Chapter 1

Introducing Sage 50 Accounts

In This Chapter

- Introducing the Sage software range
- Considering SageCover
- Installing the software
- Getting help from the wizard
- Navigating around Sage

In this chapter, I introduce you to the Sage 50 Accounts software range. I show you how easily you can install the software and give you a guided tour, so that you can get up and running quickly – essential for busy people!

Sage works on the principle that the less time you spend doing your accounts, the more time you can spend on your business, so makes each process as simple as possible.

I also discuss SageCover, an optional technical support package, which is an addition worth considering. If you experience software problems, SageCover can help. For small businesses, this support is like having an IT department at the end of a phone.

Looking at the Varieties of Sage

Sage's developers understand that every business is different and that each business has different needs. As a result, they've developed a range of accounting software designed to grow with your business, whatever it is. The three levels of Sage 50 Accounts software start with basic features and finish with a product that contains all the bells and whistles you can possibly want! These versions of Sage are:

- **Sage 50 Accounts:** The entry-level program. Sage 50 Accounts provides all the features you require to successfully manage your accounts. You can professionally handle your customers and suppliers, manage your bank reconciliations and VAT returns and provide simple reports, including monthly and year-end requirements. This basic version is suitable for small businesses with a simple structure; those that need basic stock systems, and don't need systems for project costing, foreign currency or sales/purchase order processing.

- **Sage 50 Accounts Plus:** Contains all the features of the entry model and also allows you to manage project costs versus budgets, control costs of manufactured and assembled products, and has an improved stock control system that you can use to produce bills of materials and allocate stock.
- **Sage 50 Accounts Professional:** Includes all the features of Accounts Plus and adds sales and purchase order processing, foreign trading, bank account revaluation and Intrastat support. Accounts Professional can also handle up to ten users and manage multiple companies. This product is suited to both small- and medium-sized businesses and offers customers a product flexible enough to suit a multitude of different businesses, including those who trade in both the UK and abroad.

Deciding on SageCover

You can purchase SageCover at the same time as the software. SageCover provides you with technical support in case you have any problems using Sage. It may seem an additional cost burden to begin with, but it's well worth the money if you have a software problem.

Most people who use accounting packages know something about accounting, but don't necessarily know much about computer software. When the screen pops up with an error message that you simply don't understand, a quick phone call to your SageCover support line soon solves the problem.

For Sage 50 Accounts, you can choose between two different types of cover:

- **SageCover:** Provides telephone support during normal office hours, as well as email and online question and answer support. You also get a copy of *Solutions*, the Sage magazine, along with a monthly e-newsletter. If you have Sage 50 Payroll, you also get human resource (HR) advice as standard and also software updates, which ensures that your software is always up to date with the latest legislation. Sage also offers a data repair service should your Sage data become lost or corrupted. You're eligible for the standard service if you purchase SageCover.
- **SageCover Extra:** Includes all the benefits of SageCover, plus software upgrades, so you always have access to the latest version, and you can request three customised reports (for Sage 50 Accounts users). You also gain the benefit of an Express data repair service rather than just the standard service. You're given priority telephone support with Sagecover Extra and also have additional Remote Support, which means that, with your permission, Sage technicians can remotely access your PC to help you solve your queries.

Having someone on the end of a phone to talk you through a problem is a real bonus. Sometimes the Help button just doesn't answer your question. The technical support team can help you solve the most awkward problems that would otherwise have you throwing your laptop out of the window in pure frustration!

I recommend that you install Sage on a Windows operating system. Windows 7, Windows Vista, Windows XP, Windows Server 2003 and 2008 and Windows Small Business Server 2011 are all recommended by Sage.

Sage software isn't compatible with Apple Macs unless you're running Windows XP, Windows Vista or Windows 7 via Apple's Boot Camp Utility. See `www.apple.com/support/bootcamp` for more details.

Installing the Software

In this section, I take you step by step through the installation process, showing you the screens as they appear on your computer. I also tell you about any differences for Vista users and Windows XP users.

I take you through the whole process and ensure that you load up the software correctly. I also let you know about any problems that may crop up while loading, so that you can deal with them effectively.

Anyway, onwards and upwards!

Getting what you need before you get started

Your Sage software package contains a CD, an installation and upgrade guide and, more importantly, a serial number and activation key. Without these last two pieces of information, you can't successfully load the software. But don't worry, if you purchased a genuine copy of Sage software, you have the necessary activation information.

You also need some details about your company:

- **When your company's financial year begins:** If you're not sure of the date, consult your accountant.
- **Whether and what type of VAT scheme you use:** Again, your accountant can tell you whether you operate the VAT cash accounting scheme or the standard VAT scheme. If you have a VAT registration number, keep it handy.

Moving to the installation itself

The following steps assume that you're loading Sage for the first time for a single company and single user. For those of you loading multiple-user programs, check the instructions provided with your software.

1. **Insert your CD into the disk drive.**

   If your CD doesn't immediately start, you may need to click Run.

   The Sage 50 Accounts 2012 installation routine now includes a pre-installation check of your computer. If your PC doesn't meet the required specification, this is reported on screen. Items that don't meet the system requirements are highlighted with exclamation marks on a yellow background. See Figure 1-1 for an example of the system checker.

