

Sage 50 Accounts **Report Designer 2025**

Introduction to Groups & Sections

Presenter: **Michael**

Sage



Sage



**Report
Designer 2025**

Sage 50 Accounts

Housekeeping

The screenshot shows a mobile application interface for a 'Questions' section. On the left is a dark grey sidebar with several icons: a blue flower-like logo at the top, an orange microphone icon with a slash through it, a question mark icon, a document icon, an information icon, and a list icon. At the bottom of the sidebar are the words 'Exit' and 'Send'. The main content area is light grey and contains the text 'Questions' at the top right, a question mark icon, and a large dashed arrow pointing from the text 'Want answers?' down to a white input box at the bottom. The input box contains the placeholder text 'Ask the staff a question'. A blue 'Send' button is located at the bottom right of the input box. Three green callout boxes with lines pointing to specific UI elements are present: one pointing to the microphone icon with the text 'Your microphone is muted automatically', one pointing to the question mark icon with the text 'Send us your questions', and one pointing to the document icon with the text 'Download a handout'.

Your microphone is muted automatically

Send us your questions

Download a handout

Want answers?

Ask the staff a question

Exit Send

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Report Designer 2025

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- Before you think about changes
 - Using the design tools to personalise your invoices and other layouts
 - Tables and Variables used by Report Designer
 - Introduction to Expressions
 - Introduction to Sections and Groups
 - Introduction to Criteria
 - Introduction to Filters
-
- Quiz – Test your knowledge



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

- Report structure
- Sorts
- Groups
- Further Support / Q&A



Report Structure



Non-Grouped Reports

Examples

- Customer List
- Supplier List
- Nominal List
- Product List
- Invoice Summary
- Project List
- Audit Trail (Brief / Summary)
- Day Book Reports

Date: 15/11/2022 Time: 11:02:55		Stationery & Computer Mart UK Customer List		Page: 1
Customer From: Customer To: Show Active/Inactive:		ZZZZZZZ Active and Inactive(*)		
<u>A/C</u>	<u>Name</u>	<u>Contact Name</u>	<u>Telephone</u>	<u>Email</u>
A1D001	A1 Design Services	Ian Cairns	01742 876 234	newbusinessadvice@sage.com
ABS001	ABS Garages Ltd	Mike Hall	0191 254 5909	newbusinessadvice@sage.com
BBS001	Bobs Building Supplies	Susan Livingstone	01983 567 123	newbusinessadvice@sage.com
BRI001	Fred Briant	Fred Briant	01908 78787878	newbusinessadvice@sage.com
BRO001	Bronson Inc	Paul Guy	001 214 248 8924	newbusinessadvice@sage.com
BUS001	Business Exhibitions	Stephen Kiszow	017684 30707	newbusinessadvice@sage.com
CASH001	Cash and Credit Card Sales			newbusinessadvice@sage.com
CGS001	County Golf Supplies	Keith Office	0191 385 6432	newbusinessadvice@sage.com
COM001	Compton Packaging	Sean Morris	0191 121 9876	newbusinessadvice@sage.com
DST001	Johnson Design & Build Partners	Peter Quigley	0191 234 567	newbusinessadvice@sage.com
FGL001	F G Landscape & Design	David Bradford	01603 354564	newbusinessadvice@sage.com
GRA001	Graham Electronics	Clint Peddie	0141 373 2828	newbusinessadvice@sage.com
HAU001	Hausser GMBH	Alistair Leadbetter	00 49 531 3443334	newbusinessadvice@sage.com
JSS001	John Smith Studios	John Smith	01327 617 542	newbusinessadvice@sage.com
KIN001	Kinghorn & French	John Bell	0191 676 5656	newbusinessadvice@sage.com
MAC001	Macolm Hall Associates	Siobhan Winter	01244 343433	newbusinessadvice@sage.com
MIB001	Mikes Insurance Services	Mike Bradford	01754 234 895	newbusinessadvice@sage.com
MIL001	Mile Road Health Centre	Tracy Smithson	01981 674 234	newbusinessadvice@sage.com
MOR001	Morley Solicitors	John Bampton	01789 656 556	newbusinessadvice@sage.com
PAT001	Patterson & Graham Garages	Simon Billington	0987 678 234	newbusinessadvice@sage.com
PIC001	Picture Frame Ltd	Ahmed Roumani	01249 265 9874	newbusinessadvice@sage.com
ROB001	Robertson Joinery	Stephen Baker	0181 789 2323	newbusinessadvice@sage.com
SDE001	S D Enterprises	Jane Scott	0191 937 9836	newbusinessadvice@sage.com
SHO001	The Show Lodge	Lesley Walton	0121 383 0345	newbusinessadvice@sage.com
STE001	Stevenson & Smith	Jonathon Sayers	01244 453 232	newbusinessadvice@sage.com
STE002	Steven Stephenson	Steven Young	0151 977 8876	newbusinessadvice@sage.com
STU001	Edward Stuart	Edward Stuart	0191 839 3940	newbusinessadvice@sage.com
SWA001	Swan Leisure Centre	John Blair	0191 567 2345	newbusinessadvice@sage.com
VID001	The Video Rental Company	June Whitehouse	0678 234 5678	newbusinessadvice@sage.com
YOU001	Peter Young	Peter Young	08976 656 878	newbusinessadvice@sage.com
End of Report				

