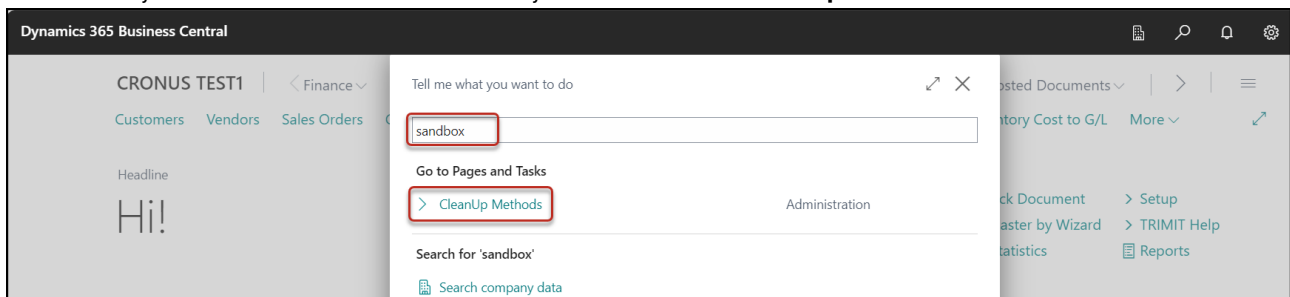
Tell me what you want to do

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

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 page for 'COPY_EMAIL'. The 'General' section includes fields for Code (COPY_EMAIL), Description (Copy Company/E-Mail changes), and Type (Copy Company). The 'Active' toggle is turned on, and 'Run only in Sandbox' is also turned on. Below this is a table of 'Lines' with columns for Inactive, Action, Table, Field, New Value, Run Validation, and Table Filter. The table lists various actions like 'Modify' and 'Add Field' for different tables such as 'Customer', 'E-Mail Template', 'E-Mail Recipient', 'Contact', 'Vendor', 'Company Information', 'Employee', and 'Job Queue Entry'.

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

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 two parts of the interface. On the left, the 'Companies' list displays a table with 'Name' and 'Display Name' columns. The first entry is 'CRONUS TRIMIT W1 Ltd.' with the same display name. The 'Copy' button is highlighted. On the right, the 'Copy Company' dialog is open, showing the 'New Company Name' field set to 'CRONUS TEST2'. The 'I understand' toggle is turned on. At the bottom, the 'OK' button is highlighted.

Companies

Do not add personal data to the company name as this is not treated as restric

New | Edit List | Delete | Copy | Automate

Name	Display Name
→ CRONUS TRIMIT W1 Ltd.	CRONUS TRIMIT W1 Ltd.

My Company

Copy Company

New Company Name: CRONUS TEST2

The new company will include all data, including transactions, from the selected company.

IMPORTANT

Copying a company can take time, and people working in the company will not be able to use Business Central during the process. We recommend that you perform this action at a time of day that will have the least impact, for example, outside of business hours.

I understand

Tip: If you just want to work with the data, there are other ways to do that. For example, you can create a sandbox environment based on production data, or do a data backup.

[Read more about sandboxes](#)

[Read more about data backup](#)

OK Cancel

E-Mail Template Recipient List										
In original company										
🔍 + New Edit List Delete Card Extra Addresses										
Recipient No. ↑		Relation Name	To E-Mail	Cc E-Mail	Bcc E-Mail	Alt. Output File Type	Alt. Output Report ID	Alt. Output Report Name	Extra 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. ↑		Relation Name	To E-Mail	Cc E-Mail	Bcc E-Mail	Alt. Output File Type	Alt. Output Report ID	Alt. Output Report Name	Extra 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

CodeDEL_ORD

DescriptionDelete Orders (Sales, Purchase, Production)

TypePeriodic Cleanup

Active

Default Run Validation

Run only in Sandbox

Lines

New LineDelete LineShow Filter Lines

Inac...	Action	Table	Field	New Value	Run Validation	Table Filter
☐	Delete	Sales Header (36)			☐	-
☐	Delete	Sales Line (37)			☐	-
☐	Delete	Purchase Header (38)			☐	-
☐	Delete	Purchase Line (39)			☐	-
☐	Delete	Production Header (6037301)			☐	-
☐	Delete	Production Line (6037302)			☐	-
☐	Delete	Production Collecting Header (6037320)			☐	-
☐	Delete	Production Collecting Line (6037321)			☐	-

