

Filters and Search.

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Sage

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Filters

Why use a filters?

- To hide records
- To display specific records / transactions
- Filter option available in most areas, but not Bank accounts
- Export your results to Excel
- Wildcards can be used to search parts of a data field
- Reporting benefits
 - filter records before generating your report
 - useful if there's not a report available

Filters

Common filters

- Hide customers with a zero balance

Filter

Clear form Wizard Open Save Save As

Only select records from 'Customers'

Join	Field	Condition	Value
Where	Balance	Is Greater Than	0.00

Expression:
Where 'Balance' > '0.00'

Filter

Clear form Wizard Open Save Save As

Only select records from 'Customers'

Join	Field	Condition	Value
Where	Balance	Is Not Equal To	0.00

Filters

Common filters

- Only show this years transactions on my audit trail

Filter

Clear form Wizard Open Save Save As

Only select records from 'Transactions'

Join	Field	Condition	Value
Where	Date	Is Greater Than Or Equal To	01/01/2022

Expression:
Where 'Date' >= '01/01/2022'

Apply Close

Filters

Common filters

- Show only BP transactions for a specific period

Filter ✕

Clear form Wizard Open Save Save As

Only select records from 'Transactions'

Join	Field	Condition	Value
Where	Transaction type	Is Equal To	BP
And	Date	Is Greater Than Or Equal To	01/10/2022
And	Date	Is Less Than Or Equal To	31/10/2022

Expression:

Where 'Transaction type' = 'BP' And ('Date' >= '01/10/2022' And 'Date' <= '31/10/2022')

Apply Close

Filters

Common filters

- Hide older invoices

Filter ✕

Clear form Wizard Open Save Save As

Only select records from 'Invoice and credits'

Join	Field	Condition	Value
Where	Invoice Date	Is Greater Than Or Equal To	01/09/2022

Expression:
Where 'Invoice Date' >= '01/09/2022'

Apply Close

Wildcards

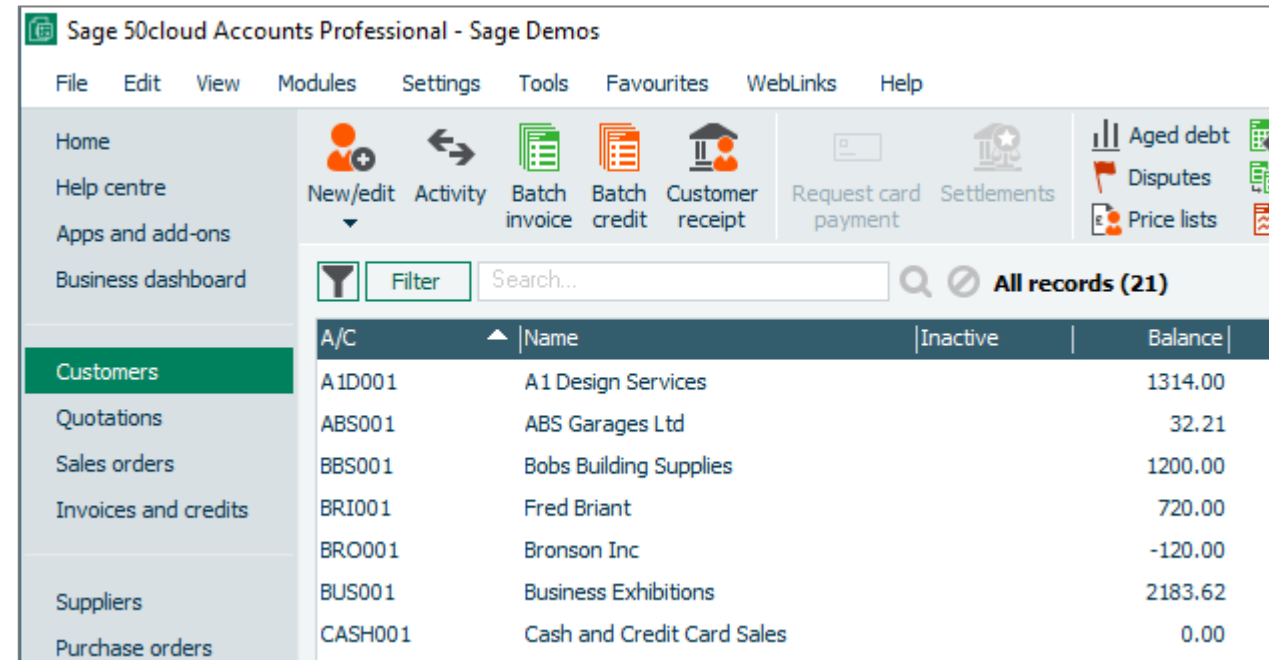
Wildcard	Use	Example
*	Represents any number of valid characters, including spaces. Position is important.	NE* N*1
\$	Represents a specific line of text anywhere in the data.	\$bottle
?	Represents a single character. Position is important.	41? 41??