Grouped Reports

Examples

- Activity Reports
 - Customer / Supplier / Nominal / Product / Project
- Aged Debtors / Creditors
- Invoices Due / Overdue
 - Customer / Supplier
- Product Profit by Customer
- Invoice Profit Report
- Sales by Analysis Code

Date: 16/11/2022

Time: 10:17:36

Stationery & Computer Mart UK

Supplier Invoices Overdue

Page: 1

Supplier From:

Supplier To: ZZZZZZZ

Transaction From: 1

Transaction To: 99,999,999

Date From: 01/01/1980

Date To: 16/11/2022

Exc Later Payments: No

A/C:	CON001	Name:	Concept Stationery Supplies	Contact:	Mark Ramsay	Tel:	0191 643 4343	
No	Type	Date	Due Date	Ref	Details	Amount	Paid	Outstanding
730	PI	30/03/2021	14/05/2022	17	Ball Point Pen - Blue	25.29	0.00	25.29
825	PI	30/03/2021	14/05/2022	18	A4 Ledger Book - 5	553.12	0.00	553.12
923	PI	30/04/2021	14/06/2022	25	Ball Point Pen - Black	89.30	0.00	89.30
1128	PI	27/04/2021	11/06/2022	33	Rubber Bands - Selection	976.68	0.00	976.68
Total:								1,644.39
A/C:	MCN001	Name:	McNally Computer Supplies	Contact:	Stuart Lynn	Tel:	0191 415 3434	
No	Type	Date	Due Date	Ref	Details	Amount	Paid	Outstanding
613	PI	29/03/2021	28/04/2022	125	Goods	605.13	0.00	605.13
724	PI	30/03/2021	29/04/2022	15	DIMM 64mb 100Mhz	2,254.64	0.00	2,254.64
830	PI	30/03/2021	29/04/2022	19	DIMM 32mb 100Mhz	6,131.74	0.00	6,131.74
892	PI	30/04/2021	30/05/2022	21	MTH1000 Motherboard	737.49	0.00	737.49
894	PI	10/04/2021	10/05/2022	21	MTH3000 Motherboard	526.78	0.00	526.78
926	PI	30/04/2021	30/05/2022	26	DIMM 128mb 100Mhz	1,812.12	0.00	1,812.12
943	PI	30/04/2021	30/05/2022	31	10gb Hard Drive	3,476.76	0.00	3,476.76
1139	PI	27/04/2021	27/05/2022	34	MTH1000 Motherboard	7,922.80	0.00	7,922.80
1176	PI	28/04/2021	28/05/2022	Pur	Router & Cabling	78.73	0.00	78.73
1177	PI	29/04/2021	29/05/2022	Pur	Router & Cabling	1,162.08	0.00	1,162.08
1178	PI	12/05/2021	11/06/2022	Pur	Router & Cabling	25.85	0.00	25.85
Total:								24,734.12
A/C:	NEW001	Name:	Newtown Builders Ltd	Contact:	John Sinclair	Tel:	0181 245 4534	
No	Type	Date	Due Date	Ref	Details	Amount	Paid	Outstanding
284	PI	28/02/2021	13/04/2022	BADDBT	Bad Debt Write Off	0.01	0.00	0.01
Total:								0.01