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

YesNo

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

i

CleanUp run is finished

OK

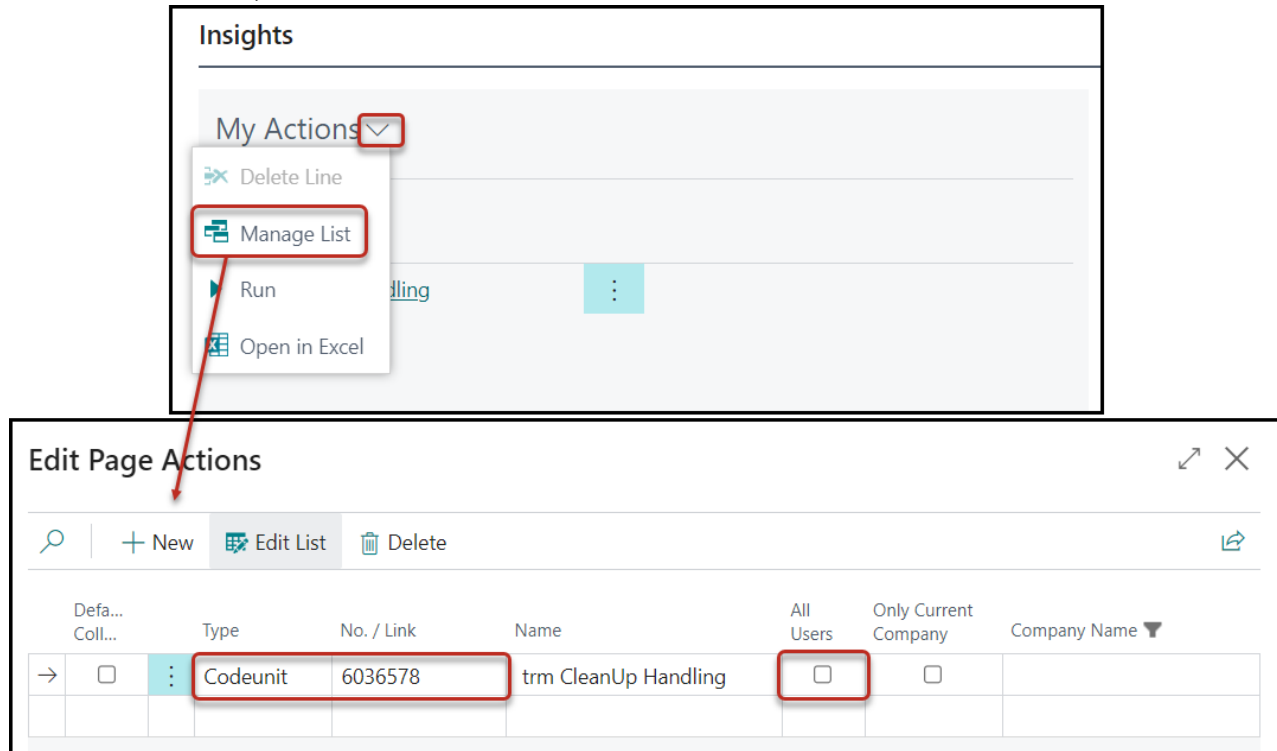
And the field **Active** will be set to *No* again.

For this, you need to have the field **System Responsible System Data** in the **User Setup** set to *Yes* and you need to have the Permissions to *Delete* records in these Tables.

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 an 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 the 'Insights' page with a 'My Actions' dropdown menu open. The 'Manage List' option is highlighted. Below this, the 'Edit Page Actions' table is visible, showing a list of actions. The table has columns for 'Defa... Coll...', 'Type', 'No. / Link', 'Name', 'All Users', 'Only Current Company', and 'Company Name'. The first row shows a 'Codeunit' with 'No. / Link' 6036578 and 'Name' 'trm CleanUp Handling'. The 'All Users' checkbox is unchecked.

Defa... Coll...	Type	No. / Link	Name	All Users	Only Current Company	Company Name
→	Codeunit	6036578	trm CleanUp Handling	☐	☐	

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

`Invoke-navContainerCodeunit -Codeunitid 6036578 etc.`

Lines

Some examples:

Lines

New LineDelete LineShow Filter Lines

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

Lines

New LineDelete LineShow Filter Lines

Inac...	Action	Table	Field	New Value	Run Validation	Table Filter
☐	Delete	Sales Header (36)			☐	—
☐	Delete	Sales Line (37)			☐	—
☐	Delete	Purchase Header (38)			☐	—
☐	Delete	Purchase Line (39)			☐	—
☐	Delete	Production Header (6037301)			☐	—
☐	Delete	Production Line (6037302)			☐	—
☐	Delete	Production Collecting Header (6037320)			☐	—
☐	Delete	Production Collecting Line (6037321)			☐	—
☐	Modify	Customer (18)	Email (102)	hello@trimt.com	☒	—

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

Table

You need to fill in 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**.

