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

Smart Accounting
Sage 50 Accounts
International Accounting Day 2024

International Accounting Day 2024

Earn your digital badge by attending at least 4 different quick learns <u>AND</u> one of our quiz sessions.

#1 – Getting paid- Time saving opportunities.

#2 - Work smart – Automating everyday transactions.

#3 – Reporting made easy

#4 – Quick tips to protect your data

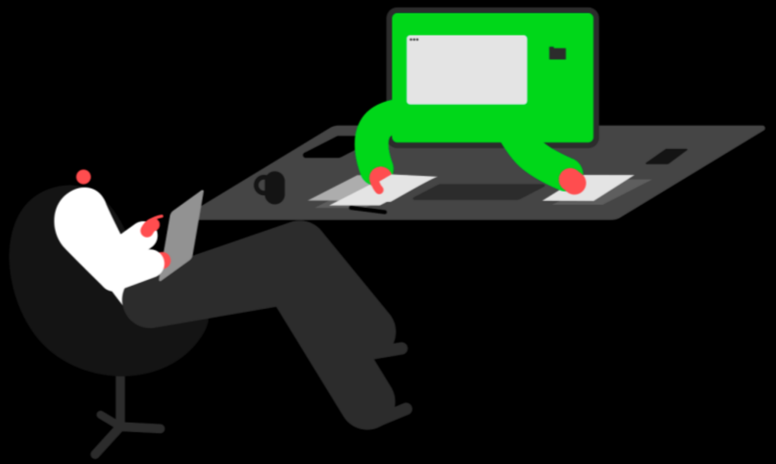
#5 – Shortcuts for success

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

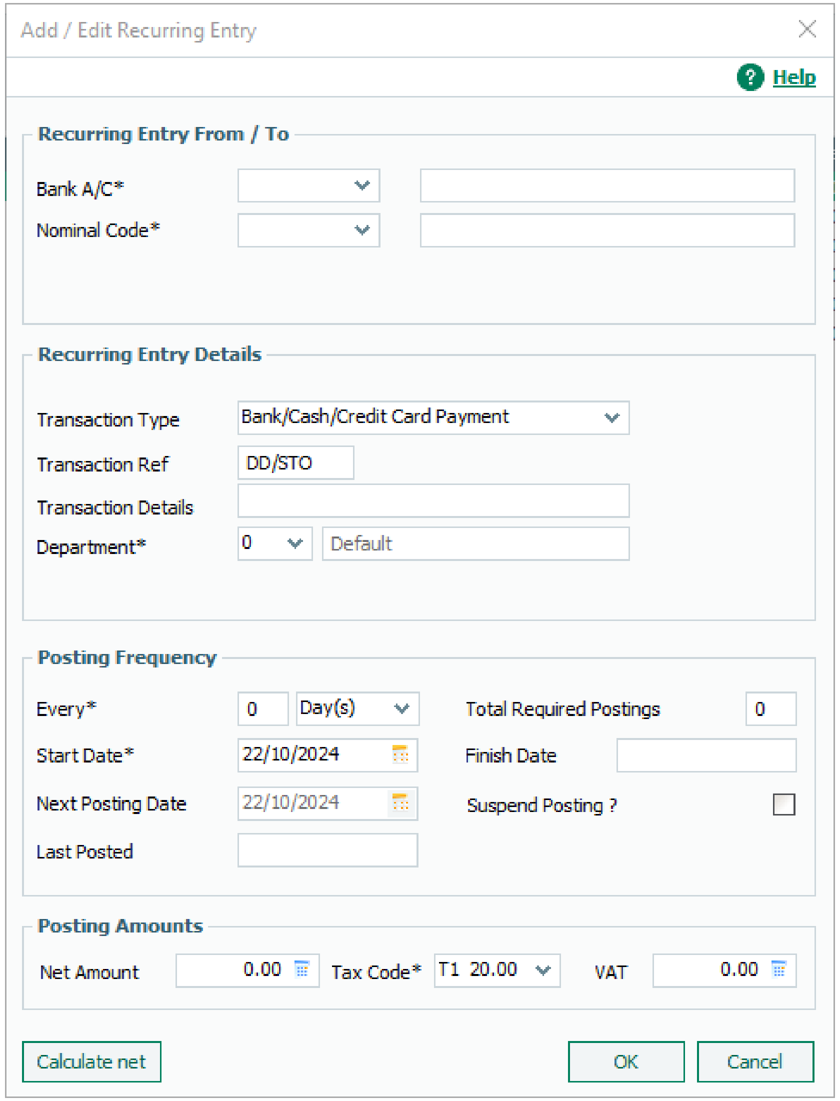
- Invite your customers to self-serve and have access to invoices 24/7
- Batch send monthly statements and balance reminders
- Currently in Early adopter phase

