Sage 50 Accounts
Data Management 2025

Inactive Records

Presenter: **Matt**

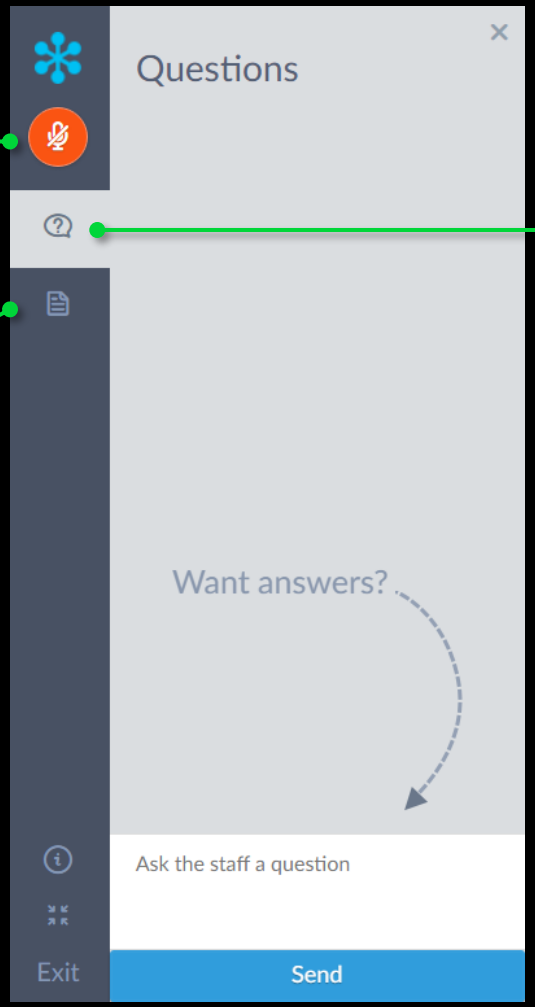
Sage

Data Management 2025
Sage 50 Accounts

Housekeeping

Your microphone is muted automatically

Download a handout



Send us your questions

Note: This webinar recording and links to register for future webinars and access other recordings will be sent to you later today.

Sage

Data Management 2025

To earn your digital badge, simply attend any 5 of the 7 topics + the Quiz

- 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

Register now

What's covered in today's webinar?

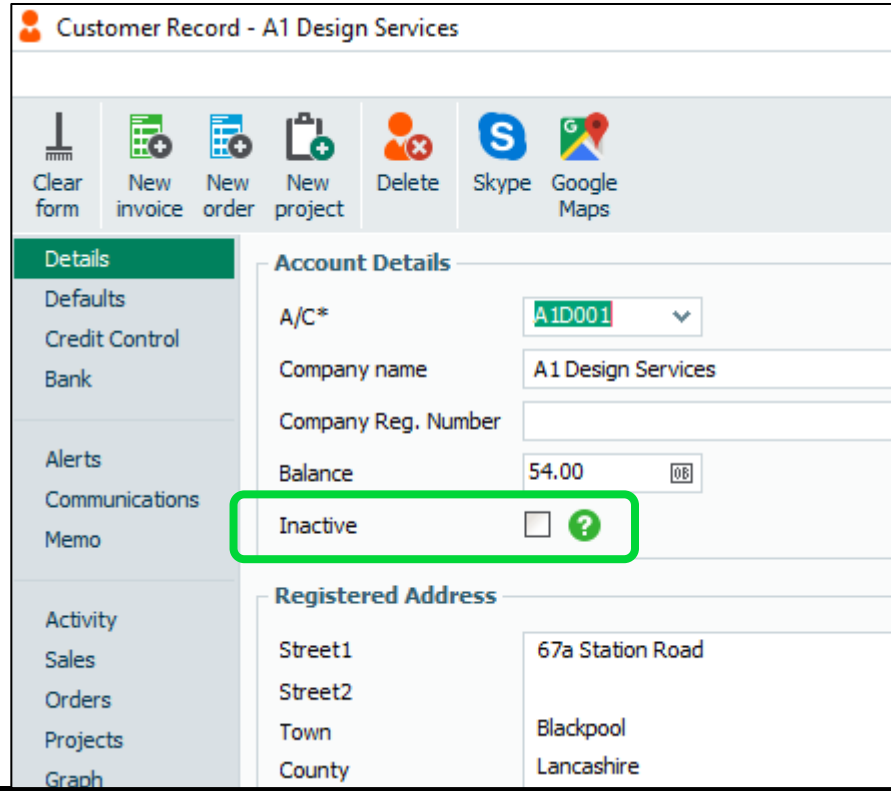
- Introduction
- Demonstrations
- Criteria
- Reactivate a record
- Alternatives to deleting records
- Further support + Q&A