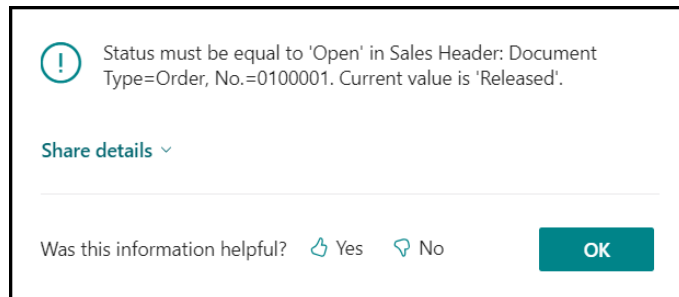
If you leave **New Value** blank, the content of the **Field** will be deleted.

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*.



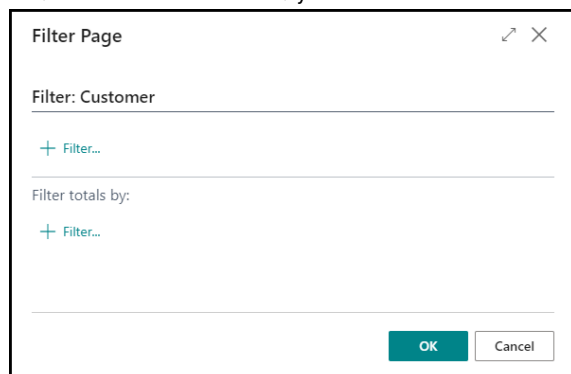
The screenshot shows a modal dialog box with a red exclamation mark icon. The text inside reads: "Status must be equal to 'Open' in Sales Header: Document Type=Order, No.=0100001. Current value is 'Released'." Below this text is a link that says "Share details" with a downward arrow. At the bottom, there is a feedback section asking "Was this information helpful?" with "Yes" and "No" options, each preceded by a thumbs-up and thumbs-down icon respectively. An "OK" button is located at the bottom right of the dialog.

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:



The screenshot shows a "Filter Page" dialog box. It has a title bar with a maximize icon and a close icon. Inside, there is a section labeled "Filter: Customer" with a text input field. Below this is a link that says "+ Filter...". Another section labeled "Filter totals by:" also has a "+ Filter..." link. At the bottom right, there are "OK" and "Cancel" buttons.

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**.

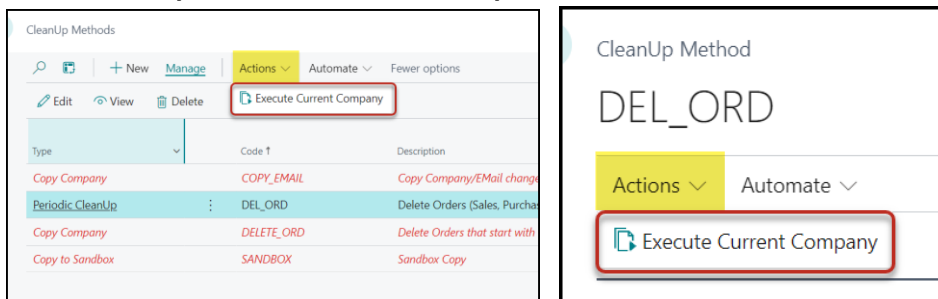
Therefore: when you want to copy a Company and make use of the **CleanUp Methods**, you need to check before if the field **Active** is set to **Yes**, otherwise it will not be executed.

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:



