

Sage 50 Accounts

Projects - Part 1

Setting up & Creating records

Michael Cox



Sage

Contents

Introduction

Setting up

Project records

- Manual
- Import

Further support & questions

Projects

Webinars

- Part 1 - Setting up the Projects ledger and creating records
- Part 2 - Recording costs and revenue *(Friday 19 April 11am)*
- Part 3 - Analysis and reports *(Friday 26 April 11am)*

[Register](#)

[Watch Recordings](#)



Projects

Introduction

- Available in Sage 50 Accounts Professional

Enable

- Settings > Company Preferences > Parameters > Enable Project-costing

Still can't see Projects?

- Level of access / Access rights
- Hidden

The screenshot shows the 'Company Preferences' dialog box with the 'Parameters' tab selected. The 'Call Charges' section has a 'Default call charge rate' of 0.00. The 'Transaction Processing' section has 'Display Account Status' checked, with 'Stop the Account' selected as the action when an account is placed on hold. The 'Others' section contains several checkboxes, with 'Enable Project Costing' highlighted by a green box. Other checked options include 'Display ActiveSearch Popup', 'Copy skeleton journal values', 'Enable Reversing Journals', 'Check for duplicates in Customer batch entries', 'Enable check data and backup with users logged in', 'Enable Smart Totals', 'Log Events', 'Check for duplicates in Supplier batch entries', and 'Enable Data management'. Unchecked options include 'Exclude deleted transactions', 'Allow Negative Stock', 'No Reconciling entries at startup', 'Enable Charity, Non-Profit options', and 'Pause outside Financial Year message'.

Category	Option	Status
Call Charges	Default call charge rate	0.00
Transaction Processing	Display Account Status	Checked
	When I place an Account on Hold	
	Show a warning on each change	Not Selected
	Stop the Account	Selected
Others	Exclude deleted transactions	Not Checked
	Display ActiveSearch Popup	Checked
	Allow Negative Stock	Not Checked
	Copy skeleton journal values	Checked
	Enable Reversing Journals	Checked
	Check for duplicates in Customer batch entries	Checked
	Enable check data and backup with users logged in	Checked
	No Reconciling entries at startup	Not Checked
	Enable Project Costing	Checked (Highlighted)
	Enable Charity, Non-Profit options	Not Checked
	Enable Smart Totals	Checked
	Log Events	Checked
	Pause outside Financial Year message	Not Checked
	Check for duplicates in Supplier batch entries	Checked
	Enable Data management	Checked

Projects

Setting up

- Settings > Configuration > Project Costing
 - Project Status
 - Project Custom Fields
 - Cost Type
 - Cost Codes

Configuration Editor

Terms Tax Codes Account Status Products Fixed Assets
Custom Fields Email Dispute Reasons Credit Control **Project Costing**

Project Status

Enter the names and description of your Project Statuses here, each status will have the options of set as default, allow postings or allow deletions.

Code	Description	Default	Postings	Deletion
ACTIVE	Active	Yes	Yes	No
COMPLETED	Completed, closed	No	No	Yes
INITIAL	Pre-acceptance	No	Yes	No
SNAG	Completed, open	No	Yes	No

Add Status Edit Status Delete Status Set as Default

Project Custom Fields

Each project record within Sage 50 Accounts has three custom fields associated with it. You can enter labels for these custom fields here:

Field 1:

Field 2:

Field 3:

Cost Type

Enter the names of your costs types here.

Type	Default
LABOUR	No
MATERIALS	No
MIXED	No
OTHER	Yes

Add Type Edit Type Delete Type Set as Default

Cost Codes

Enter the names and description of your costs codes here.

Code	Description	Type
LAB1	Labour	LABOUR
MAT1	Material	MATERIALS
MIX1	Mixed	MIXED
OHD1	Overheads	OVERHEADS

