

Inactive Records.

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Sage



Agenda

Introduction

Why flag records as inactive

Demonstrations

Criteria

Reactivate a record

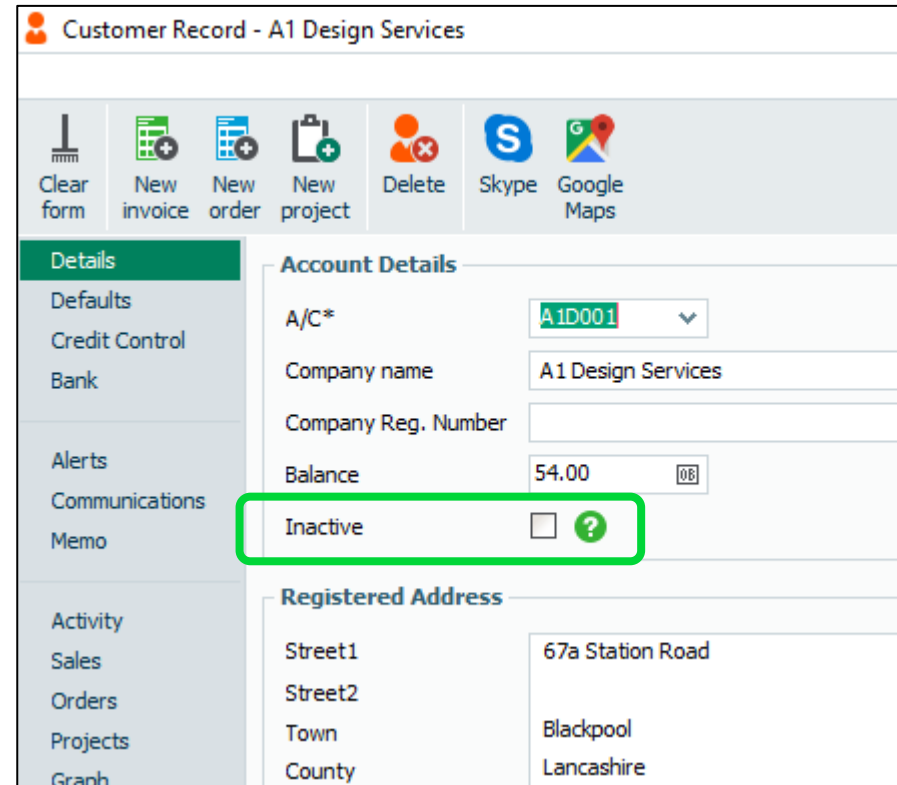
Further support

Inactive Records.

Introduction

- Keep your accounts tidy and more manageable.
- Flag records individually or multiple records simultaneously
 - Batch change not available in Essentials
- Simple check box - Easily turned on/off
- Filter your lists
- Availability
 - Customers / Suppliers / Nominal / Bank accounts / Products

Inactive Records



The screenshot displays the Sage CRM interface for a Customer Record titled "Customer Record - A1 Design Services". The interface includes a top navigation bar with icons for "Clear form", "New invoice", "New order", "New project", "Delete", "Skype", and "Google Maps". A left-hand menu lists various sections: "Details", "Alerts", "Activity", "Sales", "Orders", "Projects", and "Graph". The "Details" section is expanded, showing "Account Details" and "Registered Address". In the "Account Details" section, the "Inactive" checkbox is highlighted with a green box, indicating it is currently unchecked. The "Registered Address" section shows the address: "67a Station Road, Blackpool, Lancashire".

Account Details	
A/C*	A1D001
Company name	A1 Design Services
Company Reg. Number	
Balance	54.00
Inactive	<input type="checkbox"/> ?

Registered Address	
Street1	67a Station Road
Street2	
Town	Blackpool
County	Lancashire

Inactive Records.

Why flag records as inactive?

