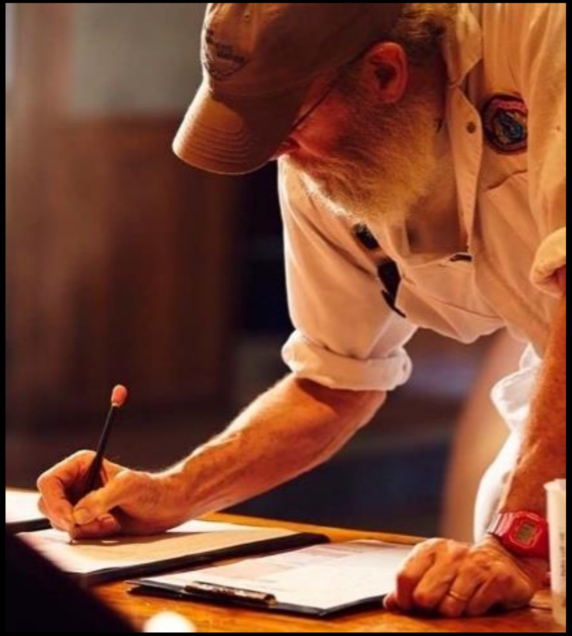
Sage 50 Accounts

Projects - Part 1
Setting up & Creating records



Michael Cox

Contents

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**

Sage

Projects

Introduction

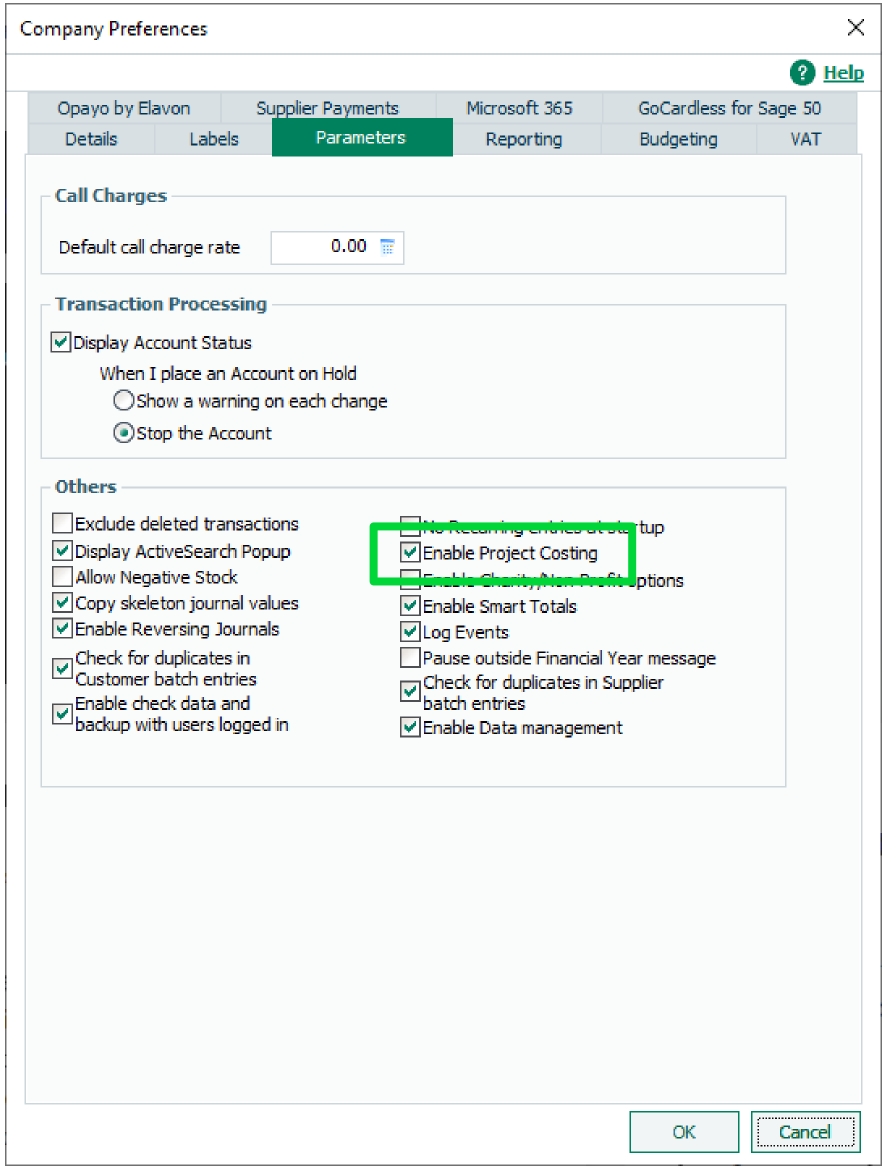
- Available in Sage 50 Accounts Professional

Enable

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

Still can’t see Projects?

