

Sage 50 Accounts **Data Management 2025**

Inactive Records

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Sage

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**Data
Management
2025**

Sage 50 Accounts

Housekeeping

The screenshot shows a mobile application interface for a 'Questions' section. On the left is a dark grey sidebar with several icons: a blue flower-like logo at the top, an orange microphone icon with a slash through it, a question mark icon, a document icon, an information icon, and a list icon. At the bottom of the sidebar are the words 'Exit' and 'Send'. The main content area is light grey and contains the text 'Questions' at the top right, a question mark icon, and a large dashed arrow pointing from the text 'Want answers?' down to a white input box at the bottom. The input box contains the placeholder text 'Ask the staff a question'. A blue 'Send' button is located at the bottom right of the input box. Three green callout boxes with lines pointing to specific UI elements are present: one pointing to the muted microphone icon with the text 'Your microphone is muted automatically', one pointing to the question mark icon with the text 'Send us your questions', and one pointing to the document icon with the text '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**?

- Introduction
- Demonstrations
- Criteria
- Reactivate a record
- Alternatives to deleting records
- Further support + Q&A



Inactive Records

Introduction

- Keep your accounts tidy and more manageable
- Flag records individually or multiple records simultaneously
 - Batch change not available in Essentials
- Simple check box to show/hide records
- Available in:
 - Customers / Suppliers / Nominal / Bank accounts / Products

Inactive Records

The screenshot shows the 'Customer Record - A1 Design Services' interface. At the top, there is a toolbar with icons for 'Clear form', 'New invoice', 'New order', 'New project', 'Delete', 'Skype', and 'Google Maps'. Below this is a sidebar menu with options: 'Details' (selected), 'Defaults', 'Credit Control', 'Bank', 'Alerts', 'Communications', 'Memo', 'Activity', 'Sales', 'Orders', 'Projects', and 'Graph'. The main content area is titled 'Account Details' and contains the following fields:

Account Details	
A/C*	A1D001
Company name	A1 Design Services
Company Reg. Number	
Balance	54.00
Inactive	<input type="checkbox"/> ?

Below the 'Account Details' section is the 'Registered Address' section:

Registered Address	
Street1	67a Station Road
Street2	
Town	Blackpool
County	Lancashire

Inactive Records

Why flag records as inactive?

- When records can't be deleted
 - Customer has transactions on the activity
 - When clear audit trail doesn't remove all transactions
 - You don't want to clear your audit trail
- You don't want to delete records
- Historically you'd rename an account to 'Do Not Use' then apply a filter
- Records must meet specific criteria

Demonstration

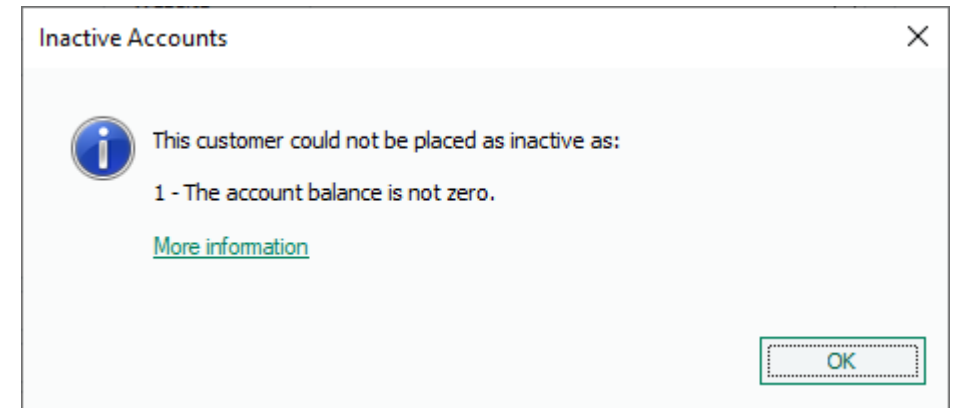
- **Flagging customers as inactive**
 - Single records
 - Multiple records simultaneously
- **Show/Hide**



Criteria

Criteria > Customers

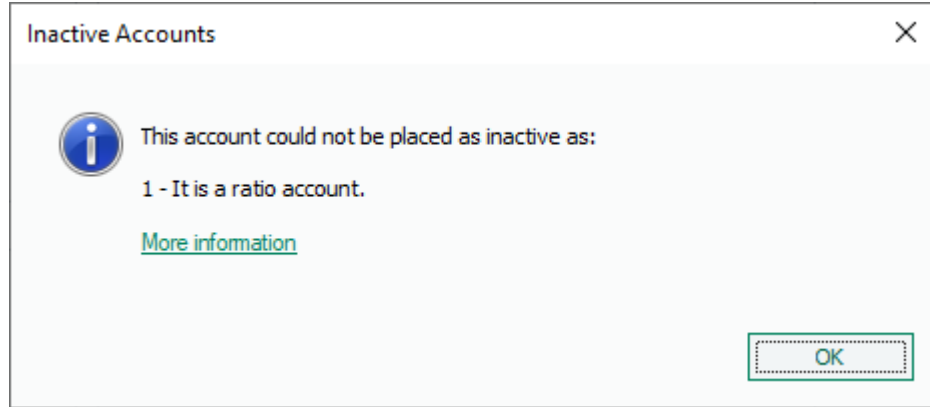
- Account balance must be zero
- All transactions must be allocated
- No active recurring items in:
 - Bank accounts
 - Invoices and credits
 - Sales orders
- Opayo (formerly Sage Pay) - must not be the default customer
- Accountant link - must not be in recording mode
 - v28 and below only



