

Global changes.

Jacqui Wilson

Sage





Housekeeping


Sage 50 Accounts Budgets


Jacqui Wilson


Sage

















Questions

← Automatically Muted

← Submit your questions

← Download Handouts

Want answers?

Ask the staff a question

Send

Contents

The global changes wizard

Increasing Credit limits

Increasing Product sales prices

Altering discounts

Batch changes

Global changes



Global Changes Wizard.

Use the Global Changes Wizard to amend a range of information at once rather than manually amending each individual record

Useful in the new year for increasing Credit limits or applying price changes.

The Global changes enables you to choose which records the changes apply to.

The wizard can be found within the tools menu.

The screenshot shows the 'Global Changes' wizard window. The title bar says 'Global Changes'. Inside, there's a header 'Global Changes' in blue. On the left is a sidebar with four steps: 1. Select Type (highlighted), 2. Select Item, 3. Enter Value, and 4. Review Items. The main area is titled 'Select Type' and contains the instruction 'Select the value types to be changed from the list below.' Below this is a list box titled 'Types of values to be changed' with a scroll bar. The list includes: Customer turnover (highlighted in blue), Customer credit limits, Supplier turnover, Supplier credit limits, Product sales prices, Product purchase prices, Product re-order levels, Product re-order quantity, Discount A, and Discount B. At the bottom left is a 'Cancel' button.

Global Changes Wizard.

The following changes can be made using the Global changes wizard.

- Customer and Supplier Turnover
- Customer Credit Limits
- Supplier Credit Limits
- Product Sales Prices
- Product Purchase Prices
- Product Re-Order Levels
- Product Re-Order Quantities
- Discount Matrices

Some of these features are not available in Sage 50 essentials

Changing Credit Limits



Changing credit limits.

Customer or supplier records can be selected to apply changes to

The following changes can be made.

- Add Amount
- Subtract amount
- Multiply by amount
- Divide by amount
- Increase by percentage
- Decrease by percentage
- Give figure

In addition rounding and adjustments can be applied

Global Changes

1 Select Type

2 **Select Item**

3 Enter Value

4 Review Items

Select Item*

Select those items, to which changes should apply. To select all items, click Swap with no items selected.

A/C	Name
A1D001	A1 Design Services
ABS001	ABS Garages Ltd
BBS001	Bobs Building Supplies
BRI001	Fred Briant
BRO001	Bronson Inc
BUS001	Business Exhibitions
CASH001	Cash and Credit Card Sales
CGS001	County Golf Supplies

Swap

Clear

Changing Product sales price



Changing product sales price.

Product records can be selected to apply changes to

The following changes can be made.

- Add Amount
- Subtract amount
- Multiply by amount
- Divide by amount
- Increase by percentage
- Decrease by percentage
- Give figure

In addition rounding and adjustments can be applied

The screenshot displays the 'Global Changes' interface. On the left, a sidebar contains four numbered steps: 1. Select Type, 2. Select Item, 3. Enter Value (which is highlighted), and 4. Review Items. The main area is titled 'Global Changes' and contains the 'Enter Value' section. This section instructs the user to 'Enter the price change type and value in the entry boxes below.' It includes the following fields: 'Type of change:' with a dropdown menu set to 'Add amount'; 'Value' with a text box containing '0.00'; 'Rounding Direction:' with a dropdown menu set to 'Round up to'; and a radio button selection for 'To' (selected) and 'Multiples of'. The 'To' option is followed by a dropdown menu set to '2' and the text 'Decimal Places'. The 'Multiples of' option is followed by a text box containing '0.00' and the text 'plus adjustment' followed by another text box containing '0.00'. At the bottom, a note states: '(For example, to round to the nearest 0.99, enter a value of 1.00 with an adjustment of -0.01)'.

Altering Discounts



Altering discounts.

Product quantity discounts can be entered into product records.

A percentage discount can be applied when Quantity thresholds are met.

This can be altered with a Global change

Global Changes

Global Changes

1 Select Type

2 Select Item

3 Enter Value

4 Review Items

Enter Value

Enter the price change type and value in the entry boxes below.