Report Structure

Summary

All reports have a Header, a section containing the Report Data, and a Footer

- Content in Report Header / Footer sections appear once per report, either first page / last page
- Content in Page Header / Footer sections appears once per page

To identify if a report is grouped:

- Edit the report
- Check the sections on the report design - banners named and numbered
- Open the Report Explorer to see any sections hidden from the report design
- Any Header / Footer sections on a report other than Page / Report belong to a group, i.e. ACCOUNT_REF Header / ACCOUNT_REF Footer

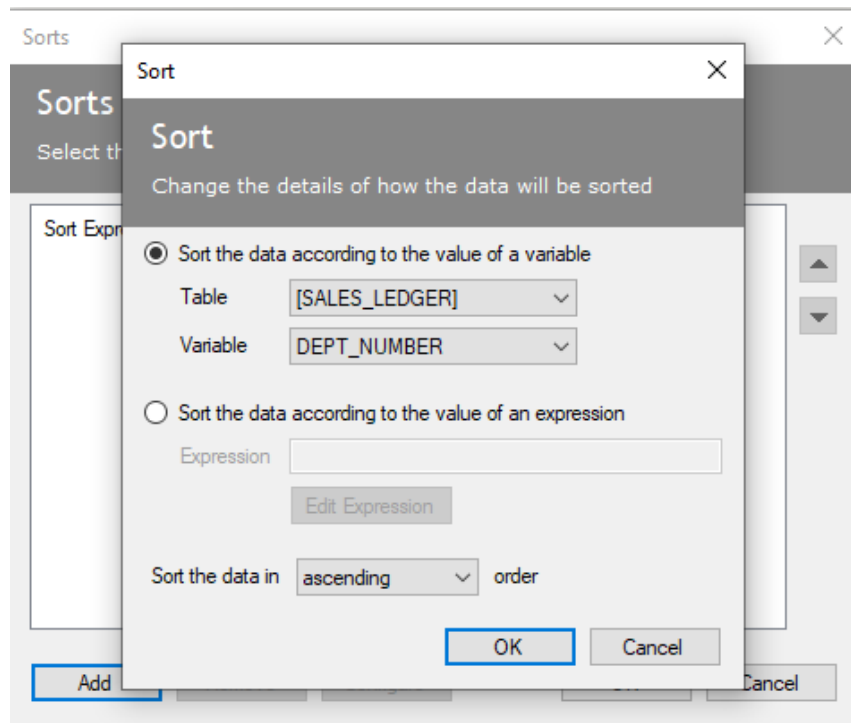
Sorts



Sage

Adding Sorts

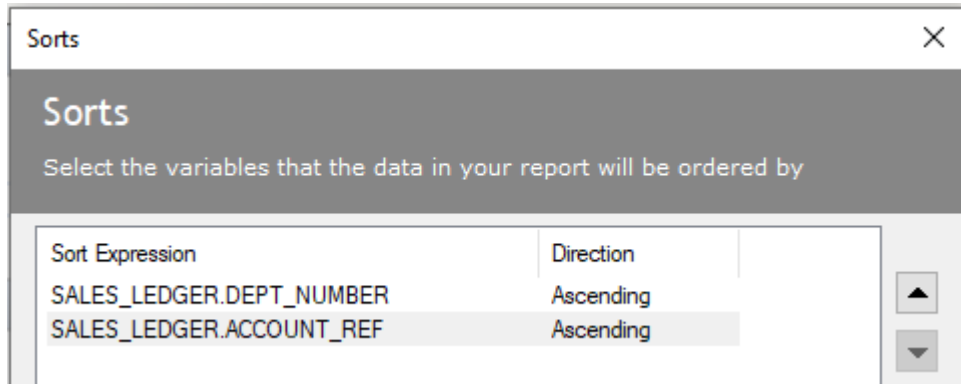
Report > Sorts > Add > select table > select variable > set sort order (ascending/descending) > OK > OK



