

E-Book

Sage for Accountants: what's new?

March 2023

Sage



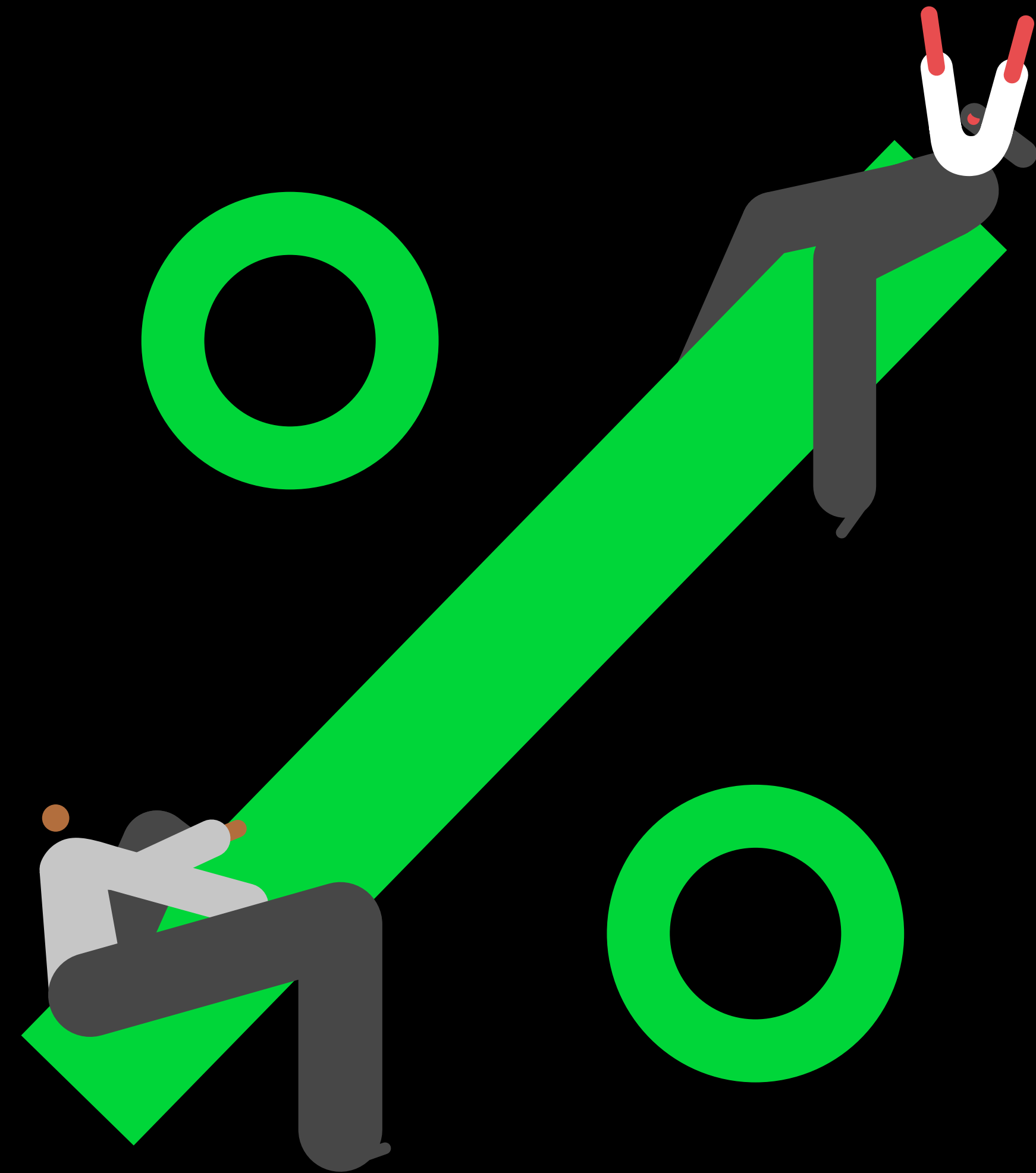
Introduction

We launched Sage for Accountants in 2021 to serve Accountants and Bookkeepers from proposal to advisory. Built for people like you to streamline productivity, Sage for Accountants helps you focus on giving clients game-changing insights and advice.

2022 was a bumper year for the newly launched digital experience, with more than 2,000 new customers signing up for the number one award-winning app—as voted for by real users at the 2022 LUCA Awards hosted by the Institute of Chartered Bookkeepers.

Client Management in Sage for Accountants powers client collaboration in the cloud.

Enhancements did not stop when it was launched—far from it—we have and will continue to work with and listen to Users to make this the go-to platform for your practice.





