

International Accounting Day

Work Smart - Automating everyday transactions

Presented by Abby

Note – You will receive a link to the recording in your follow up email.

This session will begin @ 2pm



International Accounting Day 2024

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- #1 – Getting paid- Time saving opportunities.
- #2 – Work smart – Automating everyday transactions.
- #3 – Reporting made easy
- #4 – Quick tips to protect your data
- #5 – Shortcuts for success

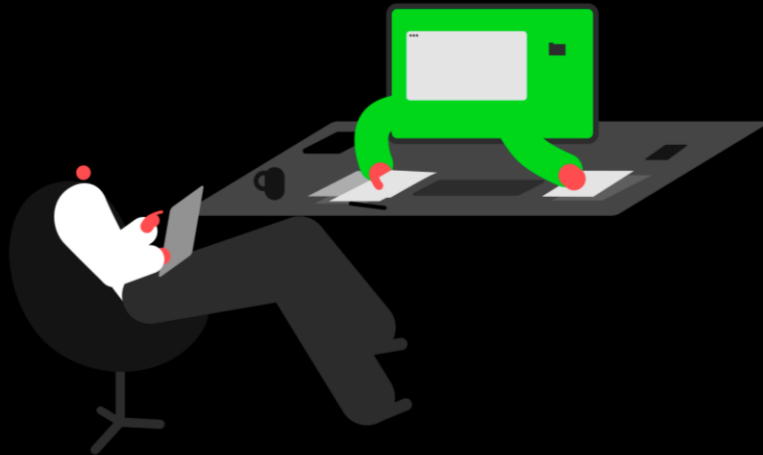
**International
Accounting Day
The quiz**

**Thu 7 Nov 2pm
Tue 12 Nov 11am**



Register now

What are we covering in today's **webinar**?



- **Why use automation?**
- **Recurring Items**
- **Memorise & Recall**
- **Bank feed rules**
- **Upcoming Webinars**

Why use automation?

- Efficiency
- Prevent human error
- Enhanced accuracy
- Reduce costs

What solutions do Sage offer?

- Recurring items
- Memorise and recall
- Bank feed rules
- Invoice payments & Opayo
- GoCardless
- Sage Connect

Invoice payments & Opayo by Elavon

- A pay now option can be added to invoice layouts for speedy payment
- Opayo is activated in Settings> company preferences> Opayo by Elavon

[Find out more](#)

GoCardless

- A simple way to collect payments using Direct Debit either in full or via instalments
- With Direct Debits, customers can authorise you to collect one-off and regular payments
- To reduce the amount of time you spend chasing payments

[Find out more](#)

Sage Connect

- Invite your customers to self-serve and have access to invoices 24/7
- Batch send monthly statements and balance reminders
- Currently in Early adopter phase

[Find out more](#)

Recurring Items

Recurring entries save time by allowing you to set up regular payments, receipts like direct debits and standing orders, to process all at once when needed.

- Great for automating regular transactions.
- They can be set up in the bank module for bank transactions.
- Tick the option if you **do not** wish to be prompted upon opening your software to process recurring items.
- No limit on how many you can set up.

Add / Edit Recurring Entry

[? Help](#)

Recurring Entry From / To

Bank A/C*

Nominal Code*

Recurring Entry Details

Transaction Type

Transaction Ref

Transaction Details

Department*

Posting Frequency

Every* Total Required Postings

Start Date* Finish Date

Next Posting Date Suspend Posting?

