

What's new Sage 50 Accounts v29

Jacqui Wilson and Michael Cox

Sage



Housekeeping

What's new Sage 50 Accounts V29?

Jacqui Wilson

Sage

Questions

Automatically muted

Submit your questions

Download handouts

Want answers?

Ask the staff a question

Exit Send

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Guest speaker – Marc Walmsley, Product Marketing Manager

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What's new in v29

We continue to **make the way you use Sage 50, simpler!** A new release packed with tools to save time and add more functionality.

In v28.1 we introduced 22 new features or enhancements based upon customer requests we have continued this in v29 with further improvements based upon the feedback from our customers.

'You asked, We did'

Smart support at your fingertips with our new Related help feature providing contextual in product help wherever you are working in your program.

In v29 we've made a range of improvements to help make your accounting tasks **more efficient, enable customisation and improve productivity.**

Installing v29.

When will I get v29?

- The update will be available from **23 January** for Accountants and partners and from **30 January** 2023 for Customers. The links can be found within your software on the homepage or on www.sage.co.uk/au
- Alternatively, you will be prompted to update your software in due course via our usual methods i.e., email and/or Auto Update.

Where can I access support with installing my update?

- Our install hub www.sage.co.uk/install
- The Sage Help centre www.sage.co.uk/help

Help

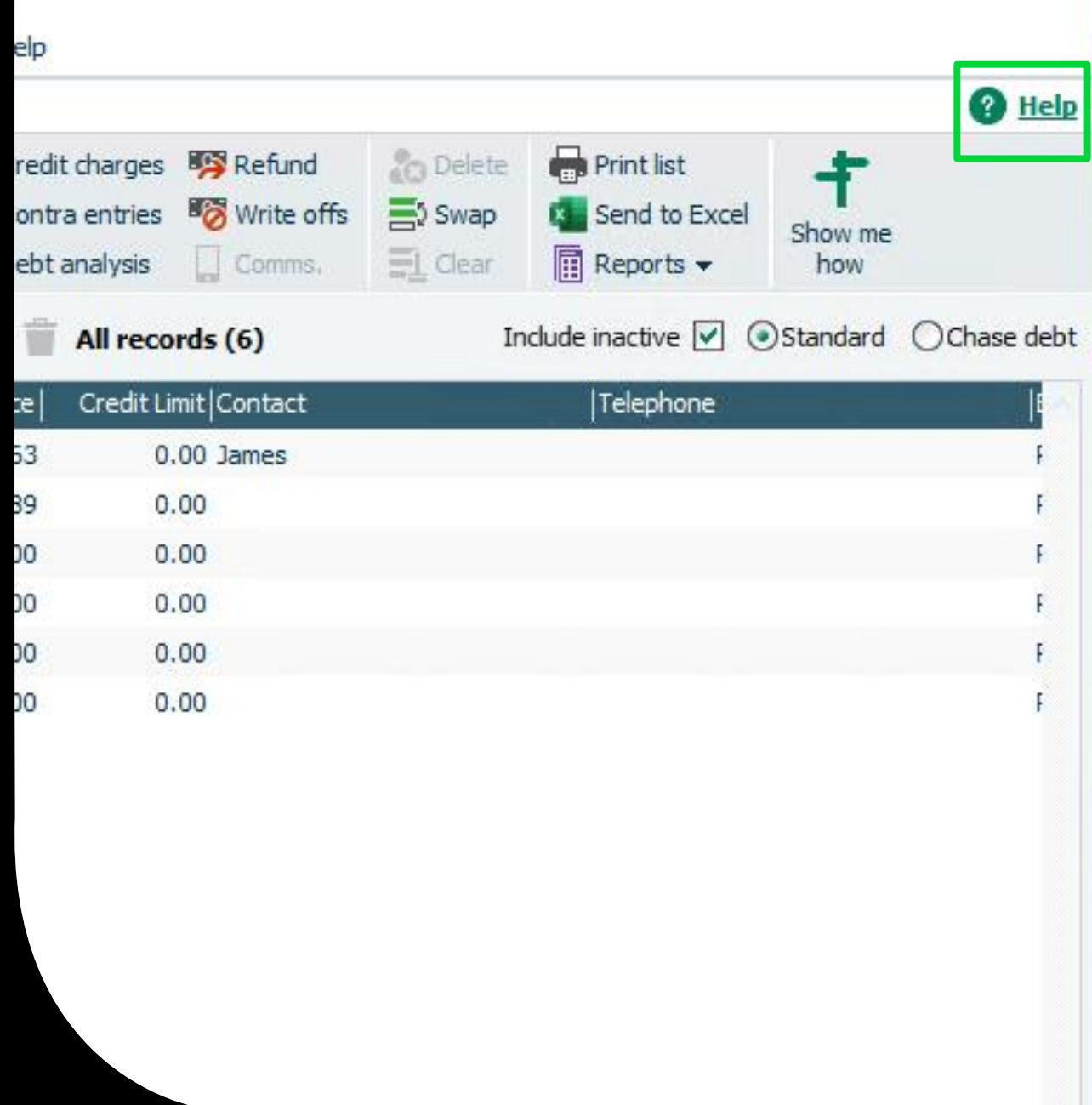


Improved Help.

Introducing our New Help Feature!

New and enhanced, simplified in-product assistance that will unlock help, provide support and **elevate your performance.**

**Help when you need it,
how you need it
and all in one place.**



Help.

