

International Accounting Day

Sage 50 Accounts Shortcuts for success

Presenter: Michael Cox

Start time: 10am (approx. 30 mins)

Sage



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

#6 - International Accounting Day - The Quiz

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What's covered in today's **webinar**?

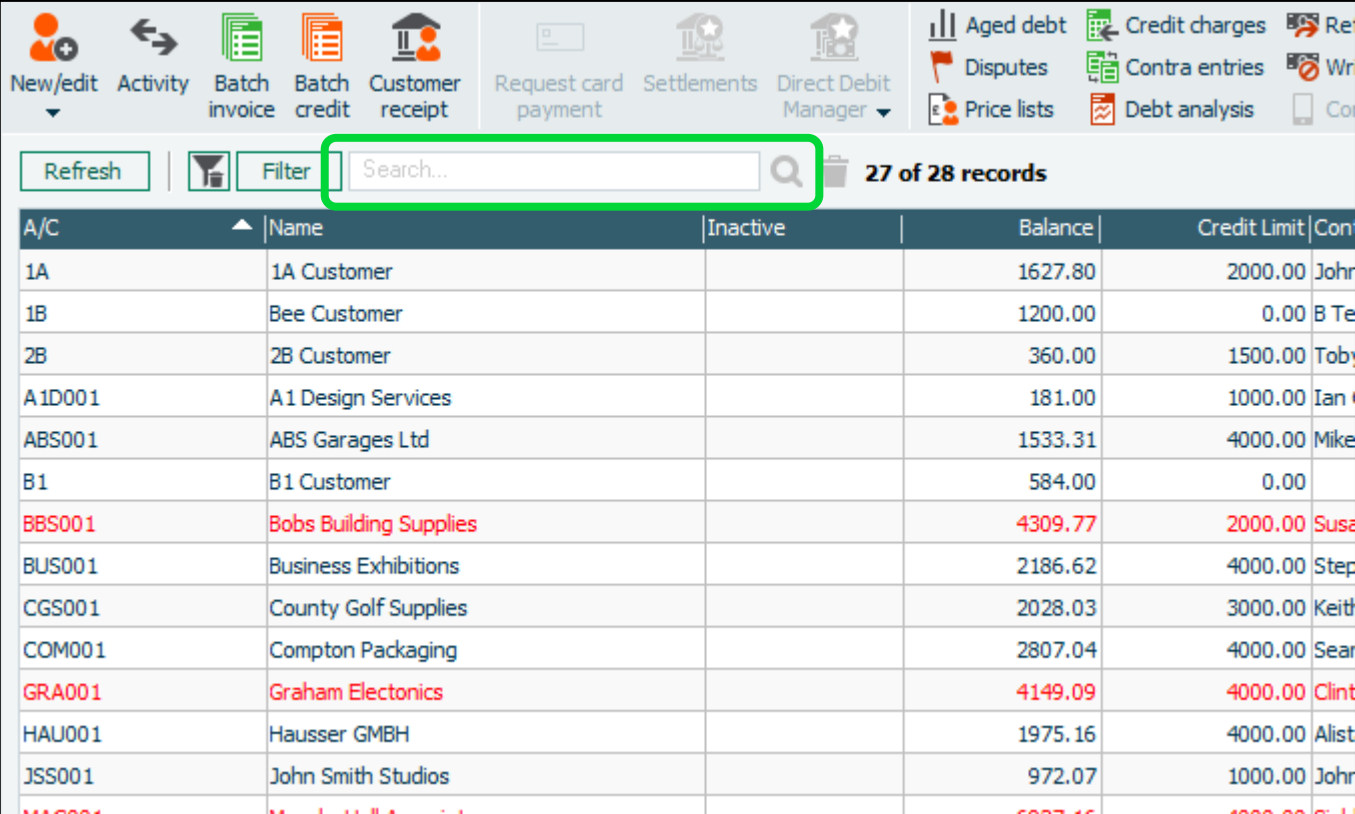
- **Quick Search**
- **Declutter your desktop**
- **Keyboard shortcuts**
- **Duplicate / Credit Invoice**
- **Quick Print / Email**
- **Smart links**
- **Further Support / Q&A**



