Sage 50 Accounts
Data Management 2025

Clearing stock transactions and deleting records

Presenter: **Matt**

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Data Management 2025

Sage 50 Accounts

Housekeeping

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Questions

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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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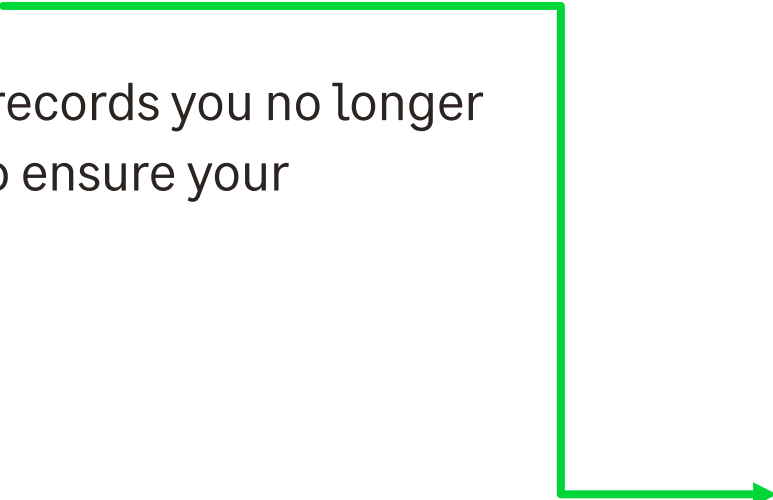**Register now**

What's covered in today's webinar?

- Why clear stock transactions and delete records?

- Manually deleting records

- Clear stock transactions

- Delete stock records

- Why can't I delete a record?

- Further support + Q&A

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Clearing stock and deleting records

Why clear stock transactions and delete records?

- It's an **optional** task

- Recommendation – Up to 20,000 product and service records.
  - Check in Help > About > Records

- Removing older transactions and records you no longer
  need in your live company helps to ensure your
  software runs efficiently
  - Processing may be quicker
  - Reporting faster
  - Check data takes less time
  - Backups are smaller

Records

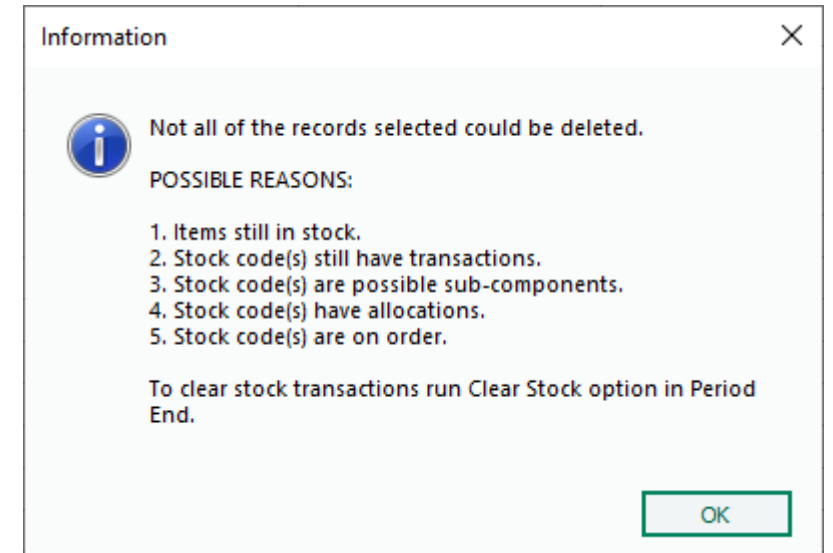|	
Customer Records	30
Customer Records (Active)	24
Supplier Records	15
Supplier Records (Active)	15
Nominal Records	155
Nominal Records (Active)	155
Bank Accounts	6
Bank Accounts (Active)	6
Product Records	106
Product Records (Active)	106
Fixed Asset Records	3
Project Records	6

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Clearing stock and deleting records