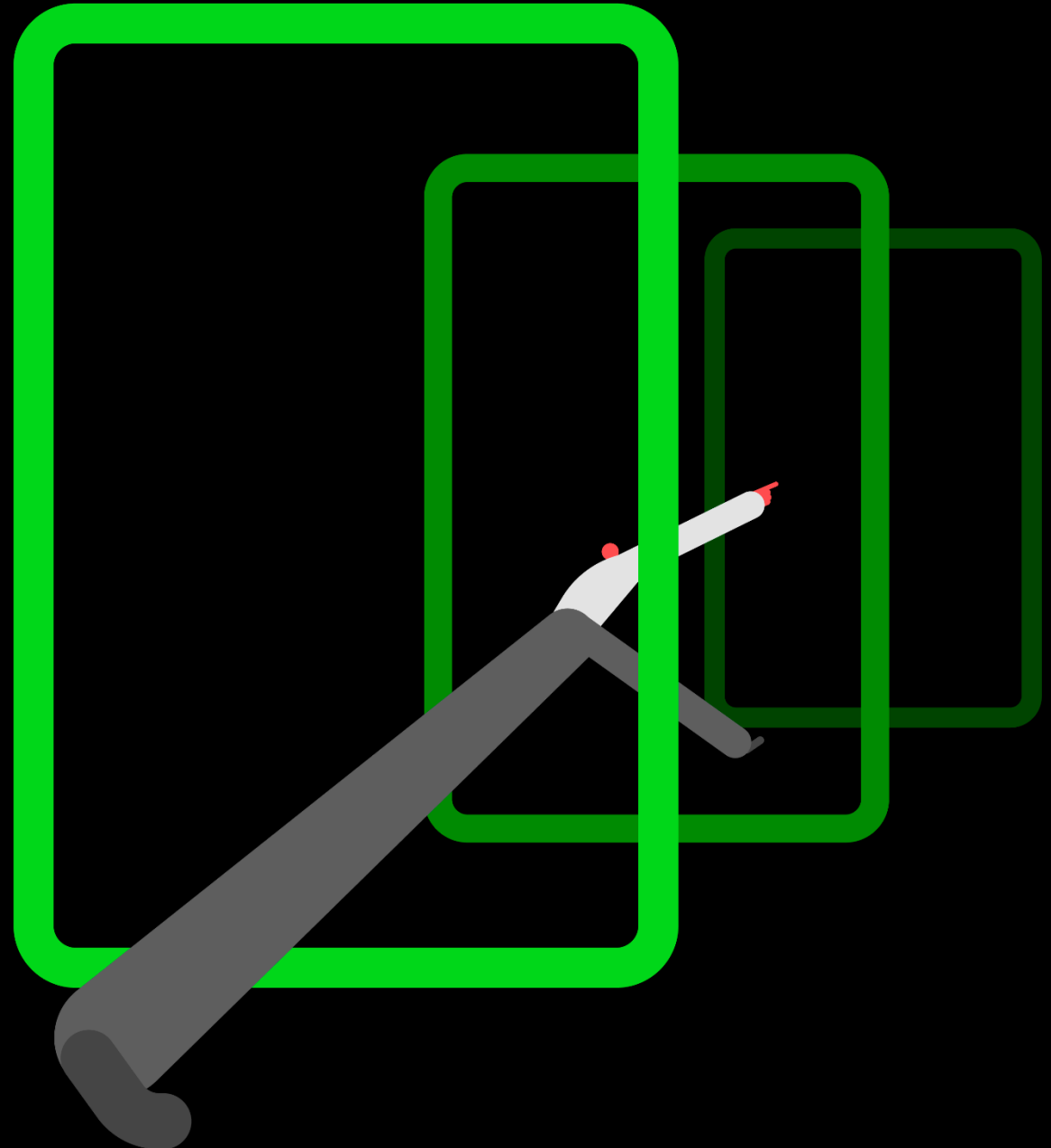
- When records can't be deleted
 - Customer has transactions on the activity
 - When clear audit trail doesn't remove all transactions
 - You don't want to clear your audit trail
- Don't want to delete record
- Historically renamed an account to 'Do Not Use' then applied a filter.
- Records must meet specific criteria

Demonstrations.