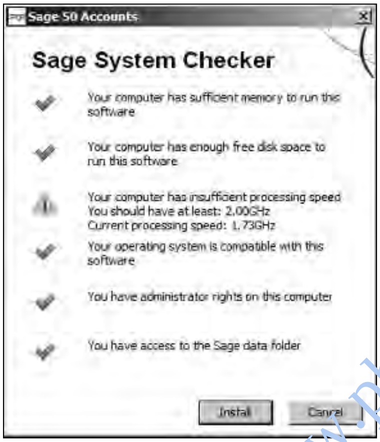

Figure 1-1: Showing the System Checker in action.

   Note: If the exclamation marks pop up, it doesn't necessarily mean that the software won't load. Rather, they identify that your system isn't the recommended specification and as a result the software may not perform to its maximum capabilities.

2. **Follow the options on your screen to run the CD.**

   A Sage 50 Accounts welcome screen appears.

3. **Choose the option to Install Sage 50 Accounts.**

   For Vista users, the User Account Control window appears, asking you for permission to continue installing Sage; this detail is a new security component. Click Continue to proceed to the software licence agreement.

   XP users are taken to the software licence agreement.

   You need to accept the software licence before you can continue. Be warned, the licence seems to go on forever, if you choose to read it! (Have a quick look through the software licence agreement though, just to see what you're signing up for!)

4. **Select the installation type and destination folder and follow the prompts.**

   You have a choice between a Standard install and a Custom install, as shown in Figure 1-2. The choice you make is important.

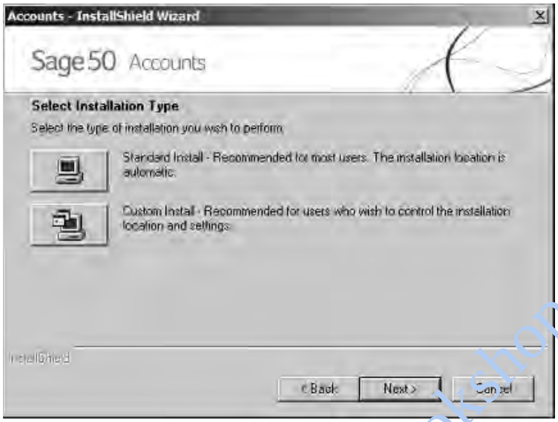

Figure 1-2: Choosing Standard or Custom install.

   Standard install is recommended for most users; it copies the files to C:\Sage\Accounts.

   Choose Custom install only if you want to control the destination of the programs being installed; for example, if you want to keep different versions of Sage separately on your computer.

   If you want to use Custom install and choose a different destination folder, follow these steps:

   i. **Click the Custom install option.**

      The destination folder at the bottom of the screen automatically defaults to C:\Sage\Accounts, but with the help of the Browse button you can change the destination folder.

   ii. **Click Browse.**

      This button allows you to change the path and set the destination folder to your preferred destination as shown in Figure 1-3.

   iii. **Click OK.**

   Check with Sage (the company, not the program!) if you aren't sure whether to use the Custom install or not.

5. **Click Next to continue with the Accounts Set-up wizard.**

   The screen shown in Figure 1-4 appears.

Figure 1-3: Browsing to customise your destination.

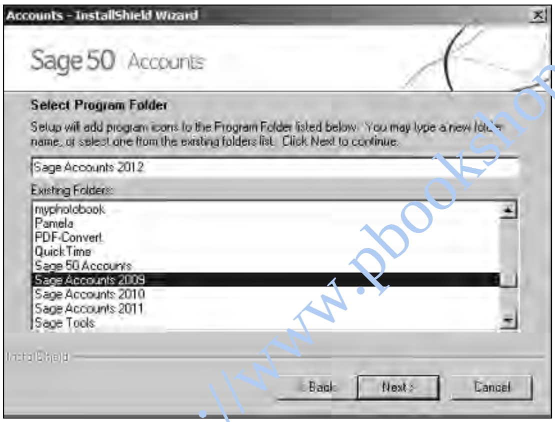

Figure 1-4: Accepting the Sage Accounts program folder.

6. **Click Next to accept the program folder name Sage Accounts, unless you wish to designate a different folder if you're using Custom install, for example Sage Accounts 2012.**

7. **Check that you're happy with the location of the destination folder and program folder and click Next.**

   The destination folder is the one you chose in Step 4 and the program folder is the one you accepted in Step 6. If you're not happy with the destinations, click your Back button and change the destinations, as shown in Step 4.

   The system then whirrs into action and starts the installation process. It takes several minutes, so you probably have time to make a quick cup of tea!

8. **Click Finish when Sage prompts you that the installation is complete.**

That's it! You have successfully installed your Sage software. You should see a Sage 50 Accounts icon on your desktop – now you're ready to rock and roll!

REMEMBER

Be sure to remove the CD and keep it in a safe place!

Setting Up with the Active Set-Up Wizard

Of course, you're champing at the bit and want to get going with Sage, so double-click the new Sage icon on your desktop to get started. The Activate Sage Software window opens as shown in Figure 1-5. You're asked to enter your activation key and serial number. You can find these on your delivery note or within your CD case. If you don't have this information, click the My Sage button and follow the online instructions.

Figure 1-5: Activating your Sage Software.

Once you've entered your activation key and serial number, the Active Set-up wizard opens. The wizard guides you through seven different screens where you must enter information as requested.

The first screen, shown in Figure 1-6, gives you three options:

- **Set up a new company:** If you're new to Sage, choose this first option.

  You'll then be guided through the automatic steps of the Active Set-up wizard. The following numbered steps lead you through this process.
- **Use a company already set up in another installation:** If you already use Sage and are upgrading, choose this option, which lets you copy accounts data from your previous Sage installation.