- Level of access / Access rights
- Hidden

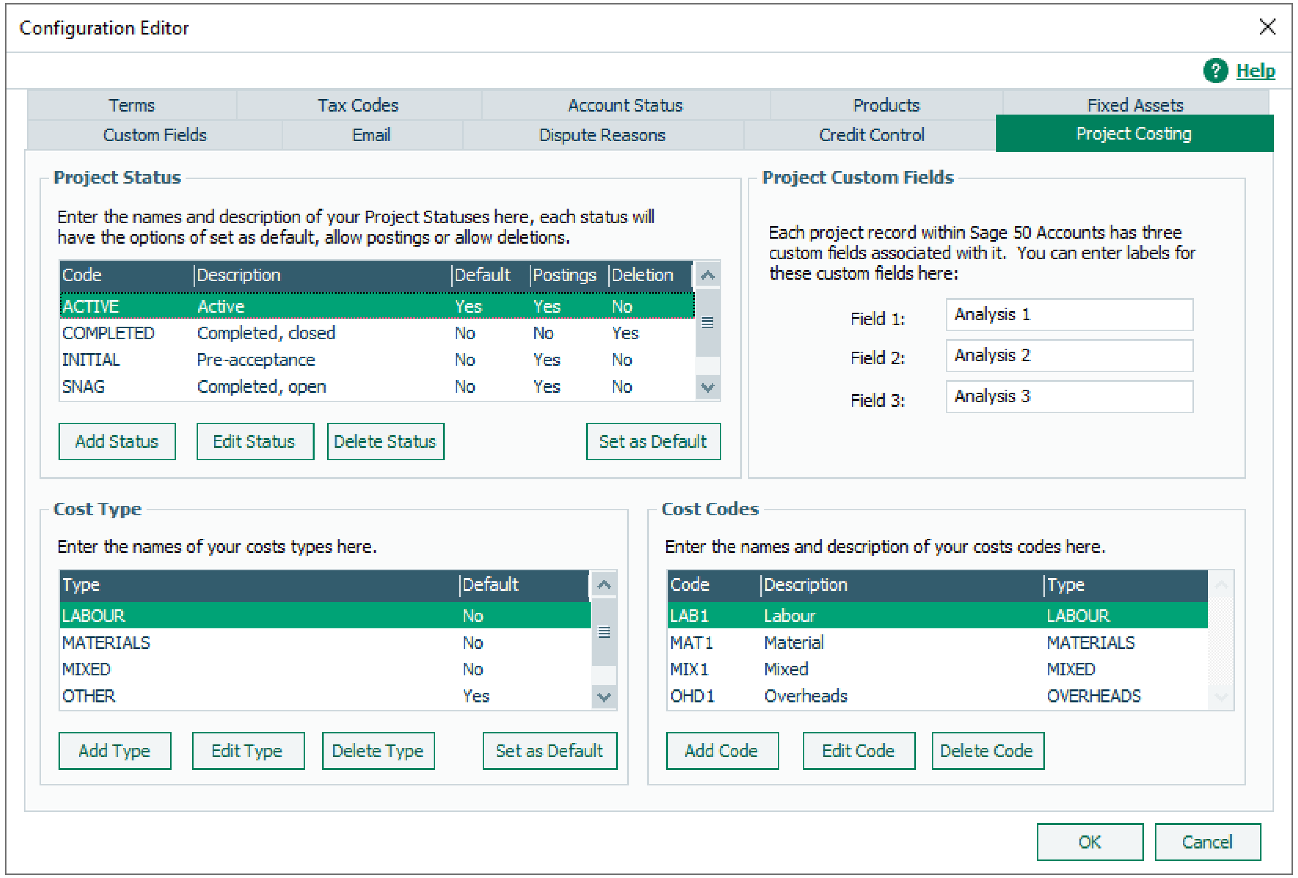


Projects

Setting up

- Settings > Configuration > Project Costing

