Sage 50 Accounts

Data Management 2025

Clearing stock transactions and deleting records

Presenter: Michael



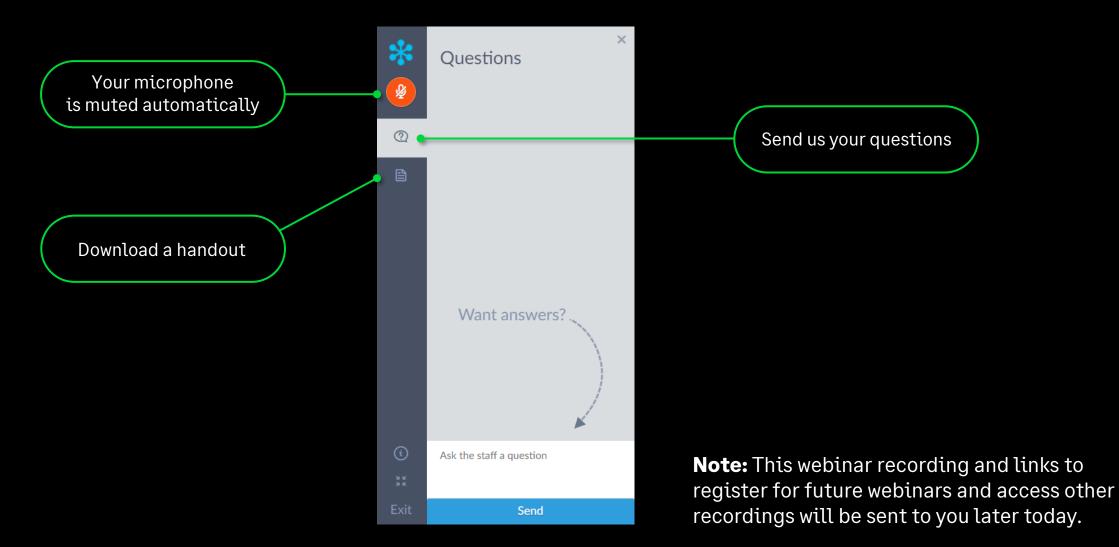
Management

Sage 50 Accounts

2025

Sage

Housekeeping





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





Data Management 2025

Sage 50 Accounts

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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



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

Benefits

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

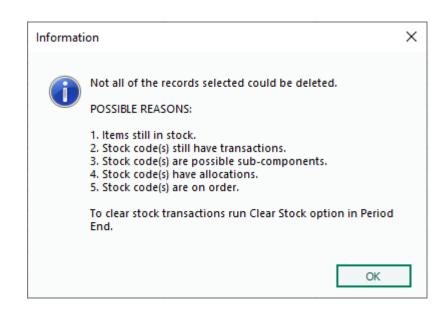
Records	
Customer Records	30
Customer Records (Active)	24
Supplier Records	15
Supplier Records (Active)	15
Nominal Records	155
Nominal Records (Active)	155
Bank Accounts	6
Bank Accounts (Active)	6
Product Records	106
Product Records (Active)	106
Fixed Asset Records	3
Project Records	6