- **Restore data from a backup file:** Choose this option if you're restoring data from an earlier version – no earlier than Version 9 – perhaps from your accountant, so that you can use the data in your new Sage installation.

Choose whichever option is best for you and follow the screen prompts.

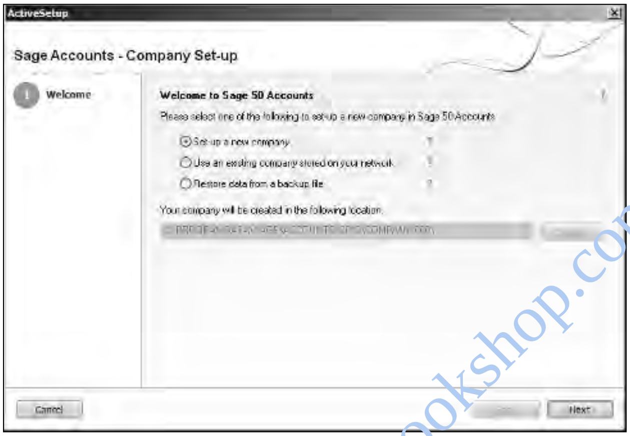

Figure 1-6: Putting the Set-up wizard to work.

The following steps take you through the process of setting up Sage for the first time.

1. **Click Set Up a New Company, then click Next and then enter your company's details.**

   You're prompted to enter your company information, such as name, address and contact details, as shown in Figure 1-7.

Figure 1-7: Asking for the company contact info.

Make the set-up speedier by putting in just the company name. You can complete the other information later by clicking Settings on the main toolbar and then selecting Company Preferences.

2. **Click Next. A screen appears that prompts you to Select Business Type, as shown in Figure 1-8.**

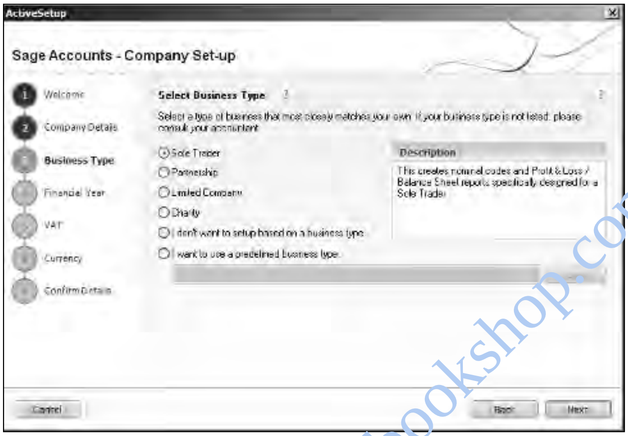

Figure 1-8: What type of business are you?

3. **Click the appropriate business type.** For example, I've chosen Limited Company, for Jingles. If you're in any doubt, contact your accountant, who'll be happy to assist. Whichever business structure you choose, Sage applies the appropriate nominal codes and Profit and Loss and Balance Sheet reports for your accounts.

   If you don't want to select any of the categories shown, you can click Customised and create your own business type. You can then use your existing nominal codes if you're transferring accounts from a different system.

4. **Click Next and select your financial year.**

   The fictional Jingles company I invented ends its financial year on 31 March 2012, so the financial start date is April 2011, as shown in Figure 1-9.

5. **Click Next and fill in your VAT details.**

   If you're not VAT registered, click No and go to Step 6.

   If you're VAT registered, enter your registration number and, using the drop-down arrow, select the appropriate VAT rate, as shown in Figure 1-10. You must enter the current standard VAT rate if that's the rate you've selected.

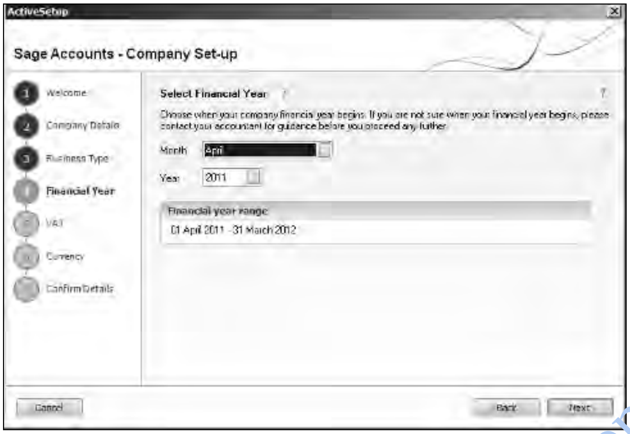

Figure 1-9: Beginning the financial year.

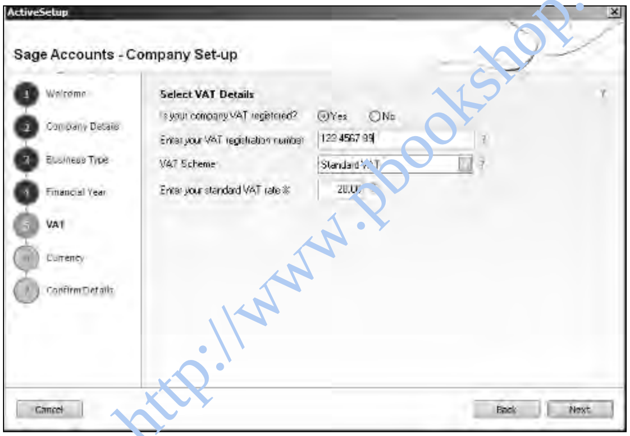

Figure 1-10: Registering your VAT status.