Sage

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

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

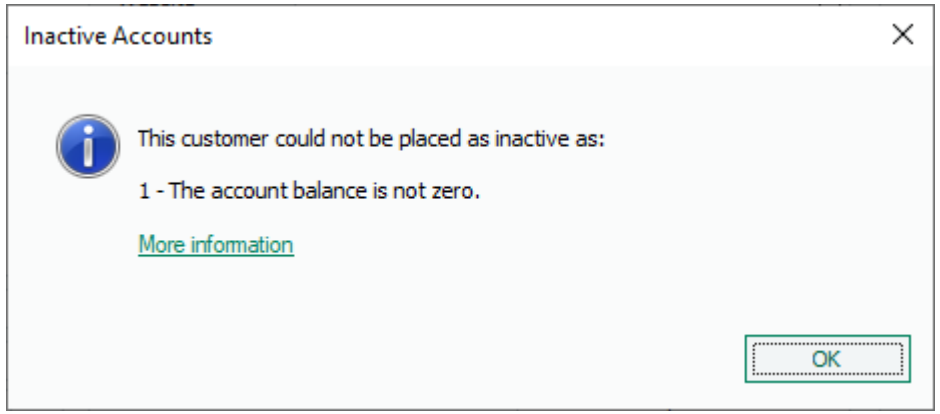
Demonstration

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

Criteria

Criteria > Customers

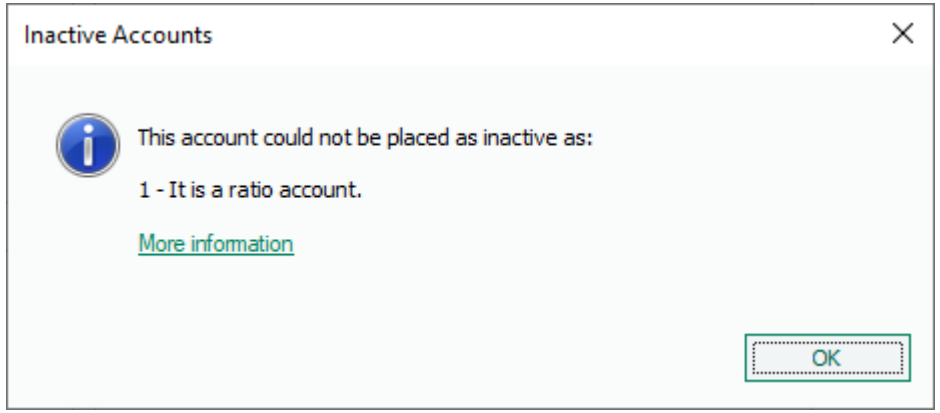
- Account balance must be zero
- All transactions must be allocated
- No active recurring items in:
  - Bank accounts
  - Invoices and credits
  - Sales orders
- Opayo (formerly Sage Pay) - must not be the default customer
- Accountant link - must not be in recording mode
  - v28 and below only