  - Project Status
  - Project Custom Fields
  - Cost Type
  - Cost Codes



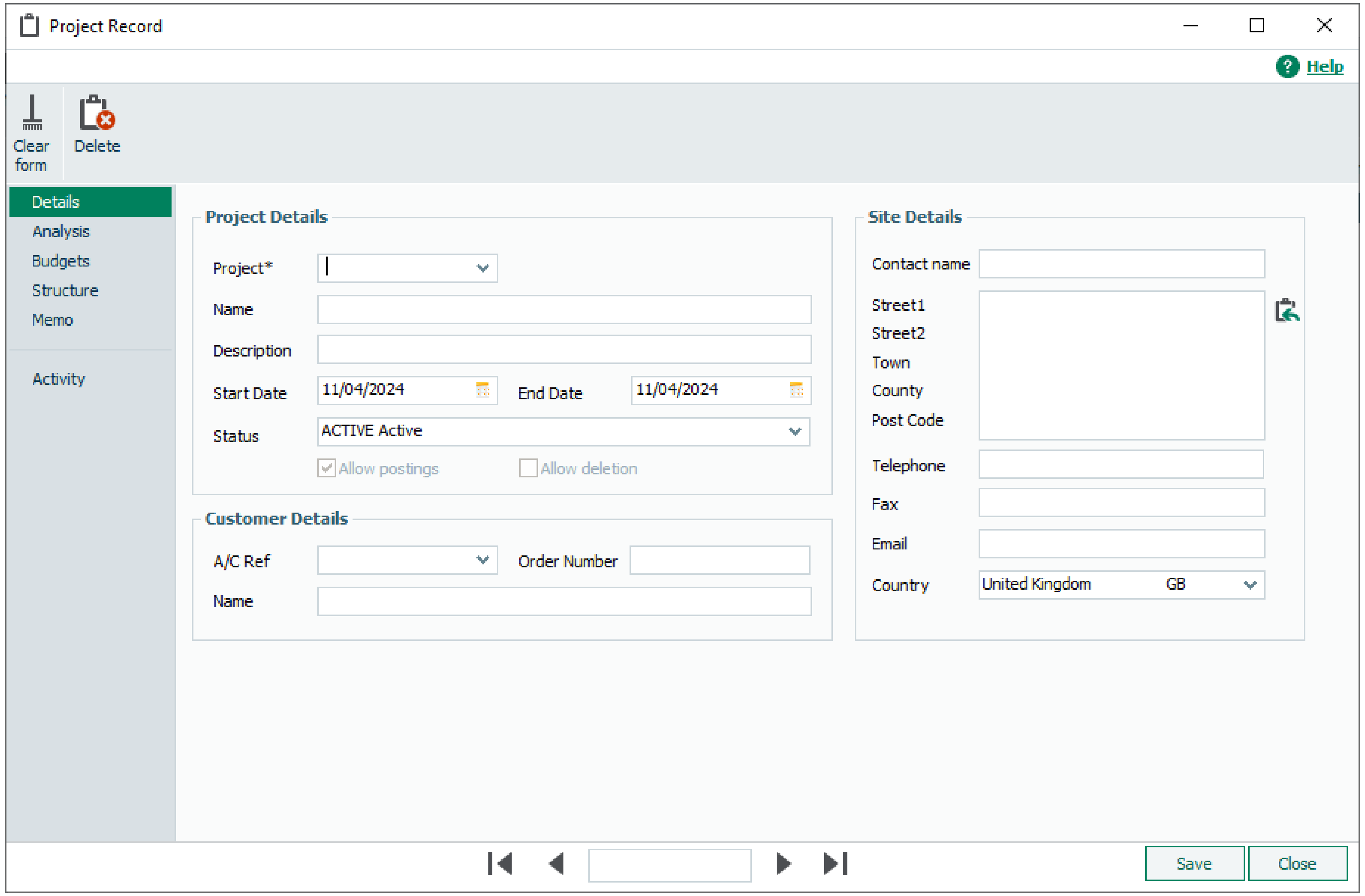
Projects