Quick Search

Quickly and easily search for records

- Search for specific text or values in multiple fields
- Available at the top of most ledgers
- Search drop-down lists when entering data
- V29 and above



The screenshot shows the Sage software interface with a search bar highlighted in green. The search bar is located at the top of the interface, next to a 'Filter' button and a 'Refresh' button. The search bar contains the text 'Search...'. Below the search bar is a table with columns: A/C, Name, Inactive, Balance, Credit Limit, and Contact. The table contains 28 records, with the first few rows visible. The record 'BBS001 Bobs Building Supplies' is highlighted in red.

A/C	Name	Inactive	Balance	Credit Limit	Contact
1A	1A Customer		1627.80	2000.00	John
1B	Bee Customer		1200.00	0.00	B Te
2B	2B Customer		360.00	1500.00	Toby
A1D001	A1 Design Services		181.00	1000.00	Ian
ABS001	ABS Garages Ltd		1533.31	4000.00	Mike
B1	B1 Customer		584.00	0.00	
BBS001	Bobs Building Supplies		4309.77	2000.00	Susa
BUS001	Business Exhibitions		2186.62	4000.00	Step
CGS001	County Golf Supplies		2028.03	3000.00	Keith
COM001	Compton Packaging		2807.04	4000.00	Sean
GRA001	Graham Electronics		4149.09	4000.00	Clint
HAU001	Hausser GMBH		1975.16	4000.00	Alist
JSS001	John Smith Studios		972.07	1000.00	John
MA001	Man...		6007.16	4000.00	...