**Reasons why you can't flag
records as inactive**

Criteria

Criteria > Bank account (common query)



Occurs when bank account is set as a ratio account

1. Nominal codes > Ratio
2. Click the relevant account > Delete > Yes > Save
3. Flag record as inactive

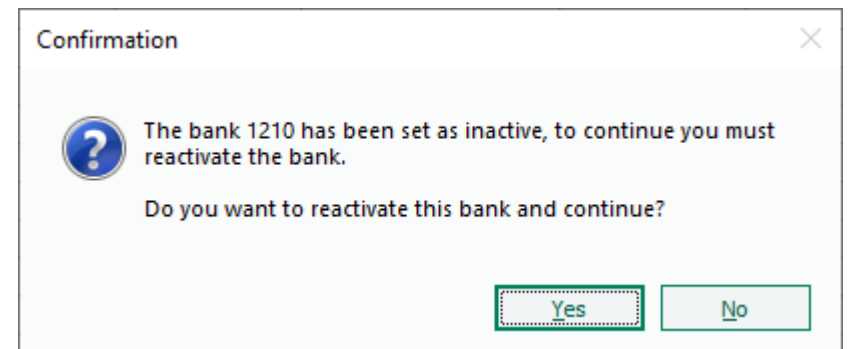
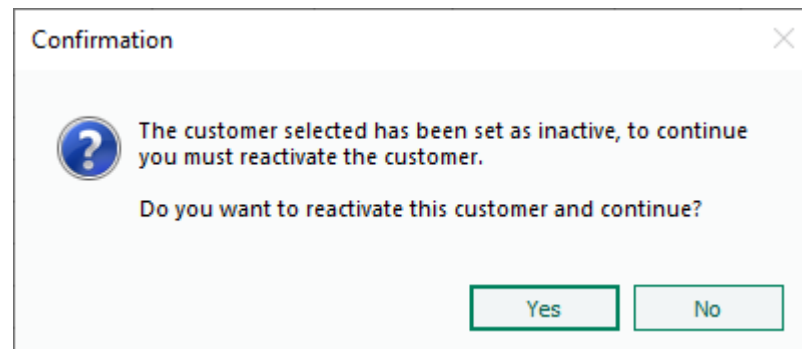
[More information](#)

Reactivate

Reactivate a record

- Edit record > Remove the inactive flag
 - Single
 - Multiple
- Use the record

Demonstration



Find out more...



[Flag a single record as inactive](#)

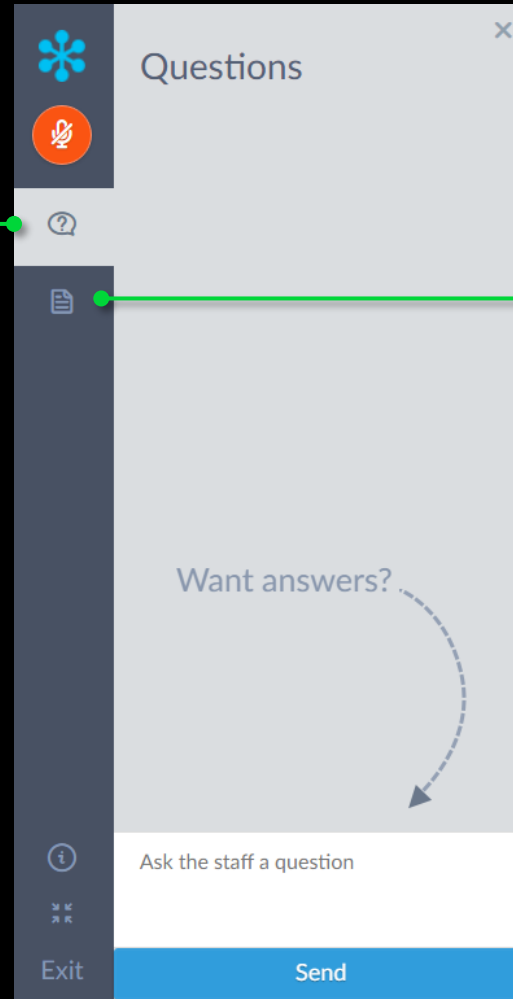
[Flag multiple records as inactive](#)

[Reasons why you can't flag records](#)

Questions

Send us your questions

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