Search

- Quickly search for specific text within records
- Searches multiple fields
- Ensure no filters are applied if using Search
- Wildcards can be used

Transactions

- Includes a Find option



The screenshot displays the Sage 50cloud Accounts Professional interface. The top navigation bar includes 'File', 'Edit', 'View', 'Modules', 'Settings', 'Tools', 'Favourites', 'WebLinks', and 'Help'. Below this is a sidebar with 'Home', 'Help centre', 'Apps and add-ons', and 'Business dashboard'. The main area features a search bar with a 'Filter' button and a search icon. The search results are displayed in a table with columns for 'A/C', 'Name', 'Inactive', and 'Balance'. The table shows 21 records, with the first few being A1D001 (A1 Design Services, 1314.00), ABS001 (ABS Garages Ltd, 32.21), BBS001 (Bobs Building Supplies, 1200.00), BRI001 (Fred Briant, 720.00), BRO001 (Bronson Inc, -120.00), BUS001 (Business Exhibitions, 2183.62), and CASH001 (Cash and Credit Card Sales, 0.00).

A/C	Name	Inactive	Balance
A1D001	A1 Design Services		1314.00
ABS001	ABS Garages Ltd		32.21
BBS001	Bobs Building Supplies		1200.00
BRI001	Fred Briant		720.00
BRO001	Bronson Inc		-120.00
BUS001	Business Exhibitions		2183.62
CASH001	Cash and Credit Card Sales		0.00

Inactive records

Why flag records as inactive?

- Keeps your accounts tidy and easier to manage by hiding records you no longer use
- Customers / Suppliers / Nominal codes / Bank accounts / Products and services
- Alternative to deleting them
- Easy to flag records – but they must meet specific criteria

Tip: Batch changes can be used to flag multiple records simultaneously – not in Essentials

- Option to show / hide inactive records in your ledgers
- Easily reactivate a record

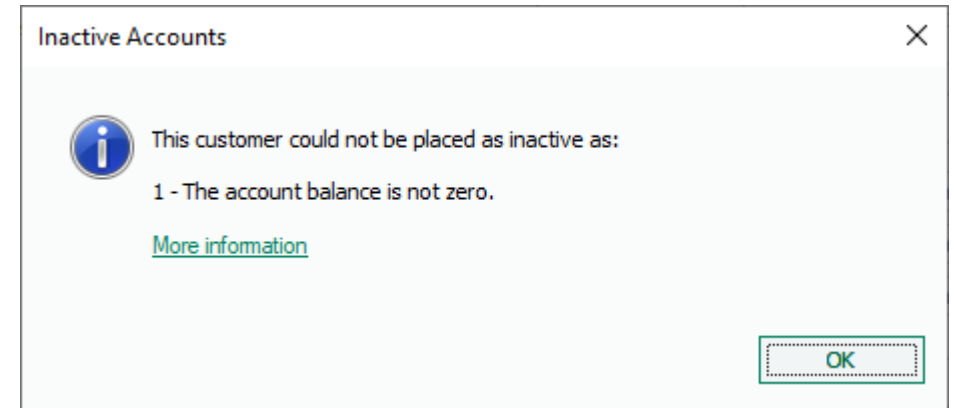
Flag records as inactive

Criteria

Inactive records

Customer criteria:

- Account balance must be zero
- No unallocated transactions
- No recurring entries attached to the record
 - Bank
 - Invoices / Orders
- Must not be the default Opayo (formerly Sage Pay) customer
- Your company must not be in recording mode – Accountant link enabled



Flag records as inactive

Criteria

Upcoming Webinars

Upcoming

VAT Return

Report Designer

Sage Membership

Quiz

CIS / DRC

Month End

Key Topics

Chart of Accounts **Wednesday 9 November 2pm**

We'll explain what the chart of accounts is, how to create new layouts or simply amend your existing one to help you report the way you want.

Management Reports **Thursday 10 November 2pm**

This session explains how the Trial Balance, Profit & Loss and Balance Sheet reports calculate.

Thank you!

Please take a minute to complete the short exit survey as you leave.

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

