Chapter 1

Introducing Sage Instant Accounts

*I*n this chapter, I introduce you to Sage Instant Accounts. I show you how easily you can install the software and give you a guided tour, so that you can get up and running quickly – essential for busy people!

Sage works on the principle that the less time you spend doing your accounts, the more time you can spend on your business, so makes each process as simple as possible.

I also discuss SageCover, an optional technical support package, which is an addition worth considering. If you experience software problems, SageCover can help. For small businesses, this support is like having an IT department at the end of a phone.

Looking at Two Sage Instant Options

Sage offers two versions of Instant Accounts:

✔ **Sage Instant Accounts:** The entry-level program. Sage Instant Accounts provides all the features you require to successfully manage your accounts. You can professionally handle your customers and suppliers, manage your bank reconciliations and VAT returns and provide simple reports, including monthly and year-end requirements. This basic version is suitable for small businesses with a simple structure.

✔ **Sage Instant Accounts Plus:** Contains all the features of the entry model, but in addition includes a simple stock system and also the ability to have up to two users.

Deciding on SageCover

You can purchase SageCover at the same time as the software. SageCover provides you with technical support in case you have any problems using Sage. It may seem an additional cost burden to begin with, but is well worth the money if you've a software problem. Sage does currently offer 45 days of free telephone support, along with free online learning and access to guides and video tutorials.

Most people who use accounting packages know something about accounting, but don't necessarily know much about computer software. When the screen pops up with an error message that you simply don't understand, a quick phone call to your SageCover support line soon solves the problem.

For Sage Instant Accounts, you can choose between two different types of cover:

✔ **SageCover:** Provides telephone support during normal office hours, as well as email and online question and answer support. You also have access to a data repair service, where a member of the Sage in-house

team will retrieve and repair your data if it becomes lost or corrupt. There's also a free subscription to Sage's business magazine *Solutions*.

✔ **SageCover Extra:** Includes all the benefits of SageCover, plus software upgrades, so you always have access to the latest version. You also gain the benefit of an Express data repair service rather than just the standard service. You're given priority telephone support with Sagecover Extra, including a call-back option and also have additional Remote Support, which means that, with your permission, Sage technicians can remotely access your PC to help you solve your queries.

Having someone on the end of a phone to talk you through a problem is a real bonus. Sometimes the Help button just doesn't answer your question. The technical support team can help you solve the most awkward problems that would otherwise have you throwing your laptop out of the window in pure frustration!

I recommend that you install Sage Instant on a Windows operating system. Windows 8 or 7, Windows Vista, Windows XP, Windows Server 2008, Small Business Server 2011 or Server 2003 are all recommended by Sage.

Installing the Software

In this section, I take you step by step through the installation process, showing you the screens as they appear on your computer and ensuring that you load up the software correctly. I also let you know about any problems that may crop up while loading, so that you can deal with them effectively.

Anyway, onwards and upwards!

Getting what you need before you get started

Your Sage software package contains a CD, a 'Getting Started with Sage Instant Accounts' guide and, more importantly, a serial number and activation key. Without these last two pieces of information, you can't successfully load the software. But don't worry, if you purchased a genuine copy of Sage software, you have the necessary activation information.

You also need a few details about your company:

- ✔ **When your company's financial year begins:** If you're not sure of the date, consult your accountant.
- ✔ **Whether and what type of VAT scheme you use:** Again, your accountant can tell you whether you operate the VAT cash accounting scheme or the standard VAT scheme. If you've a VAT registration number, keep it handy.

Moving to the installation itself

The following steps assume that you're loading Sage for the first time for a single company and single user. For those of you loading multiple-user programs, check the instructions provided with your software.

1. **Insert your CD into the disk drive.**

   If your CD doesn't immediately start, you may need to click Run.

2. **Follow the options on your screen to run the CD.**

   A Sage Instant Accounts opening screen appears. Click the Install button to continue as shown in Figure 1-1.

   For Vista users, the User Account Control window appears, asking you for permission to continue installing Sage; click Continue to proceed.

   The Sage system checker highlights any problems with loading your software, such as hardware speed and so on as shown in Figure 1-2. Click Install to continue.

Figure 1-1:
The initial screen prior to installing the software.

Figure 1-2:
System checker.
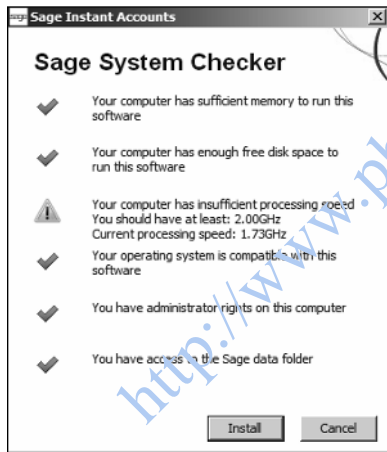
3. The Accounts Installshield wizard starts up when you click Install and this is followed by the Licence agreement as shown in Figure 1-3.

Be warned, the licence seems to go on forever, if you choose to read it! (Have a quick look through the software licence agreement though, just to see what you're signing up for!) Click Yes to accept the licence.
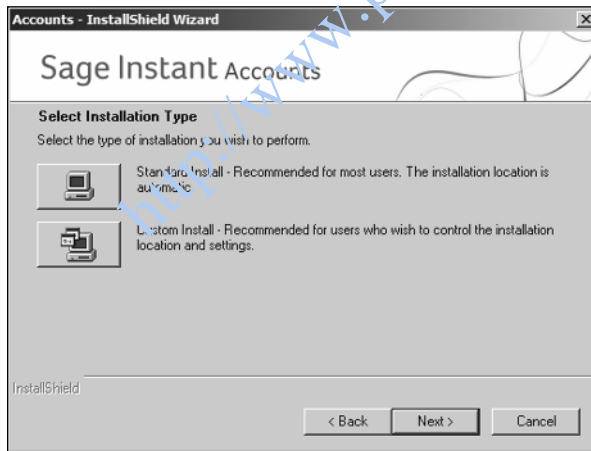
Figure 1-3:
Accepting
the software
licence
agreement.

