Sage 50 Accounts
Data Management 2025

Deleting records

Presenter: **Abby**

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Housekeeping

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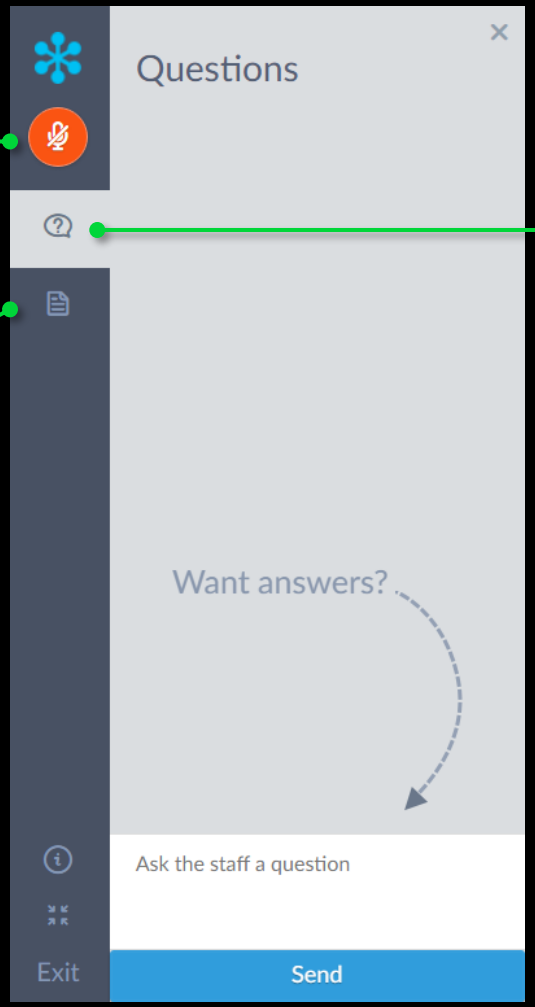

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Data Management 2025

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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

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Why should I clear out my records?

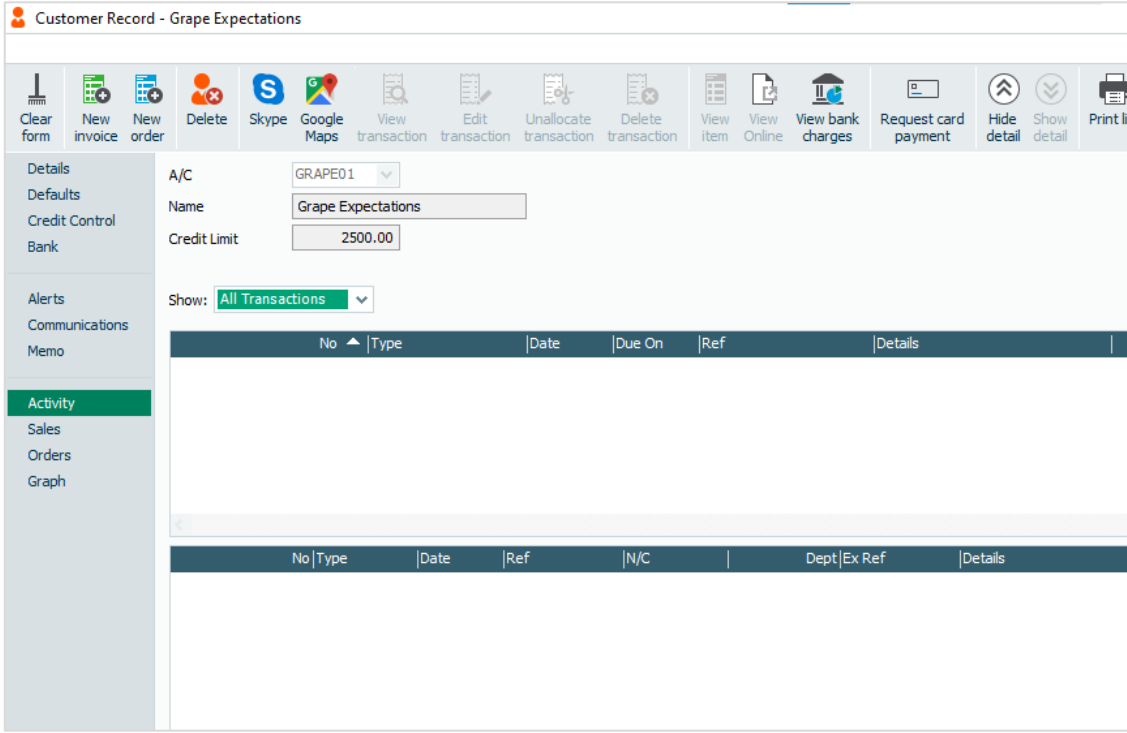
- Clearing data is an **optional** task.
- Ensures the data you use day to day is up to date.
- Can make searches and filters work more effectively.
- It can speed up general processing in the software in some cases.

