Clearing records.

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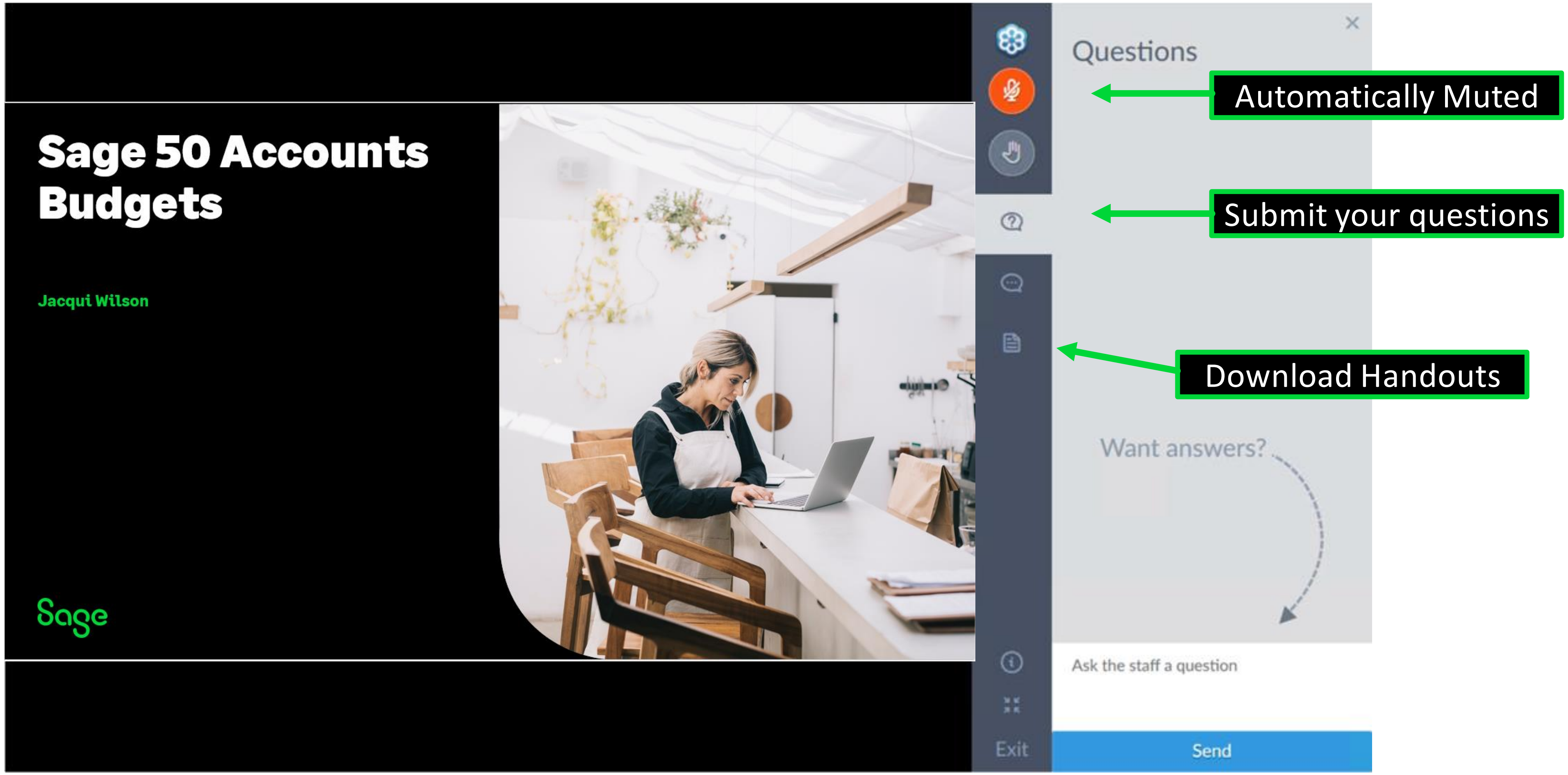
Housekeeping



Contents

Poll

Have you attended our Webinar on Clear Audit trail?

Yes

No

Why clear my records?

Why clear your records.

Please note

If you are experiencing speed issues please bear in mind there could be external environmental factors also impacting processing speeds

- Clearing is an optional task.
- Ensures the data you use day to day is up to date.
- Can make searches and filters work more effectively
- It can speed up general processing in the software in some cases

Clear audit trail

Clear audit trail - Recap.

