

# **Sage 50 Accounts**

## **Data Management 2025**

# **Clearing stock transactions and deleting records**

Presenter: **Matt**



**Sage**

**Sage**



**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 icons for a microphone, a question mark, a document, and an information icon. The main area is light grey with the title 'Questions' at the top. Below the title is a question mark icon. Further down is a document icon. At the bottom of the main area is a dashed arrow pointing to a text input field labeled 'Ask the staff a question'. Below this field is a blue 'Send' button. A green line connects the microphone icon in the sidebar to a callout box on the left. Another green line connects the question mark icon in the sidebar to a callout box on the right. A third green line connects the document icon in the sidebar to a callout box on the left.

Your microphone is muted automatically

Send us your questions

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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**?

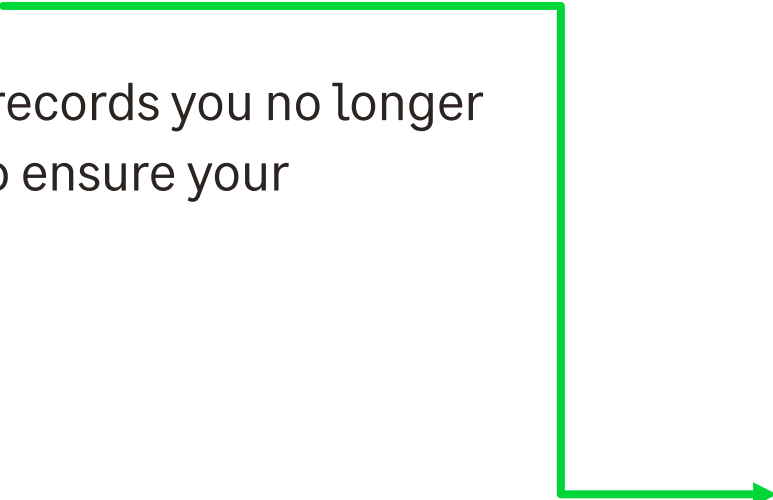
- Why clear stock transactions and delete records?
- Manually deleting records
- Clear stock transactions
- Delete stock records
- Why can't I delete a record?
- Further support + Q&A



