

Tilted Archiving for Sage 200

Operator guide: archiving and purging historical data

DRAFT 0.1 · September 2026 · Applies to the Tilted Archiving addon for Sage 200

1. What the Archiving addon does

Over the years a Sage 200 company database accumulates a large volume of historical data – posted ledger transactions, completed orders, stock movement history and the audit trail. This slows enquiries, reporting and backups. Sage 200 includes archive and purge routines for most of this data, but they must be run by hand, one module at a time, and on a large database a single run can tie up Sage for many hours.

The Tilted Archiving addon automates this housekeeping. You choose which modules to process and enter cut-off dates on a single settings screen inside Sage 200. An overnight run then works through the enabled modules automatically, always starting with the oldest data, and stops itself at a configured time each morning so it never runs into the working day. The next overnight run simply carries on from wherever the previous one got to, so even a very large backlog is cleared gradually over a number of nights without any manual effort.

Two distinct operations are involved:

- **Archive** – moves historical records out of the live tables into Sage 200's archive tables. The data is still in the database and can still be viewed through Sage's archive enquiry screens, but it no longer weighs down day-to-day processing.
- **Purge** – permanently removes previously archived records from the database. For the audit trail, entries are exported to CSV files first, so a copy is always retained outside Sage.

Important: Purging is irreversible. Once purged, data can only be recovered from a database backup. See section 7 for the recommended approach.

The modules covered, and which operations each supports, are:

Module	Archive	Purge	Notes
Sales Ledger	Yes	Yes	Posted customer transactions
Purchase Ledger	Yes	Yes	Posted supplier transactions
Nominal Ledger	Yes	Yes	Posted nominal transactions
Stock History	Yes	Yes	Stock movement history, including traceable (batch/serial) history
Sales Orders	Yes	Yes	Completed sales orders and returns
Purchase Orders	Yes	Yes	Completed purchase orders
Audit Trail	To CSV file	Yes	Entries are written to CSV files in a folder you choose, then removed from Sage
Invoicing	–	–	Reserved for a future release; enabling it currently has no effect

2. Where things are

Task	Location
Enable modules and set archive/purge dates	Sage 200 menu: Archiving ► Settings
Set the stop time, audit trail folder and SOP option	Archiving ► Settings ► Options button
The overnight run itself	A Tilted automation task on the server (the Tilted console, CLUs200), run by Windows Task Scheduler (set up by Tilted during installation)
Run results	A log of every run is kept in the Tilted logging folder on the server. It is emailed to the Error Emails address in Tilted Options (Automation & Logging) whenever a run records an error – or after every run, if Tilted set the task up that way

3. The Settings screen

Open **Archiving ► Settings**. The screen lists the eight modules with three columns you can change:

- **Enabled** – whether the overnight run processes this module at all.
- **Archive Up To** – records dated on or before this date are archived. Only editable for modules that support archiving.
- **Purge Up To** – previously archived records dated on or before this date are permanently removed. Only editable for modules that support purging.

Module	Enabled	Archive Up To	Purge Up To
Sales Ledger	☒	31/12/2023	31/12/2019
Purchase Ledger	☒	31/12/2023	31/12/2019
Nominal Ledger	☒	31/12/2023	31/12/2019
Stock History	☒	31/12/2023	31/12/2019
Sales Orders	☒	31/12/2023	31/12/2019
Purchase Orders	☒	31/12/2023	31/12/2019
Audit Trail	☒		31/12/2019
Invoicing	☐		

Dates entered for the financial modules do not take into account the 'keep transactions for' settings

Save Options Close

A module does nothing until it is both **Enabled** and given at least one date. You can archive without purging – and this is the recommended starting point – by setting only the Archive Up To date.