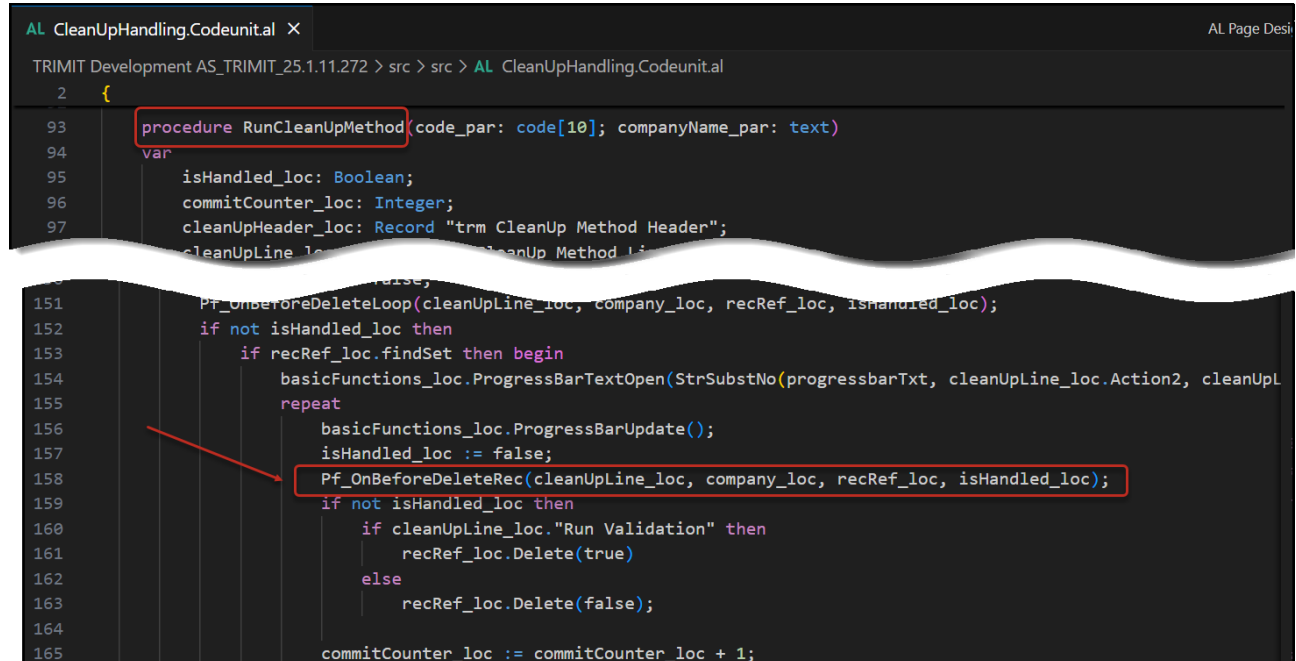
This will execute the **Lines** of the specific **CleanUp Method** to delete/change the data in the current Company.

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.

Customization

In case you want to give permissions to delete even Entry or Archive records in a Sandbox for which the user normally would NOT have permissions, you could add this in a specific event subscriber that is available in the Codeunit **6036578 trm CleanUp Handling: Pf_OnBeforeDeleteRec**



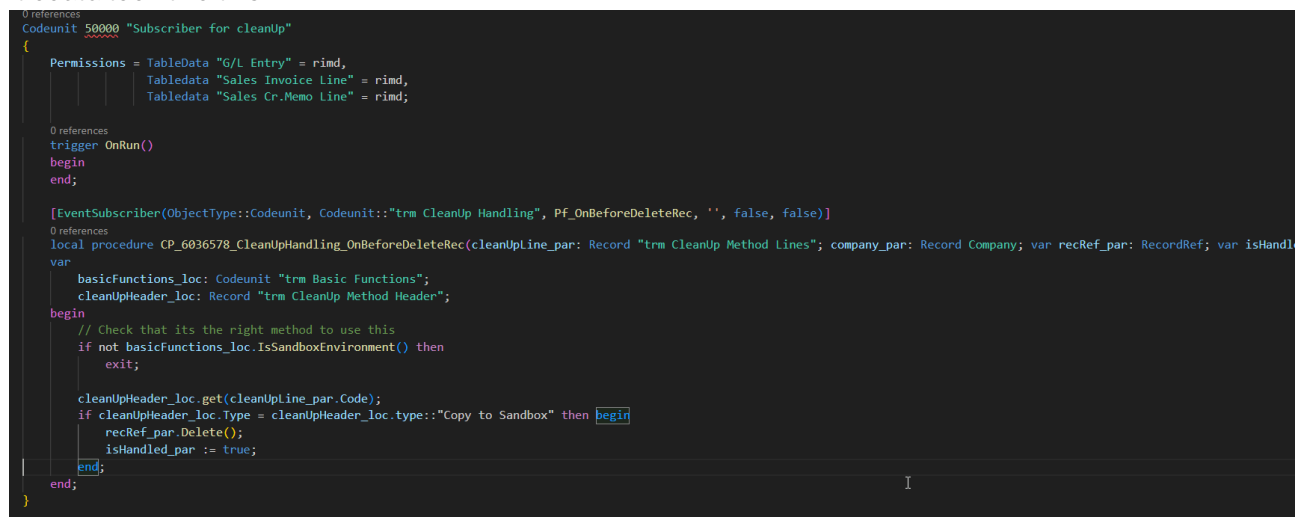
```
AL CleanupHandling.Codeunit.al X
TRIMIT Development AS_TRIMIT_25.1.11.272 > src > src > AL CleanupHandling.Codeunit.al

2 {
93 procedure RunCleanUpMethod(code_par: code[10]; companyName_par: text)
94 var
95     isHandled_loc: Boolean;
96     commitCounter_loc: Integer;
97     cleanUpHeader_loc: Record "trm CleanUp Method Header";
98     cleanUpLine_loc: Record "trm CleanUp Method Lines";
99     recRef_loc: RecordRef;
100     progressBarTxt: Text;
101     basicFunctions_loc: Codeunit "trm Basic Functions";
102     Pf_OnBeforeDeleteLoop(cleanUpLine_loc, company_loc, recRef_loc, isHandled_loc);
103     if not isHandled_loc then
104         if recRef_loc.findSet then begin
105             basicFunctions_loc.ProgressBarTextOpen(StrSubstNo(progressBarTxt, cleanUpLine_loc.Action2, cleanUpLine_loc.Code));
106             repeat
107                 basicFunctions_loc.ProgressBarUpdate();
108                 isHandled_loc := false;
109                 Pf_OnBeforeDeleteRec(cleanUpLine_loc, company_loc, recRef_loc, isHandled_loc);
110                 if not isHandled_loc then
111                     if cleanUpLine_loc."Run Validation" then
112                         recRef_loc.Delete(true)
113                     else
114                         recRef_loc.Delete(false);
115             until isHandled_loc;
116             commitCounter_loc := commitCounter_loc + 1;
117         end;
118     end;
119 }
```