WARNING!

Don't enter any transactions until you're certain of which VAT scheme you operate. Failure to use the correct scheme means that your VAT is calculated incorrectly. Sorting out the wrong VAT scheme can be extremely messy!

6. **Click Next and choose the type of currency you use, as shown in Figure 1-11.** Click Next again.

7. **The final screen summarises the data you entered on your Active Set-up wizard, as shown in Figure 1-12.**

   If you need to make any changes to your data, you can click Back and revise any information.

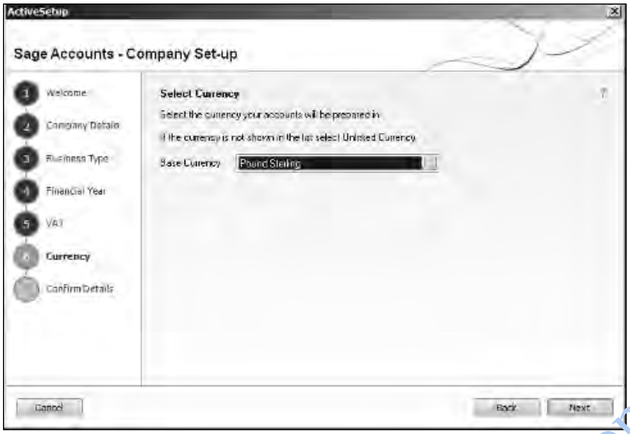

Figure 1-11: Telling Sage what currency to use to prepare your accounts.

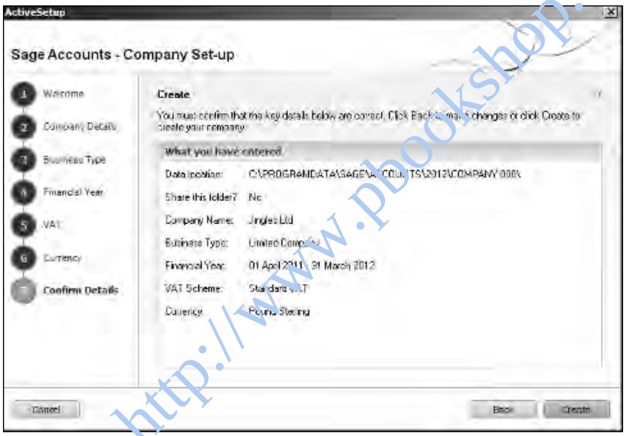

Figure 1-12: Confirming your details.

8. **Select Create when you're satisfied that the information is correct.**

   You've finished!

The system now configures and then takes you to the Welcome screen, as shown in Figure 1-13 later in this chapter.

Registering Your Software

After you install Sage, you may get a message telling you that you're using an unregistered version of the program. Don't panic! You have 60 days before you are required to formally register. You need to contact Sage UK Limited directly to obtain a new activation key; your serial number remains the same.

You can register in one of two ways:

- **By telephone.** Follow these steps:
  - i. **Open Sage 50 Accounts. From the Tools menu, click Activation and then Upgrade Program.** The Product Registration window appears.
  - ii. **Phone the Sage Customer Care Helpline on 0845 1115555.** A customer service adviser then registers your software and provides you with another activation key.
  - iii. **Enter the new activation key in the New Key box and click Continue.**
- **Via the Sage website.** Instead of telephoning Sage, follow Step 1 in the telephone instructions, but click the Web Register box in the Product Registration window. This link to the Sage website takes you directly to the Software Registration Centre; you then simply follow the online instructions.

Finding Out How Easy Sage Is to Use

Sage is a user-friendly system, using words and phrases that people easily understand rather than accounting jargon. Sage also has a lot of graphics to make the pages look more appealing and easier to navigate. For example, an icon appears next to the Bank module that looks like the entrance to a grand building – like the Bank of England, perhaps?

Burying the accounting jargon

Sage uses terms that users understand and steers clear of accounting jargon. So, instead of using *debtors* and *creditors*, Sage uses *customers* and *suppliers*; rather than *nominal ledger*, it uses *company*.

Accounting terminology isn't altogether done away with, for example you still have to print Aged Debtors reports and Aged Creditors reports, but most of the program uses very simple language.

Looking at the screen layout

When you open Sage, the first screen you come across is the Sage Welcome screen, as shown in Figure 1-13. It provides useful links and various Help pages, including a page that shows you what's new in Sage 50 Accounts.

Figure 1-13: Welcoming you to Sage.

If you look closely at the bottom of the screen, you find two tabs. The first is for the Welcome to Sage 50 Accounts screen, and the second is called Customer Process – the arrow points to it in Figure 1-13.

Introducing process maps

Process maps look like flow charts, as shown in Figure 1-14, and they illustrate specific customer and supplier processes in a pictorial format.

Figure 1-14 shows the various stages of the customer paper trail in the Customer Process map, from the original quotation through to chasing the debt and receiving the money from the customer. You can click on any one of these boxes, and Sage takes you directly to the screen necessary to process that action. For example, if you click Receive Payment, you're taken to the Customer Receipt screen, so that you can process the payment received.