The screenshot displays the Sage 50cloud Accounts Professional interface. The main window shows a table of transactions with columns for No, Type, Account, Nominal, Dept, Project, Details, Date, Posted Date, Due On, Ref, and Ex.R. The table is filtered to show 1234 records. A 'Help centre' window is open on the right, displaying a search bar and a list of related help topics under the heading 'Transactions'. The help window shows a guide for 'The Transaction module' and a search option for 'Quickly find a transaction'.

No	Type	Account	Nominal	Dept	Project	Details	Date	Posted Date	Due On	Ref	Ex.R
1211	BP	1200	7100	0		Rent Direct Debit	25/05/2022	25/05/2022		DD/STO	
1212	BP	1200	2310	0		Hire Purchase Payment	28/05/2022	28/05/2022		DD/STO	
1213	BP	1200	7903	0		Hire Purchase Interest	28/05/2022	28/05/2022		DD/STO	
1214	BP	1200	7100	0		Rent Direct Debit	22/06/2022	22/06/2022		DD/STO	
1215	BP	1200	2310	0		Hire Purchase Payment	28/06/2022	28/06/2022		DD/STO	
1216	BP	1200	7903	0		Hire Purchase Interest	28/06/2022	28/06/2022		DD/STO	
1217	BP	1200	7100	0		Rent Direct Debit	20/07/2022	20/07/2022		DD/STO	
1218	BP	1200	2310	0		Hire Purchase Payment	28/07/2022	28/07/2022		DD/STO	
1219	BP	1200	7903	0		Hire Purchase Interest	28/07/2022	28/07/2022		DD/STO	
1220	BP	1200	2310	0		Hire Purchase Payment	28/08/2022	28/08/2022		DD/STO	
1221	BP	1200	7903	0		Hire Purchase Interest	28/08/2022	28/08/2022		DD/STO	
1222	BP	1200	2202	1		HMRC VAT Payment	12/04/2022	12/08/2022		999999995	
1223	BP	1200	2202	1		HMRC VAT Payment	12/07/2022	12/08/2022		999999995	
1224	SI	COM001	4000	1		Whiteboard - Drywipe (1000 x 1500)	12/08/2022	12/08/2022	26/09/2023	74	
1225	SI	COM001	4000	1		Calculator - Desktop	12/08/2022	12/08/2022	26/09/2023	74	
1226	SI	COM001	4000	1		Envelope - White (110 x 220) Plain	12/08/2022	12/08/2022	26/09/2023	74	
1227	SI	COM001	4000	1		Whiteboard - Drywipe (1000 x 1500)	12/06/2022	12/08/2022	27/07/2023	75	
1228	SI	COM001	4000	1		Calculator - Desktop	12/06/2022	12/08/2022	27/07/2023	75	
1229	SI	COM001	4000	1		Envelope - White (110 x 220) Plain	12/06/2022	12/08/2022	27/07/2023	75	
1230	SI	COM001	4000	1		Whiteboard - Drywipe (1000 x 1500)	12/08/2022	12/08/2022	26/09/2023	76	
1231	SI	COM001	4000	1		Calculator - Desktop	12/08/2022	12/08/2022	26/09/2023	76	
1232	SI	COM001	4000	1		Envelope - White (110 x 220) Plain	12/08/2022	12/08/2022	26/09/2023	76	
1233	SI	SDE001	4000	1	PROJ001	Install 4 PCs as requested (PC Com...	11/07/2022	12/08/2022	10/08/2023	77	
1234	SI	SDE001	4000	1	PROJ001	Install 4 PCs as requested (PC Com...	11/08/2022	12/08/2022	10/09/2023	78	

- New help links within every window of the software giving you **quick easy access** to in-product help at the click of a button.
- Solutions provided are contextual to the area of the product you are working in, or the task being completed, Meaning you always get **targeted and relevant help every time**
- The help window will remain open in the software enabling you to continue working whilst accessing the online support and help documents simultaneously.

Sage City requests.



Sage City requests.

Customisation to fit your business needs.