4. **Select the installation type and destination folder and follow the prompts.**

   You've a choice between a Standard install and a Custom install, as shown in Figure 1-4. The choice you make is important.

Figure 1-4:
Choosing
Standard
or Custom
install.

Standard install is recommended for most users; it copies the files to C:\Sage\Accounts.

Choose Custom install only if you want to control the destination of the programs being installed; for example, if you want to keep different versions of Sage separately on your computer.

Check with Sage (the company, not the program!) if you aren't sure whether to use the Custom install or not.

If you want to use Custom install and choose a different destination folder, follow these steps:

   i. **Click the Custom install option.**

   The destination folder at the bottom of the screen automatically defaults to C:\Sage\Accounts 2011.

   ii. **Click Browse.** With the help of the Browse button you can change the destination folder, as shown in Figure 1-5. I have changed it to C:\Sage\Instant Accounts 2013. Click OK. The destination path has now changed to the new one that you've designated. Click Next to continue.

   Select your Program folder – this window allows you to change the program folder to your preferred destination, as shown in Figure 1-6 you can now click Next to continue.

   Sage now confirms the destination folders for the program as shown in Figure 1-7. Click Next to continue.
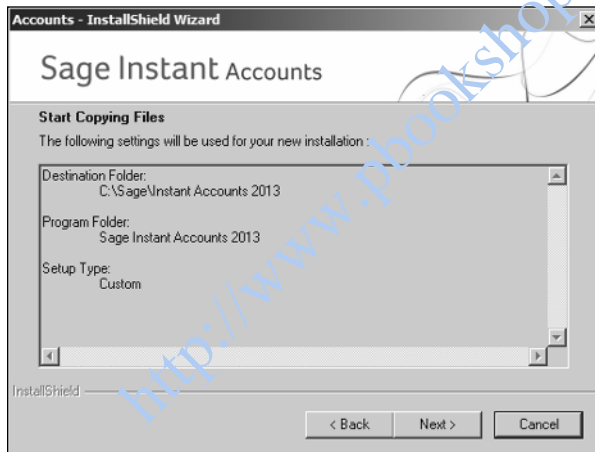

Figure 1-5:
Click the browse button to find an alternative destination for the Sage program.
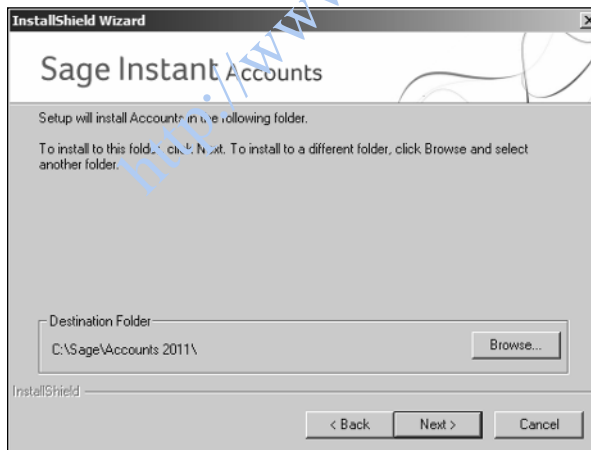
Figure 1-6:
Having
amended
to Sage
Instant 2013
directory.
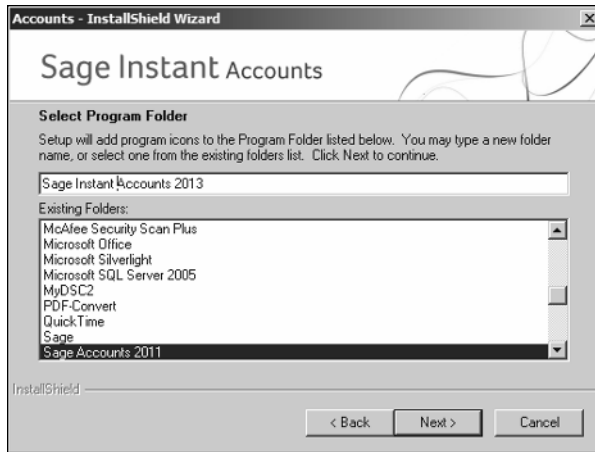
Figure 1-7:
Sage
confirms the
destination
folders for
Instant
Accounts.

The system then whirrs into action and starts the installation process. It takes several minutes, so you probably have time to make a quick cup of tea!

5. Click Finish when Sage tells you that the installation is complete.

That's it! You've successfully installed your Sage software. This is the message you should see, shown in Figure 1-8. You should see a Sage Instant Accounts icon on your desktop – now you're ready to rock and roll!
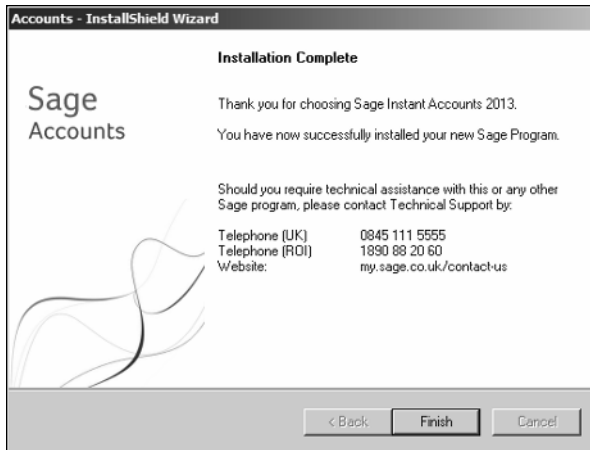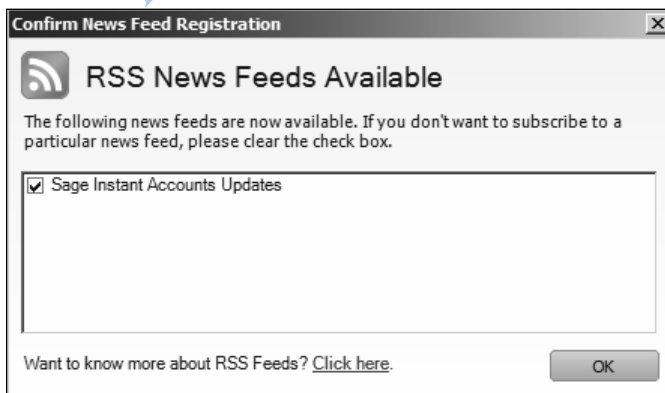
Figure 1-8:
Confirmation
of a
successful
installation!

