

Sage 50 Accounts

Data Management 2025

Deleting records

Presenter: **Abby**



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**Data
Management
2025**

Sage 50 Accounts

Housekeeping

The screenshot shows a mobile application interface for a 'Questions' section. A dark blue sidebar on the left contains several icons: a blue flower-like logo at the top, a red microphone icon with a slash through it, a question mark icon, a document icon, an information icon, and a list icon. The main content area is white and features the title 'Questions' at the top right. Below the title, there is a large grey rectangular area with the text 'Want answers?' and a dashed curved arrow pointing towards the bottom. At the bottom of the main area is a white input field with the placeholder text 'Ask the staff a question'. Below this field is a blue button labeled 'Send'. The sidebar has an 'Exit' button at the bottom. Three green callout boxes with lines pointing to specific icons provide additional information: one points to the microphone icon stating 'Your microphone is muted automatically', another points to the question mark icon stating 'Send us your questions', and a third points to the document icon stating 'Download a handout'.

Your microphone is muted automatically

Send us your questions

Download a handout

Want answers?

Ask the staff a question

Exit Send

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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?**

- **Why should I clear out my records?**
- **Deleting Customers, Suppliers & Nominal Codes**
- **Compressing Data**
- **Further support + Q&A**



Why should I clear out my records?

- Clearing data is an **optional** task.
- Ensures the data you use day to day is up to date.
- Can make searches and filters work more effectively.
- It can speed up general processing in the software in some cases.

Please note

If you are experiencing speed issues, please bear in mind there could be external environmental factors also impacting processing speeds.

Deleting Customers, Suppliers & Nominal codes

- Once a Clear Audit Trail has been ran you can then delete any records where the activity is clear.
- You can delete individual records using the Delete option along the top of the records window.
- This can also be done by highlighting the record(s) in the list and opting to delete.
 - You can do this for multiple records in one go

The screenshot shows the 'Customer Record - Grape Expectations' window. The interface includes a top toolbar with icons for 'Clear form', 'New invoice', 'New order', 'Delete', 'Skype', 'Google Maps', 'View transaction', 'Edit transaction', 'Unallocate transaction', 'Delete transaction', 'View item', 'View Online', 'View bank charges', 'Request card payment', 'Hide detail', 'Show detail', and 'Print'. A left-hand navigation pane contains links for 'Details', 'Defaults', 'Credit Control', 'Bank', 'Alerts', 'Communications', 'Memo', 'Activity' (highlighted), 'Sales', 'Orders', and 'Graph'. The main area displays customer details: 'A/C' (GRAPE01), 'Name' (Grape Expectations), and 'Credit Limit' (2500.00). Below this is a 'Show:' dropdown set to 'All Transactions'. Two data tables are visible. The top table has columns: 'No', 'Type', 'Date', 'Due On', 'Ref', and 'Details'. The bottom table has columns: 'No', 'Type', 'Date', 'Ref', 'N/C', 'Dept', 'Ex Ref', and 'Details'. Both tables currently show no data rows.

