

Company Archive.

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Housekeeping

The image shows a mobile application interface for asking questions. A dark grey sidebar on the left contains several icons: a blue flower-like logo at the top, a red microphone icon with a slash through it, a question mark icon, a document icon, an information icon, and a full-screen icon. The main content area is light grey and features a 'Questions' header with a close button, a question mark icon, and the text 'Want answers?' with a dashed arrow pointing to a text input field labeled 'Ask the staff a question'. A blue 'Send' button is at the bottom. Four white callout boxes with green borders and lines pointing to the icons contain the following text:

- Your microphone is muted automatically (points to the muted microphone icon)
- Download a handout (points to the document icon)
- Send us your questions (points to the question mark icon)
- Switch to full screen (points to the full-screen icon)

Contents

Frequently Asked Questions

What is an Archive?

How to take an archive

How to access it

Difference between Archive/Back up/Clear Audit Trail

Summary

What is an Archive?



FAQ

Once you've archived, can you then delete old records you no longer use, such as customers, suppliers or nominals?

No, Archiving is just one part of a process to reduce the size of your data. **You are unable to clear any records until you have ran a Clear Audit Trail.**

Do I have to specify a date to run an archive?

No, **archiving creates a snapshot (read only copy) of your data** as it is at that point in time including current and historical data.

How is this effected if I stop using Sage?

You must have the Sage software installed with a valid licence to be able to access your archive. We would recommend exporting reports out prior.

What is an Archive?

- A read only copy of your data as it appears in the program at that time.
 - Includes any existing logon details.
 - Cannot add anything new but can remove/edit records for GDPR
 - Need the relevant user permissions to access archive option.
- Instant access to revisit historical data, figures and run reports.
- Does **not** remove transactions.
- Archive file is saved within your data path.
 - Attachments are not included in this
- You need to have access to the software to be able to view the archive.

Note – Archive files do not sync over Remote data access

Company Archives - A P Demos and Solutions

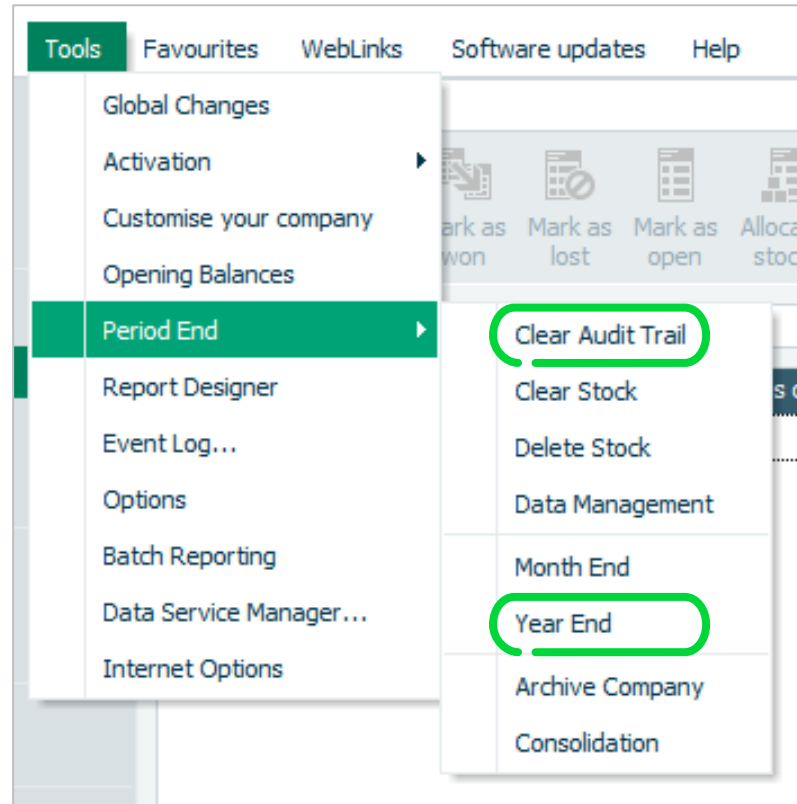
Path to Archives

Archive Date	Description	Version
19/01/2023	Mid Year 2021	2023 (v29)



When might I take an archive?

- Year End.
- Clear Audit Trail.
- Before any significant changes.



Clear Audit Trail

How to complete Year End

Difference between...