REMEMBER

Be sure to remove the CD and keep it in a safe place!

Setting Up with the Active Set-Up Wizard

Of course, you're champing at the bit and want to get going with Sage, so double-click the new Sage icon on your desktop to get started. You may get an RSS feeds message (see Figure 1-9) and you can decide whether you want to receive these or not by clicking on the tick box. Click OK to continue.

Figure 1-9:
Checking
your RSS
feeds.

The Activate Sage Software window opens as shown in Figure 1-10. You're asked to enter your activation key and serial number. You can find these on your delivery note or within your CD case. If you don't have this information, click the My Sage button and follow the online instructions.

Figure 1-10:
Activating your Sage Software.

When you've entered your activation key and serial number and clicked Continue, a confirmation message appears saying that your Sage Instant Accounts has now been registered. Click OK to continue, the Active Set-up wizard opens. The first screen, shown in Figure 1-11, gives you three options:

- ✓ **Set up a new company:** If you're new to Sage, choose this first option.

    You're then guided through the automatic steps of the Active Set-up wizard. The following numbered steps lead you through this process.

- ✓ **Use an existing company stored on your network:** If you already use Sage and are upgrading, choose this option, which lets you copy accounts data from your previous Sage installation.

- ✓ **Restore data from a backup file:** Choose this option if you're restoring data from an earlier version.

Choose whichever option is best for you and click Next.
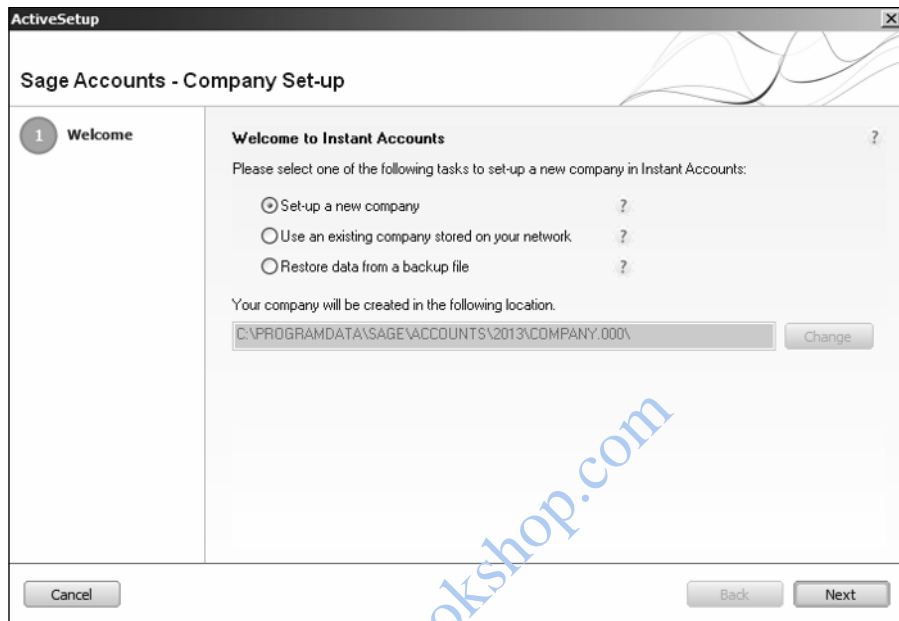
The following steps take you through the process of setting up Sage for the first time.

1. **Click Set Up a New Company, then click Next and then enter your company's details. Sage now takes you through a 7-step wizard.**

   You're prompted to enter your company information, such as name, address and contact details, as shown in Figure 1-12.

   Make the set-up speedier by putting in just the company name. You can complete the other information later by clicking Settings on the main toolbar and then selecting Company Preferences.

2. **Click Next. A screen appears that prompts you to Select Business Type, as shown in Figure 1-13.**

3. **Click the appropriate business type.** For example, I've chosen Limited Company, for Jingles. If you're in any doubt, contact your accountant, who'll be happy to assist. Whichever business structure you choose, Sage applies the appropriate nominal codes and Profit and Loss and Balance Sheet reports for your accounts.