Creating Records

- Manual - New / Edit
- Import

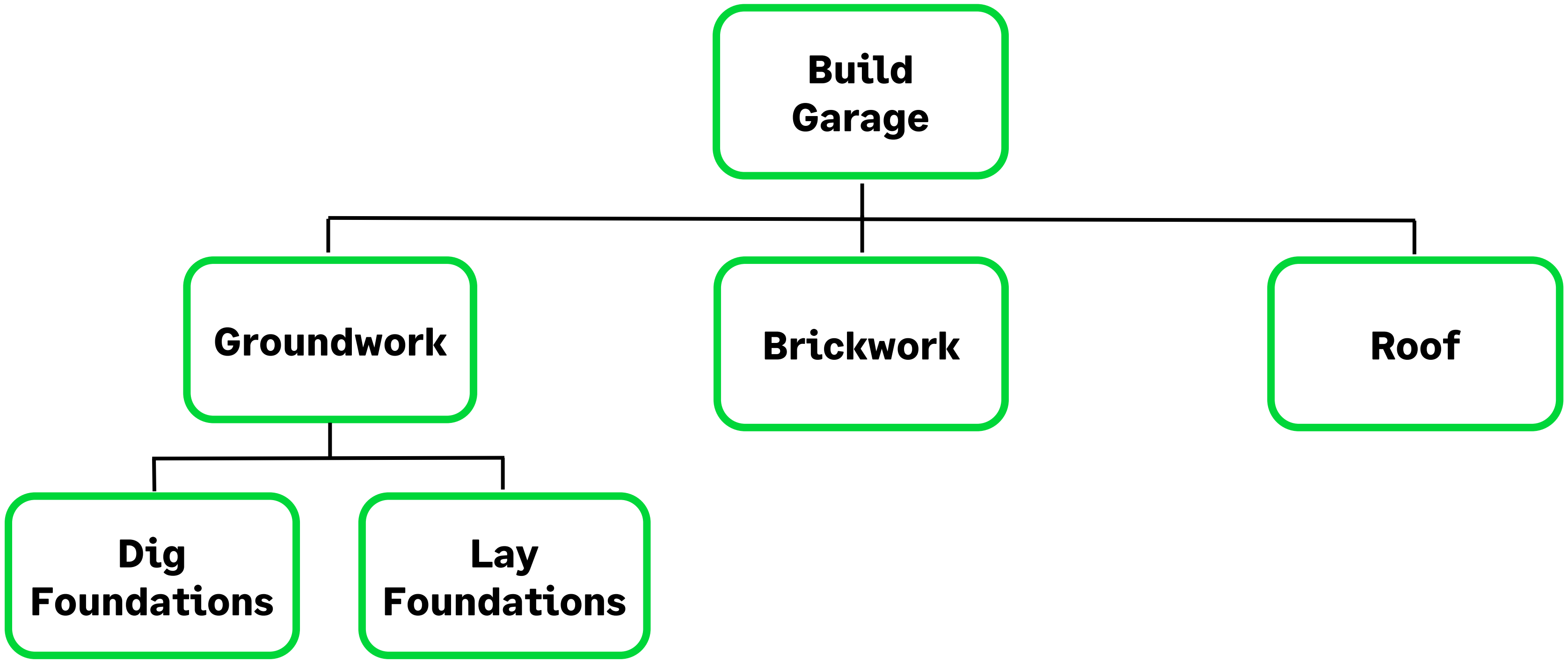
Options

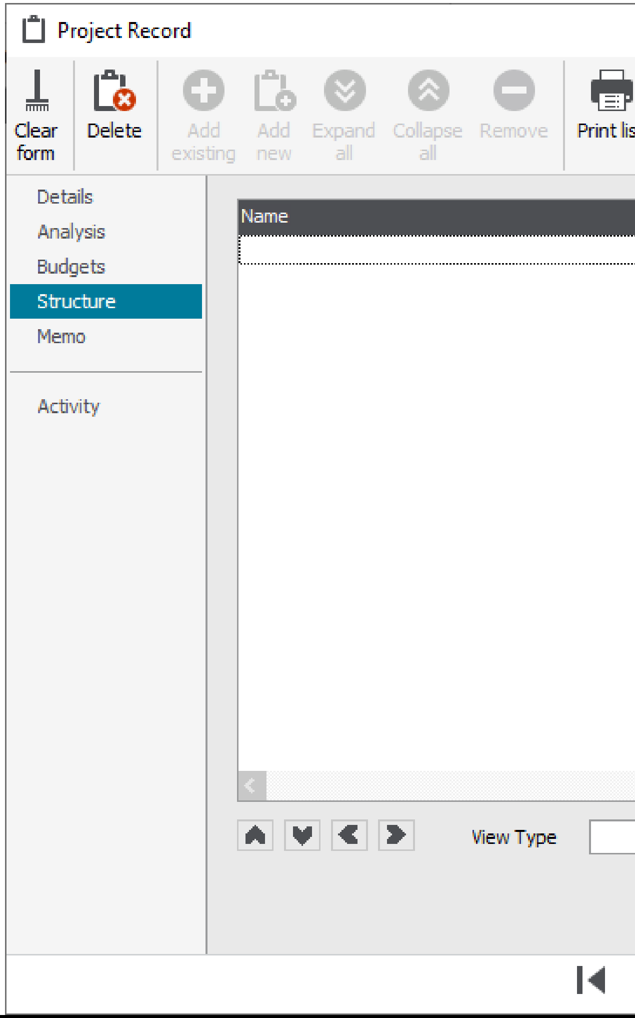
- Details