Difference Between...



Archive

Read only copy which can be opened like a separate company, does not remove transactions and you **do not** need to enter date to archive up to.



Back Up

Takes a copy of your data which can be restored over the top of live data or used to create another company. Once restored the data can be **edited** and **new information** can be added.

Difference Between...



Archive

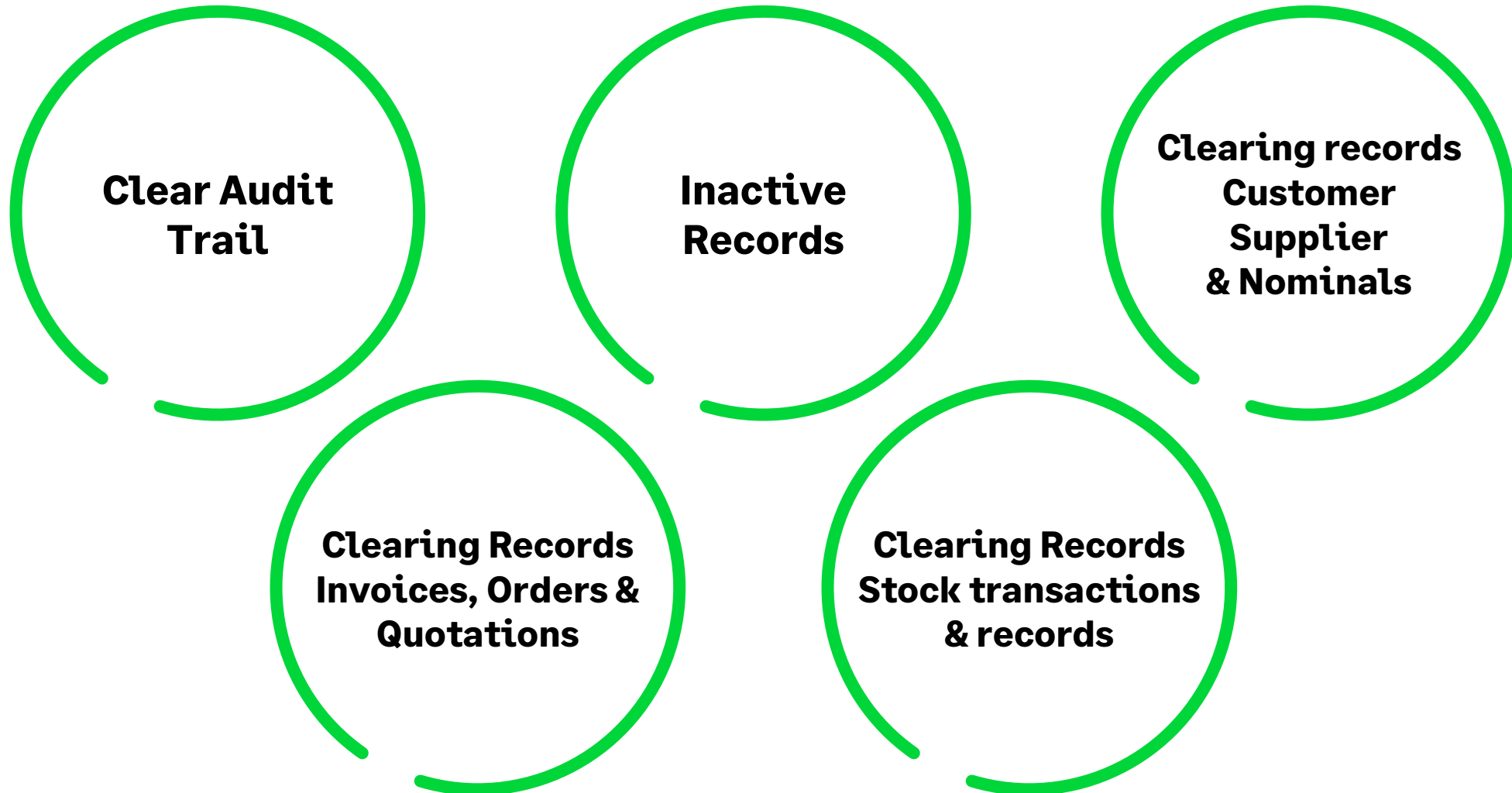
Read only copy which can be opened like a separate company, does not remove transactions and you **do not** need to enter date to archive up to.