- Clear Audit trail removes **TRANSCATIONS** from the transaction window providing they meet the following criteria

  •Dates on or before the date chosen

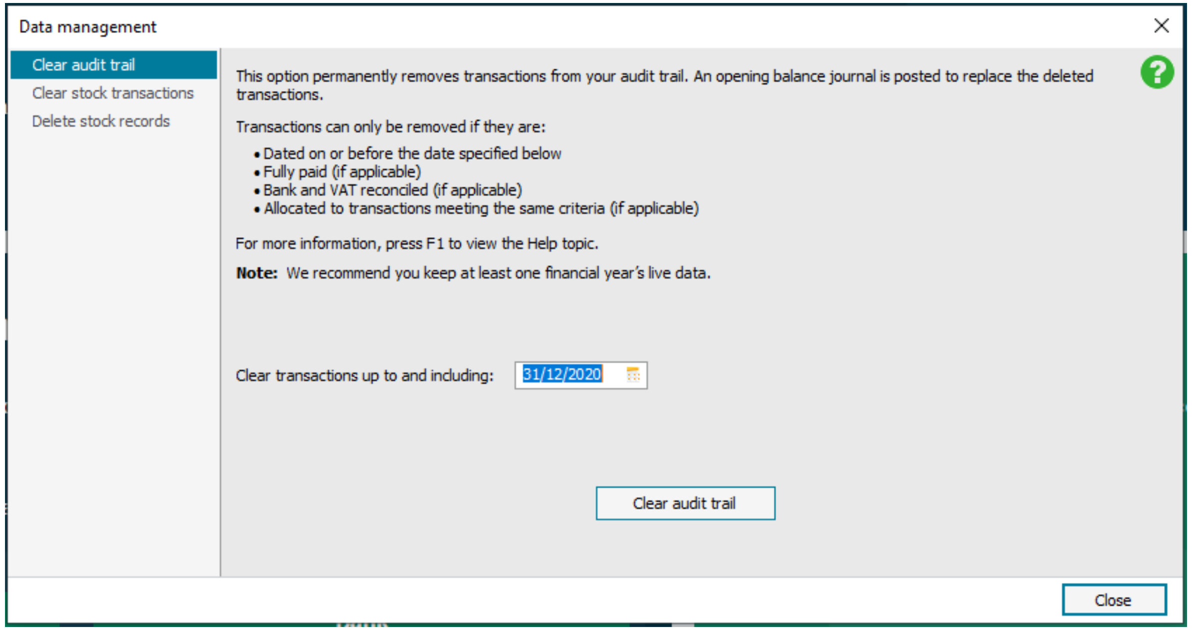
  •Are fully paid

  •Are Bank and VAT reconciled

  •Not allocated to a transaction that does not meet the above criteria.

- Clearing Audit trail will remove these transactions from customer /supplier activity

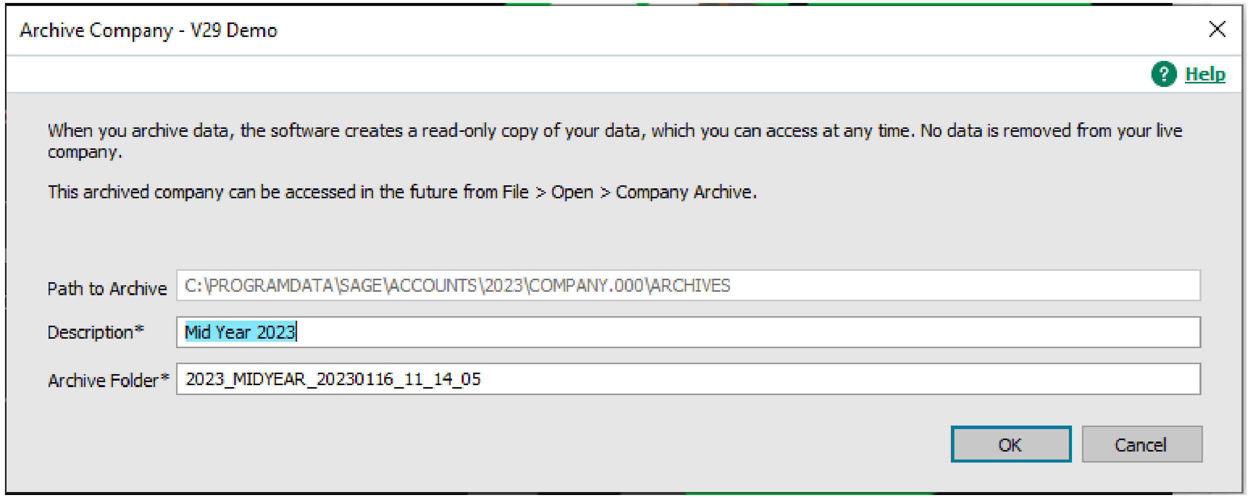
- Old customers with no activity can then be removed from the software



Archive Data

Archive Data.

