Introduction

To allow you to make a quick start with Sage we have developed this guide which provides lots of relevant information all in one place in a clickable PDF format.

What can Sage do for you?

Sage Business Cloud Accounting software is ideal for small businesses.   With the Mobile Accounting app you can monitor and manage your business anywhere. Send invoices instantly, record your expenses and keep on top of the latest business transactions to maximise your cash flow.

Getting started on Sage

It is best to familiarise yourself with Sage before getting started. In order to do this, Sage allows you to trial the software for 30 days before signing up, giving you the chance to try before you sign up. In order to sign up for the 30 day free trial, follow this link .

Once your trial has expired, you will have the option to subscribe to paying monthly for Sage. There are currently 3 levels of package offered by Sage, and the package you choose will depend on what you require from the book-keeping software. Follow this pricing page for details on the various softwares and bundles that Sage offers

50% OFF	50% OFF	50% OFF
Accounting Start	**Accounting**	**Sage 50cloud Accounts Standard**
£10 / month*	£22 / month*	£60 / month*
From £5 / month*	From £11 / month*	from £30 / month*
Simple yet powerful accounting software for sole traders and freelancers. The perfect introduction to Sage Business Cloud.	Accounting software for sole traders and small businesses (0-9 employees). Everything you need to take care of business, from bookkeeping to advanced reports.	Desktop accounting solution with stock management and departmental analysis.
✔ Quick and easy invoicing	✔ Quick and easy invoicing	✔ Up to two users
✔ Bookkeeping and cash flow made simple	✔ Profit analysis and cash flow forecasts	✔ Manage up to 10 companies
✔ No experience or training required	✔ Making Tax Digital ready	✔ Microsoft Office 365 integration**
✔ Making Tax Digital ready	✔ **Unlimited users**	✔ Track and manage stock
		✔ Making Tax Digital ready

50% OFF	50% OFF	
Sage 50cloud Accounts Standard	**Sage 50cloud Accounts Professional**	**Financials**
£60 / month*	£125 / month*	
from £30 / month*	from £62.50 / month*	from £100 /month*
Desktop accounting solution with stock management and departmental analysis.	Powerful, feature-packed accounting solution with in-depth stock and reporting.	Built on the Salesforce platform, Financials is the next step for companies that have outgrown entry level software products and are looking for more flexibility in the Cloud.
✔ Up to two users	✔ Up to 20 users	✔ Unlimited users
✔ Manage up to 10 companies	✔ Manage an unlimited number of companies	✔ Financials and predictive analytics
✔ Microsoft Office 365 integration**	✔ Microsoft Office 365 integration**	✔ Manage multiple companies, locations, languages and currencies
✔ Track and manage stock	✔ Trade in multiple currencies	✔ Multi-dimensional reporting
✔ Making Tax Digital ready	✔ Making Tax Digital ready	✔ Multi-country compliance
		✔ Making Tax Digital ready from November

Setting up your business on Sage

To set up your business follow this link and fill in the relevant information.

Adding your accountant

Once you have chosen your software and set up your business on Sage, please use the following link as a step-by-step to invite us an accountant. This allows us access to your bookkeeping records, allowing us to assist you should you require any help. Please use our dedicated Sage Online email sageone@raclement.co.uk to add us.

Connect your bank account to Sage

You can use bank feeds to securely connect Sage to your online bank account, so you'll always have an accurate overview of your business finances. Once you've got the bank feeds service up and running, you'll no longer need to download and import bank statements manually. Your bank transaction data flows seamlessly each day from your bank directly into Sage.

To set up a bank feed click on the banking tab, select the relevant bank account and 'connect to bank'. You then choose which Bank you are with. If you can't see your bank listed, click 'another bank' and accept the terms and conditions to continue. You then enter your bank name and search. Lastly, enter your online banking credentials and choose which account you'd like to connect.

These are some helpful FAQs around setting up your bank feeds and common issues.

VAT

The following page provides you with an overview of VAT. Please feel free to download Sage's Small Business Guide to VAT for a detailed looks at dealing with your VAT in Sage – you can request a copy of this guide from Sage here

Record a purchase invoice

To add an invoice from a supplier select Purchases > Purchase invoices > New invoice.
As you key in the supplier, you can either select from previous suppliers or create a new one.
For more detailed information, follow this link on how to create and manage invoices.

Adding a sales invoice

To create a new invoice to send to your customer go to Sales > Sales invoice > new invoice. Sage allows you to invoices your customers directly through email or you can choose the option to print the invoice.
For more detail click here .

Setting up nominal codes

In Sage, the nominal codes are held in the Chart of Accounts . Go to the more menu > Settings > Chart of Accounts and from here you can view, edit and create new categories. You can add as many categories as you want.
To add a new category click 'new category' and then complete the following information.

- Always tick the box ' included in chart'
- You can enter the same thing in 'Category name' and 'Display name'
- Category code can be any number but the default code ranges for each category are as follows: Assets = 0001 – 1999

  Liabilities = 2000 – 2999

  Capital = 3000 – 3999

  Income = 4000 – 4999

  Expenditure – Direct expenses = 5000 – 5999

  Expenditure – Overheads = 6000 – 9999
- Type of category determines where the category appears on your reports
- VAT Rate - Choose a default VAT rate. If required, you can change the VAT rate when entering transactions

Please follow this link for further information on creating and managing nominal codes to suit your business.

Bank Reconciliation

Click the banking tab> Choose the relevant bank account > Connect bank drop down arrow > Reconcile.

Enter statement date and the balance at that date and 'apply'.

The reconciling process is a simple checking exercise. You will look at the first transaction on your bank statement and search for it on the transactions list. When you find it click the 'reconcile' check box and repeat for all transactions. If there is a transaction on your statement that is not on the list, for example bank charges, this can easily be added by using the 'interest and charges' section. In the relevant box enter the amount and date and then save.

You can 'save for later' at any time during reconciling the bank, but once finished it should show a difference of zero and then you can click 'finish'.

For a more detailed guide follow this link which provides a video and step-by-step guide on reconciling your bank.

Getting Help

When you need help on Sage or are not sure how to do something, the best place to start is by going to the Sage Business Cloud Support Hub, Click here .

Sage Video Hub provides you with easy and straightforward videos on the basics of Sage

Don't forget to add R A Clement Associates as an accountant on your Sage Online software using our sageone@raclement.co.uk email address – this will allow us to help you wherever you are.