

# **Sage 50 Accounts**

## **Data Management 2025**

# **Company Archive**

Presenter: **Abby**



**Sage**

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**Data  
Management  
2025**

Sage 50 Accounts

# Data Management 2025

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- Backing up
  - The Data Management tool
  - Company archives
  - Clearing your audit trail to remove old transactions
  - Deleting customers, suppliers, nominal codes and bank accounts
  - Clearing stock transactions and deleting product records
  - Flagging records as inactive to hide them from your lists
- 
- Quiz – Test your knowledge



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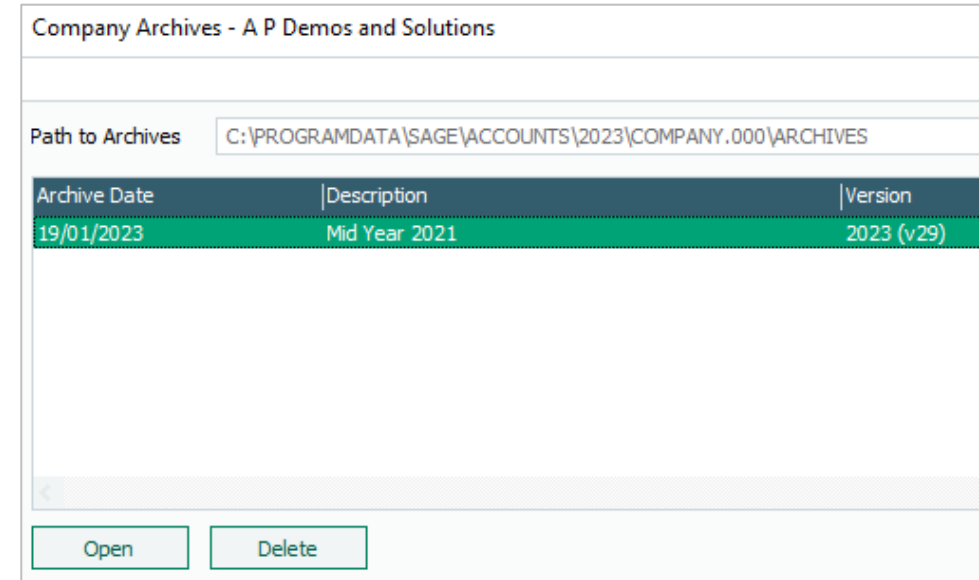
# What's covered in today's webinar?

- **What is an archive?**
- **Demonstrations**
  - Take an archive
  - Access an archive
- **FAQs**
- **Differences**
  - Back up
  - Clear audit trail
- **Further support + Q&A**



# What is an Archive?

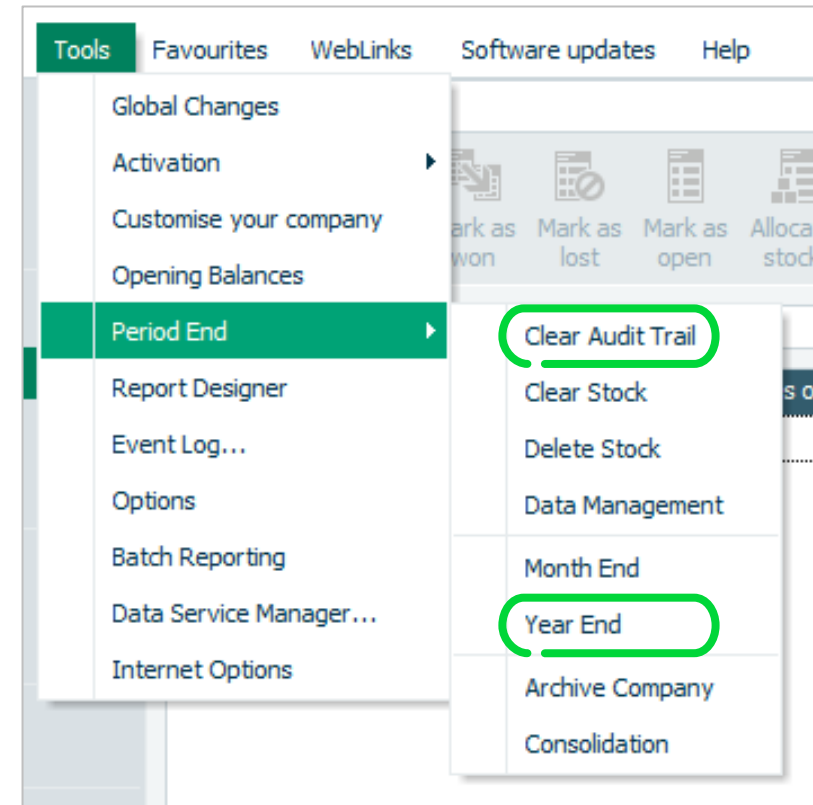
- A read only copy of your data as it appears in the program at that time.
  - Includes any existing logon details.
  - Cannot add anything new but can remove/edit records for GDPR
  - Need the relevant user permissions to access archive option.
- Instant access to revisit historical data, figures and run reports.
- Does **not** remove transactions.
- Archive file is saved within your data path.
  - Attachments are not included in this
- You need to have access to the software to be able to view the archive.