Clear Audit Trail

Removes older transactions **up to a date you have specified** so you can reduce the size of your data files.

Get Registered.



Summary.

- Archiving creates a read only copy of your data, including all historical and current information.
- It **does not** remove any transactions.
- You can take archives at anytime, but it is typically done as part of the Year End or before running Clear Audit Trail.
- You will need to use the same user credentials you used when creating the archive.
- Enables you to view historical data, edit and delete records and run reports.
- You cannot add any new data.

**Back up your
data**

**Archive your
company data**

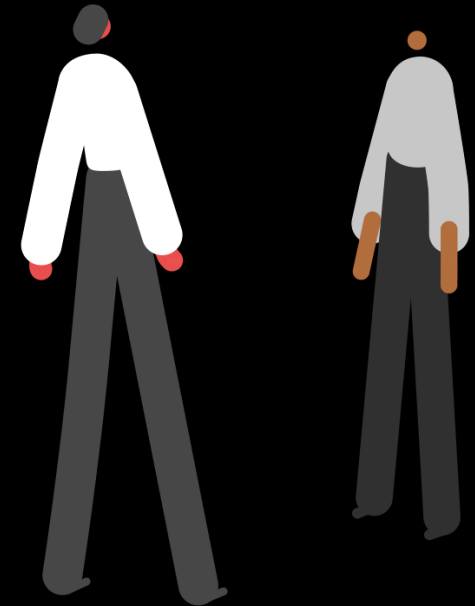
Extra Support

**Useful tips &
Resources**

**Time saving
tools**

**Regular tasks
50 Accounts**

Help Centre



Upcoming Webinars.



Upcoming Webinars.

Key Topics

Year End Tuesday 4 April 2pm

This webinar explains the year end process from start to finish, including how to prepare for and run your year end and the optional post-year end tasks.

Running reports to reconcile your VAT Return Wednesday 5 April 11am

Learn which reports to run to reconcile your VAT figures prior to submission.

Upcoming

What's new in V29

VAT return

Clear Audit Trail

Inactive records

Clearing Records - Customers,
Suppliers and Nominal



Webinar Registration

What's included as a Sage member?



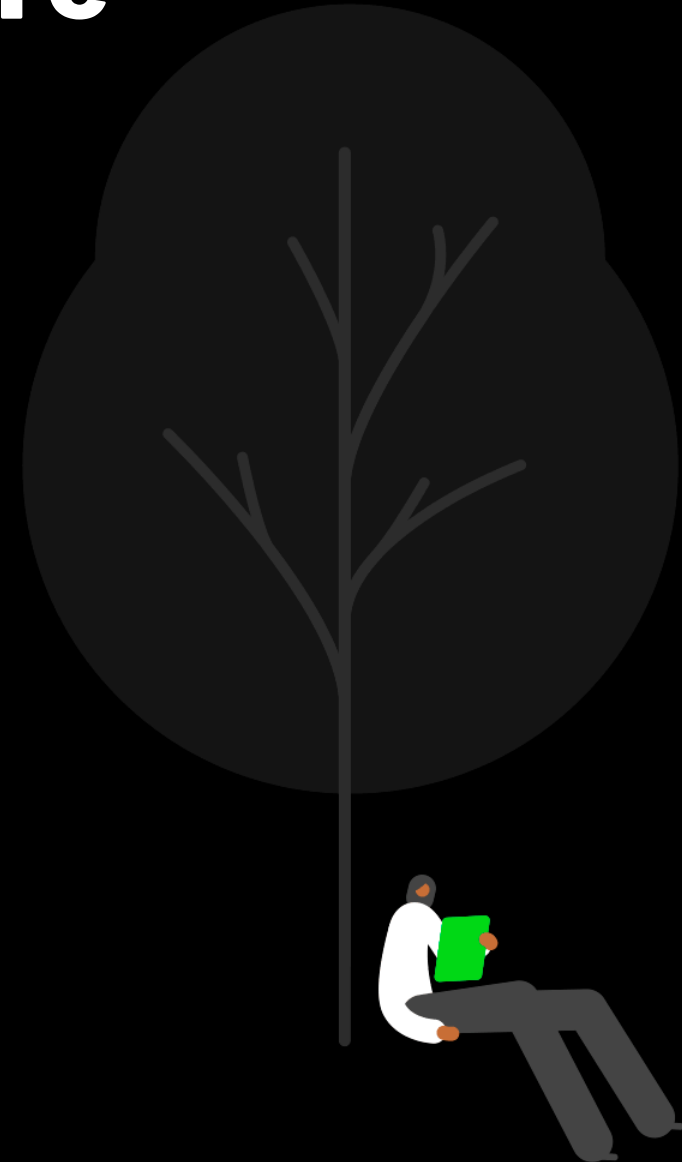
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We know that running a business can be tough and at Sage we want to help you and your business with the many challenges you face.