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



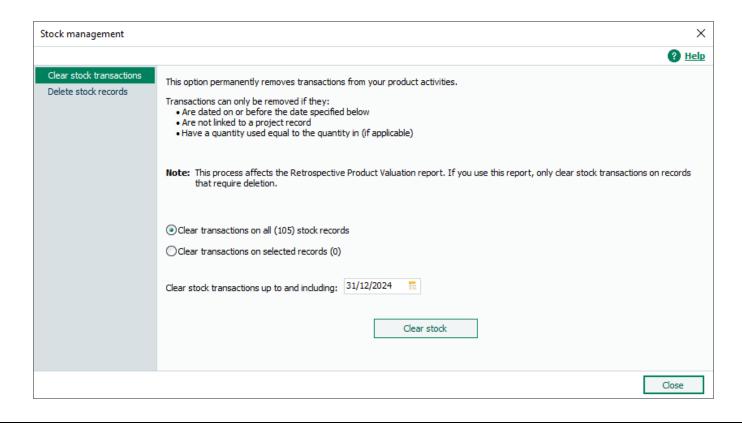
Clear stock transactions

• 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





Demonstration

Clearing Stock Transactions

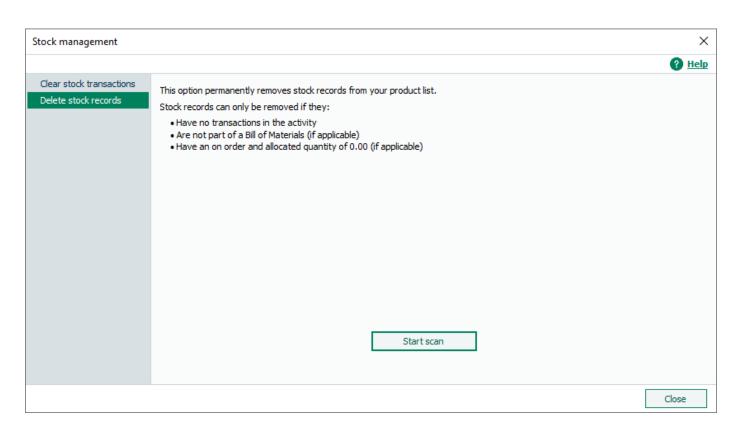


Delete stock records

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



Demonstration

Delete Stock Records

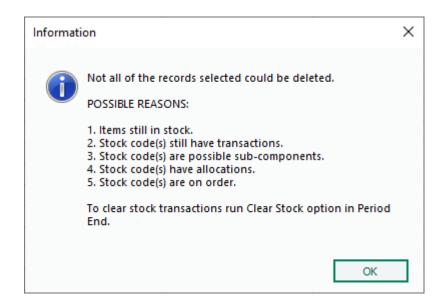


Why can't I delete a record?

- 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



How to delete product records

Find out more...



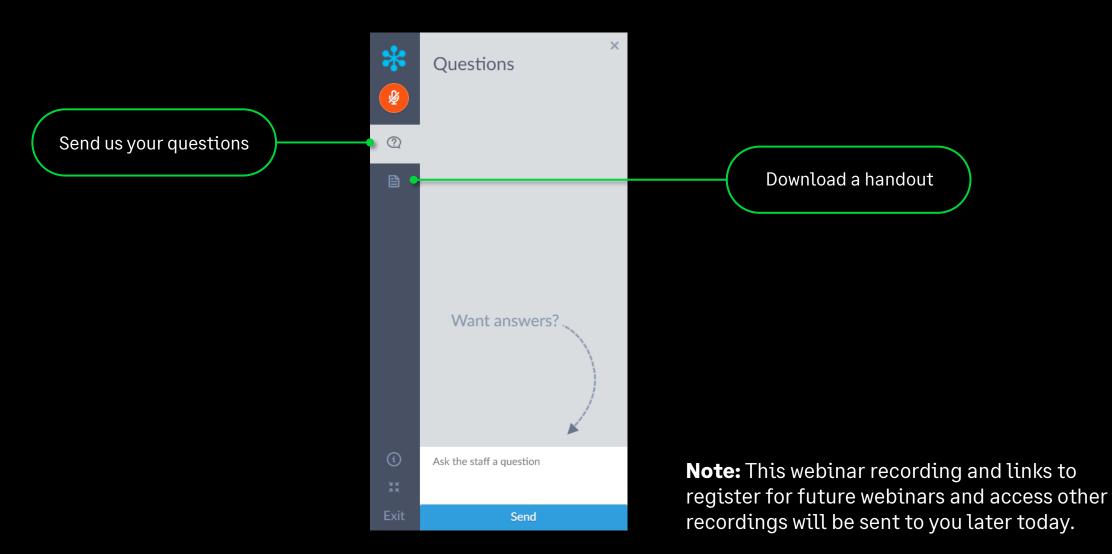


Maintenance of stock transactions and records

Inactive records



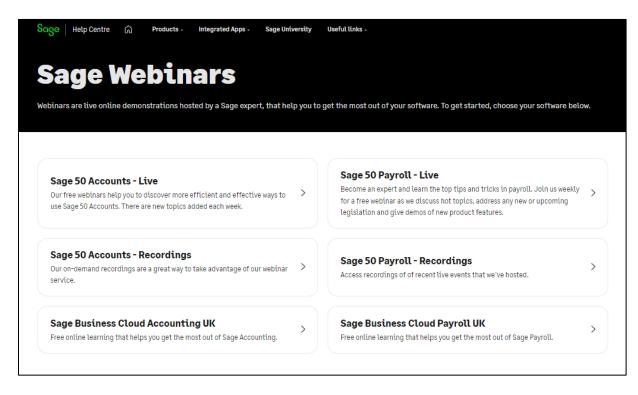
Questions







Webinars for Sage 50 Accounts & Sage 50 Payroll



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