Manually deleting records

- Record types
  - Stock Item
  - Non-Stock
  - Service Item (Professional only)

- Products and services > select your records > Delete

  Tips for selecting records
  - List selection style
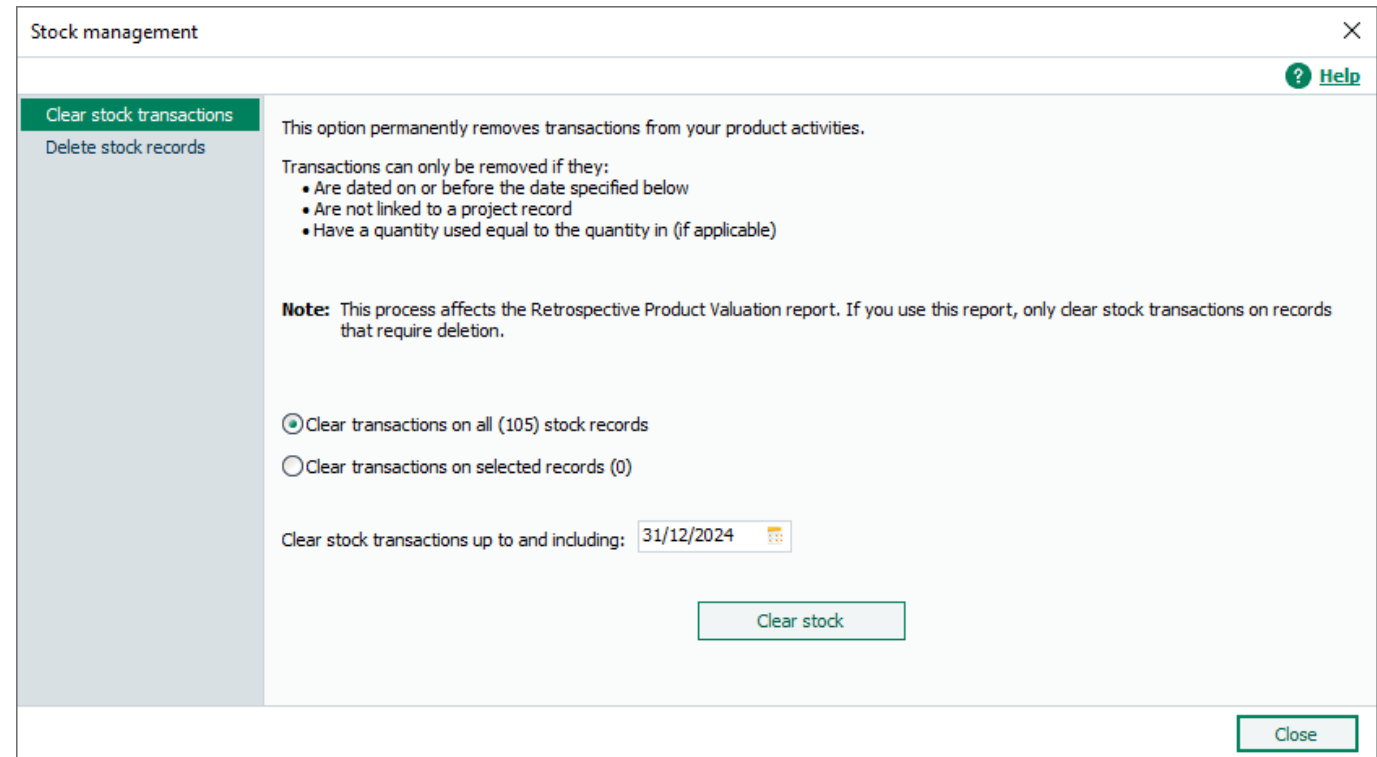 - Filter
  - Swap / Clear

Information

Not all of the records selected could be deleted.

POSSIBLE REASONS:

1. Items still in stock.
2. Stock code(s) still have transactions.
3. Stock code(s) are possible sub-components.
4. Stock code(s) have allocations.
5. Stock code(s) are on order.