   If you don't want to select any of the categories shown, you can click *I want to use a pre defined business type* and create your own business type. You can then use your existing nominal codes if you're transferring accounts from a different system.
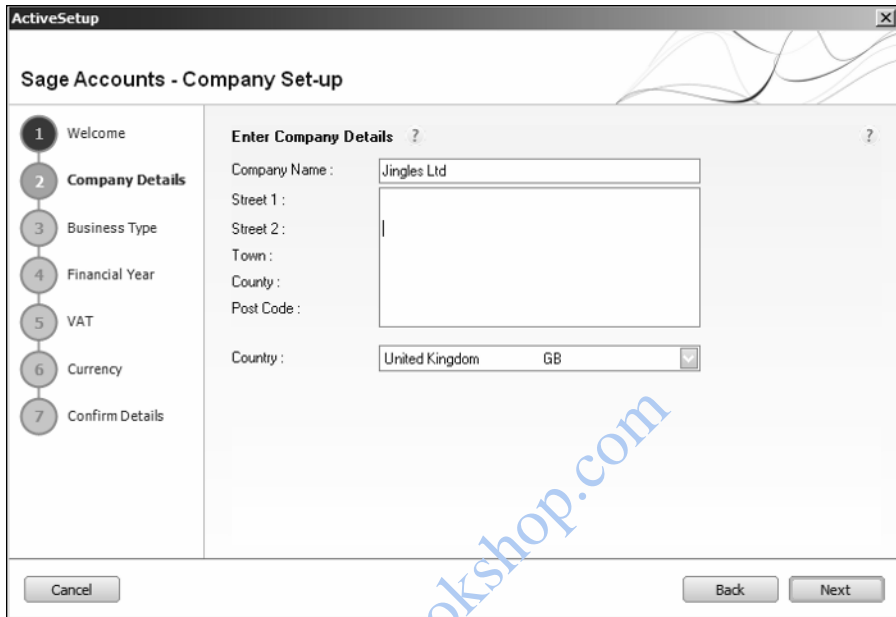
Figure 1-12:
Asking
for the
company
contact
information.
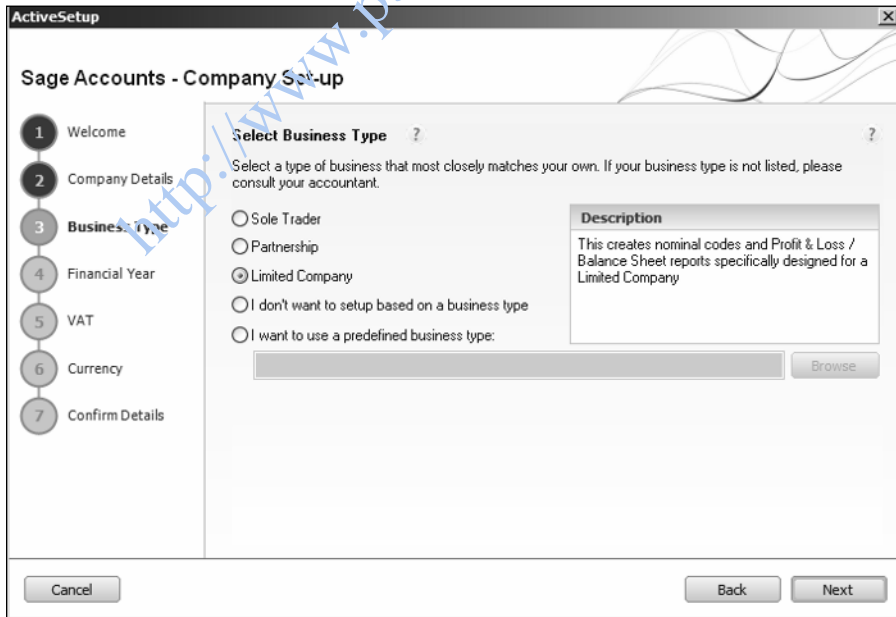
Figure 1-13:
What type
of business
are you?

4. **Click Next and select your financial year.**

   The fictional Jingles company I invented ends its financial year on 31 March 2014, so the financial start date is April 2013, as shown in Figure 1-14.

5. **Click Next and fill in your VAT details.**

   If you're not VAT registered, click No and go to Step 6.

   If you're VAT registered, enter your registration number and, using the drop-down arrow, select the appropriate VAT rate, as shown in Figure 1-15. You must enter the current standard VAT rate if that's the rate you've selected. Jingles Ltd is VAT registered for the purposes of illustration.

   WARNING!

   Don't enter any transactions until you're certain of which VAT scheme you operate. Failure to use the correct scheme means that your VAT is calculated incorrectly. Sorting out the wrong VAT scheme can be extremely messy!

6. **Click Next and choose the base currency that you use as shown in Figure 1-16.** Click Next again. Note: The currency option is only available if you've purchased the currency module.

Figure 1-14: Beginning the financial year.

Figure 1-15:
Registering
your VAT
status.

Figure 1-16:
Telling
Sage what
currency
to use to
prepare
your
accounts.

7. **The final screen summarises the data you entered on your Active Set-up wizard, as shown in Figure 1-17.**

   If you need to make any changes to your data, you can click Back and revise any information.

8. **Select Create when you're satisfied that the information is correct.**

   You've finished!

The system now configures and then asks you whether you'd like to customise your company, as shown in Figure 1-18. If you click the Customise Company button, Sage then takes you to a wizard style menu, where you can choose to set up the defaults and records for your Customers, Suppliers, Banks, Products, Financials and the Administration areas of your software. You will find helpful videos that you can play to assist you in setting up the individual modules within Sage. Sage also has a tick box you can use when you've completed each section. If you click Setup Now, Sage automatically takes you to the default screen for whichever module you're setting up. See Figure 1-19 for an example of the Customer Default window.
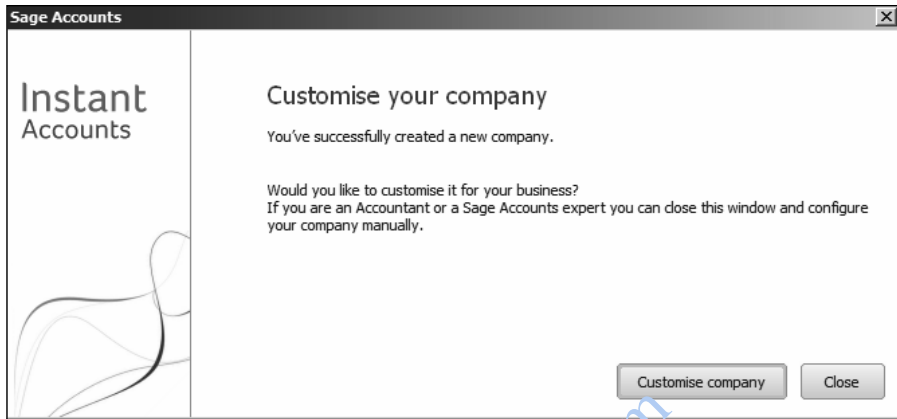

Figure 1-17:
Confirming your details.

Figure 1-18:
Customising
your
company
details.

Figure 1-19:
Customising
your
customers!

WARNING!

When you start the customisation process, it can be time consuming to go through each section, and more than you can sensibly manage in one sitting. You can close the screen, which takes you to the Sage Welcome page. When you're ready to go back to the customisation wizard, click Help from the menu bar and then Customise your Company.