Demonstration

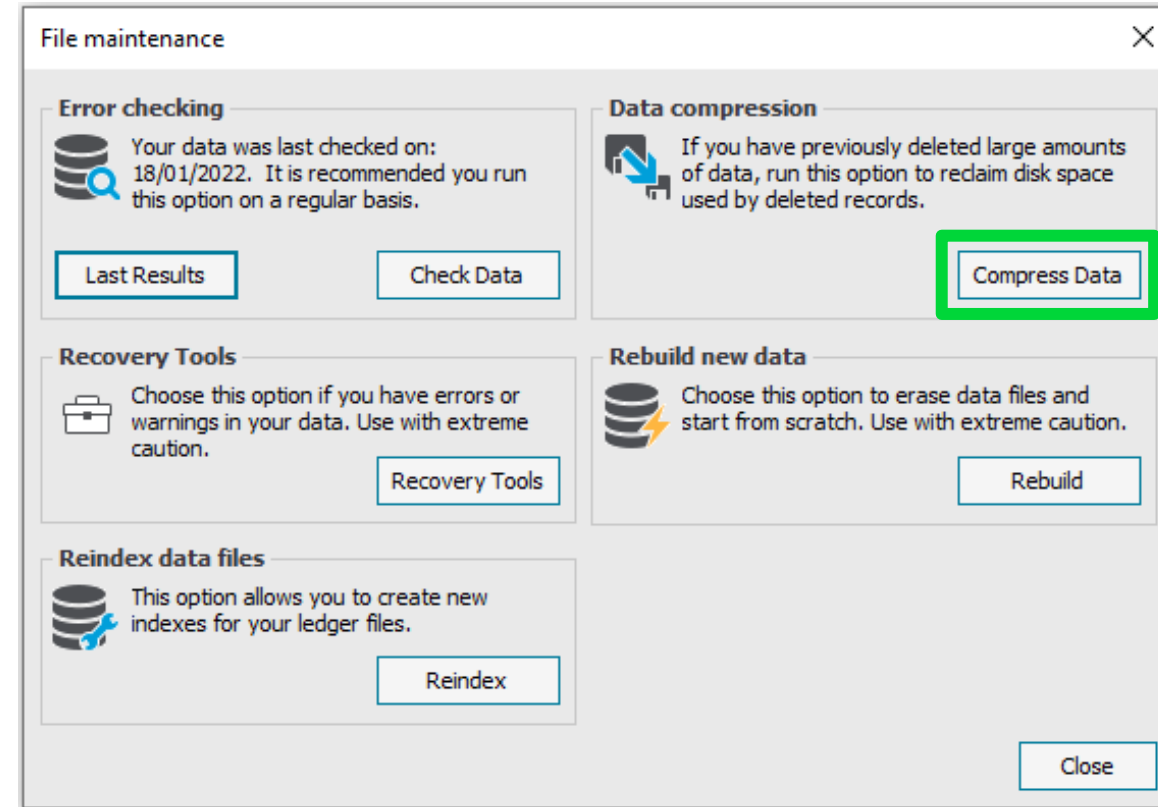


Compress your data

After deleting records, to reduce the size of your data files, you should compress the data.

File > Maintenance > Compress Data

- If you delete a record from your list the size of the data file does not reduce until the relevant ledger is compressed.
- Always ensure you have an **error free back** up prior to running this routine.



Summary

- Clearing your records is an optional task.
- Clearing older data may allow you to work more efficiently.
- Always take a full backup and ensure you have an archive prior to clearing records.
- Records will only clear if they meet certain criteria.
- If you can't remove an item an alternative may be to mark the records as inactive.
- Compressing the data reclaims disk space on your computer.

Find out more...



[Clear Audit Trail](#)

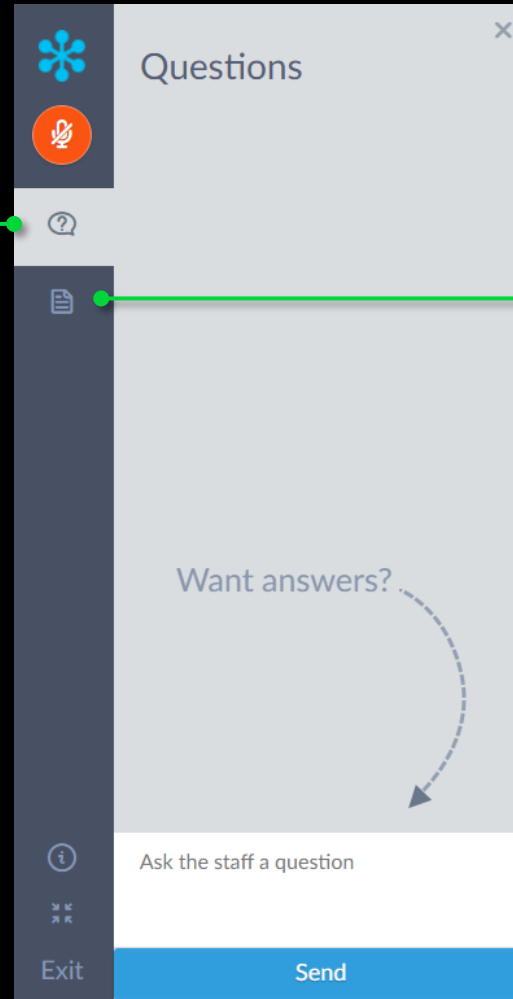
[Deleting records](#)

[Compress your data](#)

Questions

Send us your questions

Download a handout




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