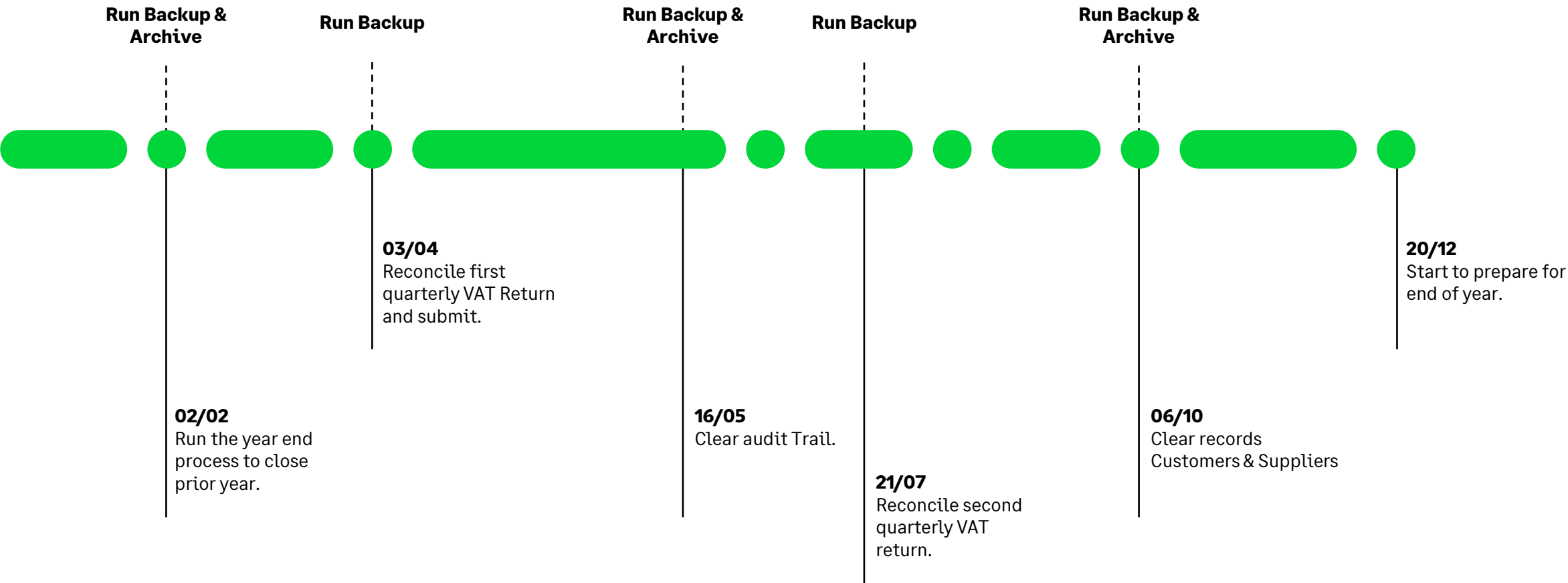
**Note:** Archive files do not sync over Remote data access.

# When might I take an archive?

- Year End.
- Clear Audit Trail.
- Before any significant changes.



# Archiving.



# FAQ

After archiving can you then delete old records you no longer use, such as customers, suppliers or nominals?

Archiving is just one part of a process to reduce the size of your data. **You are unable to clear any records until you have ran a Clear Audit Trail.**

Do I have to specify a date to run an archive?

**It creates a snapshot (read only copy) of your data** as it is at that point in time including current and historical data.

Can I select certain areas of the software to archive?

**No**, it will always make a full copy of everything in the software as it is today new and old.

# Company archives

## Archive

- Creates a read only copy of your data which can easily accessed like a separate company.
- The process does not remove any data from your live company.

## Back up

- Takes a copy of your company data.
- Can only be used by restoring it into Sage 50 Accounts. This overwrites your live data.
- Once restored the data can be edited and new information added.

## Clear Audit Trail

- Removes older transactions up to a date you specify, reducing the size of your data files.



# Summary

- Archiving creates a read only copy of your data, including all historical and current information.
- It **does not** remove any transactions.
- You can take archives at anytime, but it is typically done as part of the Year End or before running Clear Audit Trail.
- You will need to use the same user credentials you used when creating the archive.
- Enables you to view historical data, edit and delete records and run reports.
- You cannot add any new data.

# Find out more...



[Archive company data](#)


[Backing up your data](#)

[Clearing your audit trail](#)



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