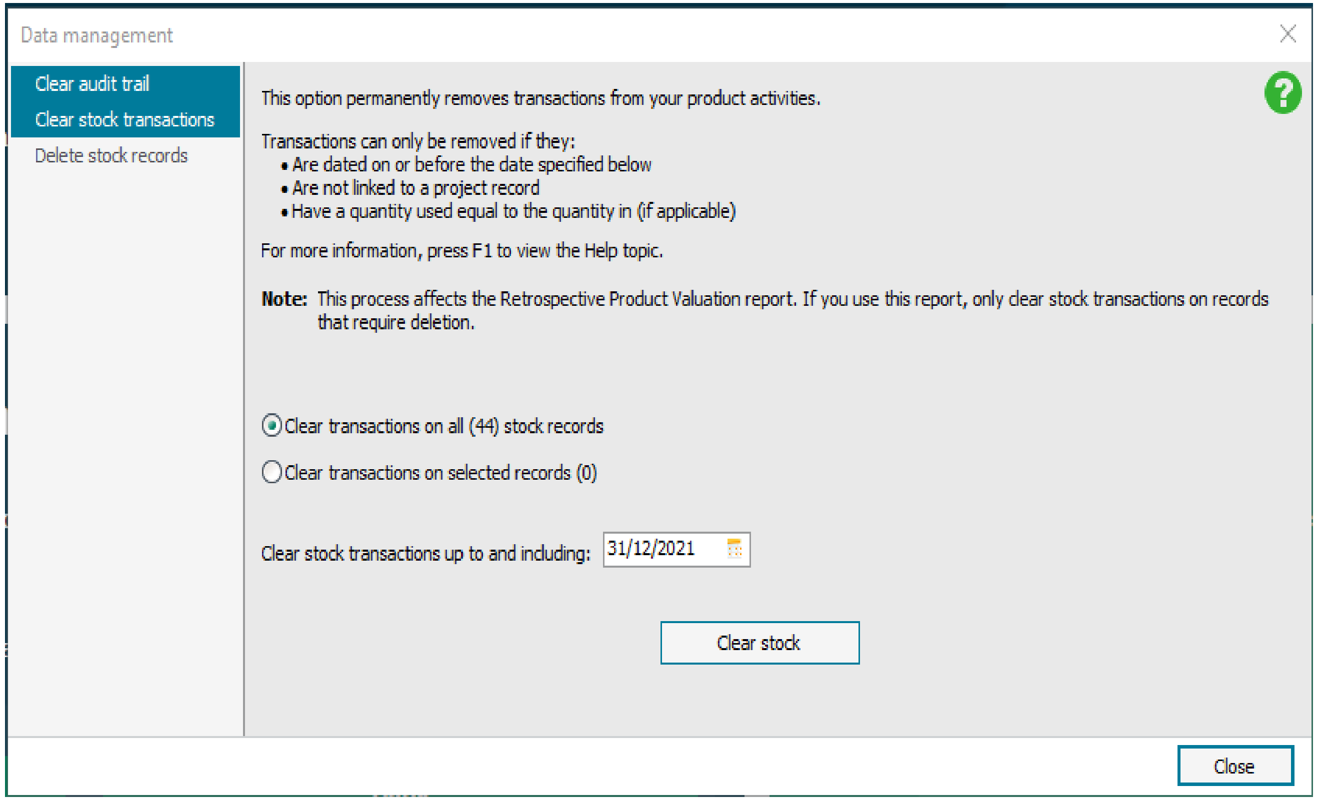
- Taking an archive of your data creates a read-only dataset.
- This is a good option if you need to go back into prior years for reporting purposes without the requirement to restore a backup.
- Taking an archive of your data DOES NOT remove any data.
- An archive can be taken at year end or at any point during the year.
- The option to take an archive without running year end is found in Tools>period end >Archive Company