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



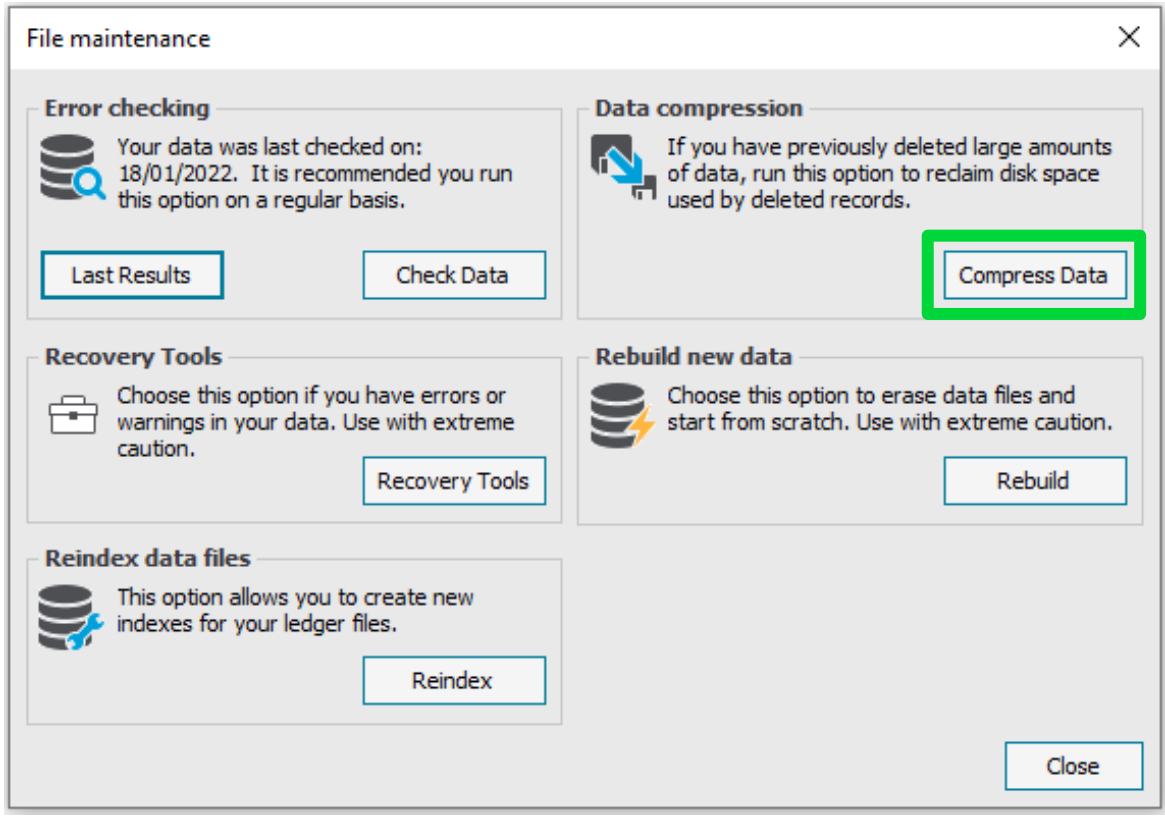
Demonstration

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

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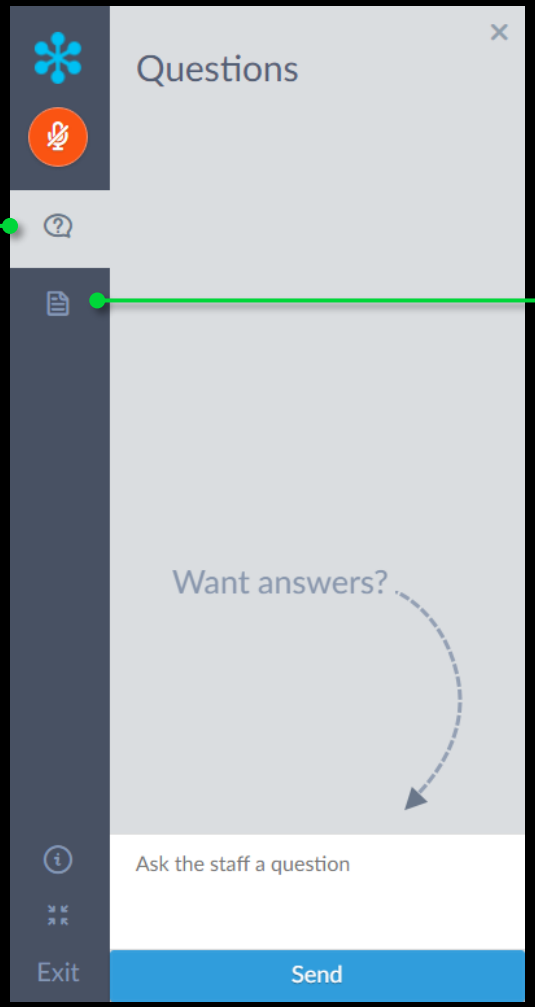
Questions