I would recommend setting up Sage manually, as you can take your time familiarising yourself with Sage. You're in danger of information overload if you try to set up all the modules in one go without taking time to navigate around Sage first.

I'm going to talk you through setting up the modules manually so that you can see where all the options are within the Sage software. The remainder of the chapter shows you how to do this.

Finding Out How Easy Sage Is to Use

Sage is a user-friendly system, using words and phrases that people easily understand rather than accounting jargon. Sage also has a lot of graphics to make the pages look more appealing and easier to navigate. For example, an icon appears next to the Bank module that looks like the entrance to a grand building – like the Bank of England, perhaps?

Burying the accounting jargon

Sage uses terms that users understand and steers clear of accounting jargon. So, instead of using *debtors* and *creditors*, Sage uses *customers* and *suppliers*; rather than *nominal ledger*, it uses *company*.

Accounting terminology isn't altogether done away with, for example you still have to print Aged Debtors reports and Aged Creditors reports, but most of the program uses simple language.

Looking at the screen layout

When you open Sage, the first screen you come across is the Sage Welcome screen, as shown in Figure 1-20. It provides useful links and various Help pages, including a Just Practice section, where if you're not sure how to do something, you can try it out in the practice company first.
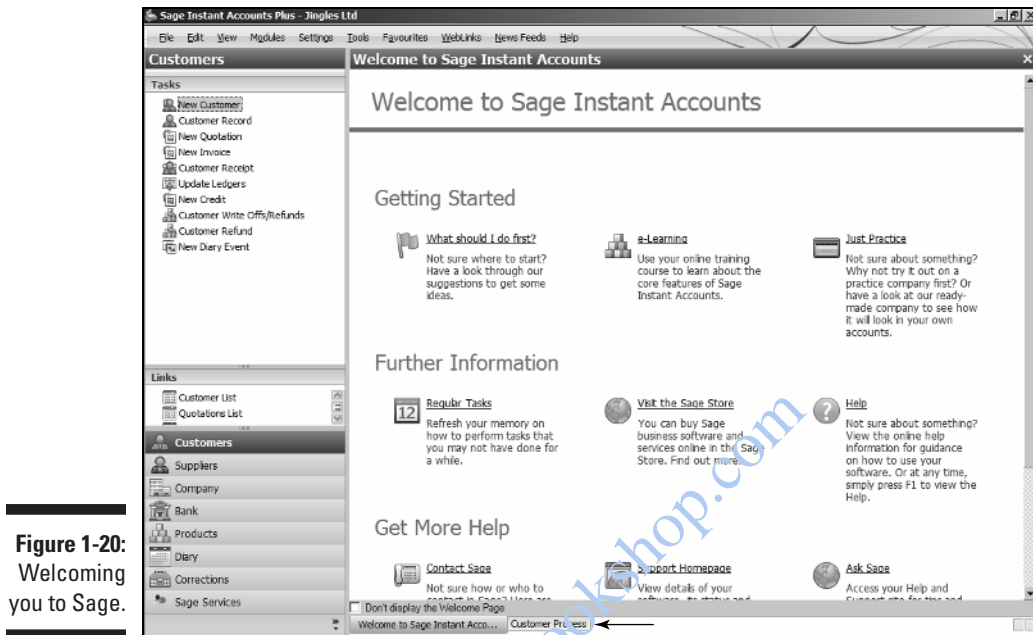
Figure 1-20:
Welcoming
you to Sage.

If you look closely at the bottom of the screen, you find two tabs. The first is for the Welcome to Sage Instant Accounts screen, and the second is called Customer Process – the arrow points to it in Figure 1-20.

Introducing process maps

Process maps look like flow charts, they illustrate specific customer and supplier processes in a pictorial format. Click the Customer Process tab to see the process map, as shown in Figure 1-21.

Figure 1-21 shows the various stages of the customer paper trail in the Customer Process map, from the original quotation through to chasing the debt and receiving the money from the customer. You can click on any one of these boxes, and Sage takes you directly to the screen necessary to process that action. For example, if you click Customer Receipt you're taken to the Customer Receipt screen, so that you can process the payment received.
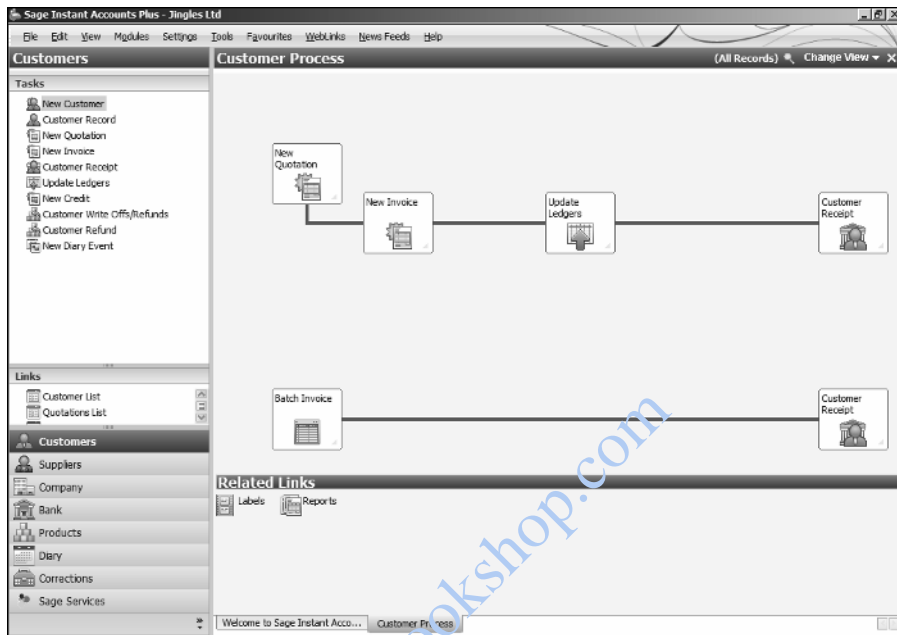
On the Customer Process screen, the words Change View appear in the top right corner. Clicking Change View produces a drop-down menu that gives you two more options to change the appearance of the screen:

✔ **Customers:** This view, shown in Figure 1-22, is the traditional Sage screen. The main body of the screen appears blank when you're starting out with Sage, but it eventually fills up with your customers' names, balances and contact details.