Help centre > Add a Sort

Summary - Sorts

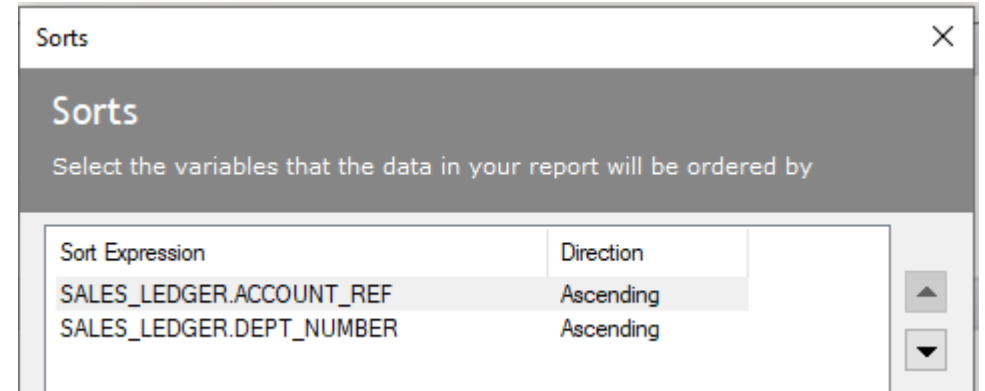
- **Non-grouped** reports can have their sort order changed easily via Report > Sorts
- Data can be sorted in either ascending or descending order
- You can add **multiple** sorts to a report as long as they make sense, i.e.



Sorts

Select the variables that the data in your report will be ordered by

Sort Expression	Direction
SALES_LEDGER.DEPT_NUMBER	Ascending
SALES_LEDGER.ACCOUNT_REF	Ascending



Sorts

Select the variables that the data in your report will be ordered by

Sort Expression	Direction
SALES_LEDGER.ACCOUNT_REF	Ascending
SALES_LEDGER.DEPT_NUMBER	Ascending

- Once you have sorted on a unique field - stop adding sorts

Groups



Groups

What is a Group?

Divides report data into groups sharing something in common:

- List of customers grouped by department
- List of transactions grouped by supplier
- List of products by stock location

Benefits

Provides structure to a report

- Report data automatically sorted on the grouped data field
- Multiple Groups
- Sub-totals
- Page Breaks
- And more!

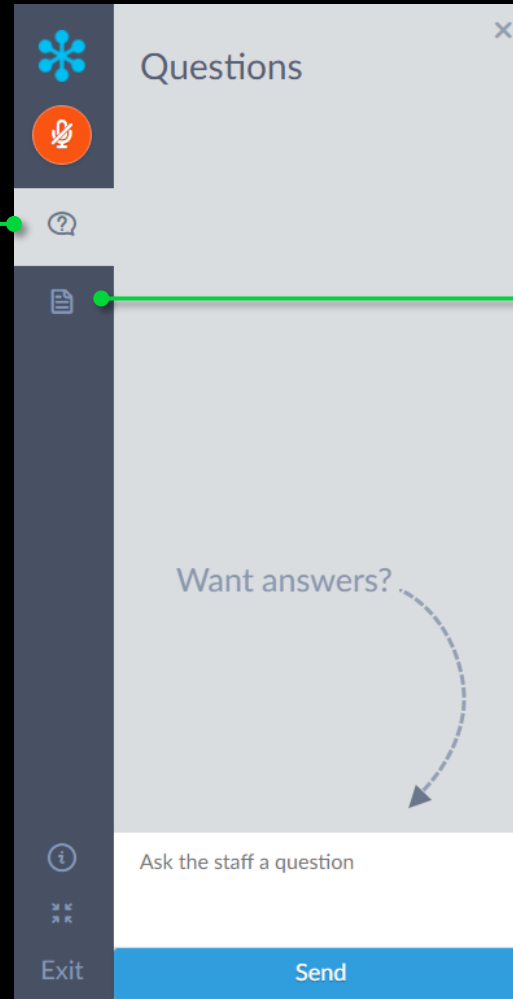
Groups and Sections

Summary

- Check report sections – to see if already grouped
- Adding objects – what, where and how it looks
- Sort data of non-grouped reports via Report > Sorts
- Do you need to add a group, or will a sort do?
- Grouped reports automatically sort on grouped data, but do not appear as a sort in Report > Sorts
- Additional sorts can be added to sort data within a group
 - Groups sorts always come before other sorts

Questions

Send us your questions



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