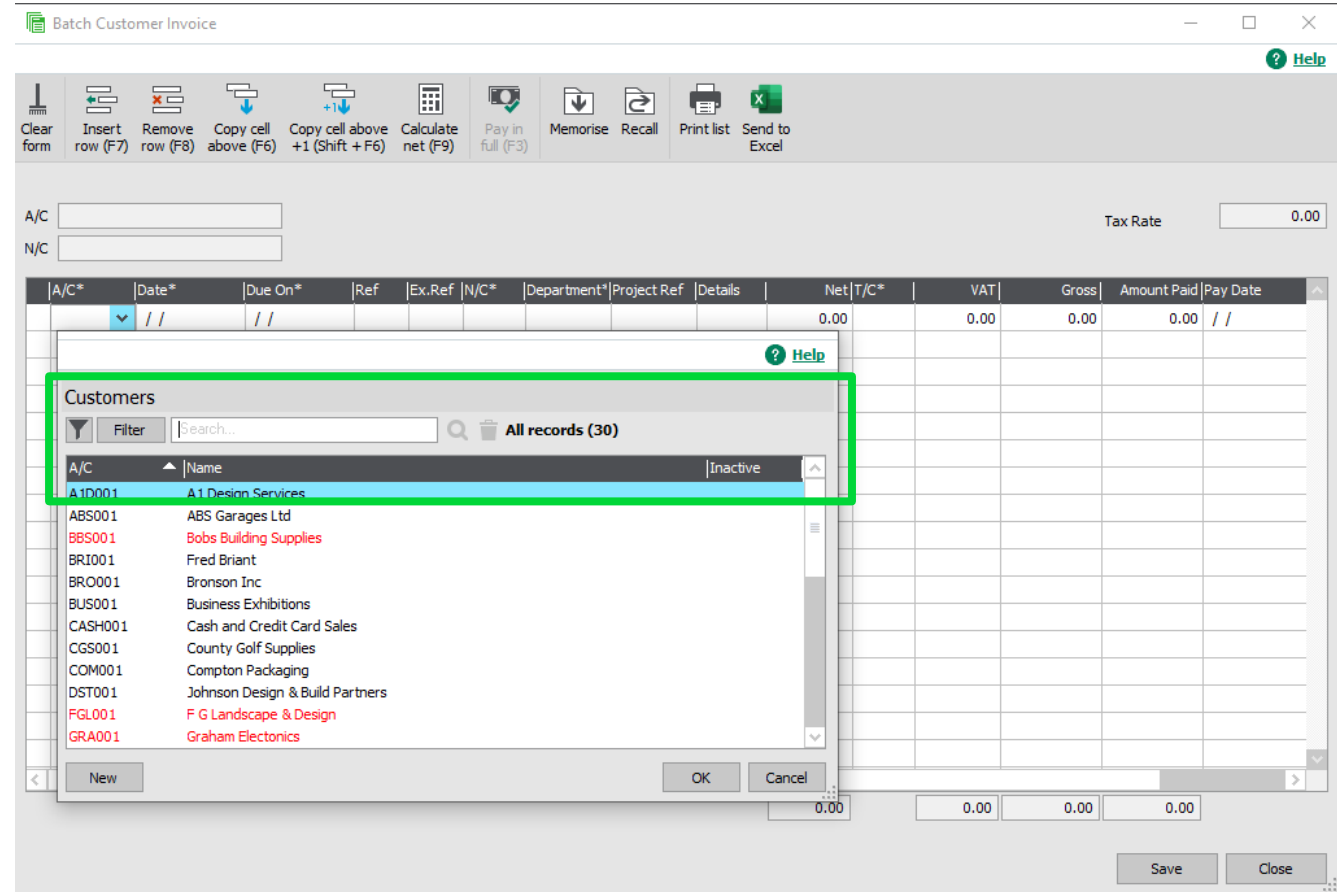
We have increased the number of characters you can enter for Product Descriptions and Part numbers in the Product Record, and added additional analysis & email fields in customer & supplier records providing you with additional capability to **customise your product to suit your needs.**

Day-to-Day tasks simplified so you can focus on what matters.

This includes an Improved search functionality enables you to quickly locate records based on various information, and a new Gross column on batch data entry screens and a new Calc net on recurring items to **save you time** by removing the need for manual calculations.

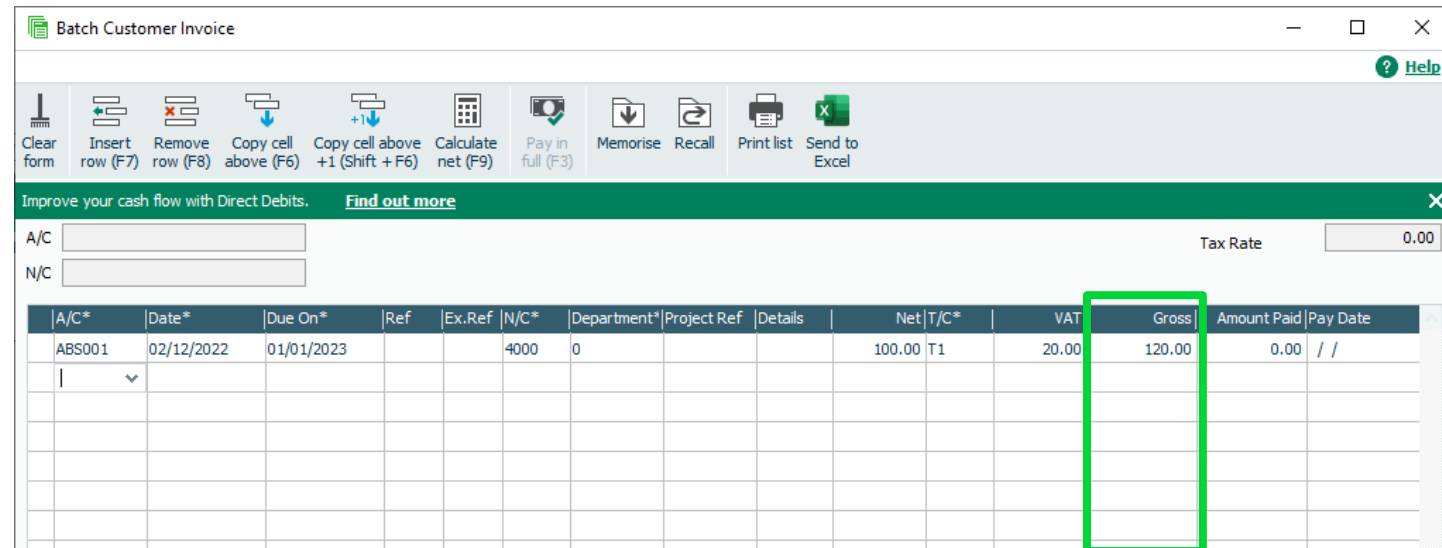
Improved search capabilities.