Flagging customers as inactive

- Single records
- Multiple records simultaneously

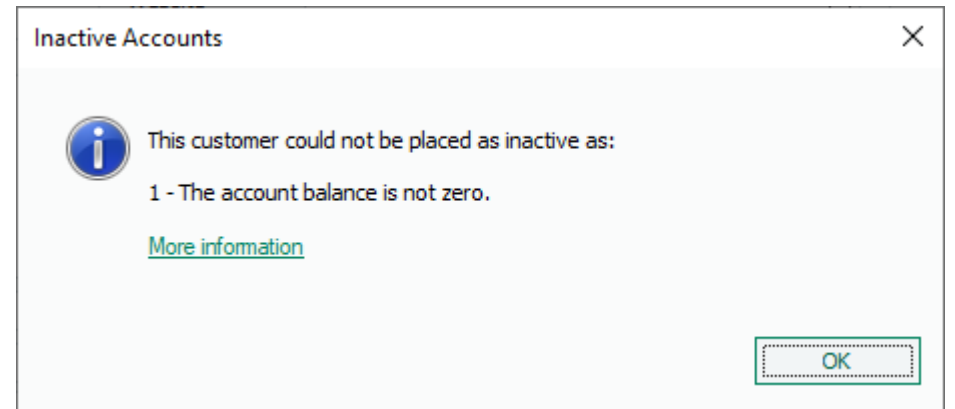
Show/Hide



Inactive Records.

Criteria > Customers

- Account balance must be zero
- All transactions must be allocated
- No active recurring items in:
 - Bank accounts
 - Invoices and credits
 - Sales orders
- Opayo (formerly Sage Pay) - must not be the default customer
- Accountant link - must not be in recording mode - v28 and below only

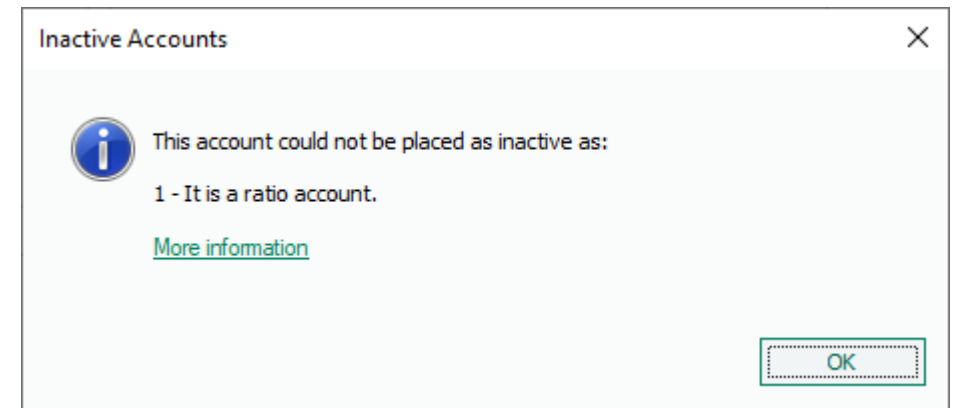


[More information](#)

Inactive Records.

Criteria > Bank account (common query)

- Message appears when set as a ratio account
 1. Nominal codes > Ratio
 2. Click the relevant account > Delete > Yes > Save
 3. Flag record as inactive
- Full criteria available in Help Centre