Last Posted

Posting Amounts

Net Amount Tax Code* VAT

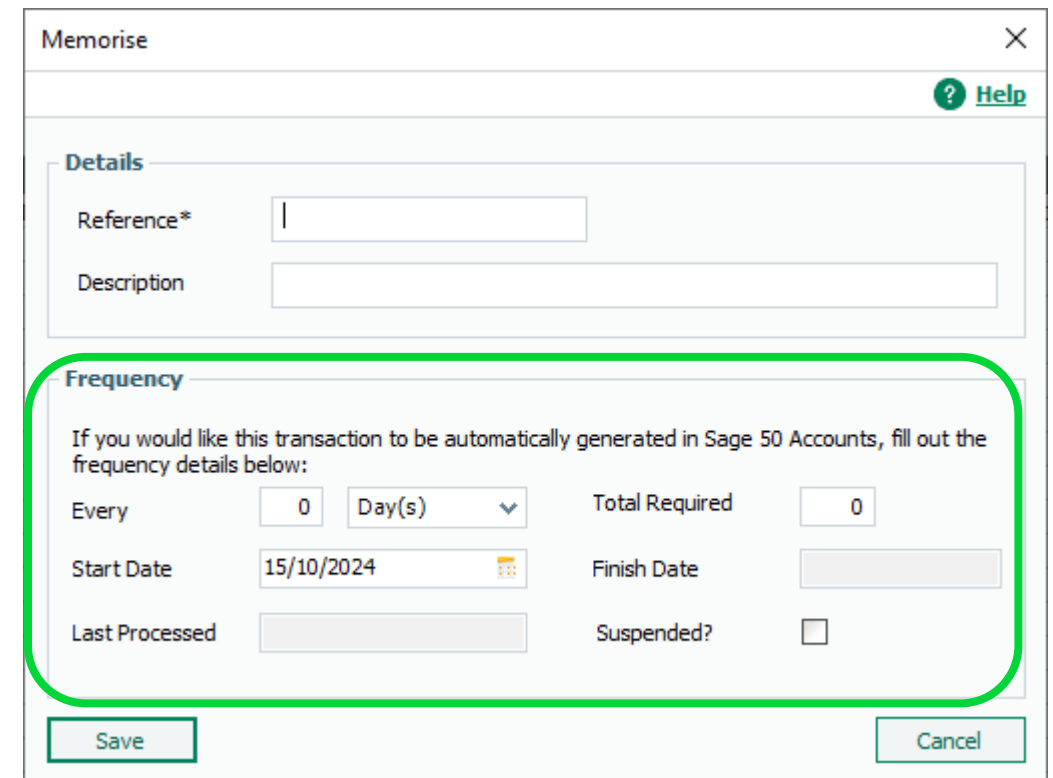
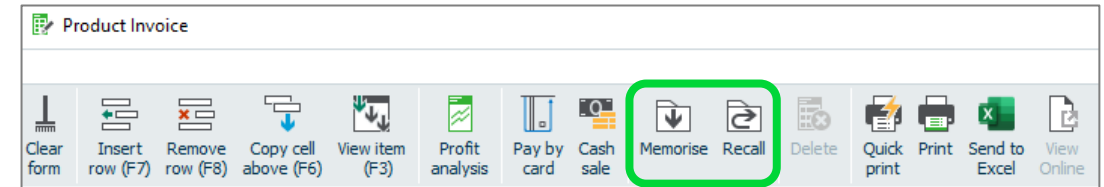
Memorise & Recall

Memorise and Recall saves time, improves accuracy, and enhance efficiency by allowing quick access to frequently used transactions while ensuring consistency and easy updates.

This feature can be found in:

- Journals
 - Bank Payments/Receipts
 - Batch invoices
 - Invoices and credits
 - Quotations
 - Sales order
 - Purchase orders
- Save an invoice to recall later.
 - Add a frequency to make it recurring (optional).

Note – Only available in Standard or professional.

A screenshot of the 'Memorise' dialog box in Sage 50 Accounts. The dialog has a title bar with a close button and a help icon. It is divided into two sections: 'Details' and 'Frequency'. The 'Details' section has input fields for 'Reference*' and 'Description'. The 'Frequency' section is highlighted with a green rounded rectangular box and contains the following fields: 'Every' (0), 'Day(s)' (dropdown), 'Total Required' (0), 'Start Date' (15/10/2024), 'Finish Date' (empty), 'Last Processed' (empty), and 'Suspended?' (checkbox). At the bottom are 'Save' and 'Cancel' buttons.

Bank feeds rules

Set up rules to automatically post transactions to your accounts as they download from your bank. Reducing manual data entry, saving time and avoiding mistakes.

- Create rules based on your **matched** transactions.
- Transactions can be created automatically.
 - Can also choose to approve before posting
- Assign nominal codes, tax codes, customers & suppliers.
- Bank transactions can be split over nominal codes
 - Splitting your Gas and Electric

Create rule ? Help

Create rule

Create rules to automatically categorise and set details on bank transactions with the conditions you choose. By doing this, you can save on processing time and handle transactions with ease.

i Rule will only apply to newly downloaded transactions.

Matched transaction details

Date	Bank account	Reference	Amount
20/06/2024	1200 - Bank Current Acco...	887	£56.73

Basic information

Rule name *

Condition(s)

Select one or more of the following conditions *

	Field	Condition	Value
<input type="checkbox"/>	Reference	Equals	887
<input type="checkbox"/>	Amount	Equals	56.73
<input type="checkbox"/>	Day of month ?	Between	20 and 20
<input type="checkbox"/>	Cheque number	Equals	
<input type="checkbox"/>	Account number	Equals	
<input type="checkbox"/>	Sort code	Equals	

Create **Cancel**

Recurring items

approx. 30 mins

Recording

Guide

Memorise and Recall

approx. 30 mins

Recording

Guide

Bank feeds Rules

approx. 30 mins

Register

Guide

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