To clear stock transactions run Clear Stock option in Period End.

OK

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Clearing stock and deleting records

Clear stock transactions

- Tools > Period End > Clear Stock > All or Selected > enter required date > Clear stock

Note: You'll be prompted to back up as part of this process

Reporting considerations

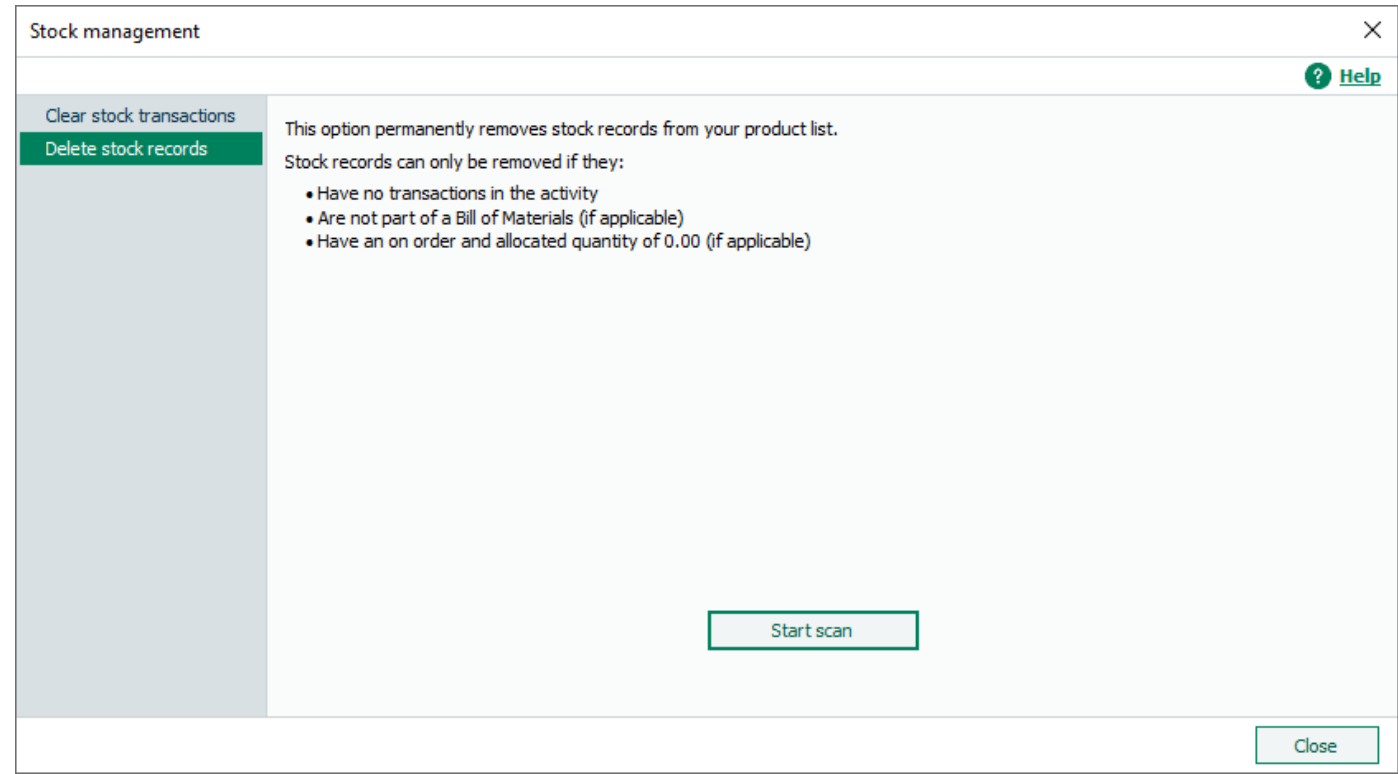- Retrospective Product Valuation

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Clearing stock and deleting records

Delete stock records

- Tools > Period End > Delete Stock > Start scan > identifies all records that can be deleted

  Note: You'll be prompted to back up as part of this process.