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.

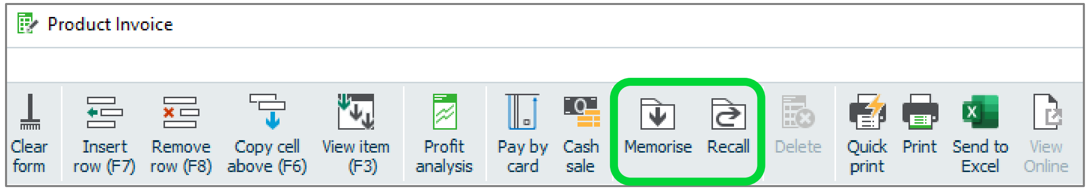
- Great for automating regular transactions.
- They can be set up in the bank module for bank transactions.
- Tick the option if you **do not** wish to be prompted upon opening your software to process recurring items.
- No limit on how many you can set up.



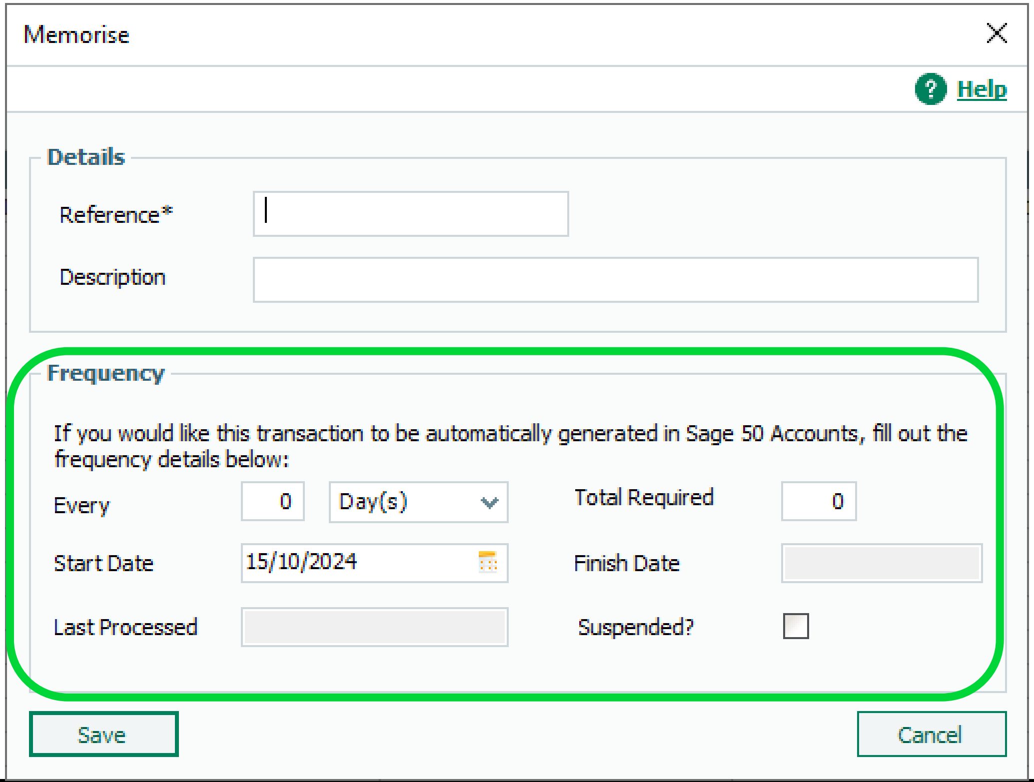
Memorise & Recall

Note – Only available in Standard or professional.