# 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

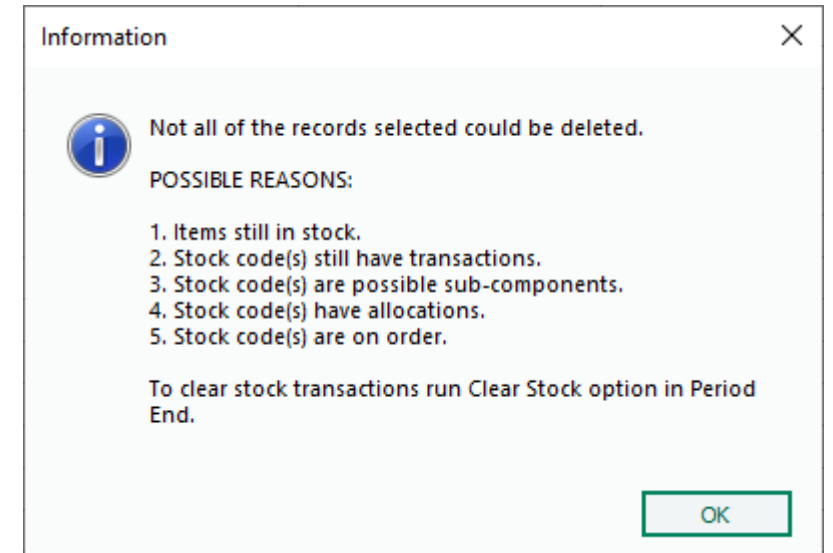
# Clearing stock and deleting records

## 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



# Clearing stock and deleting records

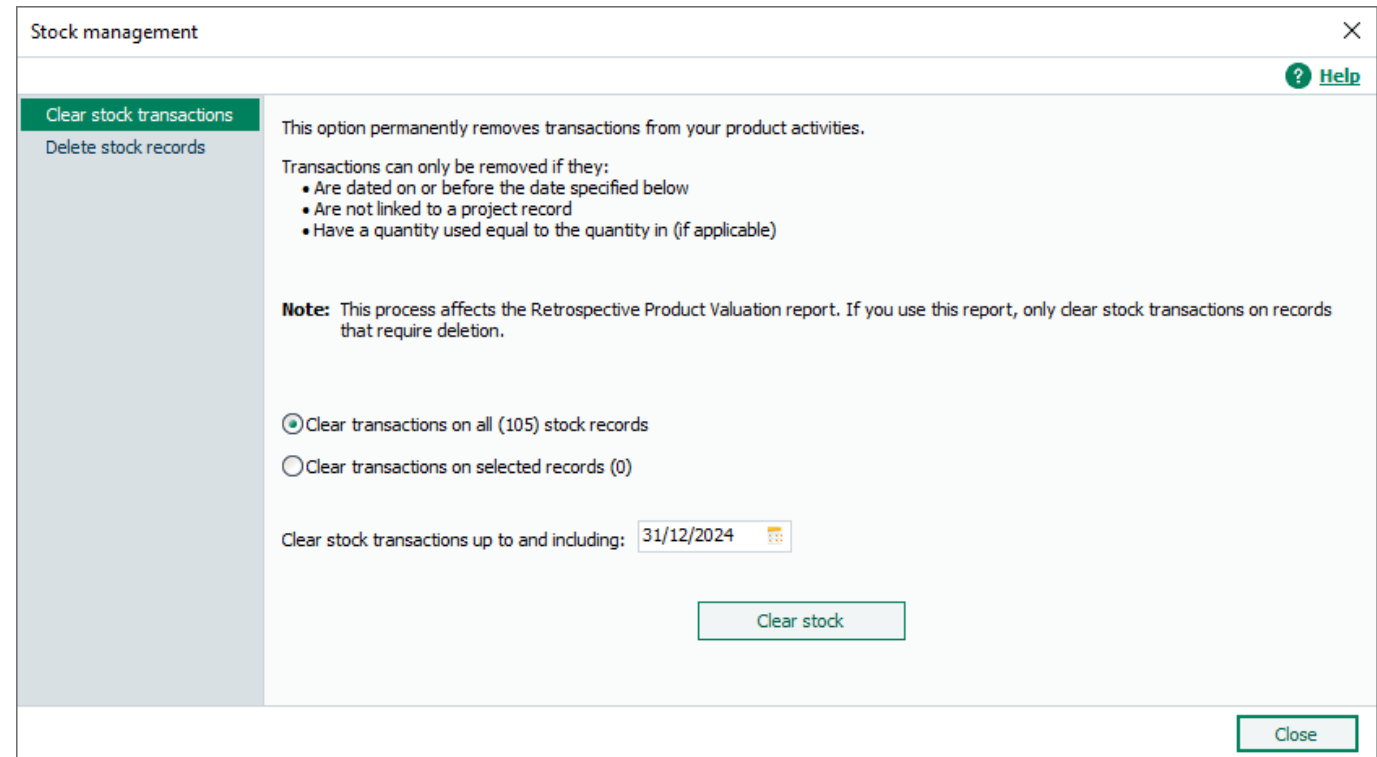
## Clear stock transactions

- 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



The screenshot shows a 'Stock management' dialog box with a sidebar on the left containing two options: 'Clear stock transactions' (highlighted in green) and 'Delete stock records'. The main area contains the following text:

This option permanently removes transactions from your product activities.

Transactions can only be removed if they:

- Are dated on or before the date specified below
- Are not linked to a project record
- Have a quantity used equal to the quantity in (if applicable)

**Note:** This process affects the Retrospective Product Valuation report. If you use this report, only clear stock transactions on records that require deletion.

There are two radio button options:

- ☒ Clear transactions on all (105) stock records
- ☐ Clear transactions on selected records (0)

Below these is a text field labeled 'Clear stock transactions up to and including:' with the date '31/12/2024' and a calendar icon.

At the bottom right of the main area is a 'Clear stock' button. At the bottom right of the entire dialog box is a 'Close' button.

