

Sage 50® Accounting (U.S. Version)

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Quick Reference Guide

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Getting Acquainted with Sage 50

Using the Navigation Bar & Centers

The Navigation Bar appears at the left side of the Sage 50 main window and offers access to "pages" called Navigation-Centers, which provide information about, and access to, Sage 50. Within each Navigation Center, related tasks are performed by clicking the buttons shown and then choosing a command from the drop-down menu. These commands replicate the functionality of the commands in the Menu Bar. The Navigation-Center Toolbar appears above the open Navigation-Center window, just below the Menu Bar.

1. To open a Navigation Center, click the name of the Navigation Center in the Navigation Bar.
2. To make changes to the Navigation Center, click an available button in the Navigation Center Toolbar.

Button	Function
"Show/Hide"	Toggles display of Navigation Center "On" or "Off."
"Refresh"	Refreshes Navigation Center.
"Default"	Sets currently-displayed Center as default when company file is opened.
"Customize"	Customizes the Navigation Center.
"Help"	Prints Navigation Center.

Using the Menu Bar

The Menu Bar provides access to the windows that perform business-related tasks, such as entering customers, writing checks, and entering bills.

1. Click one of the commands in the Menu Bar ("File," "Edit," "Tools," etc.) to view the subcommands.
2. To execute a subcommand, click it. Subcommands followed by an ellipsis mark (...) open new windows into which additional information must be entered. Subcommands followed by a right-pointing arrow indicate that you must select from another side menu of choices that appears.

Customizing Shortcuts

The "Shortcuts" section appears in the bottom section of the Navigation Bar and provides one-click access to the features and tools most often used in Sage 50. To

Making a Cloud Backup

To create cloud backups, you must have a Sage 50 Accounting product and subscription to Microsoft 365 Business (Premium or higher). To enable Microsoft 365 integration, the sign-in account used must also be a global administrator of the Microsoft 365 account.

1. Select "File Back Up..." from the Menu Bar.
2. Click the "Back Up Online" button.
3. To allow the app to make changes, click "Yes," if prompted.
4. To sign in to your Microsoft 365 account (if not already), click the "Sign In" button, enter credentials, and click "Sign In." The account appears in the "Cloud Backup" window.
5. Click "Allow" to allow permissions, if prompted.
6. Click the "Back Up" button.
7. Click "OK" after ensuring all users are logged out.
8. Click "Close" once the backup is complete.

Restoring from a Backup File

1. To restore from a local backup, select "File Restore..." from the Menu Bar. To restore from a cloud backup, select "File Cloud Backup" Restore from the Cloud..." from the Menu Bar.
2. If restoring from the cloud and not signed in, click the "Sign In" link and sign into Office 365.
3. To select a backup file, click the "Browse" button, navigate to it, select it, and click "Open." Or, select it from the list shown, if available.
4. Click the "Next" button.
5. Select "Overwrite existing company data," click the "Browse" button, navigate to the file, select it, and click "OK." Or, select "Create a new company using the restored data."
6. Click the "Next" button.
7. Make selections on the "Restore Options" screen.
8. Click "Next" button and then the "Finish" button.

Using Lists

Use lists in Sage 50 to view records entered into many of the "Main" and "Task" windows.

1. Open a "Main" or "Task" window (e.g., select "Maintain Vendors..." from the Menu Bar) and click the "List" button in the window's toolbar. Or, select "List (Category)" from the Menu Bar.
2. To open an item in the list window, double-click it. Or, select the item and click the "Open" button in the window's toolbar.
3. Make any desired changes and click the "Save" button and then the "Close" button.

Adding General Journal Entries

1. Select "Tasks General Journal Entry..." from the Menu Bar.
2. Select a "Date," enter a "Reference" code, and enter the credit and debit amounts.
3. Click the "Save" button in the toolbar.

Sales Tax

Using the Sales Tax Wizard

1. Select "Maintain Sales Taxes..." from the Menu Bar.
2. Make a selection under "What would you like to do?" ("Set up a new sales tax," "Edit an existing sales tax or sales tax agency," etc.).
3. Click the "Next" button.
4. To delete an item, select it in the wizard and click the "Delete" button. To edit an item, select it in the wizard and click the "Next" button.
5. Make selections or changes, using the "Next" and "Back" buttons to navigate the steps in the wizard.
6. Click the "Finish" button when done.

Collecting Sales Tax

Sage 50 automatically collects sales tax within the "Sales Journal Entry" window.

to Menu Bar
Customer
drop-down
+ Task

Sage 50
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Table of Contents Sage Line 50 Instruction Manual Torrent

1. Understanding the eBook Sage Line 50 Instruction Manual Torrent
 - The Rise of Digital Reading Sage Line 50 Instruction Manual Torrent
 - Advantages of eBooks Over Traditional Books
2. Identifying Sage Line 50 Instruction Manual Torrent
 - Exploring Different Genres
 - Considering Fiction vs. Non-Fiction
 - Determining Your Reading Goals
3. Choosing the Right eBook Platform
 - Popular eBook Platforms
 - Features to Look for in an Sage Line 50 Instruction Manual Torrent
 - User-Friendly Interface
4. Exploring eBook Recommendations from Sage Line 50 Instruction Manual Torrent
 - Personalized Recommendations

- Sage Line 50 Instruction Manual Torrent User Reviews and Ratings
- Sage Line 50 Instruction Manual Torrent and Bestseller Lists
- 5. Accessing Sage Line 50 Instruction Manual Torrent Free and Paid eBooks
 - Sage Line 50 Instruction Manual Torrent Public Domain eBooks
 - Sage Line 50 Instruction Manual Torrent eBook Subscription Services
 - Sage Line 50 Instruction Manual Torrent Budget-Friendly Options
- 6. Navigating Sage Line 50 Instruction Manual Torrent eBook Formats
 - ePub, PDF, MOBI, and More
 - Sage Line 50 Instruction Manual Torrent Compatibility with Devices
 - Sage Line 50 Instruction Manual Torrent Enhanced eBook Features
- 7. Enhancing Your Reading Experience
 - Adjustable Fonts and Text Sizes of Sage Line 50 Instruction Manual Torrent
 - Highlighting and Note-Taking Sage Line 50 Instruction Manual Torrent
 - Interactive Elements Sage Line 50 Instruction Manual Torrent
- 8. Staying Engaged with Sage Line 50 Instruction Manual Torrent
 - Joining Online Reading Communities
 - Participating in Virtual Book Clubs
 - Following Authors and Publishers Sage Line 50 Instruction Manual Torrent
- 9. Balancing eBooks and Physical Books Sage Line 50 Instruction Manual Torrent
 - Benefits of a Digital Library
 - Creating a Diverse Reading Collection Sage Line 50 Instruction Manual Torrent
- 10. Overcoming Reading Challenges
 - Dealing with Digital Eye Strain
 - Minimizing Distractions
 - Managing Screen Time
- 11. Cultivating a Reading Routine Sage Line 50 Instruction Manual Torrent
 - Setting Reading Goals Sage Line 50 Instruction Manual Torrent
 - Carving Out Dedicated Reading Time
- 12. Sourcing Reliable Information of Sage Line 50 Instruction Manual Torrent
 - Fact-Checking eBook Content of Sage Line 50 Instruction Manual Torrent

- Distinguishing Credible Sources
- 13. Promoting Lifelong Learning
 - Utilizing eBooks for Skill Development
 - Exploring Educational eBooks
- 14. Embracing eBook Trends
 - Integration of Multimedia Elements
 - Interactive and Gamified eBooks

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