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

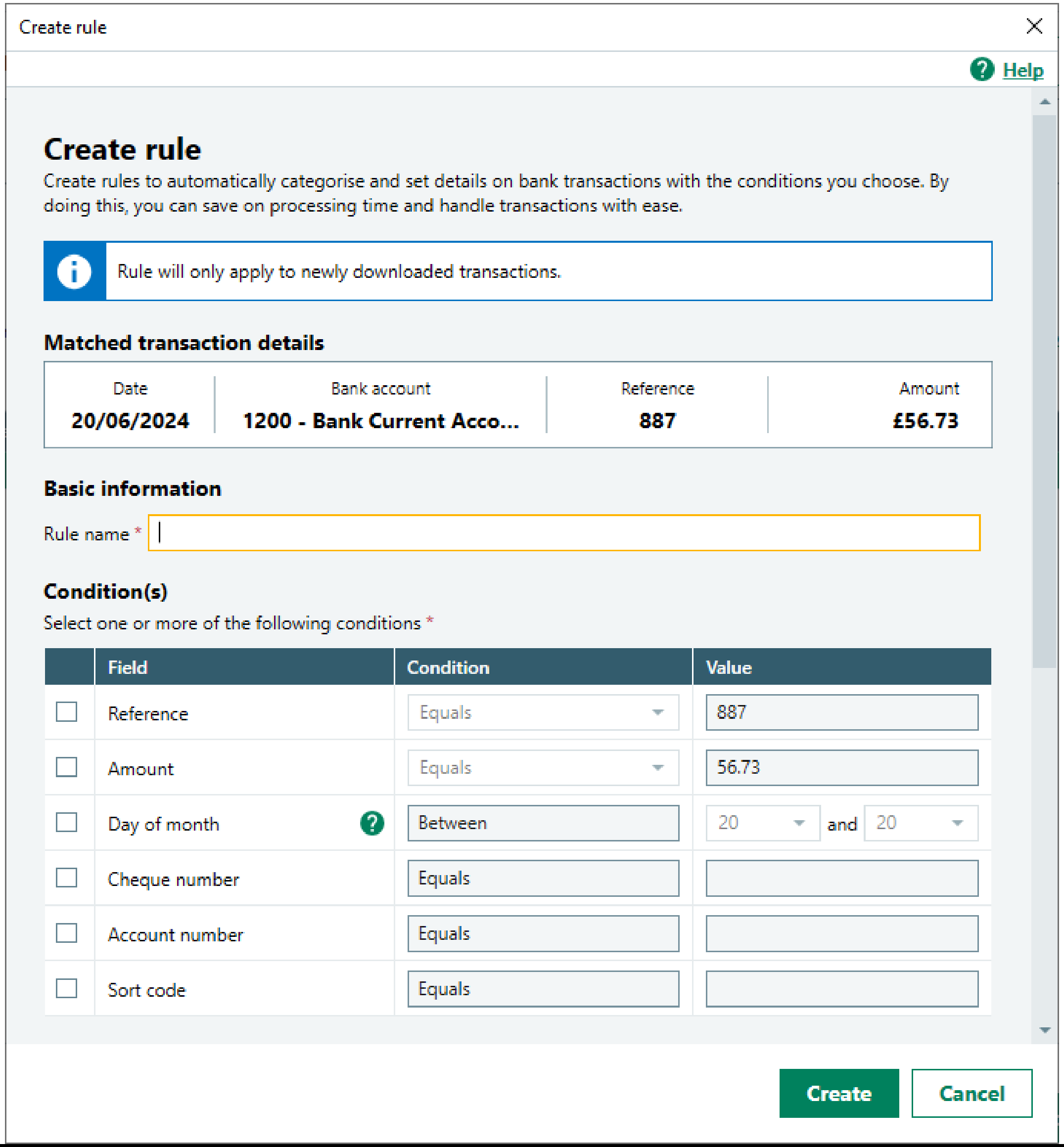


- Save an invoice to recall later.
- Add a frequency to make it recurring (optional).

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



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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Thank you!

Please take a minute to complete the short exit survey as you leave.

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