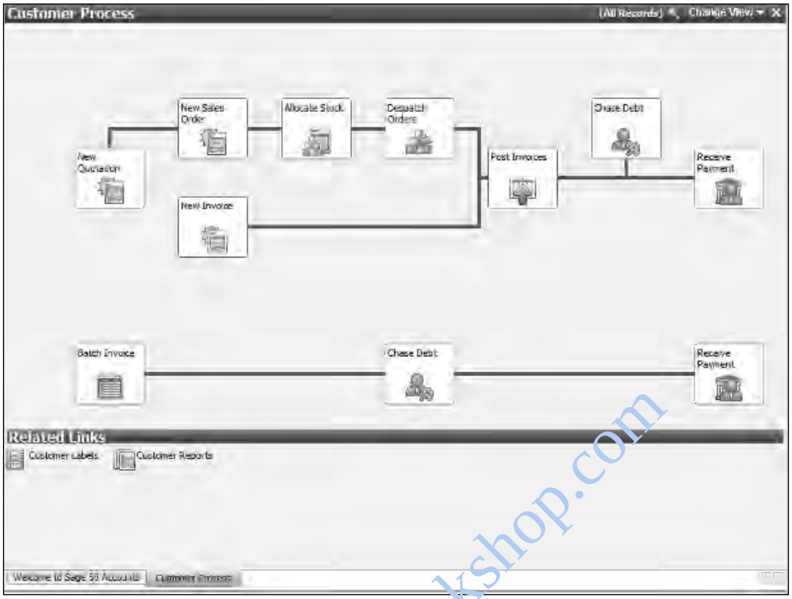

Figure 1-14: Looking at the inner workings of the customer process.

On the Customer Process screen, the words Change View appear in the top right corner. Clicking Change View produces a dropdown menu that gives you two more options to change the appearance of the screen:

- **Customers:** This view, shown in Figure 1-15, is the traditional Sage screen. The main body of the screen appears blank when you're starting out with Sage, but it eventually fills up with your customers' names, balances and contact details.

  Across the top of the screen, below the Customers heading, the icons that form part of the customer pages appear – Activity, Invoice and Credit, to name just a few.

- **Customer Dashboard:** The dashboard offers a graphic representation of the customer information. It shows the Customer Cash Overview, Aged Debt, Promised Payments and Today's Diary Events. This presentation appeals to people who want quick access to the key information in the accounts.

  Before you input any data, the Customer Dashboard screen looks extremely boring. However, even just the Sage demonstration data illustrates the dramatic impact of presenting data in this way, as shown in Figure 1-16.

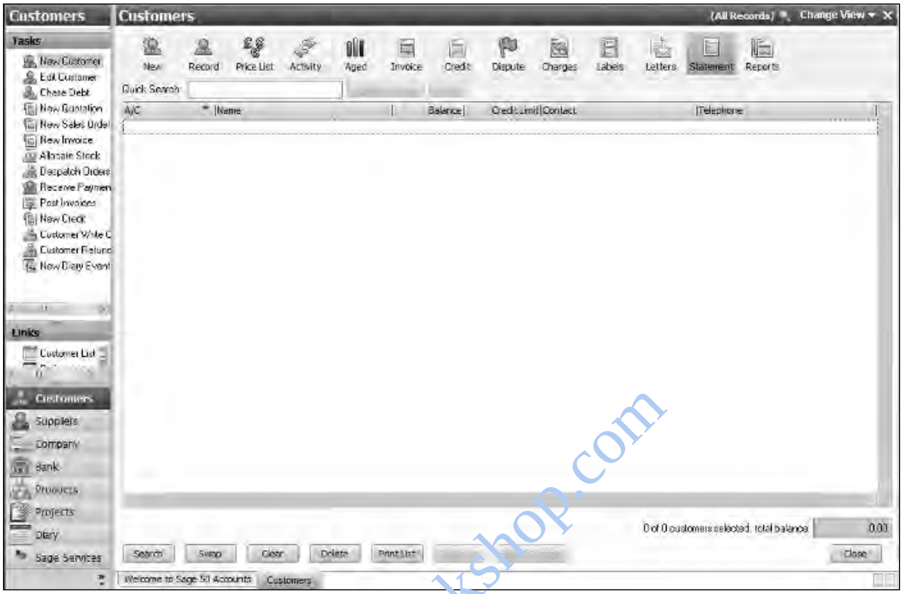

Figure 1-15: Viewing the traditional Customers screen.

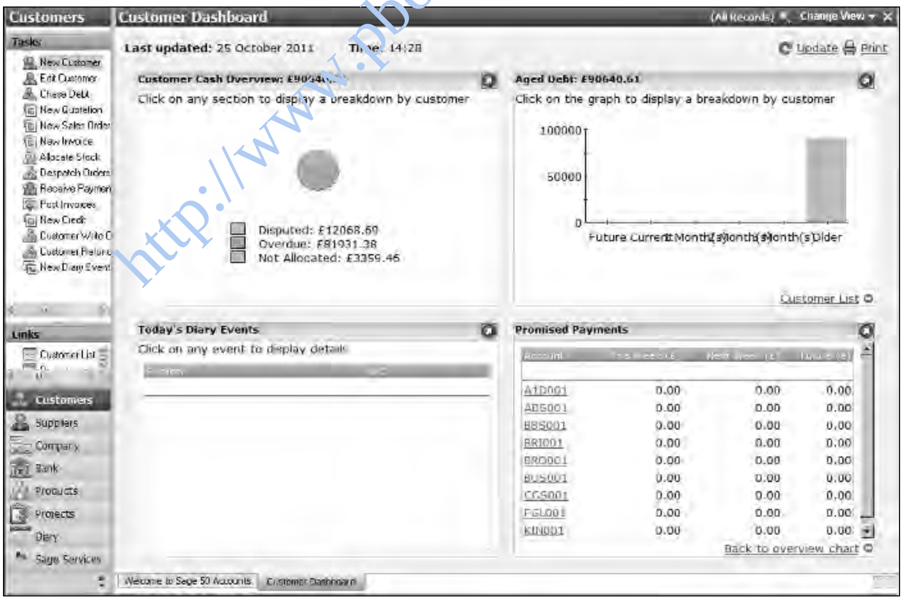

Figure 1-16: Going for the graphical view.