- Analysis
- Budgets
- Structure – sub projects
- Memo



Projects

Structure





Projects

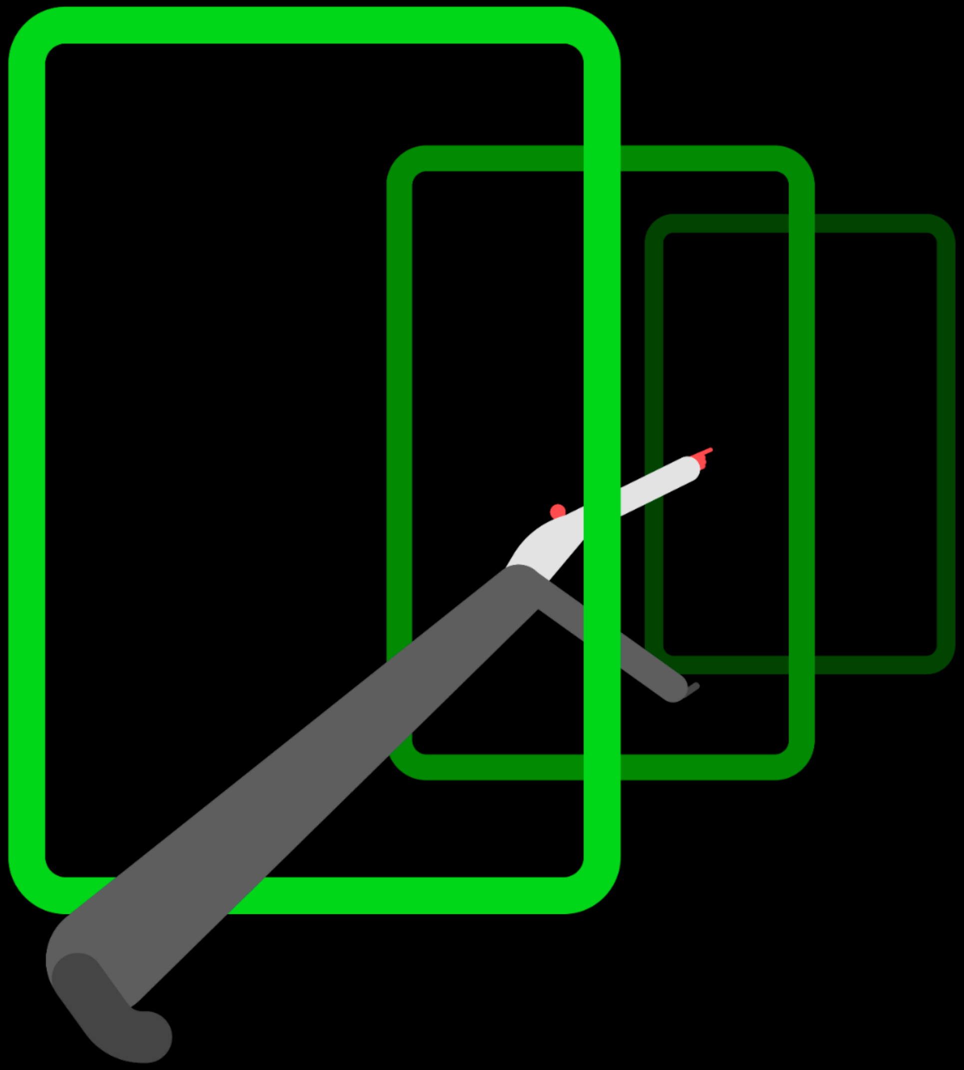
Have a go!