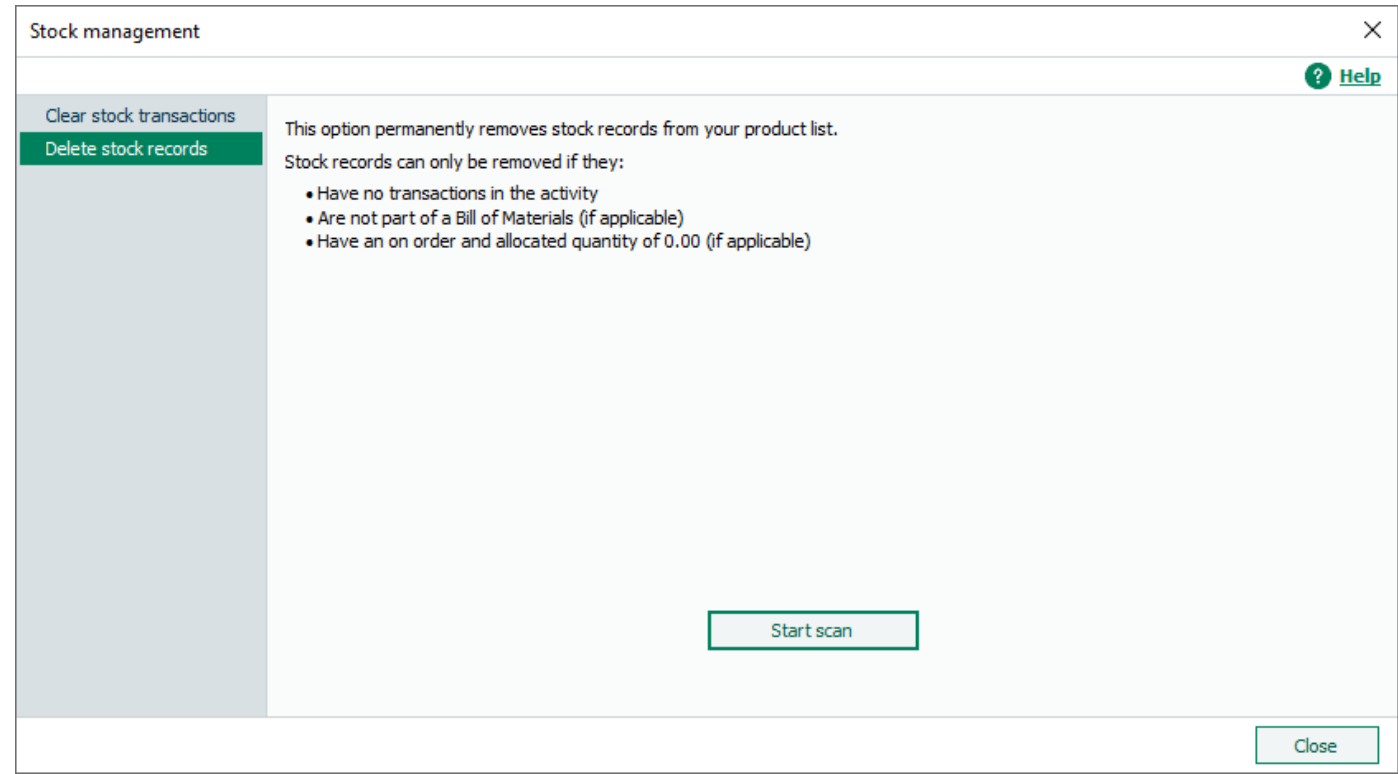
# Clearing stock and deleting records

## 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





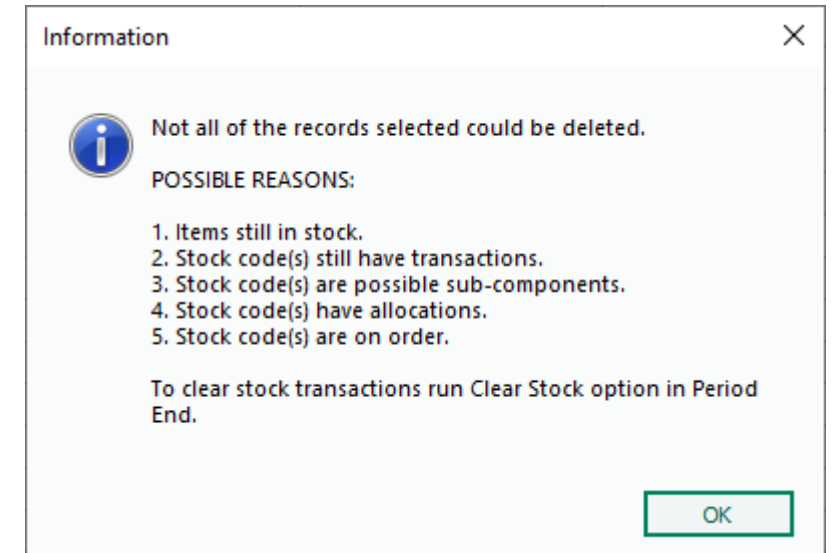
# Clearing stock and deleting records

## 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



**How to delete product records**

# Find out more...

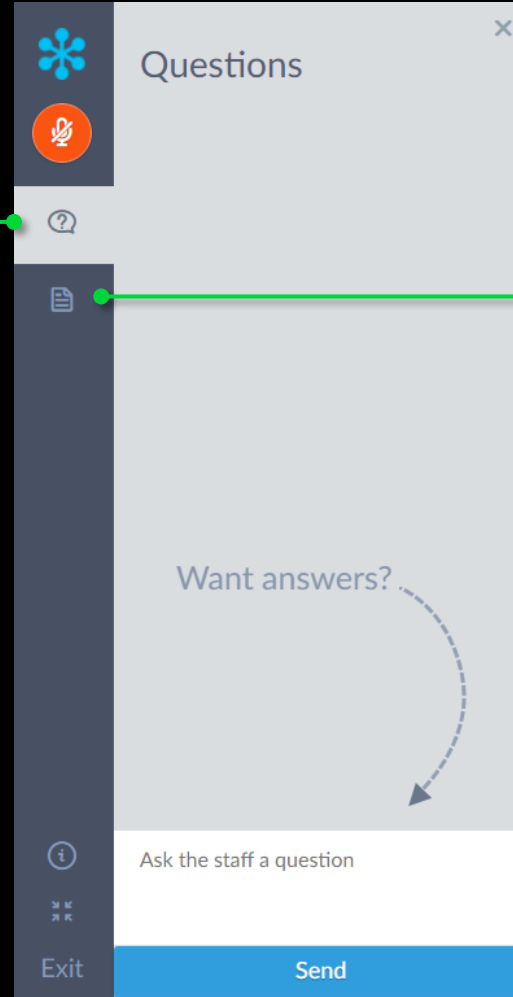


Maintenance of stock transactions and records

Inactive records

# Questions

Send us your questions




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