The event subscriber Codeunit should have the necessary permissions, and the only AL code could be "recRef_par.Delete" and of course set **isHandled** to **true**.

Typically, you might want to test if it is the right one on **Code** of the CleanUp Method or get Cleanup Methods Header and check that it is a **Type Copy to Sandbox**.

It could look like this:



```
0 references
Codeunit 50000 "Subscriber for cleanup"
{
    Permissions = TableData "G/L Entry" = rimd,
                  TableData "Sales Invoice Line" = rimd,
                  TableData "Sales Cr.Memo Line" = rimd;

    0 references
    trigger OnRun()
    begin
        end;

    [EventSubscriber(ObjectType::Codeunit, Codeunit::"trm CleanUp Handling", Pf_OnBeforeDeleteRec, '', false, false)]
    0 references
    local procedure CP_6036578_CleanupHandling_OnBeforeDeleteRec(cleanUpLine_par: Record "trm CleanUp Method Lines"; company_par: Record Company; var recRef_par: RecordRef; var isHandled_par: Boolean)
    var
        basicFunctions_loc: Codeunit "trm Basic Functions";
        cleanUpHeader_loc: Record "trm CleanUp Method Header";
    begin
        // Check that its the right method to use this
        if not basicFunctions_loc.IsSandboxEnvironment() then
            exit;

        cleanUpHeader_loc.get(cleanUpLine_par.Code);
        if cleanUpHeader_loc.Type = cleanUpHeader_loc.type::"Copy to Sandbox" then begin
            recRef_par.Delete();
            isHandled_par := true;
        end;
    end;
}
```

And a version to copy the AL Code from

Codeunit 50000 "Subscriber for cleanUp"

```
{
    Permissions = TableData "G/L Entry" = rimd,
        Tabledata "Sales Invoice Line" = rimd,
        Tabledata "Sales Cr.Memo Line" = rimd;

    trigger OnRun()
    begin
    end;

    [EventSubscriber(ObjectType::Codeunit, Codeunit::"trm CleanUp Handling", Pf_OnBeforeDeleteRec, "",
    false, false)]
    local procedure CP_6036578_CleanUpHandling_OnBeforeDeleteRec(cleanUpLine_par: Record "trm
    CleanUp Method Lines"; company_par: Record Company; var recRef_par: RecordRef; var isHandled_par:
    boolean)
    var
        basicFunctions_loc: Codeunit "trm Basic Functions";
        cleanUpHeader_loc: Record "trm CleanUp Method Header";
    begin
        // Check that its the right method to use this
        if not basicFunctions_loc.IsSandboxEnvironment() then
            exit;

        cleanUpHeader_loc.get(cleanUpLine_par.Code);
        if cleanUpHeader_loc.Type = cleanUpHeader_loc.type::"Copy to Sandbox" then begin
            recRef_par.Delete();
            isHandled_par := true;
        end;
    end;
end;
}
```