Across the top of the screen, below the Customers heading, the icons that form part of the customer pages appear – Customer Record, Activity, Batch Invoice and Batch Credit, to name just a few.

✔ **Customer Dashboard:** The dashboard offers a graphic representation of the customer information. It shows the Customer Cash Overview, Aged Debt and Today's Diary Events. This presentation appeals to people who want quick access to the key information in the accounts.

Before you input any data, the Customer Dashboard screen looks extremely boring. However, even just the Sage demonstration data illustrates the dramatic impact of presenting data in this way, as shown in Figure 1-23. To open Sage using demo data, click File from the top toolbar, then Open, then Open Demo data. At the screen login, choose Manager and no password, and then Sage opens with new company data called Stationery& Computer Mart UK.
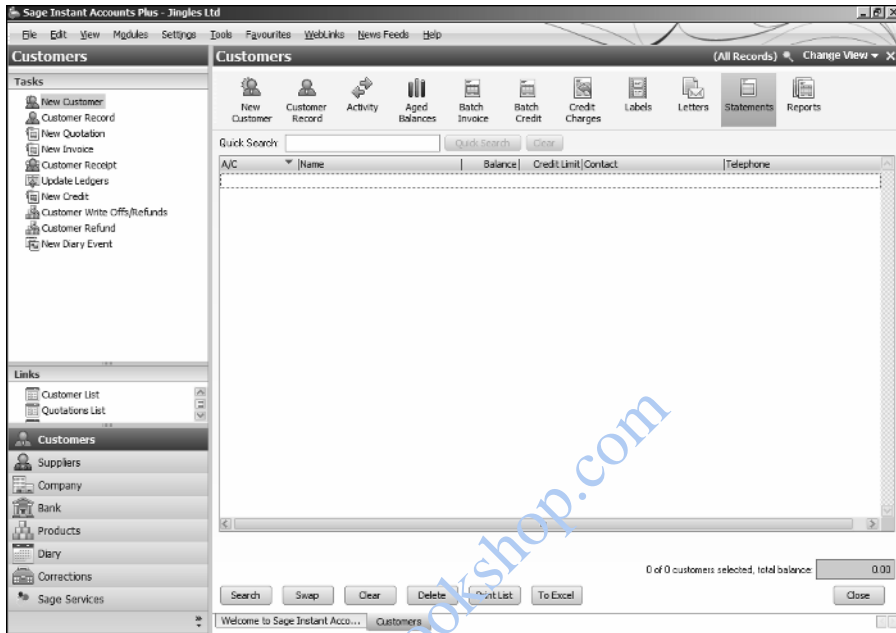
Figure 1-22: Viewing the traditional Customers screen.
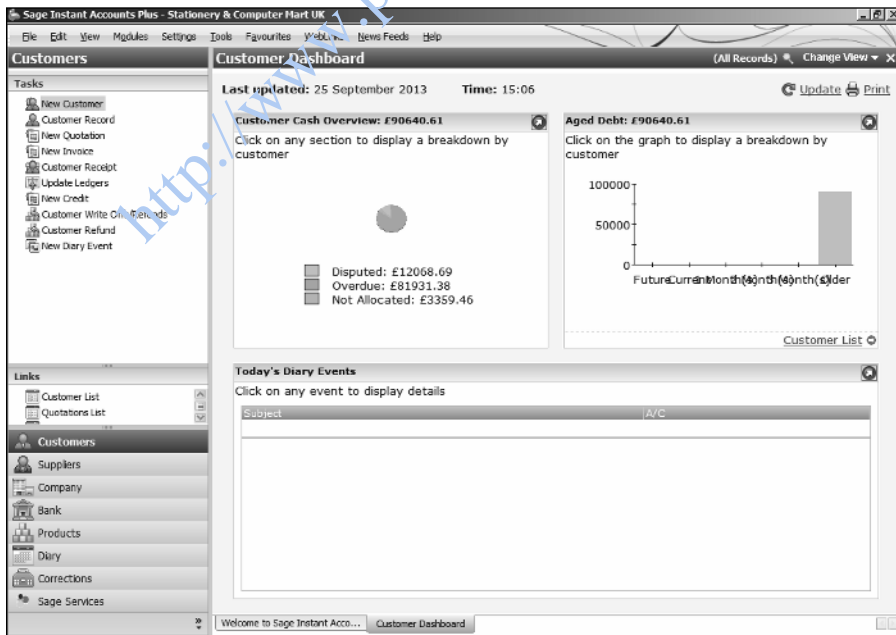
Figure 1-23: Going for the graphical view.

TIP

Alternatively you can use the Practice data to play around with Sage (you access the practice data in the same way as the Demo data).

Navigating Around Sage

At the very top of the Sage Welcome screen is the name of your version of Sage – Sage Instant Accounts Plus, for example – followed by the company name you entered when you set up Sage. (Refer to the 'Setting Up with the Active Set-Up Wizard' section, which walks you through getting Sage up and running.)

The Sage Instant desktop is divided into three key areas. The Menu Bar is found running horizontally across the top of the screen and is one method of navigating around Sage Instant. (See Exploring the Menu Bar later in this chapter)

The Navigation bar runs vertically down the left-hand side of the screen, (see the 'Navigating the Task pane, Links list and Module buttons' section later in this chapter for more detail) The navigation bar is further subdivided into three areas:

- ✔ The Tasks pane
- ✔ The Links pane
- ✔ List of Module buttons

The Work Area is the main central space of your screen and can be configured to your preferences by using Tools, and then Options from the Menu bar.

