

Sage 50 Accounts Banking Excellence Webinar Series

#8 - Adding bank information to your invoices

Presented by: Michael Cox

Start time: 2pm (approx. 30 mins)



Banking Excellence Webinar Series

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#1 - Simplifying bank transactions - Your guide to payments, receipts and transfers

#2 - Managing Customer Receipts and Supplier Payments in Sage 50

#3 - Reconcile with confidence - Mastering Bank Reconciliation in Sage 50

#4 - Revolutionise your banking with Sage 50 Bank Feeds

#5 - Simplify your routines - Work smarter with Bank Recurring items

#6 - Clean up your accounts - Correcting bank errors in Sage 50

#7 - Fast finance - Harness the power of E-Payments in Sage 50

#8 - Payment-ready invoices: Adding your bank information to your invoices in Sage 50

#Quiz - Bank on your knowledge: Sage 50 Accounts Quiz



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

- **Introduction**
- **Demonstrations**
 - The basics of editing your layout
 - Design tools
- **Further Support / Q&A**



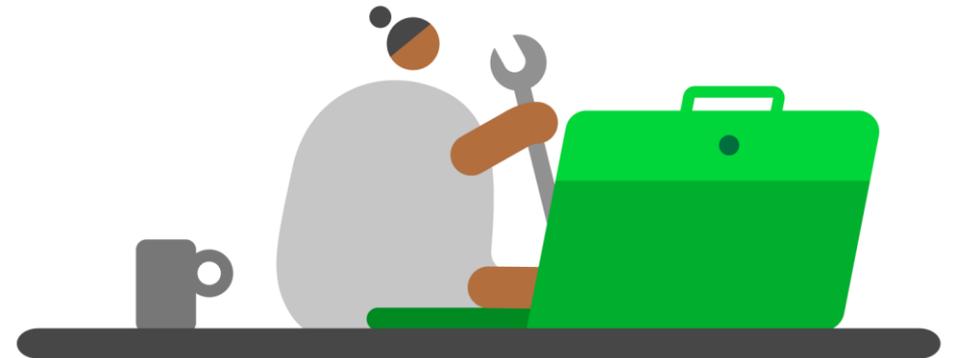
Add bank information to your invoices

Introduction

- The Report Designer is a powerful tool, enabling you create and amend layouts and reports in Sage 50 Accounts.

You don't have to reinvent the wheel!

- Find a layout or report that's close to what you want.
- Be creative or take inspiration from invoices you receive.
- Use our online resources > www.sage.co.uk/help



Add bank information to your invoices

Options

- Use a standard layout.
- Edit your existing layout.

The screenshot shows the 'Layouts' section of the Sage software interface. At the top, there is a toolbar with icons for 'New', 'Edit', 'Delete', 'Preview', 'Print', 'Export', 'Report to Excel', 'Data to Excel', 'Email', and 'View Favourites'. Below the toolbar, there is a 'Favourites' section with a 'Layouts' sub-section. The main area displays a table of layouts. The layout 'A4 Inv\Crd Without Discount with bank details - Plain Paper (Print or Email)' is highlighted with a green box. The table has columns for 'Name', 'Description', and 'Last t'.

Name	Description	Last t
★ A4 Inv\Crd Without Discount - Plain Paper (Print or Email)	Designed to be emailed or printed on plain paper. No discount values are included. To be sent via post or email.	11/12
★ A4 Inv\Crd Without Discount with bank details - Plain Paper (Print or Email)	Designed to be emailed or printed on plain paper. Includes the bank details from the invoice, but no discount values. To be sent via post or email.	
★ A4 Self Seal Invoice (With Discount)	To be used with Sage Self Seal stationery. Discount amounts are included.	
★ A4 Self Seal Invoice (Without Discount)	To be used with Sage Self Seal stationery.	