Clearing and deleting stock

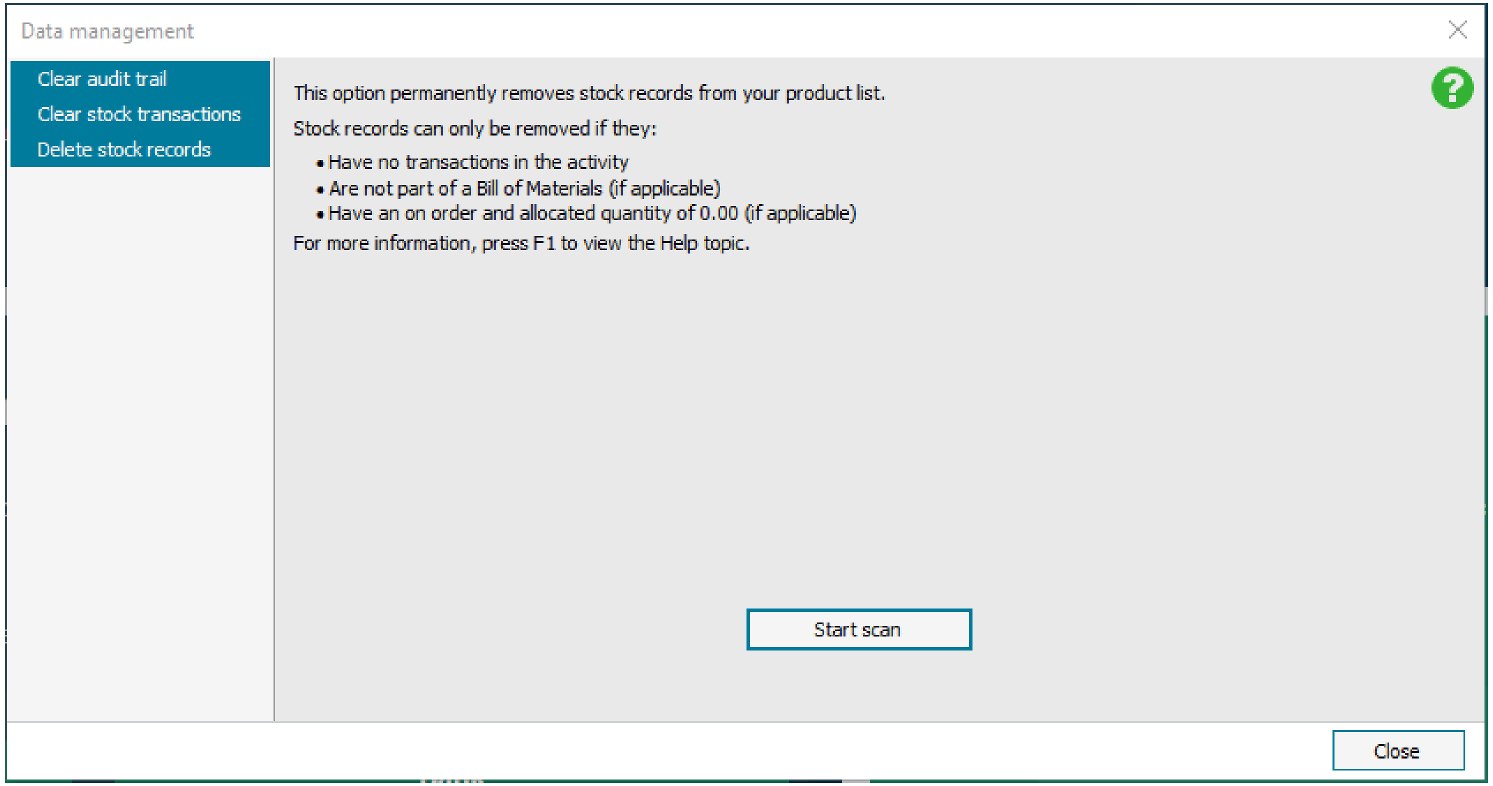
Clear stock.

- Removes the stock transactions from product records.
- Ideally you would use this to just clear stock of products you no longer use as preparation for deleting the record.
- It will only remove stock transactions if they meet certain criteria.
    - Dated on or before the date chosen
    - Not linked to a project record
    - Equal qty used to the qty in



Delete stock.