- Sage 50 Accounts > File > Open

Demo Data

Practice Data

Note: Default logon is manager

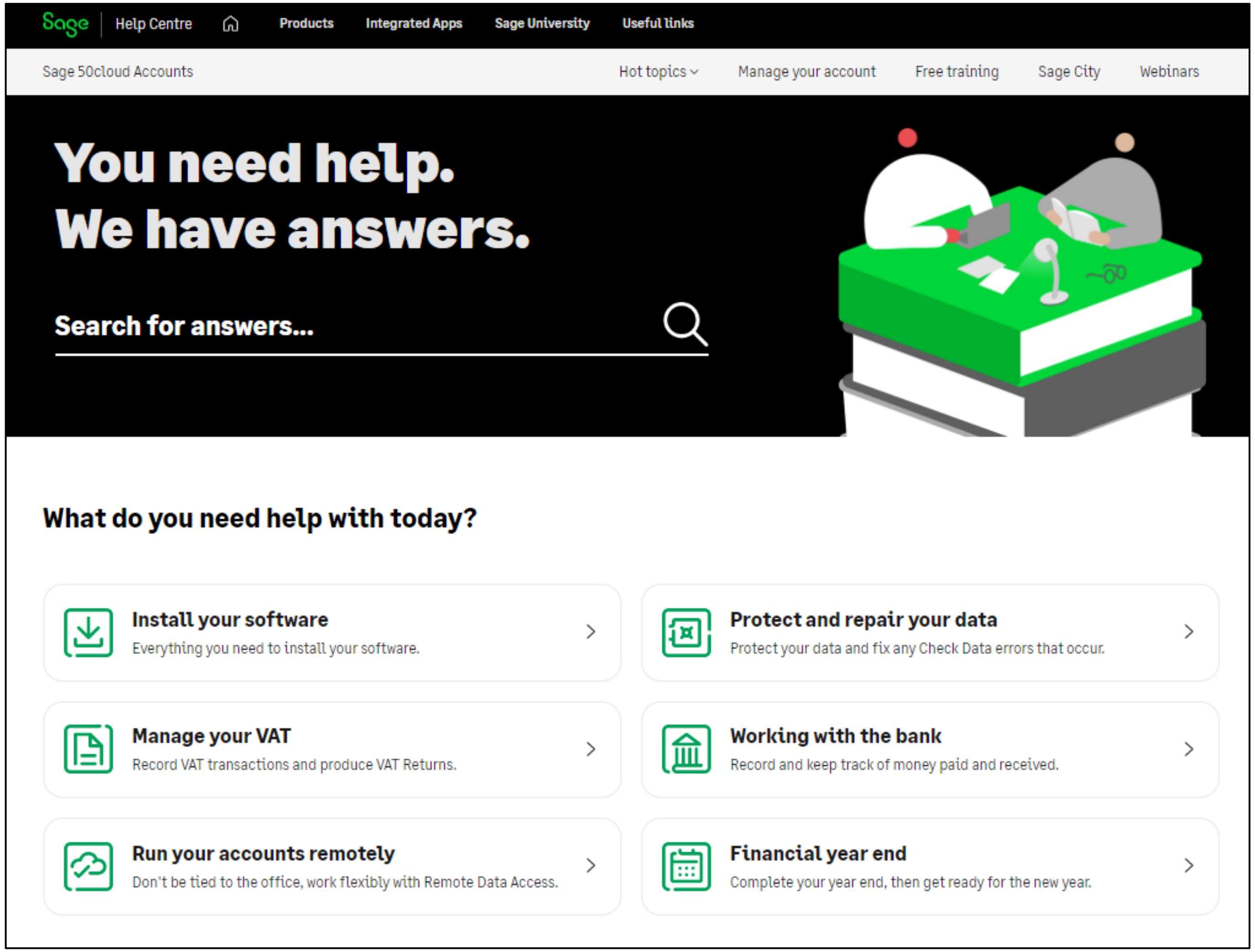


Help Centre

www.sage.co.uk/help

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

Create a project record



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.