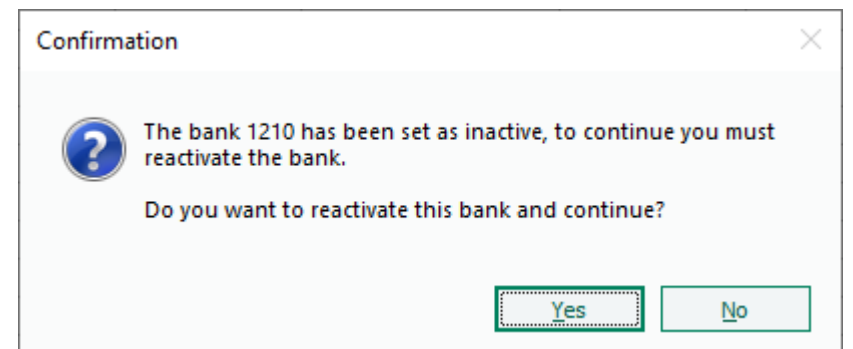
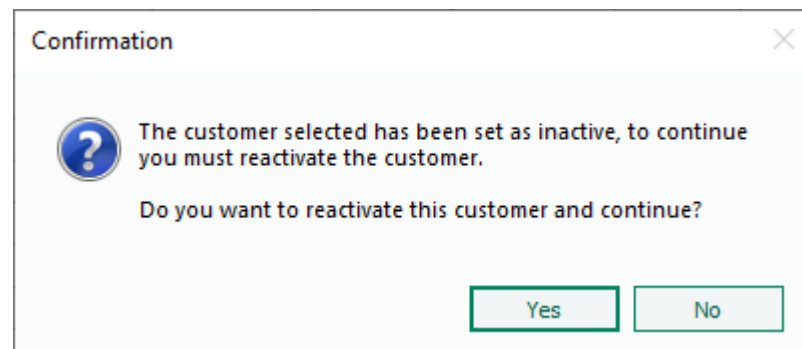
[More information](#)

Inactive Records.

Reactivate a record

- Edit record > Remove the inactive flag
 - Single
 - Multiple
- Use the record

Demonstration



What's included as a Sage member?



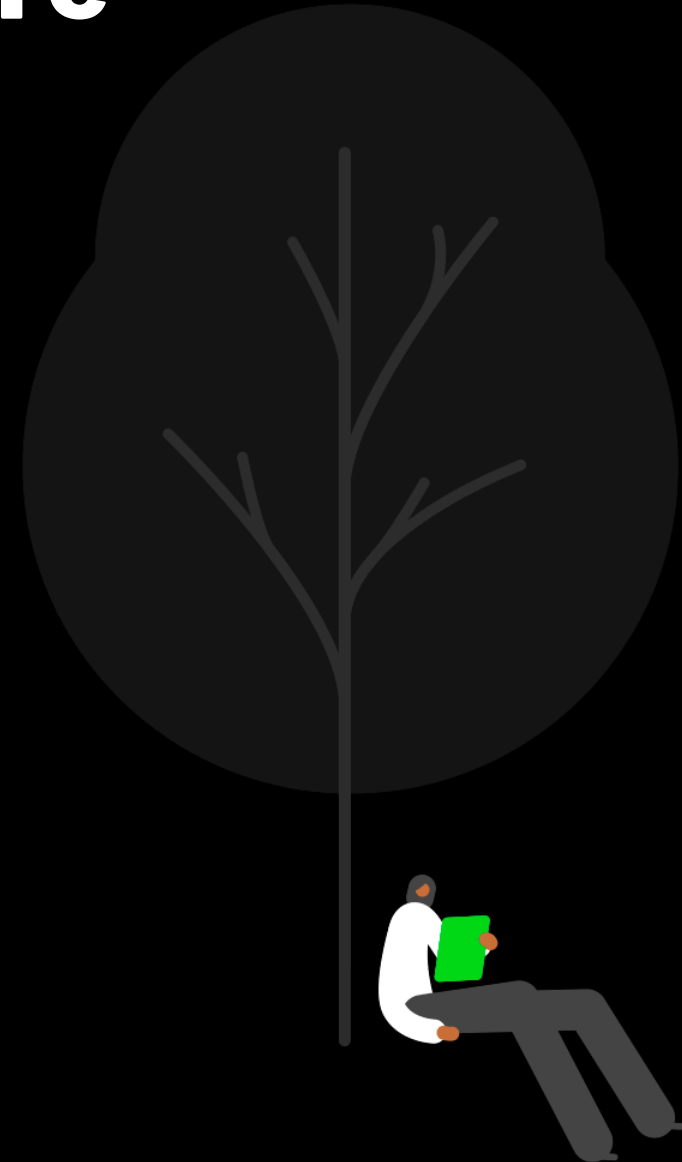
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Learning