Help centre

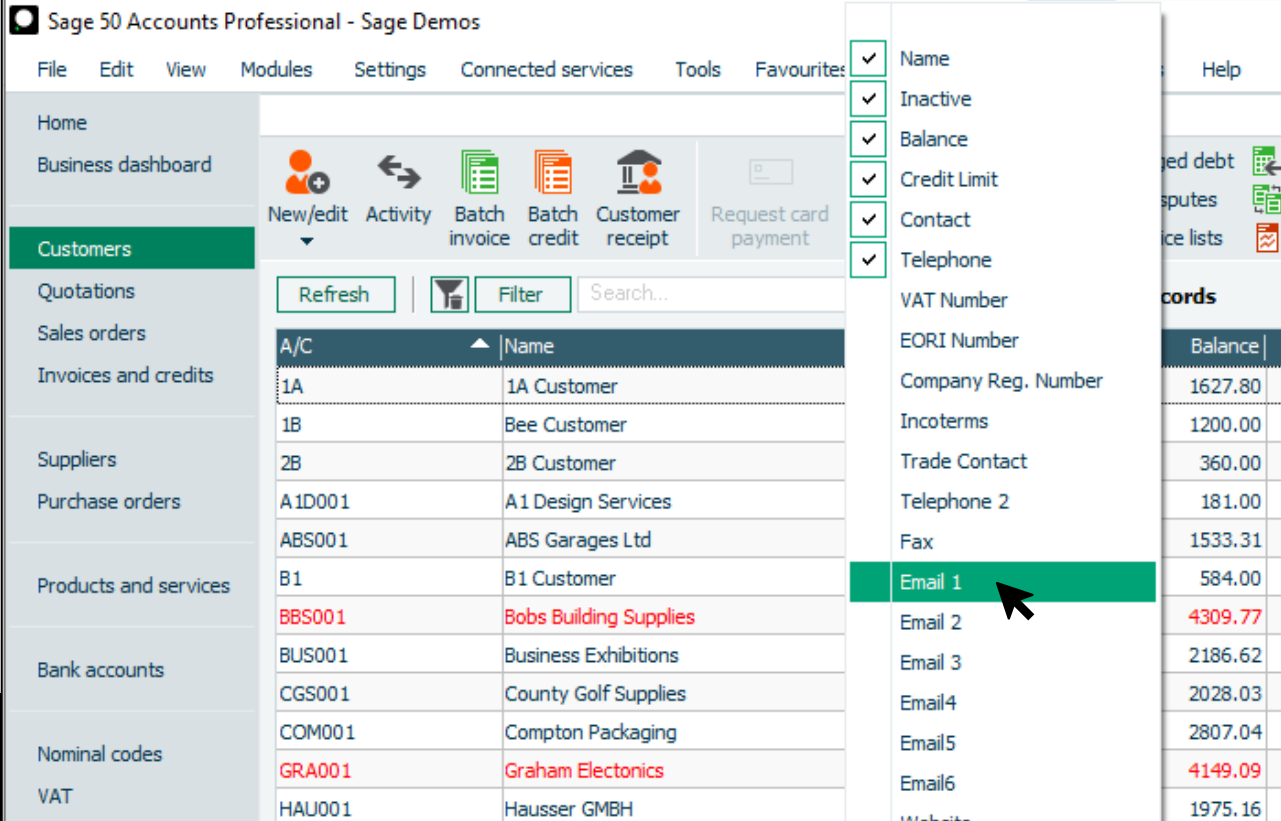
Register now

Declutter your desktop

Configure your toolbars and columns

- Right-click and then choose to show or hide
- Hide unused options on the navigation bar and toolbars
- Show additional information on your ledgers
- Hide unused columns when entering data
- Simple to revert to the default view

Help centre



The screenshot shows the Sage 50 Accounts Professional interface. The main window displays a list of customers with columns for A/C and Name. A right-click context menu is open over the 'Email 1' column, showing a list of columns to be displayed or hidden. The 'Email 1' option is highlighted with a mouse cursor.

A/C	Name
1A	1A Customer
1B	Bee Customer
2B	2B Customer
A1D001	A1 Design Services
ABS001	ABS Garages Ltd
B1	B1 Customer
BBS001	Bobs Building Supplies
BUS001	Business Exhibitions
CGS001	County Golf Supplies
COM001	Compton Packaging
GRA001	Graham Electronics
HAU001	Hausser GMBH

Column	Value
Name	<input checked="" type="checkbox"/>
Inactive	<input checked="" type="checkbox"/>
Balance	<input checked="" type="checkbox"/>
Credit Limit	<input checked="" type="checkbox"/>
Contact	<input checked="" type="checkbox"/>
Telephone	<input checked="" type="checkbox"/>
VAT Number	<input type="checkbox"/>
EORI Number	<input type="checkbox"/>
Company Reg. Number	<input type="checkbox"/>
Incoterms	<input type="checkbox"/>
Trade Contact	<input type="checkbox"/>
Telephone 2	<input type="checkbox"/>
Fax	<input type="checkbox"/>
Email 1	<input checked="" type="checkbox"/>
Email 2	<input type="checkbox"/>
Email 3	<input type="checkbox"/>
Email 4	<input type="checkbox"/>
Email 5	<input type="checkbox"/>
Email 6	<input type="checkbox"/>
Website	<input type="checkbox"/>

Keyboard shortcuts

Save time not having to switch between your keyboard and mouse

- Speed up data entry
- Access options quicker
- Function keys – F6, F7 & F8
- Configure F11 / F12
- Press Alt to access hot keys