- Once a clear stock has been run a delete stock can be done.
- This allows you to scan the product list and provides you with a list of those products which meet the criteria to be deleted from the software.



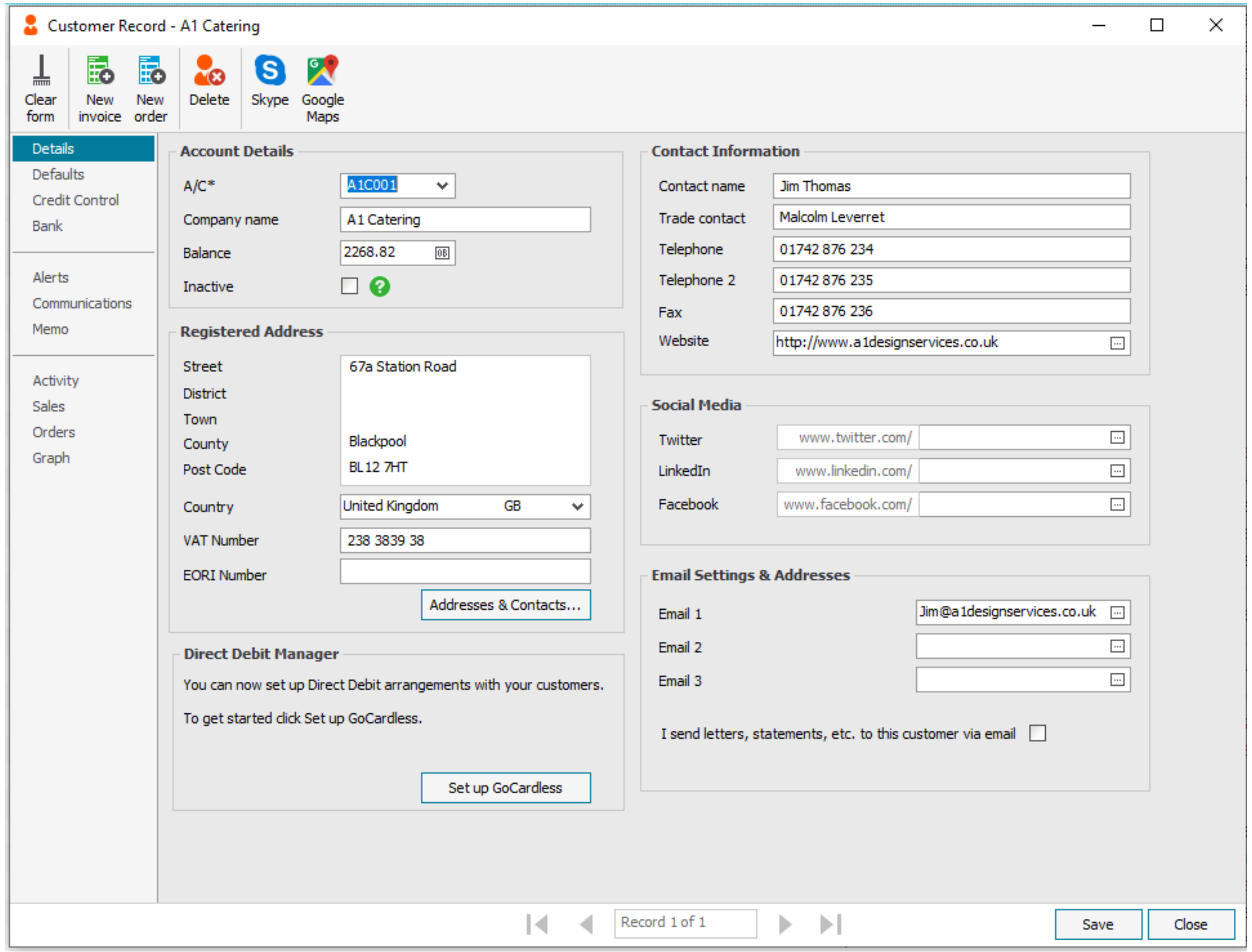
Inactive accounts

Inactive accounts.

- There may be records which cannot be cleared due to remaining activity however the accounts are inactive.
- These accounts can be marked as inactive accounts and hidden from the main list.
- To make an account an inactive account

it must meet certain criteria. For more details check out the article below.