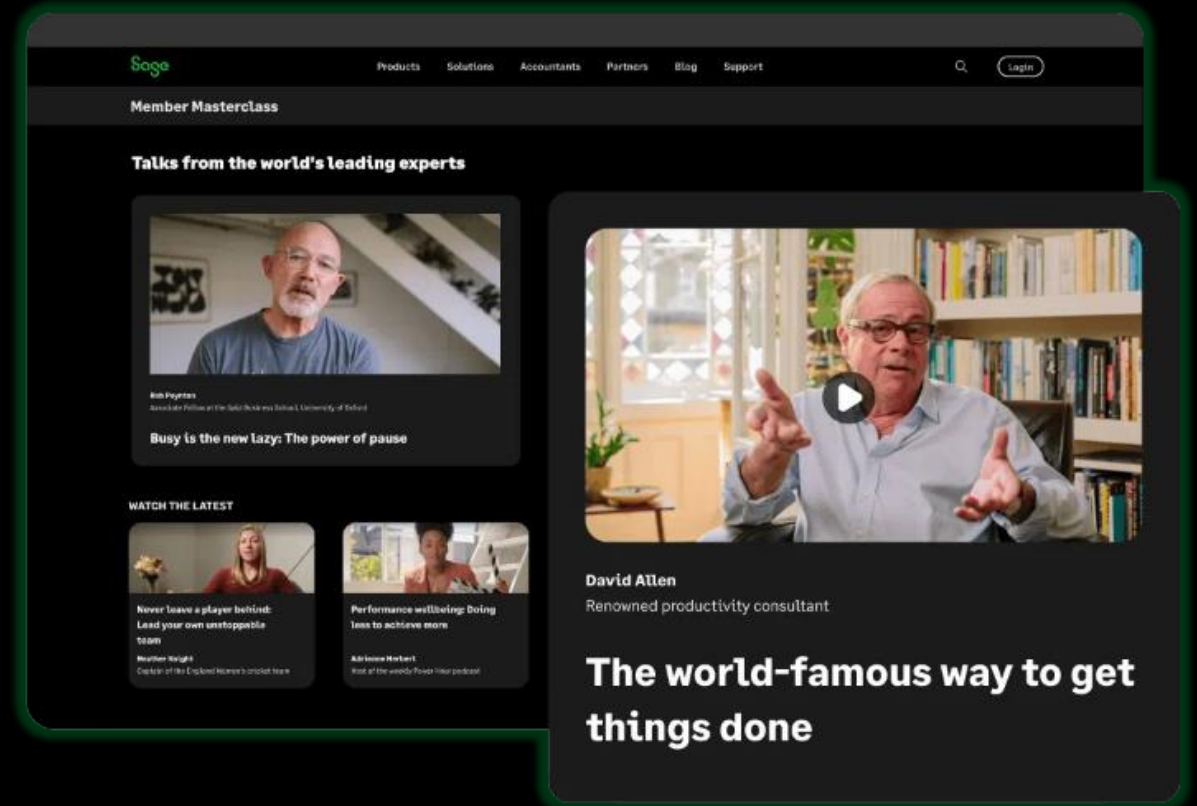
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Upcoming

V29 – What's new

Business dashboard

**Emailing Invoices and
Statements**

VAT Reports

VAT Return

Year End

Key Webinars

Clearing records – Customer, Suppliers and Nominal codes

Thursday 13 April 2pm

Clearing records – Stock records

Wednesday 19 April 2pm

Clearing records – Invoices, Orders and Quotations

Tuesday 18 April 2pm

Company Archives

Tuesday 2 May 11am

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