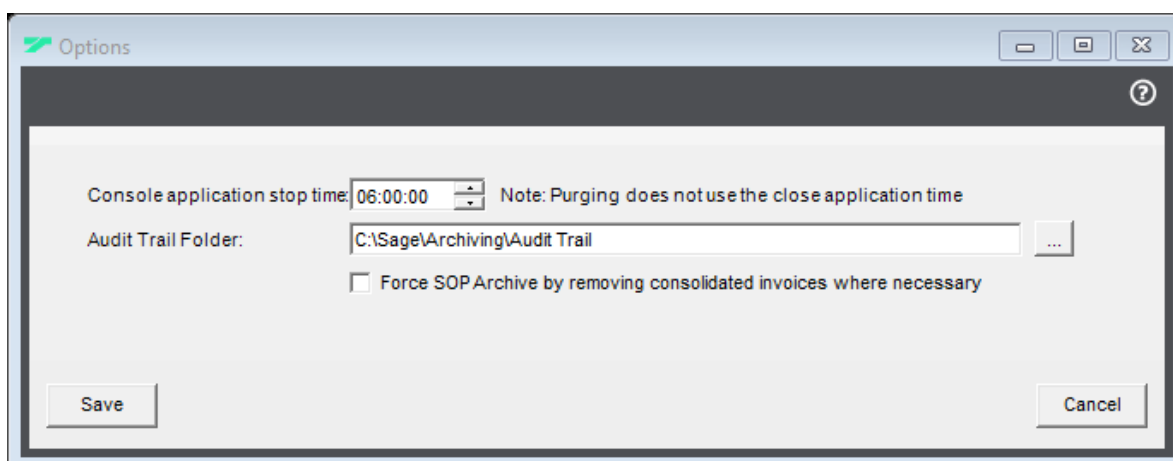
The dates do not clear themselves after a run. Once the overnight runs have worked through everything up to a date, later runs find nothing more to do for that module until you move the date forward. A common pattern is to bring the dates forward once a year, keeping a fixed number of years of live history.

The red warning on this screen – “dates entered for the financial modules do not take into account the 'keep transactions for' settings” – means the date you enter is the actual cut-off. The “Keep transactions for” months configured on individual customer, supplier and nominal accounts are not applied on top: transactions up to your date are archived regardless of those account settings.

When you save, the addon checks the Archive Up To and Purge Up To dates against the current financial year. If any of them falls in the current or a future financial year you are asked to confirm before the settings are saved – archiving or purging current-year data is rarely what you want.

4. The Options screen

Click **Options** on the Settings screen.



- **Console application stop time** – the time each morning at which the overnight run stops (default 06:00). The run finishes the item it is working on and stops cleanly; the next run carries on from there. Set this early enough that the run is finished before users start work.
- **Audit Trail Folder** – the folder the audit trail CSV files are written to. This must be set before the Audit Trail module can run. Choose a location that is included in your server backups: after purging, these files are the only copy of the removed audit trail entries.
- **Force SOP Archive by removing consolidated invoices where necessary** – see section 5.3 before switching this on.

As the screen says, not every purge uses the stop time. The Sales Order and Purchase Order purges use Sage's standard purge, which runs to completion once started, so they may run on past the stop time. The ledger, stock history and audit trail purges check the clock as they go, just as archiving does – the ledgers after each accounting period. Allow for this when choosing the stop time on the first few runs.

5. What each module does

5.1 Sales Ledger, Purchase Ledger and Nominal Ledger

These modules archive **posted transactions** using Sage 200's own archiving, working through the data one accounting period at a time, from the earliest transaction on file up to the Archive Up To date. Archived transactions remain in the database and can still be seen in Sage's archive enquiry screens; current balances are unaffected.

The run logs each period as it is processed – for the Sales Ledger, with the number of transactions archived – so the log shows exactly how far it got each night.

Purge permanently deletes archived ledger transactions dated on or before the Purge Up To date. Like archiving, it works one accounting period at a time, oldest first and account by account, and checks the stop time after each period. Only transactions that have already been archived are purged, and a purge does not need an Archive Up To date – a ledger can purge history that was archived earlier without archiving anything further.