Add Code Edit Code Delete Code

OK Cancel

Projects

Creating Records

- Manual - New / Edit
- Import

Options

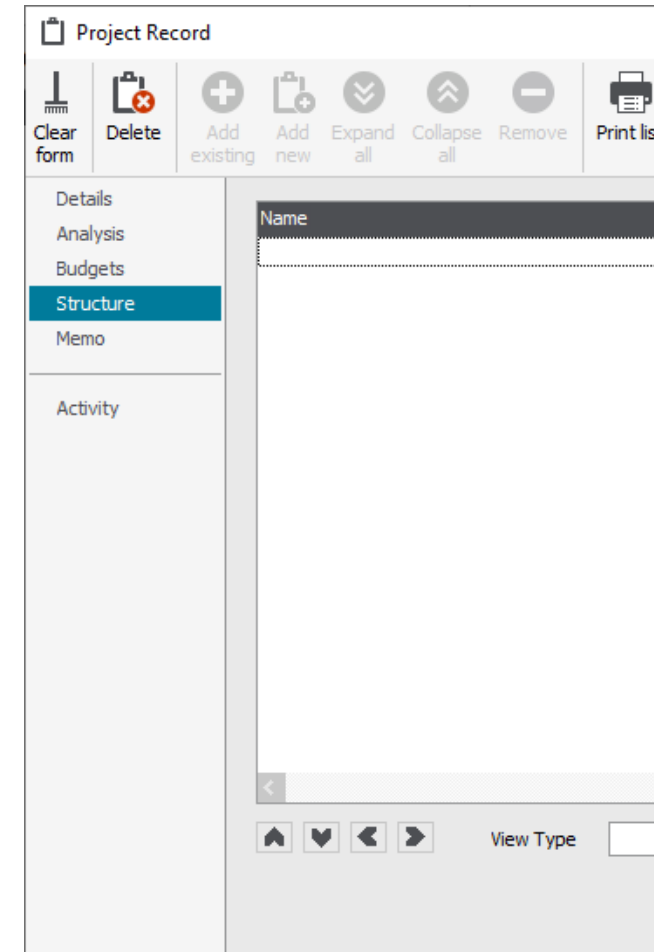
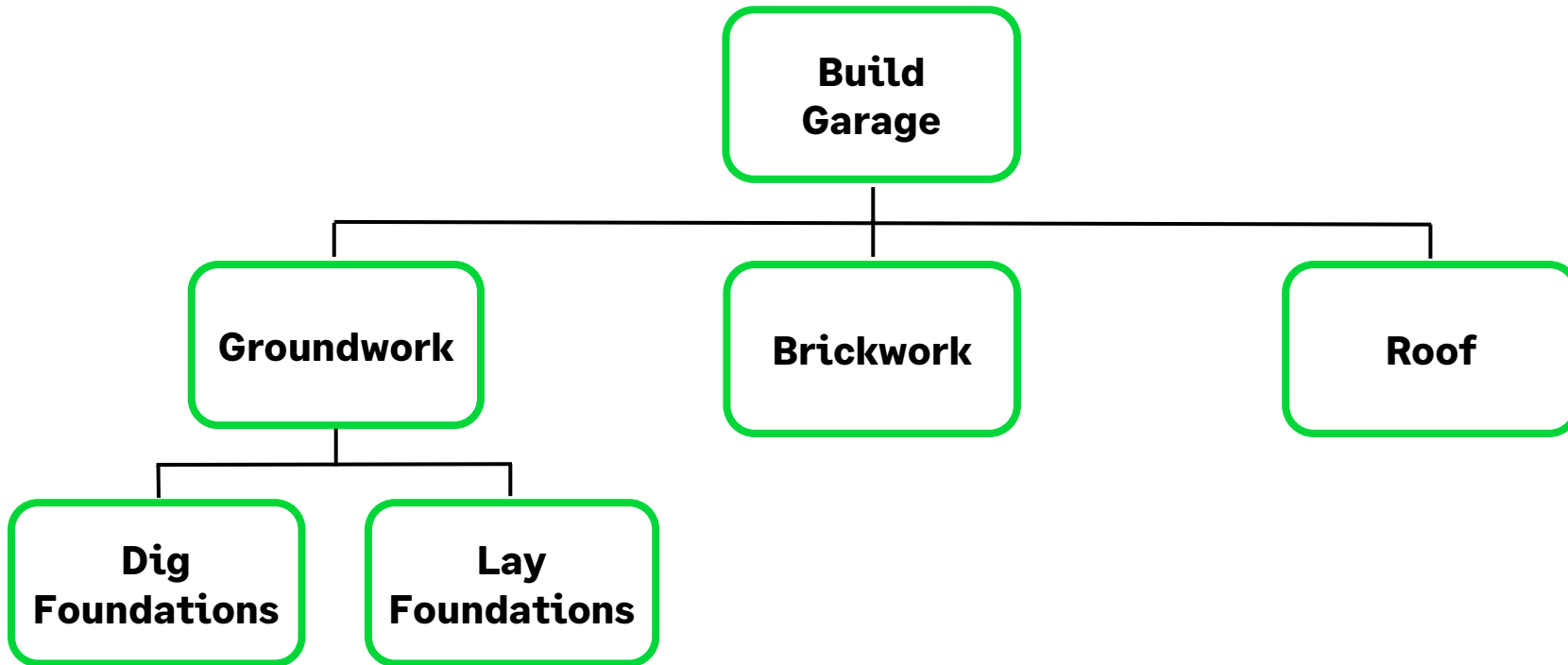
- Details
- Analysis
- Budgets
- Structure – sub projects
- Memo

The screenshot shows a software window titled "Project Record" with a standard Windows-style title bar (minimize, maximize, close) and a "Help" icon. The interface is divided into several sections:

- Navigation Bar:** Contains "Clear form" and "Delete" buttons.
- Left Sidebar:** A menu with "Details" (highlighted in green), "Analysis", "Budgets", "Structure", "Memo", and "Activity".
- Project Details:** A form section containing:
 - Project*: A dropdown menu.
 - Name: A text input field.
 - Description: A text input field.
 - Start Date: A date picker set to 11/04/2024.
 - End Date: A date picker set to 11/04/2024.
 - Status: A dropdown menu set to "ACTIVE Active".
 - Checkboxes: "Allow postings" (checked) and "Allow deletion" (unchecked).
- Customer Details:** A form section containing:
 - A/C Ref: A dropdown menu.
 - Order Number: A text input field.
 - Name: A text input field.
- Site Details:** A form section containing:
 - Contact name: A text input field.
 - Street1 and Street2: A combined text input area.
 - Town: A text input field.
 - County: A text input field.
 - Post Code: A text input field.
 - Telephone: A text input field.
 - Fax: A text input field.
 - Email: A text input field.
 - Country: A dropdown menu set to "United Kingdom GB".
- Bottom Bar:** Contains navigation arrows and a search box, and "Save" and "Close" buttons.