- Improvements to the search feature will **increase productivity** and enable you to search your data effectively.
- Searches can be applied across most fields rather than just the reference field.
- These searches have been added to drop downs within processing windows.
- The Search option has also been added to additional modules including Projects, Departments and Nominal codes



Gross column added to batch entries.

- Traditionally, Batch Entry windows would display the Net and VAT columns but would not display the Gross figure.
- v29 introduces a new column to display the Gross figure in addition to the Net and VAT values. This field is read only so cannot be amended
- Users will no longer need to manually calculate the gross figure if cross checking with invoices and documents.
- **Improves Accuracy and Automation** of processing.



The screenshot shows the 'Batch Customer Invoice' window in Sage software. The window title is 'Batch Customer Invoice' and it includes a 'Help' button. The toolbar contains various icons for actions like 'Clear form', 'Insert row (F7)', 'Remove row (F8)', 'Copy cell above (F6)', 'Copy cell above +1 (Shift + F6)', 'Calculate net (F9)', 'Pay in full (F3)', 'Memorise', 'Recall', 'Print list', and 'Send to Excel'. Below the toolbar, there is a green banner with the text 'Improve your cash flow with Direct Debits. Find out more'. The main area contains input fields for 'A/C' and 'N/C', and a 'Tax Rate' field set to '0.00'. The primary data is presented in a table with the following columns: A/C*, Date*, Due On*, Ref, Ex.Ref, N/C*, Department*, Project Ref, Details, Net, T/C*, VAT, Gross, Amount Paid, and Pay Date. The first row of data shows: A/C* ABS001, Date* 02/12/2022, Due On* 01/01/2023, N/C* 4000, Department* 0, Net 100.00, T/C* T1, VAT 20.00, Gross 120.00, Amount Paid 0.00, and Pay Date // . The 'Gross' column is highlighted with a green border.

A/C*	Date*	Due On*	Ref	Ex.Ref	N/C*	Department*	Project Ref	Details	Net	T/C*	VAT	Gross	Amount Paid	Pay Date
ABS001	02/12/2022	01/01/2023			4000	0			100.00	T1	20.00	120.00	0.00	//

Calculate net on recurring items.

- **Time saving and Improved Accuracy** with the ability to calculate Net on your recurring items
- Eliminates the need for manual calculations.
- Fewer errors and increased productivity by getting the software to do the manual work.

Add / Edit Recurring Entry

Recurring Entry From / To

Bank A/C* 1210 Bank Deposit Account

Nominal Code* 7801 Cleaning

Recurring Entry Details

Transaction Type Bank/Cash/Credit Card Payment

Transaction Ref DD/STO

Transaction Details CC Commercial Cleaners LTD

Department* 0 Default

Posting Frequency

Every* 0 Month(s) Total Required Postings 0

Start Date* 02/12/2022 Finish Date

Next Posting Date 02/12/2022 Suspend Posting?

Last Posted

Posting Amounts

Net Amount 623.33 Tax Code* T1 20.00 VAT 124.67

Calculate net OK Cancel

Additional analysis and Email fields.

- **Improved customisation** is possible with the addition of 3 additional analysis fields within both customer and supplier records.
- These can be customised with in Settings> configuration and then added to reports for analysis.
- In addition, an additional 3 email addresses can be added to customer records which can also be customised.

The screenshot displays a Sage CRM customer record form. The interface includes a top navigation bar with icons for 'Clear form', 'New invoice', 'New order', 'New project', 'Delete', 'Skype', and 'Google Maps'. A left-hand sidebar contains a 'Details' menu with options like 'Defaults', 'Credit Control', 'Bank', 'Alerts', 'Communications', 'Memo', 'Activity', 'Sales', 'Orders', 'Projects', and 'Graph'. The main content area is divided into several sections: 'Account Details' (with fields for A/C*, Company name, Company Reg. Number, Balance, and Inactive), 'Registered Address' (with fields for Street1, Street2, Town, County, Post Code, Country, VAT Number, and EORI Number), '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 six email address fields and a checkbox for 'I send letters, statements, etc. to this customer via email'). A 'Direct Debit Manager' section is also visible at the bottom.

Product description and part number.

- Product description field increased to 120 characters (previously 60).
- The Product part number increased to 60 characters (previously 16).
- This enables you add further information in the product record without having to shorten descriptions and part numbers and **customise** the software to meet your needs.

The screenshot displays the Sage software interface for product management, divided into two main sections: Product Details and Defaults.