What a purge changes. Customer, supplier and nominal account balances are not affected. The purged transactions no longer appear in Sage's archived transaction enquiries or in reports that list transactions. For the Sales and Purchase Ledgers, the turnover figures Sage holds for each customer and supplier are recalculated for the purged periods from the transactions that remain, as Sage's own purge does – so once a period has been purged, its turnover figures show as zero. For the Nominal Ledger only the transactions are removed: nominal period values and budgets are held separately, so the trial balance and financial statements for those periods are unchanged.

In the log. Sales and Purchase Ledger purges list each customer or supplier purged, with the number of archived transactions removed and the period they belong to. The Nominal Ledger lists, for each period, how many transactions were purged from how many nominal accounts.

Important: Purging ledger transactions permanently removes the detail behind your accounts and your customer and supplier turnover history. Check your retention obligations (section 7) before setting a Purge Up To date for a financial ledger, and keep it well behind the Archive Up To date.

5.2 Stock History

Archive moves stock movement history – including traceable (batch and serial numbered) history – into Sage's stock archive tables, item by item, up to the Archive Up To date. Any item that cannot be processed is logged with the reason and skipped; the run continues with the next item.

Purge permanently deletes previously archived stock history, one day of history at a time, up to the Purge Up To date. Standard and traceable (batch and serial numbered) archive entries are both covered, and once the purge reaches the Purge Up To date, archived batch and serial numbers with no activity after that date are removed as well.

5.3 Sales Orders

Archive processes sales orders and returns that are **complete** and dated on or before the Archive Up To date, oldest first, using Sage's own sales order archiving. Archived orders can still be viewed through Sage's archived order enquiries. As part of archiving each order, the invoice profit-analysis records linked to it are removed – these serve no purpose once the order is archived.

Consolidated invoices need a special mention. Where several orders were invoiced together on one consolidated invoice, the orders are archived together, along with the invoice, in the same way as

Sage's own archiving – but only once every order on the invoice is complete and dated on or before the Archive Up To date. Until then all of them are left in place, and the log names the order that is holding them back.

The Force SOP Archive option on the Options screen is a last resort for orders that still cannot be archived for some other reason: when it is switched on and an order (or a group of orders sharing an invoice) fails to archive, the run removes the invoice records concerned from Sage and then archives the orders. It is rarely needed and is best left off unless Tilted advises otherwise.

Important: With Force SOP Archive switched on, the Sage records of the affected invoices are deleted – they will no longer appear in invoice enquiries. Printed or filed copies of the invoices are unaffected. Only enable this option once you are happy the invoices concerned are old enough that the Sage records are no longer needed.

Purge permanently removes archived sales orders dated on or before the Purge Up To date, using Sage's standard purge.

5.4 Purchase Orders

Archive processes purchase orders that are **complete** and dated on or before the Archive Up To date, oldest first. The addon uses its own copy of Sage's purchase order archive routine, which works around a fault in the Sage-supplied one; the result is the same as Sage's own archiving and the orders remain visible in the archived order enquiries. **Purge** removes archived purchase orders up to the Purge Up To date using Sage's standard purge.

5.5 Audit Trail

The audit trail is handled differently: entries are **exported to file and then removed** in one step, driven by the Purge Up To date. For each day of audit trail entries up to that date, the run:

1. Exports the day's entries using Sage's own audit trail archive format.
2. Appends them to a CSV file for that month – one file per calendar month, named after the year and month (for example “2019 January .csv”) – in the Audit Trail Folder.
3. Removes the entries from Sage.

The CSV files open directly in Excel, so historical audit trail data remains available for inspection after it has left Sage.

5.6 Invoicing

This module is reserved for a future release. It appears in the settings grid but enabling it currently has no effect.

6. The overnight run

The overnight run is a Tilted automation task on the server, scheduled by Tilted during installation – typically to start in the evening after backups. There is nothing to start or monitor by hand. Each run:

1. Works through the enabled modules in the recommended order (section 7): Sales Orders, Purchase Orders, Stock History, Sales Ledger, Purchase Ledger, Nominal Ledger, Audit Trail. Within each module it archives first and then purges.