TIP

On the Welcome screen is a Just Practice option. Click Just Practice to get step-by-step instructions on how to access the demonstration data or the practice company, to help you grasp the functionality of Sage.

Navigating Around Sage

At the very top of the Sage Welcome screen is the name of your version of Sage – Sage 50 Accounts Professional 2012, for example – followed by the company name you entered when you set up Sage. (Refer to the 'Setting Up with the Active Set-Up Wizard' section, which walks you through getting Sage up and running.)

From the Welcome screen, use the browser toolbar that runs horizontally across the top to navigate through the program. For example, if you misspelled your company name in your excitement at setting up, or missed off Ltd, you can amend the error by using the browser toolbar.

Exploring the browser toolbar

The browser toolbar is the traditional way of navigating around the system. Sage introduced the navigation bar that runs down the left side of the screen more recently. Refer to Figure 1-17 (later in this chapter) to see both the browser toolbar and navigation bar. The navigation bar includes the Task pane, Links list and Module buttons (see the 'Navigating the Task pane, Links list and Module buttons' section later in this chapter for more detail).

By clicking the different browser toolbar options, you gain access to submenus and different parts of the system. The next sections talk about each option on the browser toolbar in turn.

File

Nothing counter-intuitive here; clicking File gives you options for creating, accessing, saving and sharing data. The submenu options are:

- **New Report:** Takes you into a Report wizard that enables you to design new reports.
- **New Batch Report:** Allows you to bundle a set of individual reports together and view, export, print or email them at the same time. Click F1 for Sage Help and type **batch reporting** for more details.
- **Open:** Enables you to access the demonstration data and practice data from here, open a report and open previously archived data, including the VAT archive.

- **Close:** Closes the dropdown menu.
- **Backup:** Allows you to back up your data. You can also back up your data when you exit the program.

  Back up your data each time you use Sage, or at least at the end of each day. Back up more often during the day if you're processing significant amounts of data.

  Sage automatically gives the backup a filename, which is usually SageAccts then your company name, followed by the date and some numbers, then 001. (Sage backup files always have the file extension .001.) If you do more than one backup on the same day, differentiate the file name by adding a different number, otherwise Sage could overwrite the previous backup.
- **Maintenance:** Enables you, amongst other things, to correct data, delete records, check data or even, as a very last resort, rebuild the data. I talk about maintenance in more detail in Chapter 9.
- **Restore:** Allows you to retrieve data from a previous backup, if necessary. You may need to utilise this function if you have problems with the current data – perhaps it's been corrupted and you want to return the data to a known point in time when it was free of problems.

  Import: Allows you to import records, such as customer, stock and project records, from other sources, like Microsoft Excel, as long as they're in a pre-determined CSV (comma separated values) format. This option is very useful when you're setting up Sage and have other information or records that you wish to import. You can speed up the data-entry process if you import information instead of keying in each individual record. I cover importing and CSV formatting in more detail in Chapter 19.
- **Office Integration:** Using this option, you can export data to Microsoft Excel, Word or Outlook (if you have a compatible version of Microsoft Outlook).
- **Send:** Enables you to send a message by using your default email program.
- **Exit:** Lets you exit the program altogether. You can also exit the program by clicking the black cross in the top right corner of the screen.

Edit

You can use Edit to cut, copy, paste, insert or delete rows, duplicate cells or memorise or recall data.

View

The *status bar* is the narrow strip across the bottom of your screen, showing the name of your Sage product, today's date, the start of the financial year and the current transaction number. You can switch it on and off. You can also view the user list, which shows who is currently logged onto Sage.

Introducing the Sage Services button

The Sage Services button gives you the ability to access a number of online Sage services, such as SageCover and Sage software updates. Prior to this service being available, SageCover was only available via the phone and software updates came either by CD or more recently online from the main Sage website, which involved opening up another browser session on your computer. You can now quickly access useful websites directly from your Sage software without having to open a separate Internet browser, but you need to create an account on the `www.sage.co.uk` website and obtain a Sage login and password first. You can record the details in your Sage software. (To do this, select the Tools menu, and then Internet Options and finally select the Sage Account tab, where you can enter your login details.)

Modules

The *modules* are essentially the different components that form the whole of the Sage accounting system. The modules include the usual accounting ledgers, such as Customers, Suppliers, Bank, Nominal Ledger and reporting functions, but they also include (depending on which version of Sage you purchased) additional components, such as Projects, Sales Order Processing and Purchase Order Processing. You can also access the Invoicing function, wizards and a diary.

Access modules by clicking Modules on the browser toolbar and selecting the module of your choice, or by clicking the much larger buttons on the navigation bar at the bottom left of the screen. I prefer the buttons at the bottom – they're easier to use and more visible.

Settings

The settings include the Configuration Editor and Company Preferences, which hold some of the basic information about your company and the way Sage was set up upon installation. Settings also include many of the default screens for the ledgers, which save you time when setting up records at a later date. If you need to change the system date or check the financial year, you can do it within settings. You also have access to the security settings for accessing the software and can set up passwords to protect your accounts data. The settings include:

- **Configuration Editor:** Holds the basic information you enter when you complete the Active Set-up wizard. Have a look at the numerous tabs within this option and familiarise yourself with them. Examples of things you can do include: editing your customer and supplier trading terms; amending your VAT codes; and managing your project cost types and cost codes.