Exploring the Menu bar

The menu bar runs horizontally across the top of your screen and provides many navigational tools to help find your way around Sage. Refer to Figure 1-24 (later in this chapter) to see both the Menu bar and Navigation bar.

By clicking the different Menu bar options, you gain access to sub-menus and different parts of the system. The next sections talk about each option on the Menu bar in turn.

File

Nothing counter-intuitive here; clicking File gives you options for creating, accessing, saving and sharing data. The sub-menu options are:

- ✔ **New Report:** Takes you into Sage Report Designer, where you can use the Report wizard, which enables you to design new reports.

- ✔ **Open:** Enables you to access the demonstration data, practice data and open a report previously saved.

- ✔ **Close:** Closes the drop-down menu.

- ✔ **Backup:** Allows you to back up your data. You can also back up your data when you exit the program.

  Back up your data each time you use Sage, or at least at the end of each day. Back up more often during the day if you're processing significant amounts of data.

  Sage automatically gives the backup a filename, which is usually SageAccts then your company name, followed by the date and some numbers, then 001. (Sage backup files always have the file extension .001.) If you do more than one backup on the same day, differentiate the file name by adding a differ- ent number, otherwise Sage may overwrite the previous backup.

- ✔ **Maintenance:** Enables you, among other things, to correct data, delete records, check data or even, as a last resort, rebuild the data. I talk about maintenance in more detail in Chapter 9.

- ✔ **Restore:** Allows you to retrieve data from a previous backup, if neces- sary. You may need to utilise this function if you have problems with the current data – perhaps the data has been corrupted and you want to return it to a known point in time when it was free of problems.

- ✔ **Import:** Allows you to import records, such as customer, supplier, stock, assets, nominal accounts and project records, from other sources, like Microsoft Excel, as long as they're in a pre-determined CSV (comma separated values) format. This option is useful when you're setting up Sage and have other information or records that you wish to import. You can speed up the data-entry process if you import information instead of keying in each individual record. I cover importing and CSV formatting in more detail in Chapter 15.

- ✔ **Microsoft Integration:** Using this option, you can export data to Microsoft Excel, Word or Outlook (if you've a compatible version of Microsoft Outlook).

- ✔ **Send:** Enables you to send a message by using your default email program.

- ✔ **Exit:** Lets you exit the program altogether. You can also exit the program by clicking the black cross in the top right corner of the screen.

Edit

You can use Edit to cut, copy, paste, insert/delete rows and duplicate cells.

View

The *status bar* is the narrow strip across the bottom of your screen, showing the name of your Sage product, today's date, the start of the financial year and the current transaction number. You can switch it on and off. You can also view the user list, which shows who is currently logged onto Sage.

Modules

The *modules* are essentially the different components that form the whole of the Sage accounting system. The modules include the usual accounting ledgers, such as Customers, Suppliers, Bank, Nominal Ledger and reporting functions, but they also include the Invoicing function, wizards and a diary.

Access modules by clicking Modules on the *M*enu bar and selecting the module of your choice, or by clicking the much larger buttons on the *N*avigation bar at the bottom left of the screen. I prefer the buttons at the bottom – they're easier to use and more visible.

Settings

The settings include the Configuration Editor and Company Preferences, which hold some of the basic information about your company and the way that Sage was set up upon installation. Settings also include many of the default screens for the ledgers, which save you time when setting up records at a later date.

REMEMBER

If you used the Customisation Wizard when you installed Sage, then you may have already seen these default screens.

If you need to change the system date or check the financial year, you can do it within settings. You also have access to the security settings for accessing the software and can set up passwords to protect your accounts data. The settings include:

- ✔ **Configuration Editor:** Holds the basic information you enter when you complete the Active Set-up wizard. Have a look at the numerous tabs within this option and familiarise yourself with them. Examples of things you can do include: editing your customer and supplier trading terms; amending your VAT codes; grouping your product categories, editing your custom fields and applying a status such as 'on hold' to your customer/ supplier records.

- ✔ **Company Preferences:** Allows you to enter extra information if you didn't add it all when using the Active Set-up wizard. You may want to update your address information, for example, or perhaps check your VAT details. Company Preferences provides many more tabs to look at, too many to comment on here, so have a flick through at your leisure.

✔ **Customer/Supplier/Bank/Product/Invoice and Email Defaults:** Gives you the opportunity to amend parts of the default data you set up on installation.

✔ **Financial Year:** Identifies the start of the company's financial year, as input during the Active Set-up wizard. This date is fixed when you start to enter data.

✔ **Change Program Date:** Allows you to change dates when running a month-end or a year-end report. The date is normally set to the current day's date, but there may be times, such as period ends, when you wish to change the date, albeit only temporarily.

✔ **Lock Date:** You have the ability to enter a lock date into the system, which means that you can prevent postings before a specific date that you enter. This feature is useful when you're processing year ends. Only users with access rights to Lock Dates can post.

✔ **Currencies:** Enables you to edit your currency requirements if you're using multiple currencies.

✔ **Countries:** Lists all the countries in the world in the Countries table, together with country codes, and identifies those countries that are currently members of the EU.

You can amend the Countries table as and when countries enter or leave the EU.

✔ **Control Accounts:** Gives you an at-a-glance list of all the control accounts within Sage. A *control account* is a summary of all entries contained within a specific ledger. For example, the Sales Ledger control account includes all transactions for all sales ledger accounts and the balance on the control account tallies with the sum of the sales ledger accounts. Control accounts are used as a check on the numerical accuracy of the ledger accounts and form part of the double-entry system that Sage performs when you enter transactions.

If you're going to change the control accounts, do so before you enter any transactions; otherwise, leave them alone.

You can reconcile a control account. Just click Help and follow the instructions for reconciling debtors or creditors.

✔ **Change Password:** Allows you to change your password periodically as part of your data protection and security routine.

Tools

The tools option is a hotchpotch of items. You can run the Global Changes wizard, run period ends, open up Report Designer and convert reports, to name but a few. The options are outlined below:

✔ **Global Changes:** Allows you to globally change customer or supplier credit limits, turnover values and product sales or purchase prices.