Projects

Structure



Projects

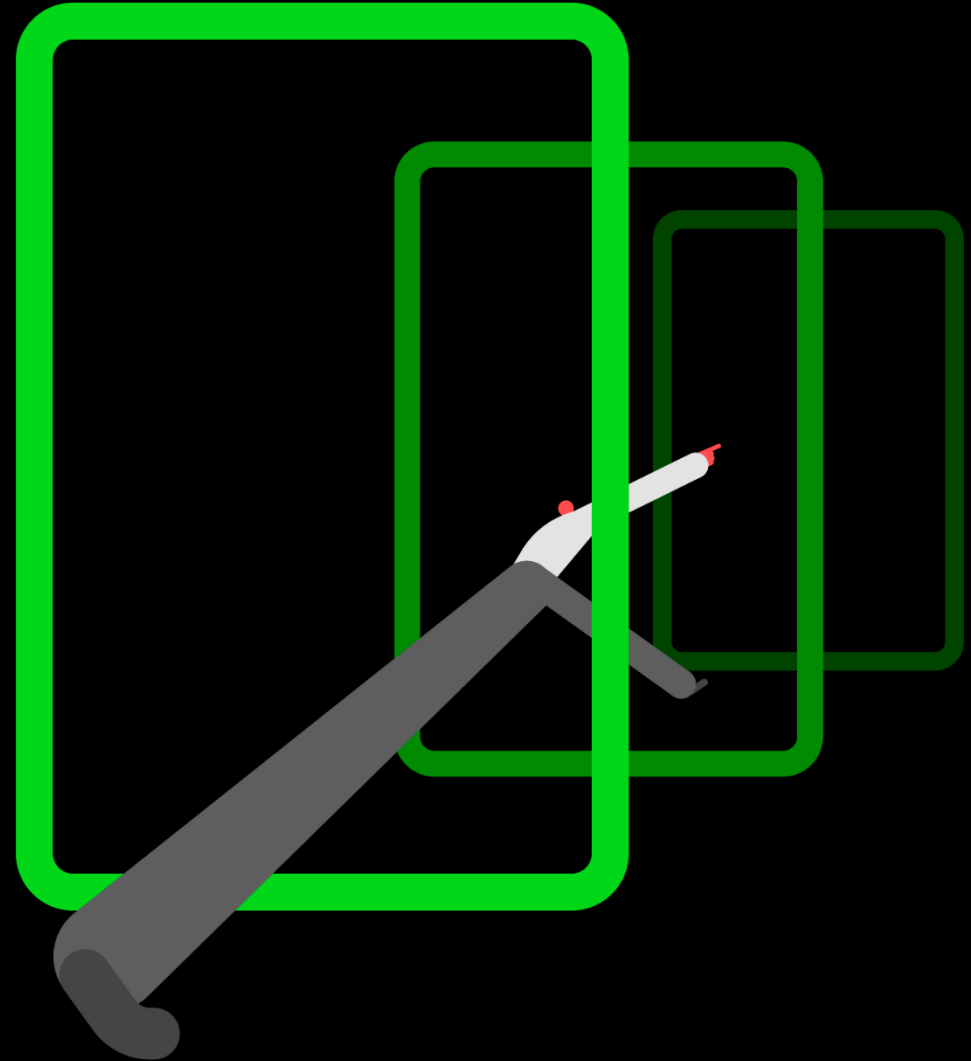
Have a go!

- Sage 50 Accounts > File > Open

**Demo
Data**

**Practice
Data**

Note: Default logon is manager



Help Centre

www.sage.co.uk/help

- Search the knowledgebase
- Support guides
- Webinars
- Videos
- Training
- Get in touch

[Create a project record](#)

The screenshot shows the Sage Help Centre website. At the top, there is a navigation bar with the Sage logo and links for 'Help Centre', 'Products', 'Integrated Apps', 'Sage University', and 'Useful links'. Below this is a secondary navigation bar with 'Sage 50cloud Accounts', 'Hot topics', 'Manage your account', 'Free training', 'Sage City', and 'Webinars'. The main content area features a large black banner with the text 'You need help. We have answers.' and a search bar labeled 'Search for answers...'. To the right of the search bar is an illustration of a person sitting at a desk with a computer, with a large green book in the foreground. Below the banner, there is a section titled 'What do you need help with today?' which contains six cards, each with an icon and a title: 'Install your software', 'Protect and repair your data', 'Manage your VAT', 'Working with the bank', 'Run your accounts remotely', and 'Financial year end'. Each card includes a brief description and a right-pointing arrow.

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.