That's why Sage goes beyond great software solutions

As a valued Sage customer and member of the Sage community, you'll enjoy benefits that help you and your business by connecting with brilliant experts and industry peers.

Sage is here to help you grow and your business flow.



A member of the Sage community

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**Member
Masterclass**

Learning

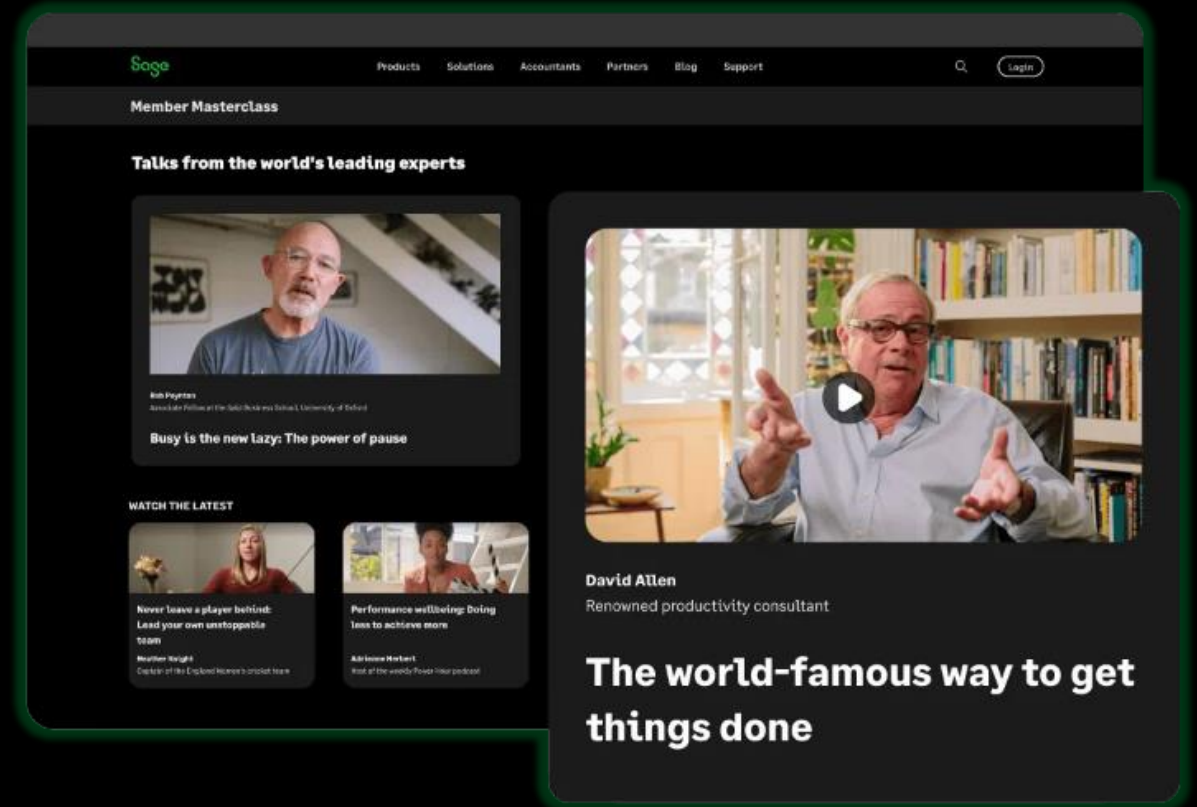
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Forums**

**Award winning
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Season 2: Learn how to unlock the power of productivity



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Renowned productivity consultant

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Rob Poynton
Associate Fellow at the Saïd Business School, University of Oxford

Busy is the new lazy: The power of pause

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Heather Knight
Captain of the England Women's cricket team

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and watch recordings later today.