- **Company Preferences:** Allows you to enter extra information if you didn't add it all when using the Active Set-up wizard. You may want to update your address information, for example. Company Preferences provides many more tabs to look at, too many to comment on here, so have a flick through at your leisure.
- **Customer/Supplier/Bank/Product/Invoice and Order Defaults:** Gives you the opportunity to amend parts of the default data you set up on installation.
- **Financial Year:** Identifies the start of the company's financial year, as input during the Active Set-up wizard. This date is fixed when you start to enter data.
- **Change Program Date:** Allows you to change dates when running a month-end or a year-end report. The date is normally set to the current day's date, but there may be times, such as period ends, when you wish to change the date, albeit only temporarily.
- **Lock date:** This is a new feature for Sage 50 2012. You have the ability to enter a lock date into the system, which means that you can prevent postings before a specific date that you enter. This is useful when you're processing year ends. Only users with access rights to Lock Dates can post.
- **Currencies:** Enables you to edit your currency requirements if you're using multiple currencies.
- **Countries:** Lists all the countries in the world in the Countries table, together with country codes, and identifies those countries that are currently members of the EU. The Sage 50 Accounts Professional package uses Countries information to comply with Intrastat reporting requirements. (Chapter 17 talks more about Intrastat.)

  You can amend the Countries table as and when countries enter or leave the EU.
- **Control Accounts:** Gives you an at-a-glance list of all the control accounts within Sage. A *control account* is a summary of all entries contained within a specific ledger. For example, the Sales Ledger control account includes all transactions for all sales ledger accounts and the balance on the control account tallies with the sum of the sales ledger accounts. Control accounts are used as a check on the numerical accuracy of the ledger accounts and form part of the double-entry system that Sage performs when you enter transactions.

  If you're going to change the control accounts, do so before you enter any transactions; otherwise, leave them alone.

  You can reconcile a control account. Just click Help and follow the instructions for reconciling debtors or creditors.
- **Change password:** Allows you to change your password periodically as part of your data protection and security routine.

- **Internet Resources:** Provides you with an Internet Resources list that you can use to set your courier and credit bureau information, if you have them. You can launch your website browser from within Sage and go to your credit bureau to check the status of a customer or go to a courier's website to track the progress of a parcel.

Tools

The tools option is a hotchpotch of items. You can run the Global Changes wizard, carry out contra entries, run period ends, open up Report Designer and convert reports, to name but a few. The options are outlined below:

- **Global Changes:** Allows you to globally change customer or supplier credit limits, turnover values, nominal budgets, product sales or purchase prices, reorder details and discount table values.
- **Contra Entries:** Enables you to match sales invoices against purchase invoices, which often happens at the point of sale as the supplier usually raises an invoice of the same value to offset against your sales invoice. No money officially changes hands, just the provision of goods and services.
- **Activation:** Allows you to upgrade your program and enable third-party integration or the Construction Industry Scheme. *Third-party integration* enables you to use add-on software, developed by a third party, which is tailored to your specific industry. Sage has a separate module for the Construction Industry Scheme (CIS) and the recording of payments to subcontractors. Activate this scheme by clicking Tools and then Activation for businesses that fall under the scheme.

  You can use the Upgrade Program option to register after your initial 60-day Sage trial period runs out.
- **Opening Balances:** Presents you with a series of actions that need to be completed to enter your Opening Balances. Chapter 4 guides you through the Opening Balances wizard.
- **Period End:** Enables you to run the month-end, allowing you to post accruals, prepayments and depreciation. This option also clears the current-month turnover figures. You can run your year-end, which sets your Profit and Loss nominal accounts to zero for the new financial year.

  The *consolidation* option can create multi-company accounts. You also have the opportunity to clear stock and clear your audit trail. (See Chapter 16 for further information on clearing stock and audit trails.)
- **Transaction Email:** Gives you the ability to exchange invoices and orders with your customers and suppliers via Microsoft Outlook. You can import any orders or invoices that you receive via email directly into your Sage accounts.

- **Report Designer:** Allows you to edit or create new reports, customised for your business.

  Event Log: Shows a history of system events. If you contact the Sage helpline with a system problem, the event log may come in handy.
- **Options:** Gives you options to change the settings and appearance of Sage. For example, you can change the default view of the Customers and Suppliers screens from the process map to customer or supplier lists.
- **Batch reporting:** You can generate several reports from any area of the Sage software at the same time. Type Batch Reports into the search field in Sage to find more information.
- **Internet Options:** Here you can vary the Sage update criteria, enter Sage Cover login details, and also enable Sage Mobile by clicking the Mobile tab.

Favourites

You can store your favourite reports under this heading. To find out how to set up favourite reports, use the Help menu supplied with Report Designer (which can be accessed via Tools on the browser toolbar – Chapter 18 goes into more detail about the Report Designer).

Weblinks

Weblinks gives you a number of links to useful websites, such as Sage shop and HM Revenue and Customs, provided that you're hooked up to the Internet.

News Feeds

The Sage RSS News Feeds option keeps you informed about updates on the Sage system. It can update you on the content of blog entries, news headlines or podcasts.

Help

Help is the last entry on the browser toolbar, but probably one of the most useful. If you want to understand more about the system and want to know how to do something, click the Help option. The Contents and Index option allows you to type in key words that may help with answering your question.