2. Within each module, processes the oldest outstanding data first, logging each period, order or item as it goes.
3. Checks the clock as it works, and stops cleanly when the stop time is reached – whatever is left simply waits for the next run.
4. Writes a log of what was archived and purged and of any records it could not process. The log is emailed to the Error Emails address in Tilted Options if anything went wrong (or after every run, if the task was set up to do so).

Individual records that fail – for example an order that Sage refuses to archive – are logged and skipped; they never stop the run. If the same record appears in the log night after night, contact Tilted.

7. Recommended approach

Recommended order. Work through the modules in this order – it runs from the trading documents, through the stock movements they created, to the ledger postings, and leaves the audit trail, the record of everything posted, until last:

1. **Sales Orders** – completed sales orders and returns, together with their invoices.
2. **Purchase Orders** – completed purchase orders.
3. **Stock History** – stock movements, including batch and serial numbered history.
4. **Sales Ledger** – posted customer transactions.
5. **Purchase Ledger** – posted supplier transactions.
6. **Nominal Ledger** – posted nominal transactions.
7. **Audit Trail** – exported to CSV files and removed from Sage.

The overnight run always processes the enabled modules in this order, and only starts the next module while there is time left before the stop time, so a large backlog is worked through in this order over as many nights as it takes. Add purge dates in the same order once the archiving has settled, and keep to it whenever you bring dates forward.

- **Take a database backup** before the first run, and make sure the Audit Trail Folder is included in your routine server backups.
- **Check your retention obligations first.** Financial records typically have to be kept for a number of years (in the UK, HMRC generally expects six). Archiving keeps data in the database, but purging removes it – for the audit trail, the CSV files become the retained copy.
- **Start with archiving only.** Leave every Purge Up To date blank until the archive runs have settled down and you are happy with the results.
- **Move dates forward in steps.** On a large backlog, set the Archive Up To date a year or two beyond the oldest data and let a few nights clear it, rather than jumping straight to the final date. The run stops at the stop time regardless, but smaller steps make the results emails easier to review.
- **Keep purge dates well behind archive dates** – for example archive up to two years ago, purge up to six – so recently archived data stays available in the archive enquiries.
- **Review the results email** after each of the first few runs, then weekly.

8. Troubleshooting

Symptom	Cause and remedy
Run reports “You need to setup the stop time before running the archive routines”	The stop time has never been set. Open Archiving ► Settings ► Options and save a stop time.
Run reports “Need to setup the audit trail archive folder first”	The Audit Trail module is enabled but no folder is set. Choose an Audit Trail Folder on the Options screen.
A module is enabled but nothing happens	Check a date is entered for the operation you expect (Archive Up To and/or Purge Up To), and that the date is not in the current financial year.
Run reports “The date of the first entry is higher than the 'purge up to' date”	Everything in that ledger up to the Purge Up To date has already been purged, so there is nothing more to do. Move the date forward the next time you want to purge, or clear it. The same message with 'archive up to' means no posted transactions are old enough to archive.
Run reports “No archived sales entries” (or purchase or nominal entries)	A Purge Up To date is set but that ledger has no archived transactions yet. Archive first, or clear the Purge Up To date.
Run reports “The specified archive date is earlier than the last archived date”	The Archive Up To date for that module is earlier than the date its records have already been archived to – by an earlier run or by Sage's own archiving. Set a later date; nothing else is archived for that module until you do.
A sales order is reported night after night as sharing a consolidated invoice	Another order on the same invoice is not yet complete, or is dated after the Archive Up To date. The orders are archived together once all of them qualify – complete the outstanding order or move the date forward.
An order or item is reported with another error	It is skipped and the run continues. Persistent entries usually mean custom data is referencing the order – contact Tilted with the log line.
The run seems to finish later than the stop time	The Sales Order and Purchase Order purges run to completion once started, and a ledger purge finishes the accounting period it is on (see section 4). If this is regular, reduce how far the purge dates move forward each time.