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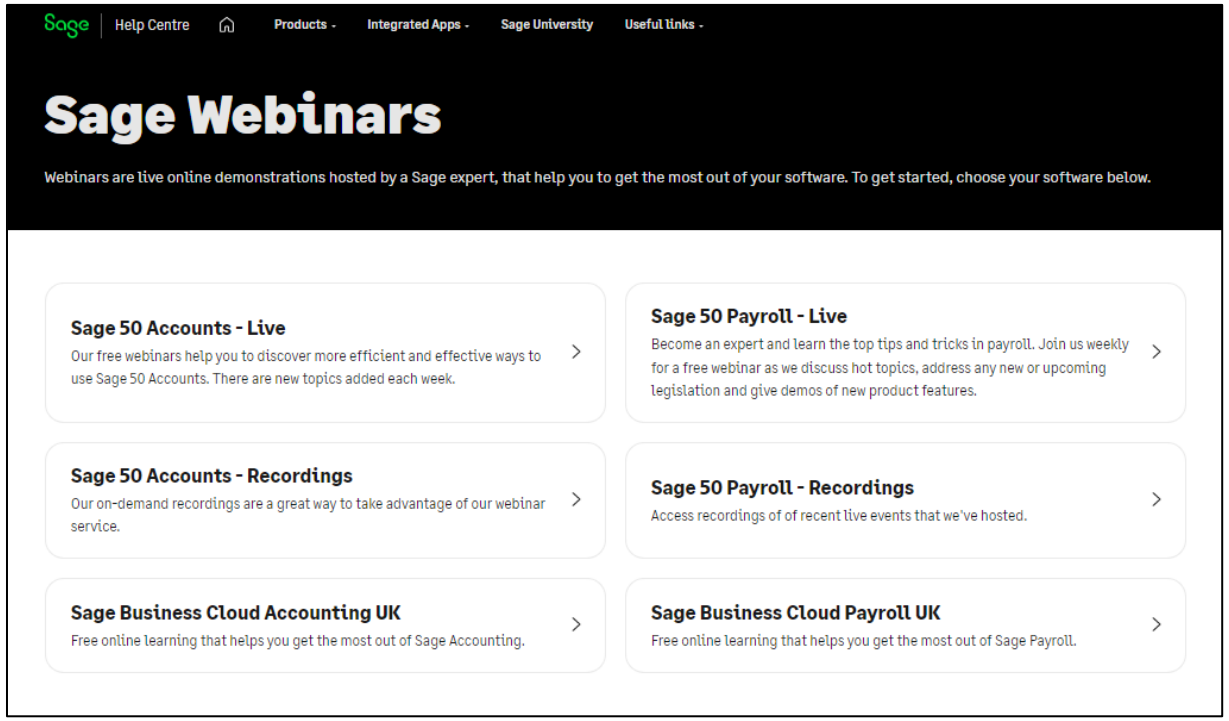

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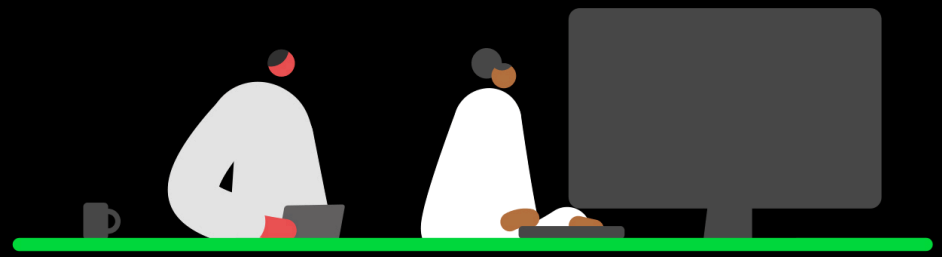

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