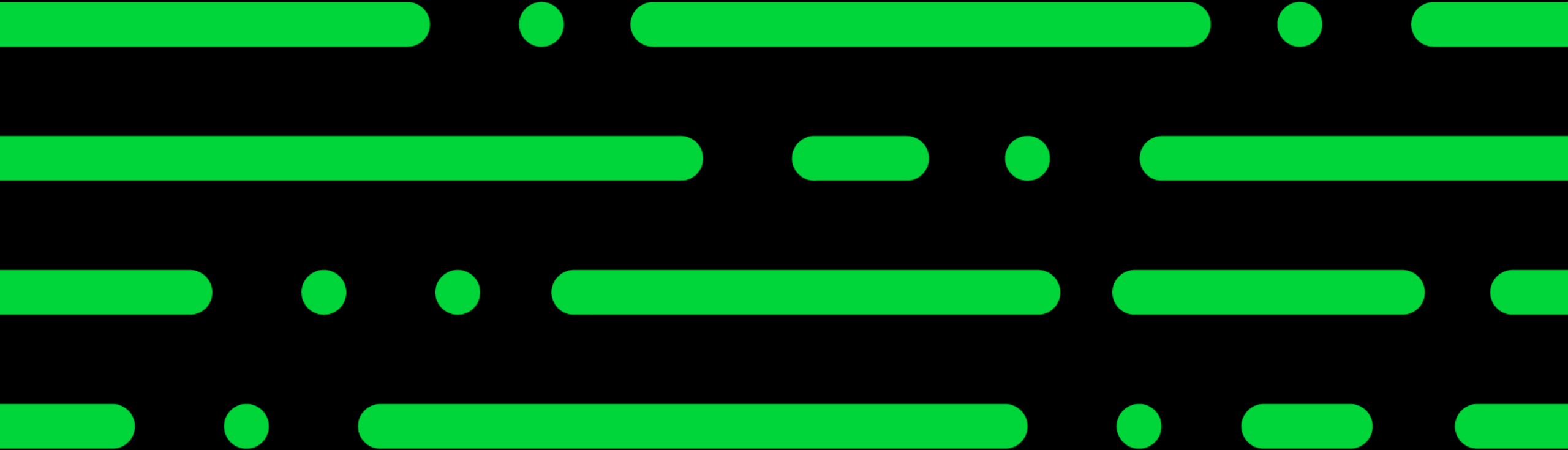
Product Details:

- Product Code*:** PINEDOORS
- Item Type:** Stock Item
- Description:** Pine finish wooden internal doors full panel partially Glazed 50cm x70cm x10cm Rec
- Category:** 1
- Intrastat Com. Code:** (empty)
- Supp Unit Qty:** 0.00
- Com. Code Description:** (empty)
- Weight (kg):** 0.00
- Bar Code:** (empty)
- Inactive:** (with a green question mark icon)
- Location:** (empty)
- Country of Origin:** United Kingdom GB

Defaults:

- Sales Nominal Code:** 4000
- Tax Code:** T1 20.00
- Purchase Nominal Code:** 5000
- Part No.:** PF50x70x10X123456789ABI
- Supplier A/C:** (empty)
- Department:** [Icon] Default
- EC VAT Description:** (empty)

Enhancements to support Cash Flow Management.



Invoice layouts with bank details.

- Get paid quicker by giving customers everything they need for quick payment.
- Version 29 includes standard layouts with bank details.
- Details are picked up from the bank record.
- How to add bank details to an invoice layout is a common support query.
 - steps in Help Centre if needed

Name	Description	Last Run	Filename
★ A4 Inv\Crd Unit Price, Without Discount (Tax Breakdown)	Includes details of VAT rates and values.		TBIPA4
★ A4 Inv\Crd Unit Price, Without Discount, With EC Vat Description	EC VAT description is included, with totals shown in Sterling.		ECINVA4
★ A4 Inv\Crd Without Discount - Plain Paper (Print or Email)	Designed to be emailed or printed on plain paper. No discount values are included. To be sent via post or email.		INVPLAINA4
★ A4 Inv\Crd Without Discount with bank details - Plain Paper (Print or Email)	Designed to be emailed or printed on plain paper. Includes the bank details from the invoice, but no discount values. To be sent via post or email.	02/12/2022 13:57	INVPLAINA4_BANKDETAILS
★ A4 Self Seal Invoice (With Discount)	To be used with Sage Self Seal stationery. Discount amounts are included.		SELFSEALA4WITHDISCOUNT
★ A4 Self Seal Invoice (Without Discount)	To be used with Sage Self Seal stationery.		SELFSEALA4WITHOUTDISCOUNT
★ E-Mail Invoice (Euro)	Totals are shown in Euro and Sterling. For HTML output.		EMA_INV

Invoice Payments.

- In v29, Invoice Payments includes two enhancements:

Partial Payment

- Customers can now choose to make a part payment.
- Useful if they can't afford to make a full payment.
- Disputed items or returns don't get in the way.

Settlement Discount

- When making a full payment, if offered, settlement discount will be shown and the payment amount will clearly show how much should be paid.

Invoice

From:
V29.0 Webinar Demo
Sage UK
C22 and C23 Cobalt Park Way
Newcastle upon Tyne

To:
ABS GARAGES

VAT Reg No: FR12345678901

Invoice No. 11
Invoice / Tax Date 05/12/2022
Customer Order No.
Account No. ABS001

Quantity	Details	Unit Price	Disc Amt	Net Amt	VAT %	VAT
2.00	Pine finish wooden doors 50cm x70cm	27.56	0.00	55.12	20.00	11.02
2.00	Chrome Cupboard Handles	8.12	0.00	16.24	20.00	3.25

Total Net Amount 71.36
Carriage Net 0.00
Total VAT Amount 14.27
Invoice Total 85.63
Euro Total 0.00

[Pay Now](#)

With Sage Invoice Payments you can make payments securely and conveniently through a trusted payment service provider.
To make a payment, select Pay Now.

Invoice Finance – UK only.

- Access fast, flexible finance with Satago.
- Get an advance on the money tied up in customer invoices.
 - Up to 85% of an invoice value can be advanced.
 - Choose which invoices to finance.
- Integration with Sage 50 makes the process faster.



Invoice Finance Integration.

- The integrated Invoice Finance module provides quick access to the Satago portal from Sage 50 Accounts.
- Check for eligible invoices, submit for invoice financing and keep on top of your Satago account.
- Gain fast access to funds within 24 hours of approval*.
- To get started > Apps and add-ons
- Keep an eye out for webinars starting in February.