✔ **Activation:** Allows you to upgrade your program and enable third-party integration.

Third-party integration enables you to use add-on software, developed by a third party, which is tailored to your specific industry.

You can use the Upgrade Program option to register after your initial 30-day Sage trial period runs out.

✔ **Opening Balances:** Presents you with a series of actions that need to be completed to enter your opening balances. Chapter 4 guides you through the Opening Balances wizard.

✔ **Period End:** Enables you to run the month-end and the year end, as well as clearing the audit trail and clearing stock. (See Chapter 12 for further information on clearing stock and audit trails.) When you run your year-end, Sage sets your Profit and Loss nominal accounts to zero for the new financial year.

✔ **Transaction Email:** The Transaction Email Control Panel opens, but it can only be configured if you have Microsoft Office set up.

✔ **Report Designer:** Allows you to edit or create new reports, customised for your business.

✔ **Options:** Gives you options to change the settings and appearance of Sage. For example, you can change the default view of the Customers and Suppliers screens from the process map to customer or supplier lists, using the View tab.

✔ **Convert Reports:** This option opens the Batch Report Converter. Click F1 Sage Help for more details.

✔ **Internet Options:** Here you can vary the Sage update criteria, enter Sage Cover login details, change network settings and view SData settings, which provide remote access to business information held in your Sage software.

Favourites

You can store your favourite reports under this heading. To find out how to set up favourite reports, use the Help menu supplied with Report Designer (which can be accessed via Tools on the browser toolbar – Chapter 15 goes into more detail about the Report Designer).

Weblinks

Weblinks gives you a number of links to useful websites, such as Sage shop and HM Revenue and Customs, Sage Stationery, Sage e-banking and Sage Pay, provided that you're hooked up to the Internet.

News Feeds

Sage provides news feeds data that you can access, to provide information on relevant Sage updates and topics.

Help

Help is the last entry on the menu bar, but probably one of the most useful. If you want to understand more about the system and want to know how to do something, click the Help option. The program has several help options you can choose from, all of which take you to a web help page, where you can enter your keyword and click search to find the answers to your problems. A list of relevant options are presented and you can select the one you require. In addition you can find the 'Customise your Company' wizard which you may have discovered when you first installed Sage. You can access these screens at any time and amend your module defaults and other administrative functions.

The About page now contains a raft of information about your computer, including system details, licence information, contact details for Sage and much more. Sage support staff find this page useful when trying to identify any problems that you may be experiencing with your software. If you choose Help from the main toolbar and click About, the Sage support page opens up and shows you the mass of information held about your computer.

Navigating the Task pane, Links list and Module buttons

An alternative method of navigation, and probably the easiest, is to use the navigation bar, which is down the left side of the screen. It includes a Task pane and Links list, as well as buttons at the bottom of the bar for opening up your modules.

Sage offers a variety of ways to navigate to the same point. For example, if you want to open a new customer record, you can click New Customer in the Task pane or use the menu bar and click Modules, Customers and then the New Customer icon (assuming you changed the view to Customers not the process map – refer to the 'Looking at the screen layout' section earlier in this chapter).

As you get used to using Sage, you'll see that the first navigation bar to open is the Customers bar. Figure 1-24 shows the navigation bar in the Customer module, where you can see these features:

- ✔ **Task pane:** The topmost menu is the Task pane, which is different for each module.

- ✔ **Links list:** The Links list offers different links for each module within Sage. The Customer Links list takes you to customer-orientated pages, such as Customer Invoices, Aged Balances or simply a list of customers.

✔ **Module buttons:** These buttons sit at the bottom left side of the screen and enable you to switch between modules. They're wide buttons that start with a little icon and then a description. The first button is Customers, followed by Suppliers, Company, Bank, Products, Diary, Corrections and Sage Services.

Just below the Diary button is a tiny chevron with a small arrow directly beneath it. Clicking on the chevron gives you the option of showing fewer buttons or adding or removing buttons. You can play about with the buttons and decide which display you prefer. The Diary button assists with credit control and also allows you to create diary tasks or events to help meet deadlines.

Sage Services is a relatively new feature that provides access to an online service (see the 'Introducing the Sage Services button' sidebar for more information).

Clicking the various Tasks, Links or Module buttons automatically moves you to the relevant part of the system.

Menu
bar

Figure 1-24:
Identifying the Navigation bar, the Task pane, the Links list, the Modules buttons and the Modules toolbar as viewed from the Customers module.

Navigation bar

Module buttons

Introducing the Sage Services button

The Sage Services button gives you the ability to access a number of online Sage services, such as SageCover and Sage software updates. Prior to this service being available, SageCover was only available via the phone, and software updates came by CD or more recently online from the main Sage website, which involved opening up another browser session on your computer. You can now quickly access useful websites directly from your Sage software without having to open a separate Internet browser, but you need to create an account on the `www.sage.co.uk` website and obtain a Sage login and password first. You can record the details in your Sage software. (To do this, select the Tools menu, and then Internet Options and finally select the Sage Account tab, where you can enter your login details.)

TIP

I prefer the Module buttons, as I find it easier to navigate with them as they're more visible and easier to click than the Task page or Links list.

Using Wizards

A number of wizards wield their technological magic through Sage. You can access these helpful creatures, whose job is to help you through a wide variety of setups and tasks, by clicking Modules on the browser toolbar and then Wizards.

REMEMBER

A wizard's job is to make your work easy; all you have to do is follow the prompts and enter the information the wizard requests.

Wizards can help you in both setting up Sage and day-to-day processing. They can assist you in setting up new records for customers, suppliers, nominal accounts, bank accounts and products. But you can also use them to do the otherwise tricky double-entry bookkeeping for items such as opening and closing stock. In addition, whenever you click the New icon on the Modules toolbar, you go straight into the Record Set-up wizard; if you click the Customer module and click the New Customer icon, for example. See Chapter 18 for more details about wizards.