Type of change:

Add amount

Value

0.00

Rounding Direction:

Round up to

☒ To

2

Decimal Places

☐ Multiples of

0.00

plus adjustment

0.00

(For example, to round to the nearest 0.99, enter a value of 1.00 with an adjustment of -0.01)

Batch changes



Batch changes.

Not available in Sage 50 Essentials.

Found within Customers, Suppliers, Products and services and the Fixed asset Register.

The batch changes feature enables some changes to fields across multiple records simultaneously.

Those fields which can be changed show as active fields, those which cannot be changed are greyed out.

The screenshot displays the 'Customer - Batch Changes' interface. On the left is a sidebar with a dark grey background and white text, containing a 'Details' section with sub-items: 'Details' (highlighted), 'Defaults', 'Credit Control', and 'Bank'. The main area is a light grey form with a top navigation bar. The navigation bar includes a 'Clear form' button and three 'New' buttons for 'invoice', 'order', and 'project', along with a 'Delete' button. The form is divided into several sections: 'Account Details' with fields for A/C*, Company name, Balance (0.00), and an Inactive checkbox; 'Registered Address' with fields for Street1, Street2, Town, County, Post Code, Country (United Kingdom), and VAT; 'Contact Information' with fields for Contact name, Trade contact, Telephone, Telephone 2, Fax, and Website; 'Social Media' with fields for Twitter, LinkedIn, and Facebook; and 'Email Settings & Addresses' with fields for Email 1, Email 2, and Email 3. A 'Direct Debit Manager' section at the bottom provides information on setting up a direct debit mandate and includes a 'Direct Debit email' field and a 'Set up mandate' button. A 'Bank' section is also visible at the bottom right.

Summary



Summary.

- The Global changes wizard is found within the tools menu.
- Global changes can be used to make changes to multiple records simultaneously and records to apply the new settings too can be selected.
- These allow different changes to be applied for example changes to sales prices and credit limits.
- The changes applied include options for a fixed amount or a percentage increase/decrease.
- Batch changes can also allow changes to multiple records

Upcoming Webinars.

Upcoming

VAT Return

Projects - Part 2

Invoicing

Report Designer
Edit your invoice layout

Recurring items

Tips and Tricks in
Sage 50cloud Accounts

Key Topics

Running your Year end

Fri Jan 6 2pm

This webinar explains the year end process from start to finish, including how to prepare for and run your year end and the optional post-year end tasks.

Report Design- Regrouping layouts

Wed Jan 11 2pm

The next in our report design series

What is Sage Membership ?

Sage University – Sageu.com

Sage City – Sagecity.com

Sage Masterclass

Member Masterclass

Season 1: Finding and keeping great people

Built exclusively for Sage members and available to everyone for a limited time only.


Your greatest asset is your people. So, how do you find and keep the best?

Whether you're a one-person business or already lead a team, a great hire is game-changing.

In the very first season of Member Masterclass, you'll discover:

- How to create a world-class onboarding experience.
- How to develop and nurture your talent.
- How to retain the talent you have.

Visit sage.com/uk/masterclass now and learn from visionary leaders on how to hire and retain top talent.




SEASON 1: FINDING AND KEEPING GREAT PEOPLE

How to create a more human company


Join Michael Acton Smith, Co-Founder and Co-CEO of Calm, and discover techniques to help you build a happier, healthier and more productive workplace.

Watch the keynote




Duke Stump
Chief Brand Officer at Newlab

Building a business with soul




Charlie Gladstone
Author and Creative Entrepreneur

The life-changing magic of emotional intelligence at work




Khalilah Olokunola
Chief People Officer at TRU Colors

Why successful recruitment doesn't end with onboarding




Duke Stump
Chief Brand Officer at Newlab

How to spark inspiration and create a positive culture



Julia Jahn
Global Employee Experience Lead

How to make your people thrive and come alive



Bobette Buster
Author, Film Producer, and Professor of Storytelling

How to create a deeper connection with your people

And
more...

Thank you!