



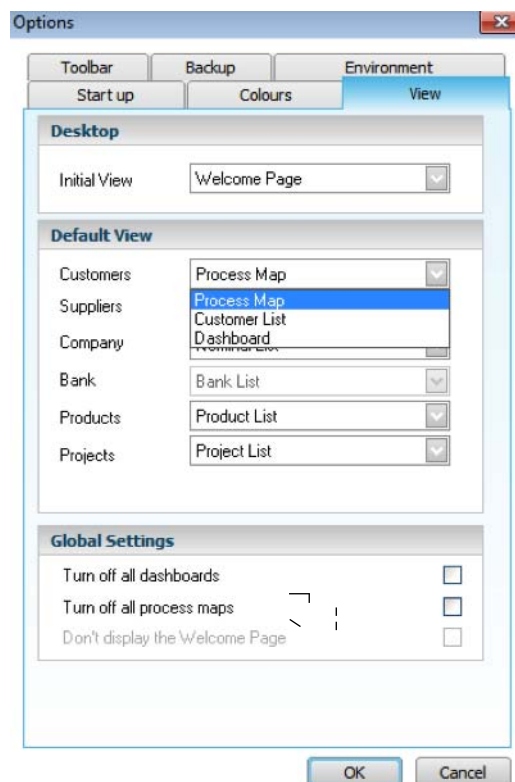
Sage 50 Accounts - Tips and Short-Cuts

Change the default View settings permanently on each module

The default view settings can be changed permanently for six of the Sage modules – Customers, Suppliers, Company, Bank, Products and Projects. Particularly useful is the ability to change Customers and Suppliers onto the List option.

On the main Sage 50 desktop, Click the Tools menu (at the top), then Click Options and then Click the View tab.

Individual changes can then be made by using the drop-down against the appropriate module.



The Initial View (i.e. which screen Sage opens when first logging in) can also be changed here. Just Click OK when finished.



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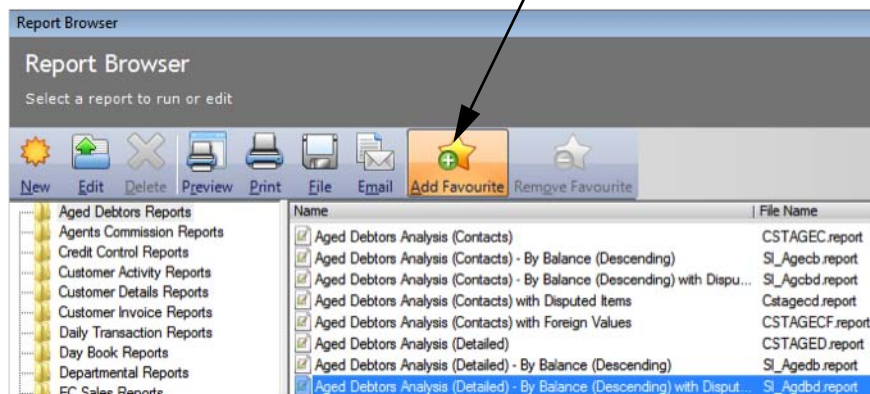
Add reports to the Favourites menu

To avoid having to go into lots of different folders to get to the reports required on a regular basis, set them all up in the Favourites menu

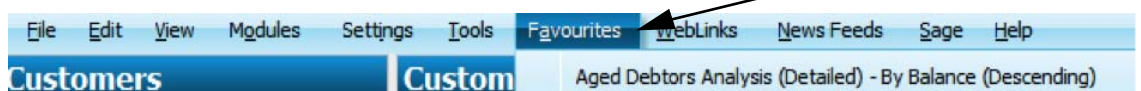


This one-off procedure will need to be repeated for each report to be added.

Click the Reports icon in the relevant module, then Click the relevant Reports folder. Click the actual report to be added and then Click the Add Favourite icon



The report is then displayed in blue, and can then be accessed from the Favourites menu as below.





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Search and search criteria

Most of the record screens in Sage have a Search button at the bottom. This can be used to apply a search criteria and to either view and drill-down the selected records, or to run a report/letter/layout for the selected records.

So for example, we may want a list of customers whose 'Balance Older' is > £2,500.

So Click the Search button at the bottom of the Customer screen.

Then make the selections for each column

Join – select Where

Field – select Balance Older

Condition – select 'Is Greater Than'

Value – enter 2500

Join	Field	Condition	Value
Where	Balance Older	Is Greater Than	2500.00

Expression:
Where 'Balance Older' > '2500.00'

Click the Apply button



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Only customers who match the Search criteria are displayed and on the top right of the customer record screen the number of records is displayed.



If more criteria are required, then in the Search dialogue press tab on the Value field to open up a new search row, specify the Join as an “And” or “Or” and then enter a new field, condition and value.

To re-select all records again, then Click the magnifying glass next to the record count.