Sage 50cloud Accounts Professional - SMITHS LIMITED

File Edit View Modules Settings Tools Favourites WebLinks Software updates Help

Home
Apps and add-ons ●
Business dashboard ●

Customers
Quotations ●
Sales orders
Invoices and credits
Invoice Finance

Suppliers
Purchase orders

Products and services

Bank accounts
Nominal codes
VAT ●
Transactions

Fixed assets
Departments ●
Projects

Diary

For help and support please contact Satago customer services on 020 8050 3016

Satago

! You need to select a Sa

SMITHS LIMITED / Finance

Taskboard

Finance ▾

Eligible Invoices

Pending Invoices

Financed Invoices

My Account

Bank Transactions

£1,000.00 available credit

Date Type

There are no invoices

*Additional fees apply

Compliance.



EORI Numbers.

The screenshot shows a software dialog box titled "Address" with a close button (X) in the top right corner and a "Help" button (question mark icon) in the top right corner. The dialog is divided into several sections:

- General:** Contains a "Description*" field with the value "France Delivery Address", an "Address type" dropdown menu set to "Registered address", and a "Notes" text area.
- Address:** Contains fields for "Company" (ABS GARAGES), "Street1" (2452 Rue de Lyon), "Street2", "Town" (Paris), "County", "Post Code", and "Country" (France / FR).
- Contact Details:** Contains fields for "Contact name:", "Role:", "Telephone:", "Telephone 2:", "Fax:", and "Email:".
- VAT Details:** Contains a "Def. Tax Code:" dropdown menu (T1 20.00), a "VAT Number:" field (FR12345678901), and an "EORI Number:" field (FR1234567) which is highlighted with a green border.

At the bottom of the dialog are "OK" and "Cancel" buttons.

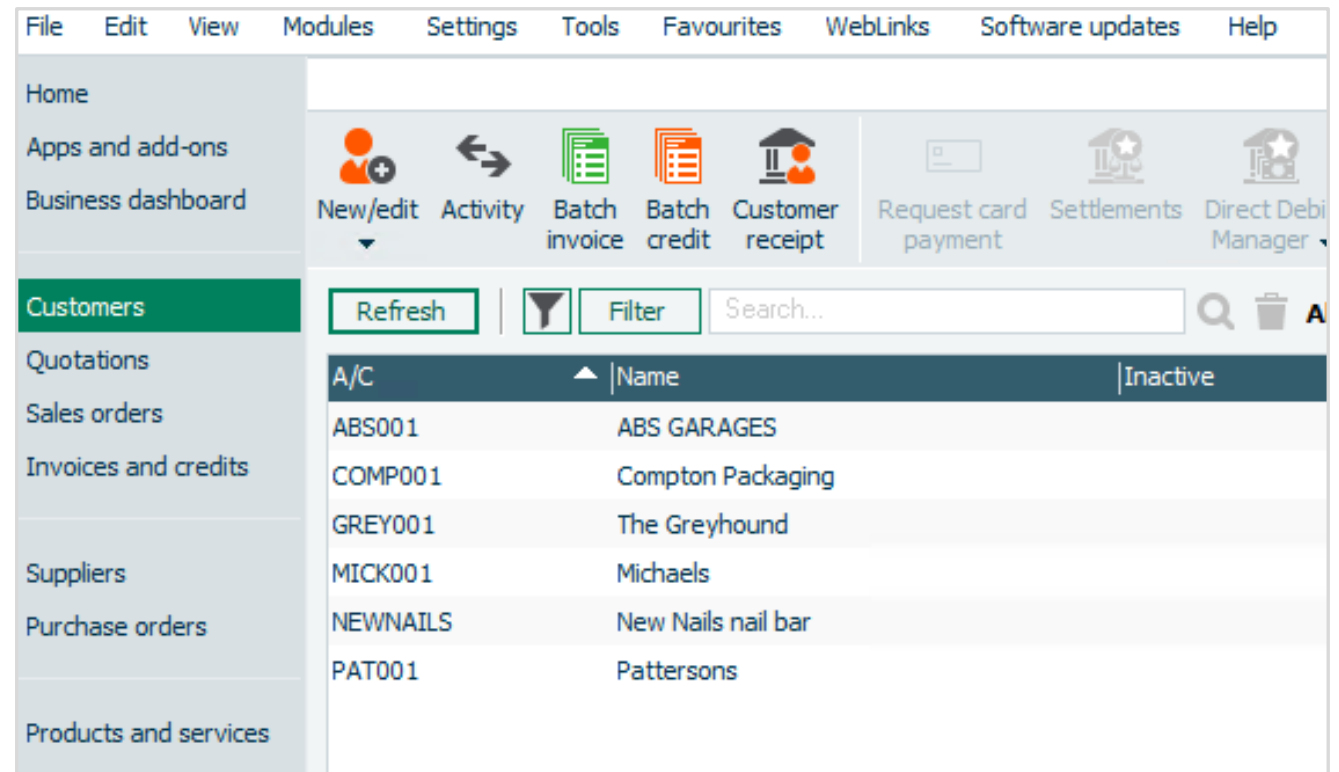
- To remain compliant with post Brexit legislation, EORI numbers need to be stored on customer and supplier delivery addresses.
- Additional box to add an EORI number to each additional address within Addresses & Contacts.

Other enhancements.