A new feature for 2012 includes a radical overhaul of the Help, About page. This now contains a raft of information about your computer, including system details, licence information, contact details for Sage and much more. Sage support staff find this page very useful when trying to identify any problems that you might be experiencing with your software. If you choose Help from the main toolbar and click About, the Sage support page opens up and shows you the mass of information held about your computer.

Navigating the Task pane, Links list and Module buttons

An alternative method of navigation, and probably the easiest, is to use the navigation bar, which is down the left side of the screen. It includes a Task pane and Links list, as well as buttons at the bottom of the bar for opening up your modules.

Sage offers a variety of ways to navigate to the same point. For example, if you want to open a new customer record, you can click New Customer in the Task pane or use the browser toolbar and click Modules, Customers and then the New icon (assuming you changed the view to Customers not the process map – refer to the 'Looking at the screen layout' section earlier in this chapter).

As you get used to using Sage, you'll see that the first navigation bar to open is the Customers bar. Figure 1-17 shows the navigation bar in the Customer module, where you can see these features:

- **Task pane:** The topmost menu is the Task pane, which is different for each module.
- **Links list:** The Links list offers different links for each module within Sage. The Customer Links list takes you to customer-orientated pages, such as Customer Invoices, Orders or simply a list of customers.
- **Module buttons:** These buttons sit at the bottom left side of the screen and enable you to switch between modules. They're wide buttons that start with a little icon and then a description. The first button is Customers, followed by Suppliers, Company, Bank, Products, Projects, Diary and Sage Services.

  Just below the Diary button is a tiny chevron with a small arrow directly beneath it. Clicking on the chevron gives you the option of showing fewer buttons or adding or removing buttons. You can play about with the buttons and decide which display you prefer. The Diary button is a new feature recently added to Sage. It assists with credit control and is discussed in more detail in Chapter 6.

  Sage Services is a relatively new feature that provides access to an online service (see the 'Introducing the Sage Services button' sidebar, earlier in this chapter, for more information).

Clicking the various Tasks, Links or Module buttons automatically moves you to the relevant part of the system.

TIP

I prefer the Module buttons, finding it easier to navigate with them as they're more visible and easier to click than the Task pane or Links list.

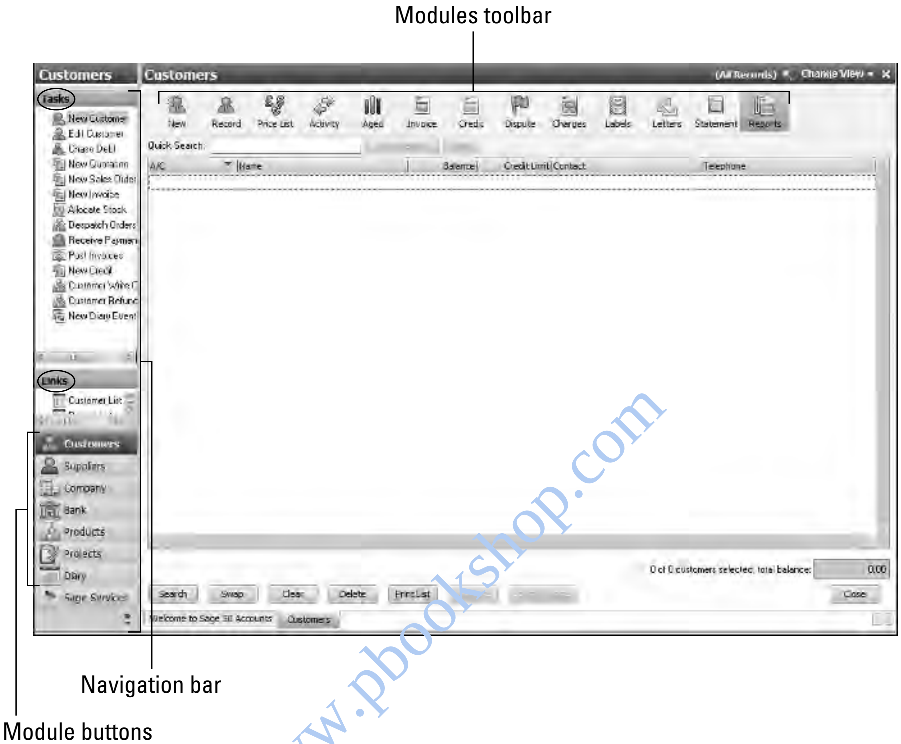

Figure 1-17: Identifying the Navigation bar, the Task pane, the Links list, the Modules buttons and the Modules toolbar as viewed from the Customers module.

Using Wizards

A number of wizards wield their technological magic through Sage. You can access these helpful creatures, whose job is to help you through a wide variety of set-ups and tasks, by clicking Modules on the browser toolbar and then Wizards.

A wizard's job is to make your work easy; all you have to do is follow the prompts and enter the information the wizard requests.

Wizards can help you in both setting up Sage and day-to-day processing. They can assist you in setting up new records for customers, suppliers, nominal accounts, bank accounts, products and projects. But you can also use them to do the otherwise tricky double-entry bookkeeping for items such as opening and closing stock, fuel-scale charges and VAT transfers. A wizard to help you set up the Foreign Trader features is also available.

In addition, whenever you click the New icon on the Modules toolbar, you go straight into the Record Set-up wizard; if you click the Customer module and click the New icon, for example. See Chapter 22 for more details about wizards.