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

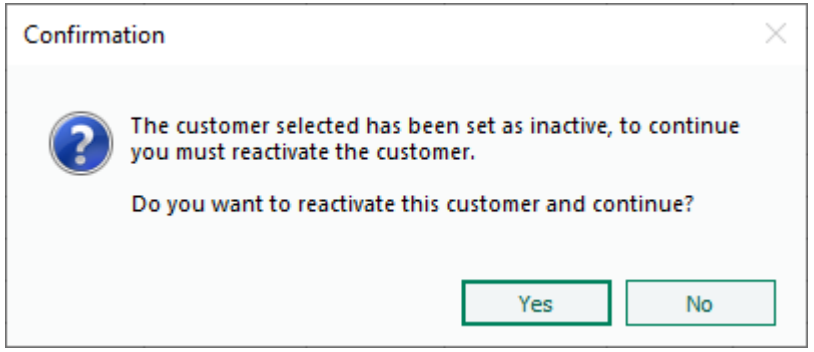
Reactivate

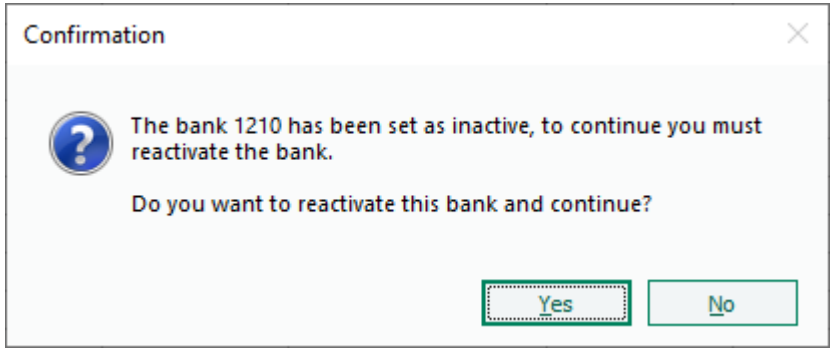
Reactivate a record

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

- Use the record

Demonstration



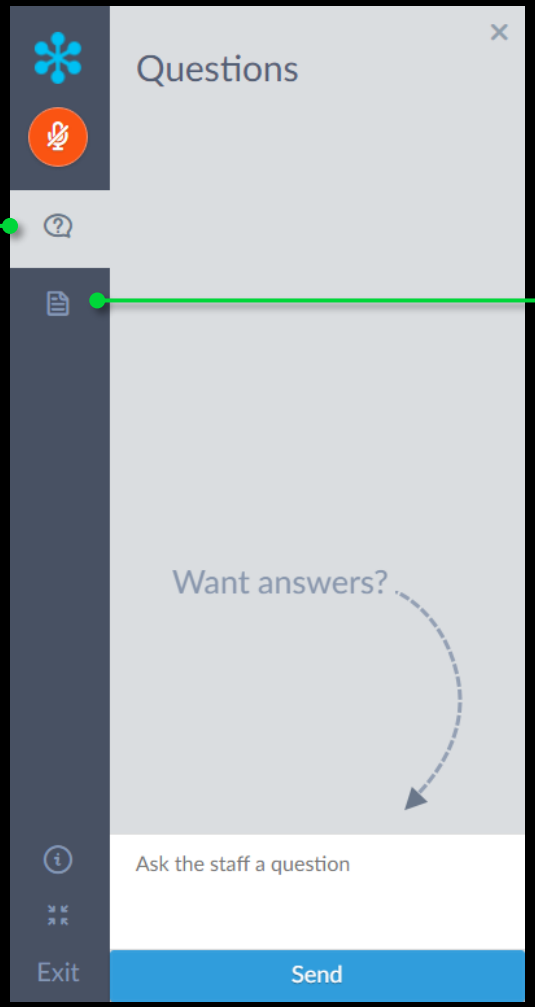


Find out more...

