Sage 50 Accounts

TOP TEN TIPS

1. If you are doing something on Sage you are not sure about, or have never done before then practice using the Practice Data that Sage supplies with your software. To find this, got to
   FILE, OPEN, OPEN PRACTICE DATA. Anything you do in here doesn't influence your own data and can be wiped clean if you do it wrong

Sage uses the Function keys to perform certain task and short-cuts – make the most of them:

Pressed in any screen, opens up the *Help* screen which is relevant to the module you are in. For example, pressing F1 in Customers, brings up all the help content to do with the Customers Module.

Pressed in any screen, opens up a calculator.

Pressed in any screen opens up the database. For example, when entering a new product invoice, pressing F4 opens up the list of product codes previously entered.

Pressed when entering free text is the spell-check.

Repeats the data in the field above. Useful when entering in batch entry fields, if the data is the same as the field above.
Inserts a line of data.

Deletes a line of data.

Opens up the Control Panel.

Opens up Report Designer (or from the Tools menu, choose Options, then choose the Environment tab, select the Configure F12 As Hide Key check box, OK. Now you can use the F12 key to minimise Sage at any time).

2. You can save your most frequently used to Reports to the Favourites Tab on the top toolbar. To do this just find the report you use on a frequent basis. Click it until it turns blue, then press the Add Favourites icon.
   This report can now be quickly accessed by pressing Favourites on the top menu

3. Use the in-built diary to create reminders (really useful for key dates such as Year End, Vat Return Due Dates, Company Annual Return). The diary can be used to set up regular reminders and has an alarm on start-up to remind you. The To-Do list can be printed as well.

4. Sage has a number of letters templates in the Customer and Supplier modules. These can be used to notify Customers and Suppliers of change of address, shut-down dates and to chase debts. These can also be customised and saved as new letters templates.

5. To keep your Sage data secure, set up Access Rights. This allows you to set up individual log-in passcodes and restrict access to the various areas of Sage. This is found in Settings, Access Rights.

6. If you have a Customer disputing an invoice, prevent Credit Control from chasing the customer whilst you investigate, by flagging the invoice as 'disputed'. To do this, highlight the customer name then press the flag icon. A list of outstanding invoices appears. Press on the details, and it will turn blue. Then press 'Dispute' and a sub-menu will allow you to choose a reason for the dispute. Choose an option and then a 'd' will appear against that invoice. The same steps apply if you are disputing a Purchase Invoice, in the Suppliers Module.

7. By clicking on a Customer Record, the Communications Tab is shown. This records all statements and letters sent to the customer.

8. At the end of a year, it is easy to accidentally type in the previous year date. To prevent this happen, choose the 'Lock Date' setting, found in the Settings heading in the main menu.

9. Take the time to set up your Web Links. It means that Sage can link directly to HMRC, saving you time. It also allows you to use Sage Pay if you are a retailer, or wish to give customers to pay you through Sage Pay (you can put a link on your emailed invoice). The Web Links function allows you to e-bank direct from Sage to your bank.

For further assistance and details of how we can help your business develop and grow please visit our website:

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