

Area	Retention Period	Notes
<b>Financial</b>		
Location Level	7 years	Enables most financial based reporting (i.e.: executive summary, cash sheet summary, etc.) <i>Note: Despite details (like deductions) being purged at earlier intervals, location level reporting will continue to report category level totals. The user simply won't be able to see the details.</i>
Station/Register Level	2 years	
Cashier Level	2 years	
Time Period Sales	2 years	
Bank Deposit Detail	2 years	Cash +/- is known for reporting via the location level financials
Payout Detail	2 years	
Rebate Detail	2 years	
Overing Detail	2 years	
Deduction Detail	2 years	
Forecast: - Daily - By time period - Product Mix	2 years 2 years *already purged after 2 weeks	
<b>Sales / Product / Menu</b>		
Product Mix	2 years	Affects: cash sheet – product mix,
• By destination	6 weeks	Already in place
• By time period	6 weeks	Already in place
POS Transaction Detail	7 days	Already in place
Sales Assumptions	45 days	Already in place
<b>Inventory</b>		
Purchase Orders	6 months	This is already in place as part of current Clearview functionality
Transfers	2 years	
Invoices	2 years	
Full/Master Counts	2 years	
Hot/Mini Counts	2 years	
Theoretical Usage Detail	1 year	
Waste	2 years	
Inventory Pool	**	This is the data used to provide FIFO valuation for inventory and is based on invoices, transfers, and count adjustments. Will be purged 90 days after it has been used up. (counts older than 90 days cannot be re-opened as part of current Clearview functionality). Delete after 14 months if location is not performing counts

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Supplier Products	**	Inactive supplier products will be purged once all references to them (via invoice, transfer, count etc.) have been purged. Active products, NOT on a current order guide, and without being on PO, invoice or transfer will be purged after a period of 6 months without activity. This is based on the organization, not individual restaurants. Once the master product is inactivated it is removed from all store level order guides, so the inventory pool would get used up. 6 months after that we would remove the product from the store and once no stores have product we would remove it from the master list.
Inventory Items	**	Items inactivated at the global level will be purged once all references – via supplier product, invoice, transfer, count etc. – have been purged. This is based on the organization, not individual restaurants. Items cannot be on any recipes and all related products will need to be deleted. At that point, the item has no value and would be removed.
		<b>**</b> <i>Both the inventory item and the supplier product are linked to how long we keep inventory count data. We can't delete the product or item until all counts that reference them have been purged (2 years is the timeline for purging counts).</i>
<b>Labor</b>		
Inactive Employee File Data	7 years <sup>1</sup>	This includes: Basic; Job & Pay; Store Assignment; Review; Missed Shifts; Date Requests; Time Cards; Notes; Availability, TimeShark; Awards, Forms; Emergency Contacts; and Training/Certification information available from the employee information in Clearview.
Inactive Employee Time Card Data	7 years <sup>2</sup>	To allow for regional regulatory requirements.
Schedules	7 years <sup>3</sup>	
Time Period Labor	7 years <sup>4</sup>	

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<sup>1</sup> To be reduced based on regional regulatory requirements.  
<sup>2</sup> To be reduced based on regional regulatory requirements.  
<sup>3</sup> To be reduced based on regional regulatory requirements.  
<sup>4</sup> To be reduced based on regional regulatory requirements.