

# **Sage 50 Accounts Management Reports Webinar Series**

## **#4 – running management reports for a previous/future financial year**

**Presented by:** Michael Cox

**Start time:** 11am (approx. 45 mins)



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

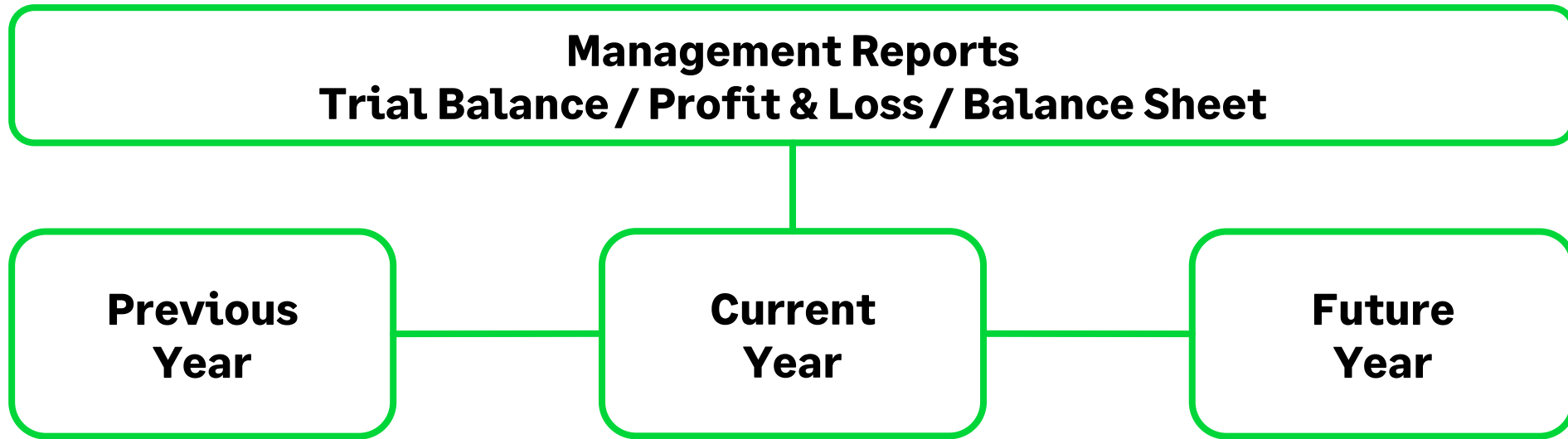
- **Introduction**
- **Demonstrations**
  - Current year
  - Future year
  - Previous year
- **Further Support / Q&A**