**Add bank details text
to your invoice layout**

Demonstrations

- **The basics of editing your layout**
- **Design tools**



Help Centre

www.sage.co.uk/help

- Search the knowledgebase
- Support guides
- Webinars
- Videos
- Get in touch

Reports and layouts

The screenshot shows the Sage Help Centre page for 'Reports and layouts'. The page has a dark header with the Sage logo and navigation links: 'Help Centre', 'Products -', 'Integrated Apps -', 'Sage University', and 'Useful links -'. Below the header is a breadcrumb trail: 'Sage 50 Accounts > Support hubs > Reports and layouts'. The main heading is 'Reports and layouts' in large white text. Below the heading is a sub-heading: 'Create reports and layouts to help you run and analyse your business.' There is a search bar with the placeholder text 'Search for answers...' and a magnifying glass icon. A tip below the search bar reads: 'Tip: Use detailed phrases or exact error messages to find the most relevant help guides.' A blue callout box contains the text: 'Free Additional Reports Did you know that you're entitled to extra Sage 50 Accounts reports for free, as part of your Sage Cover support? [Find out more >](#)'. Below this is a navigation bar with tabs: 'Support guides' (selected), 'Videos', 'Free training', and 'Get in touch'. The main content area features a grid of ten article cards, each with a title, a brief description, and a right-pointing arrow. The cards are: 'Generate reports' (How to print, preview and save reports in your software.), 'Report finder' (Enter your requirements to find the best report for you.), 'Email your reports and layouts' (Speed up your processing by emailing reports and layouts.), 'Reporting services' (Find out about our report libraries and request a bespoke design.), 'Create your own reports' (Learn how to design your own custom reports.), 'Digital stationery' (Discover the digital options in your software.), 'Microsoft 365' (Find out how Sage 50 Accounts can integrate with Microsoft 365.), 'Top tips to help you use Report Designer' (Fantastic hints and tips to get the most from reports and layouts.), and 'Common problems when running reports' (Find the answers to common reporting issues.).

Grow your knowledge

Find out more about our 1-2-1 Bespoke training options.

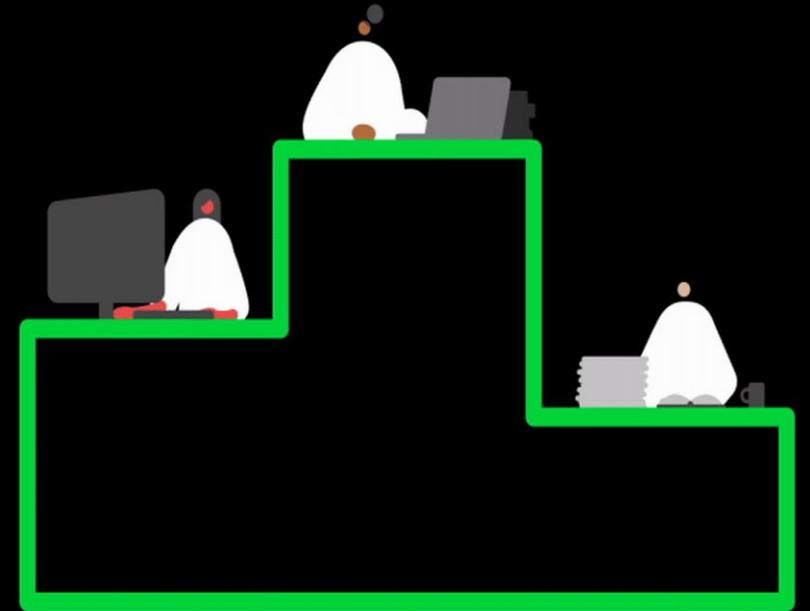
With training bundles including

- **Stock control**
- **Construction Industry**
- **Banking**
- **Debtors and creditors**
- **Sage Professional features**

Revolutionise your business management and unlock the full potential of your software.

Email us at ukisageuniversity@sage.com for a personalised quote

Sage



Thank you!

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

You'll receive a follow-up email containing links to register for future webinars and watch recordings.