

# New Sage 50 Accounts

## Full feature table



### Helping you to...

#### Get up and running

- Support for Virtual Environments
- Month-end, year-end and VAT guides
- Video/simulations guides
- New diary with views by day, week, month
- Recurring tasks/events
- Delegate tasks (network versions only)
- Diary synchronisation of tasks with Outlook
- Ability to assign tasks to customers/suppliers and their contacts
- Automatic update of software
- More assistance including tutorials, getting started and upgrades
- Improved corrections - easily access and correct data
- Practice company
- Option to access demo or practise company on start up
- RSS feed informing of updates & product news
- Information centre
- New active set up wizard, improved activity, smart links to stock & project
- Multi-company - resizable list & can be printed
- Process Maps & Dashboards
- Improved Data Import - easier to import project records
- Document Manager
- Excel Integrated Reporting
- Copy & Batch Change Facility
- Smart Totals & Smart Links
- Drill down to source transaction
- Online Registration & Activation
- Company configuration
- Help centre with online content
- In a language non accountants can understand
- Easily find the information you need in the new report browser
- VAT 'Show me how'
- Supported by Sage through Live Link
- **Simple access rights set up**
- **Clearly labelled keyboard shortcuts make it easy to become an efficient user**
- **Simple and modern design that makes it easy to use**
- **Tailor the navigation and toolbar to fit the way you work**
- **Schedule regular automatic back ups that won't interrupt your work**

#### Manage your customers

- Integration with Web Stores
- Pay Now Button on Invoices, chase letters and statements\*
- Customer transactions – filter/ sort and ability to credit and refund at point of processing (needs subscription to Sage Pay\*\*)
- Cash Register
- Payment processing including sort /filter and recurring transaction management
- Improved dashboards - easily see where money is, what is outstanding, who is due, days left to pay and tasks for the day
- Improved chase debt by overdue, promised, dispute and custom views with smart columns to personalise view to suit needs
- Easily access account record and view activities and communications
- Easily view all communications in one single place
- Account balance when communication took place automatically added
- Communications automatically updated when statements and letters sent
- Easily record new communications and follow up
- Store details of account contacts including address, telephone numbers and email
- Record notes against contact and delivery addresses
- Set preferences for issuing of documents such as invoices, statements, letters, orders etc. including both contact to issue and email.
- Contact and delivery addresses available in Accounts variant
- Easily view disputed items
- Disputes introduced into Accounts variant
- Record method of payment – cash, cheque, card, SO/DD, factoring, invoice discounting
- Drillable reports – aged debt, credit management summary
- Communications history by customer
- Easier to send statements to correct contact and by email
- Automatically update communications history
- Easier to send letters to correct contact and by email
- Automatically update communications history
- Improved reporting - drillable aged debt and credit management summary report
- Contact and delivery addresses available in reporting and on documents
- Refunds - customer payments
- Recurring Invoices - ability to edit recurring invoices & generate recurring transaction reports
- Store customer bank details
- Intrastat defaults available for customers
- Improved quotations
- Improved discounting – one-off discounts to individual items
- Cash sales (Accounts Pro only)
- Intrastat submissions
- Reprint delivery notes
- Repeat Invoices & Orders
- Batch conversion of Quotes & pro-formas
- Transaction e-mail
- Individual customer pricing & custom price lists – Accounts Plus & Pro
- Goods Received Notes
- Multiple Delivery Addresses – Accountant Plus & Pro
- Easily email invoices to your customers
- View stock levels when creating an invoice or sales order
- **Sage 50 Accounts Mobile Sales\* – up to date information on your tablet to help initiate and close sales and manage your sales pipeline**
- **Flag and hide inactive customer records**

#### Manage your suppliers

- Prioritise payments - who needs to be paid, what disputes need to be resolved, who you have promised to pay. Customise the view with information required using new smart columns and develop own view of money owing.
- Improved dashboards - easily see where money is, what is outstanding, who is due, days to pay and tasks for the day
- Easily access account record and view activities and communications
- Easily view all communications in one single place
- Store details of account contacts including address, telephone numbers and email
- Record notes against contact and delivery addresses
- Refunds - supplier receipts
- Intrastat defaults available for suppliers
- Supplier price list
- Create Purchase Order from BOM
- Easily email documents to your suppliers
- **Flag and hide inactive supplier records**