- Flag a single record as inactive
- Flag multiple records as inactive
- Reasons why you can’t flag records

Sage

Questions



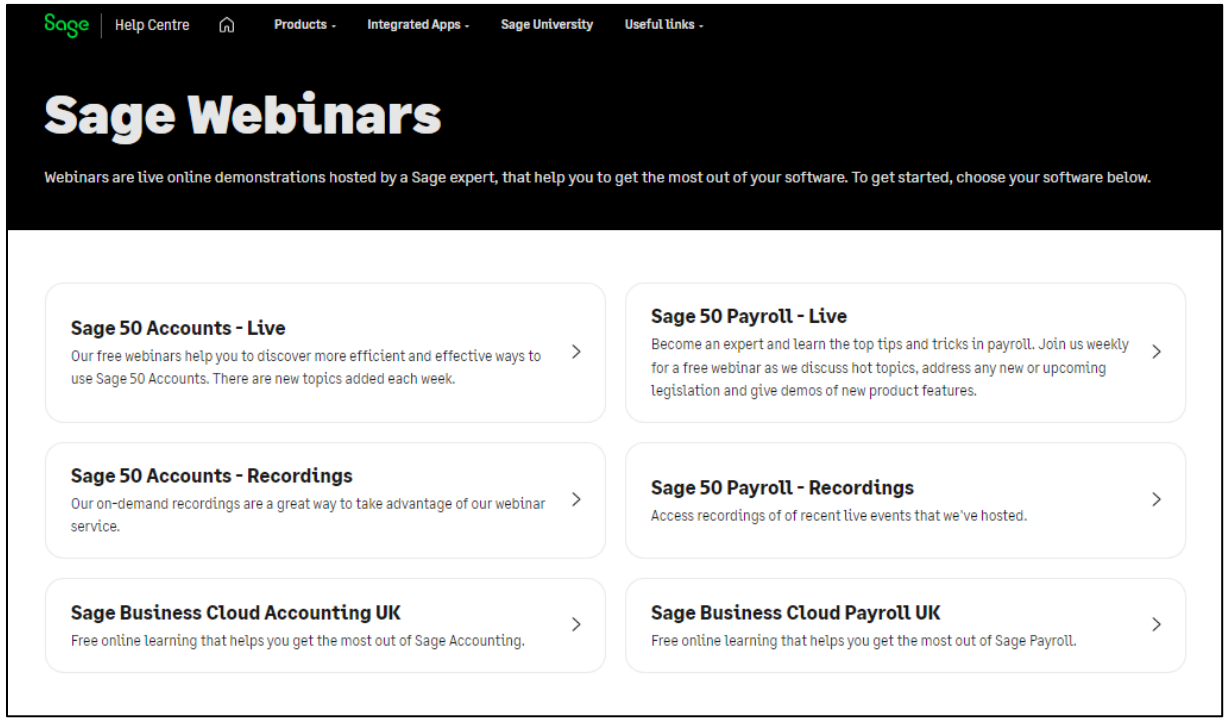
Send us your questions

Download a handout

Note: This webinar recording and links to register for future webinars and access other recordings will be sent to you later today.

Sage

Webinars for Sage 50 Accounts & Sage 50 Payroll



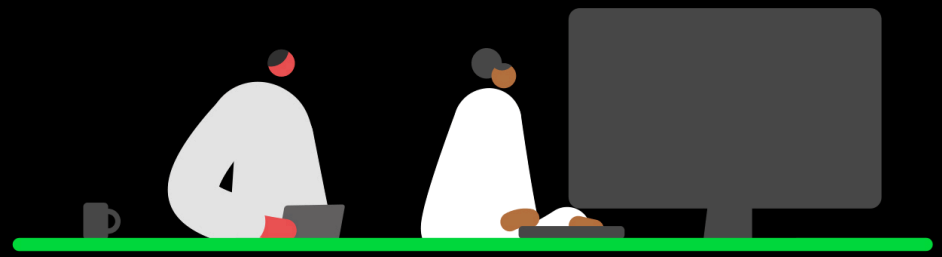
Sage

www.sage.co.uk/webinars

Thank you for attending!

Please take a minute to **complete the survey** as you leave.

You'll receive a follow-up email containing links to register for future webinars and watch recordings.



Sage

© 2025 The Sage Group plc, or its licensors. All rights reserved.