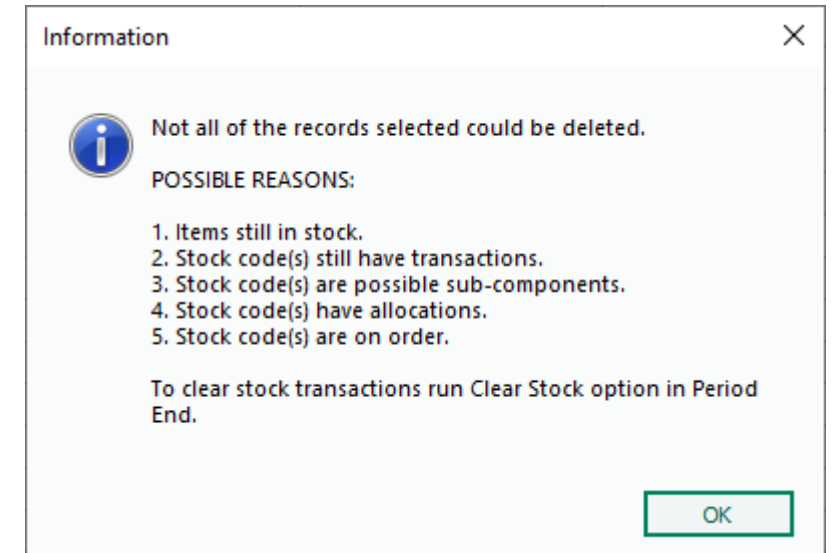- Manually select – or – Swap/Clear

Clearing stock and deleting records

Why can't I delete a record?

1. Items still in stock – Stock Items only

2. Stock code(s) still have transactions – Stock Items only

Sage 50 Accounts Professional only

3. Stock code(s) are possible sub-components
   – BOM component – has a link level
   – Run the Reverse Product Explosion Report

4. Stock code(s) have allocations – Record > Allocated

5. Stock code(s) are on order – Record > On-Order

Information

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To clear stock transactions run Clear Stock option in Period End.

OK

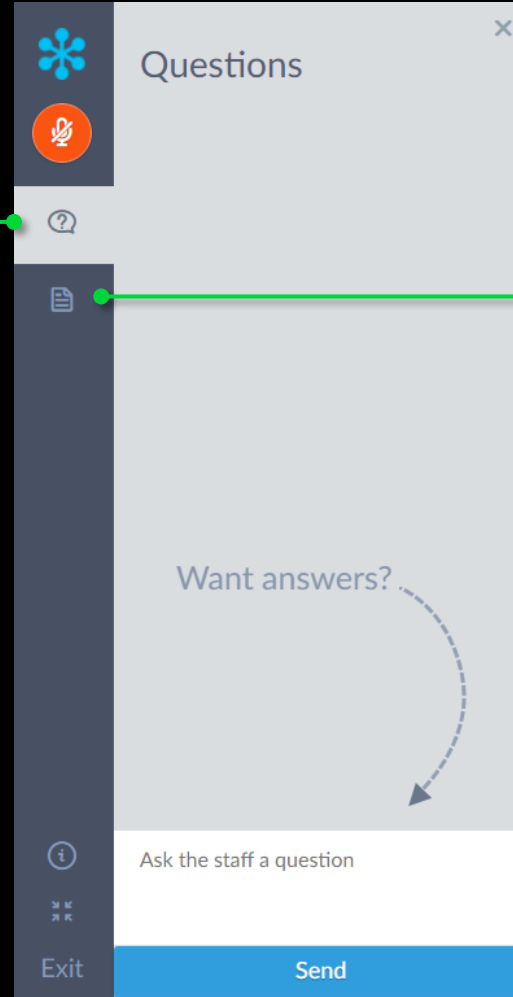**How to delete product records**

Find out more...

Maintenance of stock transactions and records

Inactive records

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Questions

Send us your questions

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