#### Manage your finances

- Accounting for Standard, VAT Cash and Flat Rate VAT schemes
- VAT management and preparation for revised ECSDL (Jan 2010)
- Management of recurring entries
- VAT - message & Tax code analysis for EC service sales
- VAT – ability to change HMRC bank account
- VAT - online submissions & payments inc. agent submission via client manager
- VAT - electronic VAT 3 Form (Ireland)
- VAT - ledger, manual adjustments to VAT Return, unique identifier, automatic archiving
- VAT - Improved EC sales list & Carousel Fraud
- VAT - Audit Reports
- Reconciliation Link VAT & Bank Reconciliation changes can be automatically applied
- Accountant Link - easily work with accountant to exchange information and process adjustments
- Management Reporting - cash flow separates incomings and outgoings, includes credits
- Management Reporting - rebuild department actuals based on transactions
- Management Reporting - updated Dept. Number table to be numeric only
- Management Reporting - depts - Improved year-end actuals all transferred to prior year
- Management Reporting - improved prior year, budget and actual reports for Departmental reporting
- Management Reporting - new management reports - month by month, quarterly, drill to transactions
- Management Reporting - more information available - current year, prior year and budget on one report
- Management Reporting - copy chart of accounts
- Management Reporting - departmental budgets, per nominal code per department
- Management Reporting - new department ledger, store up to 5 years of data & budget for 1 year in the future
- Management Reporting - improved Journal Reversals - can specify the date when reversing journals
- Management Reporting - Cashflow Planner
- View your archived data
- Archive data at any point
- Management Reporting - Recurring Entries - Customer & Supplier Accounts
- Lock Date
- Chart of Accounts
- Annual Return of Trading Details (Ireland)
- Improved management reports with drill down
- Easy to follow month-end, year-end & VAT process
- Report designer – simple view, easy to edit reports and invoices
- Improved Excel integration is a usable format
- Automatically validate VAT return with VAT verifier
- Foreign trading functionality now available on the VAT Cash Accounting scheme
- **Real-time collaboration with your accountant with Sage Drive Connected Accountant\*\***

#### Manage your business

- Understand what services are available with the Sage Services toolbar
- Import and export templates
- Sage Pay integration\*
- Reporting functionality - support for Barcodes, Pan Sage 50 Report Explorer and working with favourites
- Process management - year-end management, activity detail screens, improvements to backup routine, ability to open Financial and Nominal screens at the same time
- Reporting functionality - batch reporting
- Reporting functionality - password protection
- Reporting functionality - easier to use - assign name, spell check, joining tables
- CIS Module\*
- Reporting functionality - generate report output to Excel or Word
- Reporting functionality - Report Designer
- Reporting functionality - no limit to variables/data that can be included on any report
- Reporting functionality - criteria can be defined per report, apply formulas
- Reporting functionality - run wizard to amend existing reports
- Reporting functionality - change reports whilst in preview
- Audit Assistant
- Project Costing - correct transactions & allocate project to payments or receipts
- Project Costing - Project Hierarchy, committed costs, improved reporting
- Financial reports by fund
- Charities - launch pad to make it easier to navigate and set up
- Charities - improved SOFA Report - all fund types on one single report
- Charities - HMRC Approved Gift Aid report (R68)
- Charities - management of funds, SOFA reporting
- Record and report on small donation
- Product a gift aid form that can be directly uploaded to HMRC
- Bank Reconciliation Report from within module
- Banking - retrospective bank reconciliation report
- Banking - smart totals, additional columns, resizable screen
- Banking - works with more banks & no additional charge for e-banking
- Banking – Reverse Bank Reconciliation
- Banking - Bank Reconciliation
- Foreign Trader module\*- introduced
- Foreign trader functionality for Sage 50 Accounts and Sage 50 Accounts Plus\*
- Foreign Trader\* - transactions corrections & display foreign bank balance
- Foreign Trader\* - bank revaluation
- Foreign Trader\* - currency price lists
- Stock - improved BOM (Sage 50 Accounts Plus & Professional)
- Stock - allocation (Sage 50 Accounts Plus & Professional)
- Stock - shortfall & stock take
- Import a stock take from Excel or CSV
- Delete product/service records that you no longer sell
- Calculate the cost of your stock
- International Payments (FX)\*
- Accountant Dataset Manager (Client Manager)
- Quick Tasks - create invoices from product list, invoice cash sales
- **Sage Drive enabled**
- **Flag and hide inactive product records**
- **Anywhere/anytime access with Sage Drive Connections**
- **Sage 50 Accounts Tracker - up to date, convenient and meaningful business insight on your smartphone\*\***
- **Work with up to 20 concurrent users\*\*\***
- **Efficient performance with up to 1.5 million transactions**

\*Charges may apply.

\*\*Included for duration of subscription and Sage Cover Extra contracts. 12 months' use included with upgrades, thereafter charges may apply.

\*\*\*11-20 users only available to subscriptions customers, when Sage 50 Accounts Professional is taken.

Please note: New Sage 50 Accounts is not compatible with Windows XP.