# Management Reports

## Introduction

*“I haven’t run my year end yet, can I run a P&L for my new financial year?”*



# Demonstrations



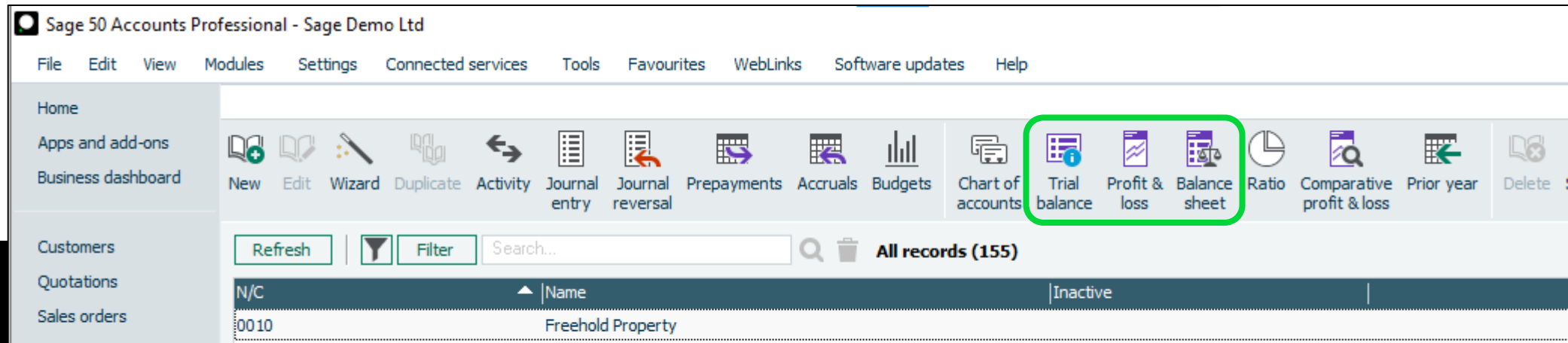
# Current year

## Options

- Nominal codes
  - Trial balance
  - Profit & loss
  - Balance sheet

## Tips

- Save PDF copies at year end / period end
- Create a company archive - done automatically
- Use Batch Reporting to save time (Standard & Professional only)



The screenshot displays the Sage 50 Accounts Professional interface for 'Sage Demo Ltd'. The top menu bar includes File, Edit, View, Modules, Settings, Connected services, Tools, Favourites, WebLinks, Software updates, and Help. The left sidebar shows navigation options: Home, Apps and add-ons, Business dashboard, Customers, Quotations, and Sales orders. The main toolbar contains various icons for accounting functions. A green box highlights three specific icons: 'Trial balance', 'Profit & loss', and 'Balance sheet'. Below the toolbar, there is a search bar with 'Refresh', 'Filter', and 'Search...' buttons, and a status bar indicating 'All records (155)'. The bottom section shows a table with columns for 'N/C', 'Name', and 'Inactive', with a visible entry '0010 Freehold Property'.

N/C	Name	Inactive
0010	Freehold Property	

# Future year

## Common support query

*“I haven’t run my year end yet, can I run a P&L for my new financial year?”*

## Options

- Standard report
  - Nominal codes > Profit & loss > Future to Future > Period column
- Transactional Management Reports (Standard & Professional only)
  - Nominal codes > Reports > Profit and loss > Transactional Profit & Loss
  - Run for specific date range

# Previous year

## Options

- PDF copies
- Company archive (recommended)
  - File > Open > Company Archive > choose data for required financial year
- Restore a backup into the Practice company
- Prior year report
  - Nominal codes > Prior year
- Comparative report
  - Nominal codes > Comparative profit & loss
- Transactional Management Reports (Standard & Professional only)
  - Nominal codes > Reports > Profit and loss > Transactional Profit & Loss

# Help Centre

[www.sage.co.uk/help](https://www.sage.co.uk/help)

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

The screenshot shows the Sage Help Centre website. At the top is a navigation bar with the Sage logo, 'Help Centre', and links to 'Products', 'Integrated Apps', 'Sage University', and 'Useful links'. Below this is a sub-header for 'Sage 50 Accounts (Desktop)' with links for 'Hot topics', 'Webinars', 'Community Hub', 'Manage your account', and 'Contact us'. The main hero section has a dark background with the text 'You need help. We have answers.' and a search bar. To the right is an illustration of two figures sitting on a large stack of books. Below the hero section is a section titled 'What do you need help with today?' featuring six help topics in a grid:

- Install your software**: Everything you need to install your software.
- Manage your VAT**: Record VAT transactions and produce VAT Returns.
- Run your accounts remotely**: Don't be tied to the office, work flexibly with Remote Data Access.
- Sage Copilot**: Get the most out of your new AI-powered productivity assistant.
- Working with the bank**: Record and keep track of money paid and received.
- Financial year end**: Complete your year end, then get ready for the new year.





# Get started with Copilot in Sage 50 Accounts

Join us for demonstrations and learn how Sage Copilot can help you with:

- Managing debt
- Managing stock
- Monitoring business performance
- Improving data accuracy
- Report analysis

**Register now!**



# Management Reports Webinar Series

To earn your digital badge, simply **attend any 5 of the 6 Management Reports webinar topics + the Quiz.**

**#1** – Nominal records

**#2** – Working with the Chart of Accounts

**#3** – The Trial Balance, Profit & Loss and Balance Sheet

**#4** – Running management reports for a previous/future financial year

**#5** – Reconciling your aged debtors and creditors reports

**#6** – Business Dashboard

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**#Quiz** – Test your knowledge



**Register now**

# 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.