Ledger refresh.

- Refresh option added to most modules.
- Ensures the data you see is up to date.
- Simple way to refresh your ledgers.
- Use F5 to refresh.

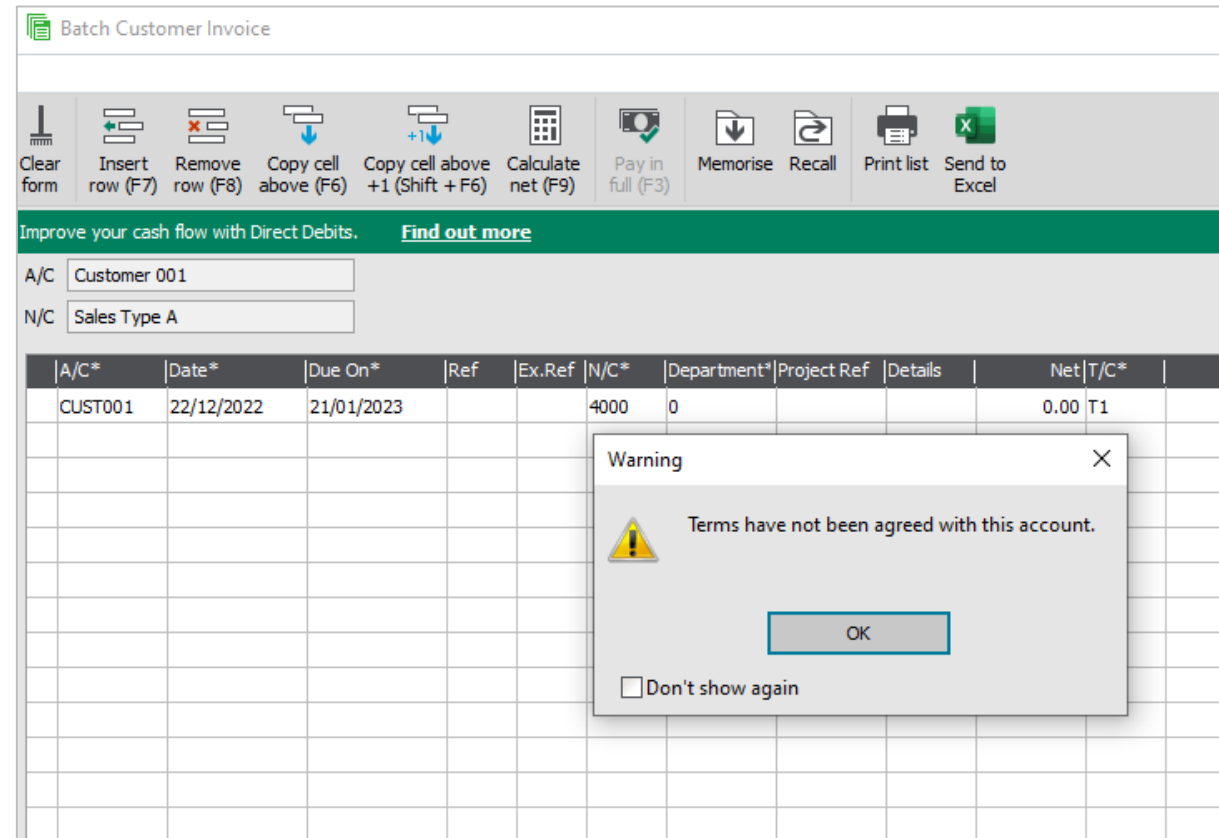


The screenshot shows the Sage software interface. The top menu bar includes File, Edit, View, Modules, Settings, Tools, Favourites, WebLinks, Software updates, and Help. The left sidebar lists various modules: Home, Apps and add-ons, Business dashboard, Customers (highlighted in green), Quotations, Sales orders, Invoices and credits, Suppliers, Purchase orders, and Products and services. The main content area displays a table of customer accounts. Above the table, there is a toolbar with buttons for New/edit, Activity, Batch invoice, Batch credit, Customer receipt, Request card payment, Settlements, and Direct Debit Manager. A 'Refresh' button is highlighted in green in the toolbar. Below the toolbar, there is a search bar and a filter icon. The table has columns for A/C, Name, and Inactive. The data rows are as follows:

A/C	Name	Inactive
ABS001	ABS GARAGES	
COMP001	Compton Packaging	
GREY001	The Greyhound	
MICK001	Michaels	
NEWNAILS	New Nails nail bar	
PAT001	Pattersons	

Don't show again messaging.

- 'Don't show again' check box added to messages:
 - Terms agreed message
 - Sales order status
 - Processing outside financial year
 - Credit charges - if foreign trader activated
 - Contra entries - if foreign trader activated



Batch Customer Invoice

Clear form | Insert row (F7) | Remove row (F8) | Copy cell above (F6) | Copy cell above +1 (Shift + F6) | Calculate net (F9) | Pay in full (F3) | Memorise | Recall | Print list | Send to Excel

Improve your cash flow with Direct Debits. [Find out more](#)

A/C Customer 001
N/C Sales Type A

A/C*	Date*	Due On*	Ref	Ex.Ref	N/C*	Department*	Project Ref	Details	Net	T/C*
CUST001	22/12/2022	21/01/2023			4000	0			0.00	T1

Warning

Terms have not been agreed with this account.

OK

Don't show again

Other enhancements.