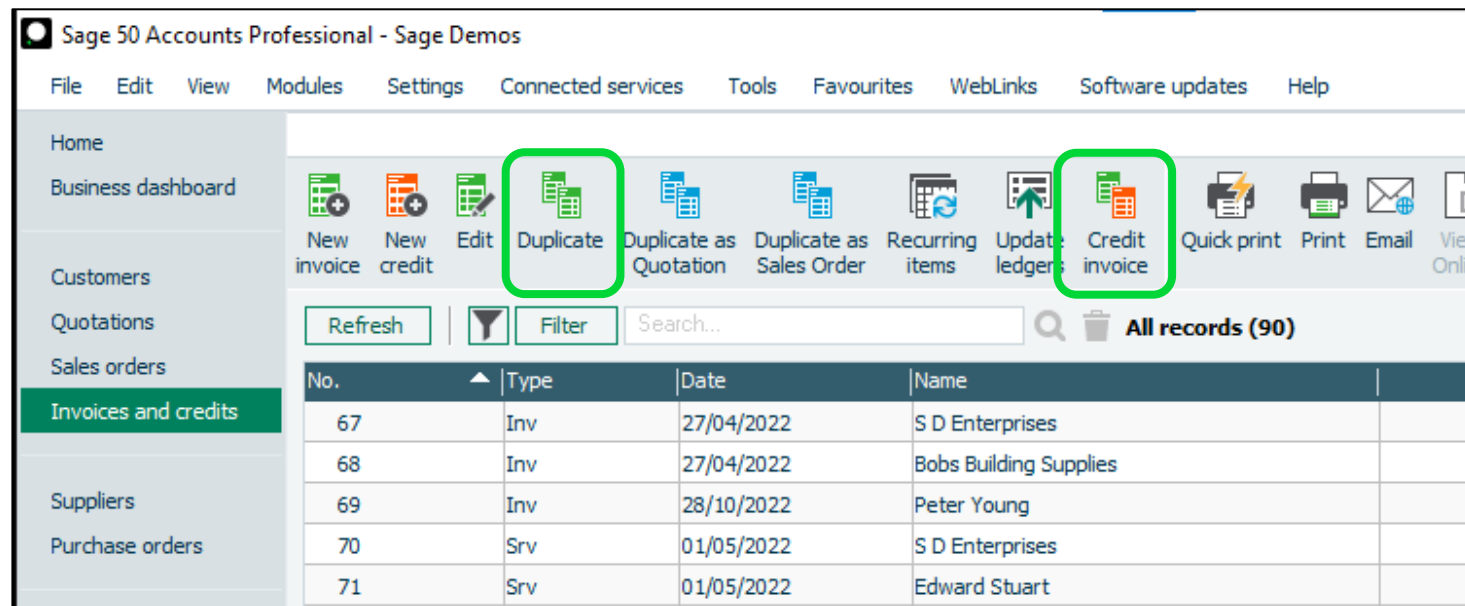


Duplicate / Credit invoice

Generate invoices and credits quickly and easily

- Great for repeat invoices or generating the same invoice for multiple customers
- Raise a credit note based on the original invoice
 - Make amends
 - Automatically update and allocate it

Help centre



Sage 50 Accounts Professional - Sage Demos

File Edit View Modules Settings Connected services Tools Favourites WebLinks Software updates Help

Home
Business dashboard
Customers
Quotations
Sales orders
Invoices and credits
Suppliers
Purchase orders

New invoice New credit Edit Duplicate Duplicate as Quotation Duplicate as Sales Order Recurring items Update ledgers Credit invoice Quick print Print Email View Only

Refresh Filter Search... All records (90)

No.	Type	Date	Name
67	Inv	27/04/2022	S D Enterprises
68	Inv	27/04/2022	Bobs Building Supplies
69	Inv	28/10/2022	Peter Young
70	Srv	01/05/2022	S D Enterprises
71	Srv	01/05/2022	Edward Stuart