To recap, here are some of the biggest reasons practices love Sage for Accountants:

- Digitised workflows from proposal to advisory
- Client management to organise and collaborate with clients
- Self-serve client subscriptions for Accounting, Payroll, and free Compliance
- Earn Sage Points as you add subscriptions to save more as you go
- Free software for your practice



In addition, here's a reminder of the new Sage for Accountants workflows set to simplify your days:

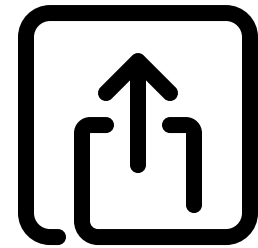
1. Invite Accountant
2. Sage Accounting integrates with Futrli by Sage
3. AutoEntry in Sage for Accountants



Easily collaborate with clients

Accountants told us they wanted to be agile and dip in and out of different client books throughout the day. They also felt how they start working with a client sets the tone and want to be flexible with who pays for subscriptions—either paying for the client or letting the client pay for themselves.

We've made it easier for you to begin working together, so you can access real-time client data in just a click.



Invite Accountant

Clients can pay for their own subscriptions and then invite you to collaborate with them. You simply share your unique ID with your new client, who can then invite you to securely connect to their data via a magic link. Their subscription will appear as a connected product in your products tab, and you can access their subscription anytime from the client list, or within their client record.



Work better with your team and your clients

Teamwork is at the heart of working in practice and with clients. We reflect this in Client Management, enabling team roles, permissions, hierarchies, and @mentions for internal collaboration. Accountants wanted greater visibility and control over client subscriptions. So now, not only can you add, remove, upgrade, and downgrade clients' subscriptions yourself, we have enhanced the experience with these capabilities:



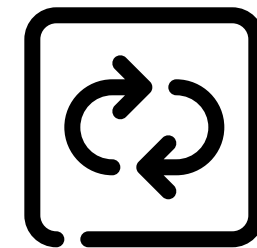
Manage client subscriptions

See client subscriptions you work on, whether your client pays, or you do.



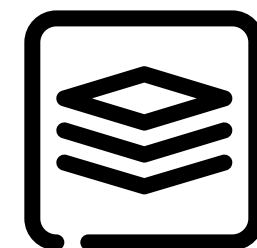
Smooth workflows from proposal to advisory

Not only are AutoEntry and GoProposal by Sage part of the Sage family, Futrli has joined forces with us too. Our commitment to automate proposal to advisory, and capture to tax, continues with us helping you to take data capture and advisory to the next level. Expect more deeper integrations with our Sage suite soon—to automate more of your day.



Sage Accounting integrates with Futrli by Sage

We have connected Futrli's powerful prediction, forecasting and reporting engine to Sage Accounting to transform client advice with data driven insights.



AutoEntry in Sage for Accountants

You can also now launch AutoEntry from where you're already working, in the client list or record in Client Management.

Visible activity log

Be able to review what's been done and when, by people in your practice.



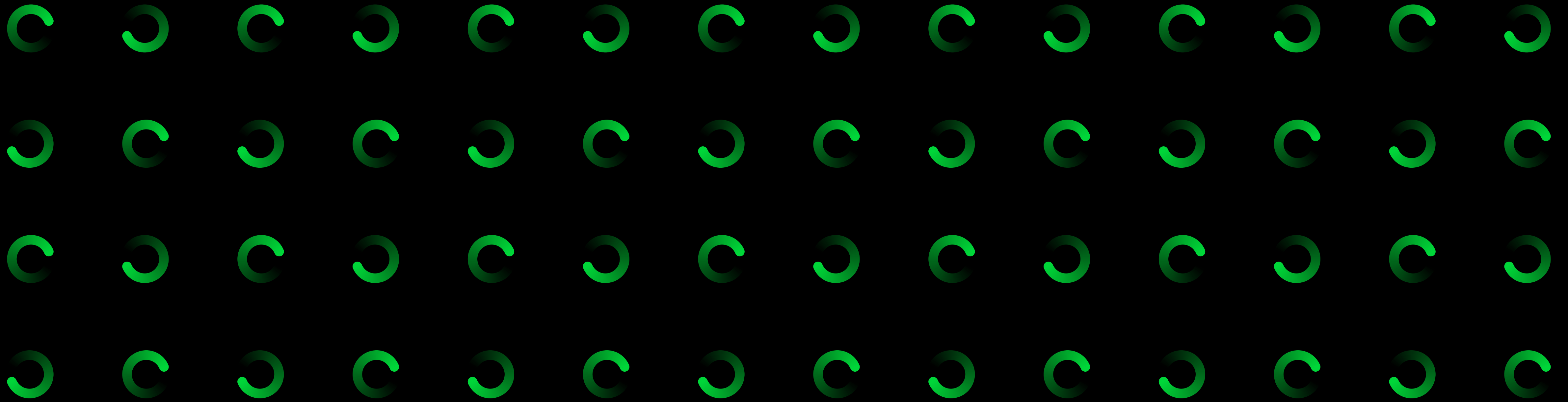
Activity log

Filter by things like activity type, date, and person editing to see document updates, data deletion, and more.

We will continue to invest and develop Sage for Accountants to transform your practice within a single platform that combines the technology and expert support you need to boost productivity.

See all of this and more in action, by signing up for our 'What's New in Sage for Accountants' live webinar—[register for free here](#).





sage.com
0800 923 0340

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