**New Sage branding
within the software**

**Home page
Clear messaging to
indicate if no response
is received from the
server**

**Removal of features
relying on
Internet Explorer**

**Company registration
fields in
Customer/ Supplier
and Company details**

**Removal of
Accountants link feature**

**VAT performance
improvements – A faster
VAT return process**

**Search bar and Filter
options added to
Projects module**

**Change the official name
of Turkey to Turkiye**

**Zipped reports to
improve the speed of
software installation**

**Reinstate the ability to
ignore 'Zero Value'
entries on file import**

Summary.

Today has just been a taste of what's to come with v29 and there are many more fantastic improvements on the way.

Many improvements are as a result of your feedback and ideas submitted to Sage City.

The update is due to be released to customers on 30 January.

Keep an eye out for in-product messaging, automatic updates and emails.



Sage 50 Accounts Roadmap.

- Access from the in-product Home page.
- View our timeline.
- See what's next.
- View suggestions.
- Vote for your favourites.
- Submit your own ideas.

The screenshot displays the 'Sage 50 Accounts Roadmap' interface. At the top, a black header contains the title 'Sage 50 Accounts Roadmap' in white, with the tagline 'We're committed to making Sage 50 Accounts even better.' below it. The main content area features three white cards with colored bases: a green base labeled 'DELIVERED', an orange base labeled 'LAUNCHING SOON', and a blue base labeled 'THE FUTURE'. Each card contains text describing the content: 'View our timeline to see the improvements we've already brought you', 'See what we're building now for our next release', and 'Take a look at the exciting new stuff we're looking at and vote for your favourite'. Below these cards is a white box titled 'Have your say' with a sub-header 'Got an idea for an improvement? To submit an idea or comment on others, select your location and visit Sage City:' and a button labeled 'Submit an idea or vote'.

What's included as a Sage member?



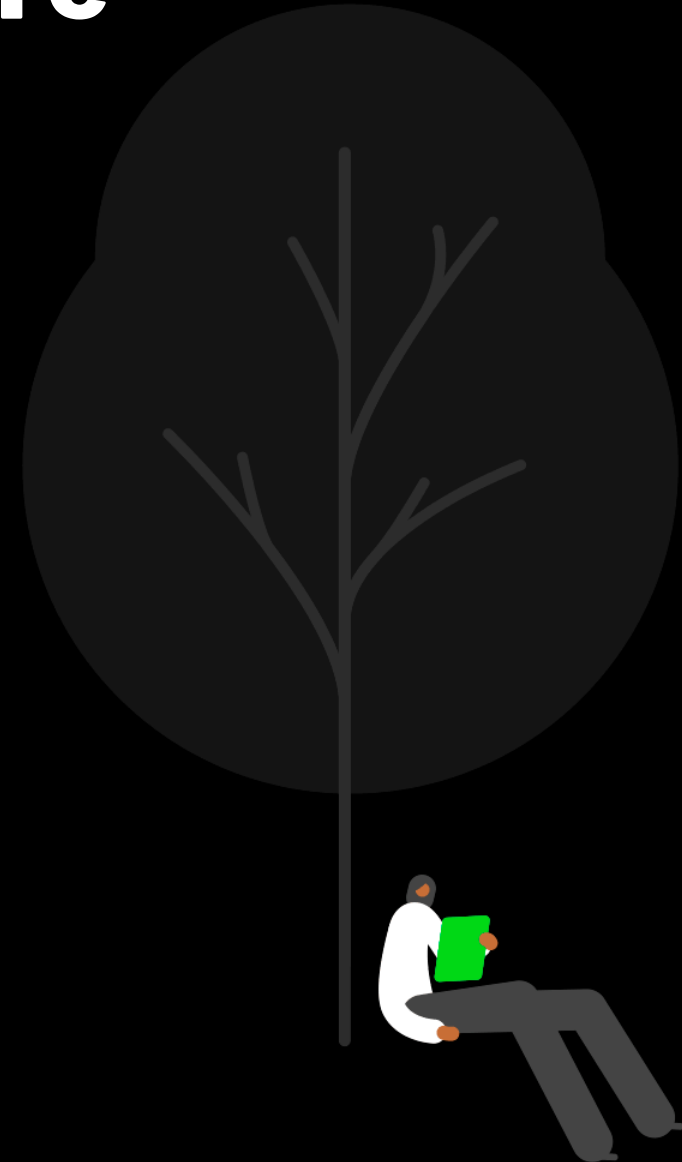
More than just great software

We know that running a business can be tough and at Sage we want to help you and your business with the many challenges you face.

That's why Sage goes beyond great software solutions

As a valued Sage customer and member of the Sage community, you'll enjoy benefits that help you and your business by connecting with brilliant experts and industry peers.

Sage is here to help you grow and your business flow.



A member of the Sage community

All included as a member of Sage – FREE

Being a Sage member you get **great software solutions**, expert advice to **get the most from your solutions** and **more help with the business challenges you face**. All wrapped in the **human touch of Sage's community** of customers, partners and colleagues.

Exclusive member benefits include:

Member
Masterclass

Learning

Community
Forums

Award winning
support

Business Advice

Software
Certification



Upcoming Webinars

Upcoming

Emailing Statements

Emailing Invoices

Clearing Records

VAT Return

Year End

Bank Reconciliation

Bank Feeds + Rules

Key Topics

Making Tax Digital New penalties for 2023

Wednesday 25 January 11am

Join us for an update on UK MTD for VAT legislation including the new penalties introduced in January.

Thank you!

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

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