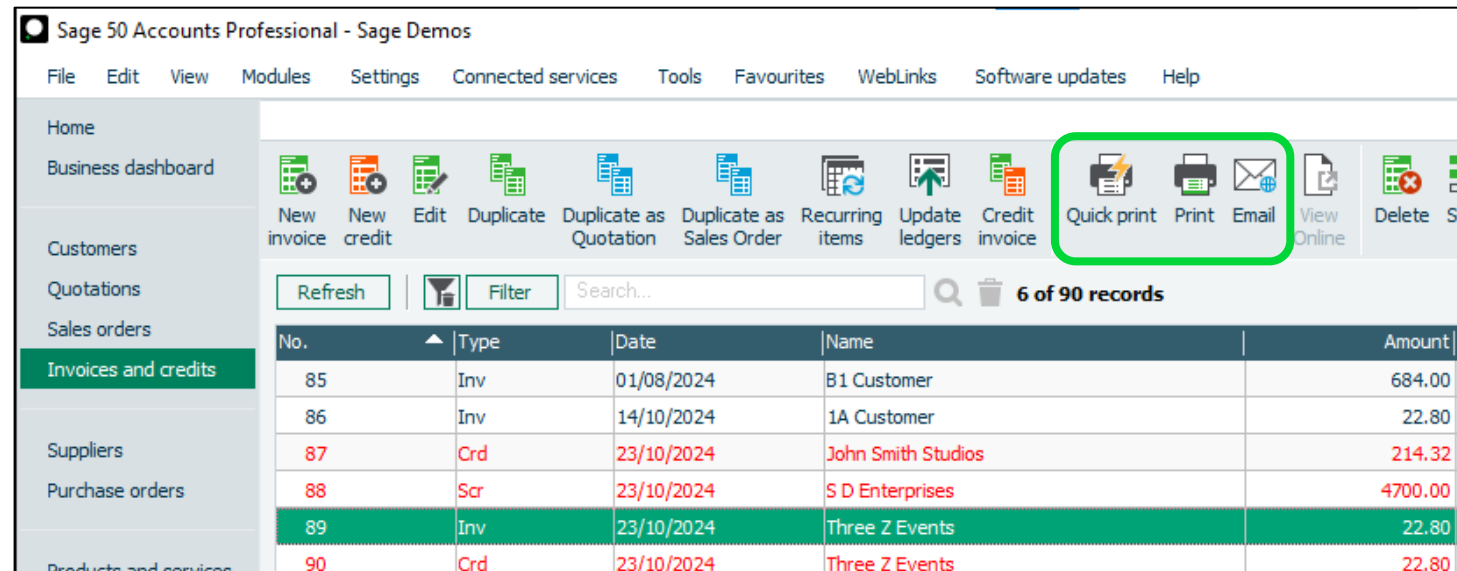
Quick Print / Email

Use these options to print or email invoices, quotations and orders with just one click

- No need to locate the layout or choose the printer each time
- Make your processes faster and easier
- Change your default layouts at anytime

Quick print

Email



Sage 50 Accounts Professional - Sage Demos

File Edit View Modules Settings Connected services Tools Favourites WebLinks Software updates Help

Home
Business dashboard
Customers
Quotations
Sales orders
Invoices and credits
Suppliers
Purchase orders
Products and services

New invoice New credit Edit Duplicate Duplicate as Quotation Duplicate as Sales Order Recurring items Update ledgers Credit invoice Quick print Print Email View Online Delete S

Refresh Filter Search... 6 of 90 records

No.	Type	Date	Name	Amount
85	Inv	01/08/2024	B1 Customer	684.00
86	Inv	14/10/2024	1A Customer	22.80
87	Crđ	23/10/2024	John Smith Studios	214.32
88	Scr	23/10/2024	S D Enterprises	4700.00
89	Inv	23/10/2024	Three Z Events	22.80
90	Crđ	23/10/2024	Three Z Events	22.80

Smart links

Click a smart link to jump to the associated invoice, credit or order

- Easily access a full invoice from an activity window
- Access the customer record directly from the invoice

The screenshot shows the Sage Activity window for a customer account. The window title is "Activity". The top toolbar contains icons for View transaction, Edit transaction, Unallocate transaction, Delete transaction, View item, View bank charges, View Online, Request card payment, Hide detail, Show detail, Print list, and Send to Excel. Below the toolbar, the account details are displayed: A/C (222), Name (Three Z Events), Credit Limit GBP £ (0.00), Balance GBP £ (22.80), Amount Paid GBP £ (0.00), and Turnover YTD GBP £ (19.00). The transaction list is filtered to show "All Transactions" from "01/01/1980 to 31/12/2099". A single transaction is listed with a smart link icon (a circle with a double-headed arrow) next to the date "23/10/2024". The smart link icon is highlighted with a red circle.

No	Type	Date	Due On	Ref	Details	Amount £	O/S £	Debit £	Credit £
1374	SI	23/10/2024	22/11/2024	89	Whiteboard - Drywip...	22.80	22.80 *	22.80	

Help centre

Thank you!

Please take a minute to [complete the survey](#) as you leave

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