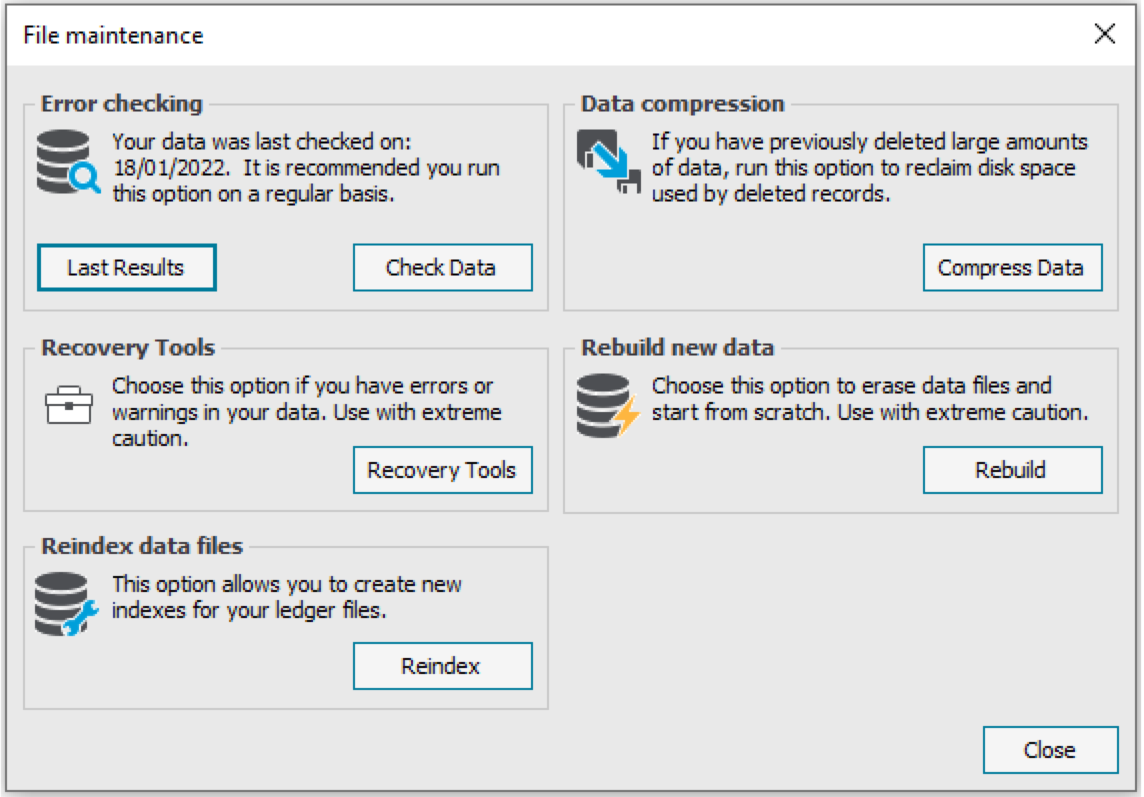
[Reasons why you can't flag records as inactive]



Compress your data

Compress your data.

- After Deleting records, in order to reduce the size of your data files you must compress the data.
- If you delete a record from your customer list the size of the data file does not reduce until the sales ledger is compressed.
- Always ensure you have an error free back up prior to running this routine.
- The option can be found within File> maintenance.



Summary.

- Clearing your records is an optional task, You are under no obligation to complete these.
- Clearing older data may allow you to work more efficiently in your dataset.
- Always ensure to take a full back and ensure you have an archive prior to clearing records.
- Records will only clear if they meet certain criteria.
- If you cannot remove an item an alternative may be for you to mark the records as inactive.
- Compressing the data allows you to reclaim disk space.

Useful links

Tidy up your data after year end

The Clear Stock option

Removing unwanted quotations, invoices, credits or orders

The Clear Audit Trail option

Why has Clear Audit Trail not removed some transactions?

The Compress Data option

Upcoming Webinars.

Upcoming	Key Topics
VAT Return Projects - Part 2 Invoicing Report Designer Edit your invoice layout Recurring items Tips and Tricks in Sage 50cloud Accounts	**Clearing customers, suppliers and nominal codes.** **Wed Jan 18 2pm** Join us to see how to clear out older customer, supplier and nominal records. **Clearing invoices, orders and Quotations.** **Wed Jan 25 2pm** Join this session to see how to clear out older invoice, orders and quotations. .

Thank you!