E-book

Sage for Accountants: what's new?

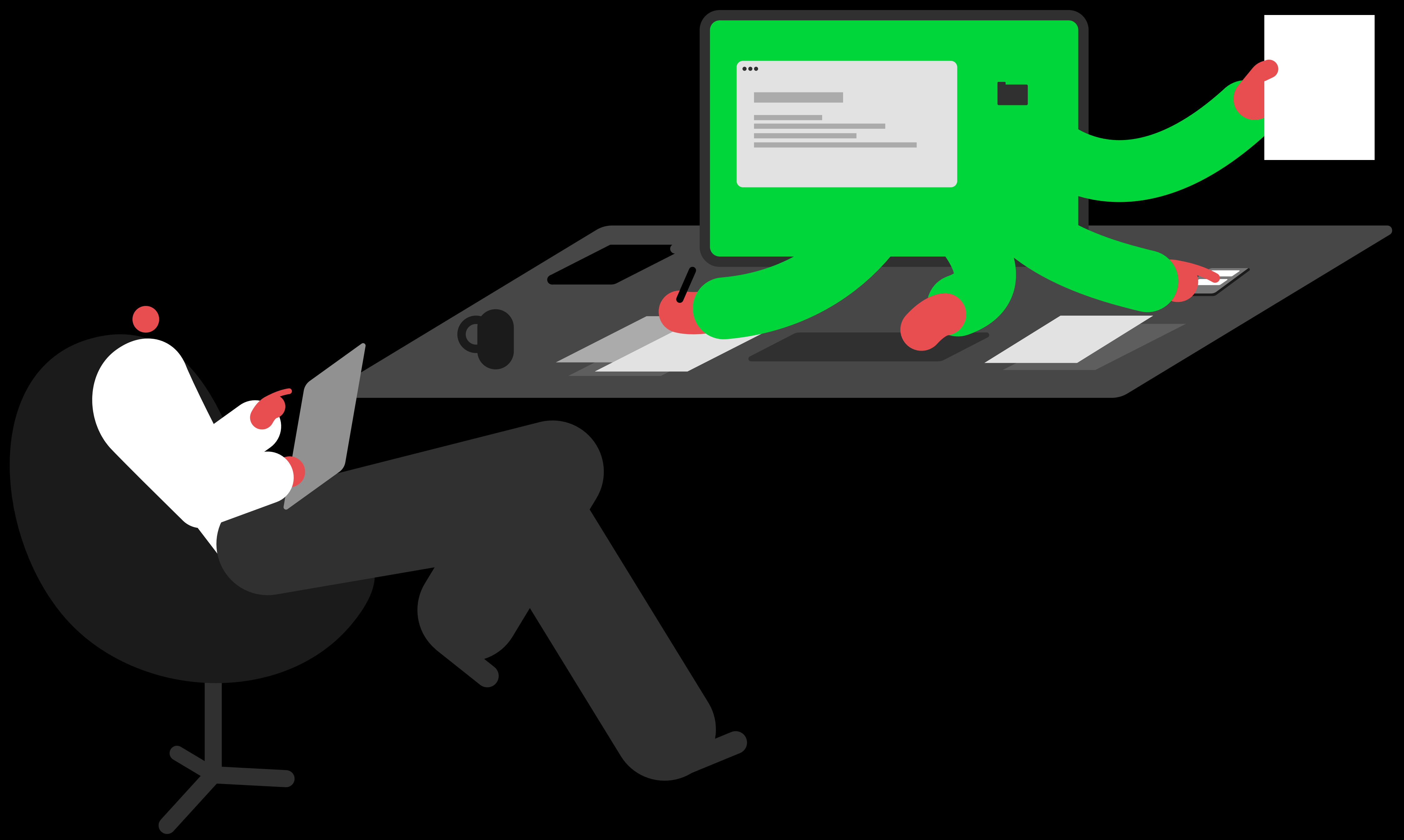
September 2023

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. More than 2,000 new accountants and bookkeepers signed up for the award-winning app—as voted for by real users at the 2022 LUCA Awards, hosted by the Institute of Certified 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 for year end accounts preparation and tax companies and self-assessment.
- 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.

Get started quickly

Get started in Sage for Accountants quickly and easily by adding lists of clients all in one go. You can also add a new list if you've organised a new Volume Purchase Agreement, helping you make the most of your discount across all subscriptions.

Client record import in Client Management
Save hours of time by accurately uploading lists of clients' data in bulk—map, import, and automate validity checks to cut out any human errors.

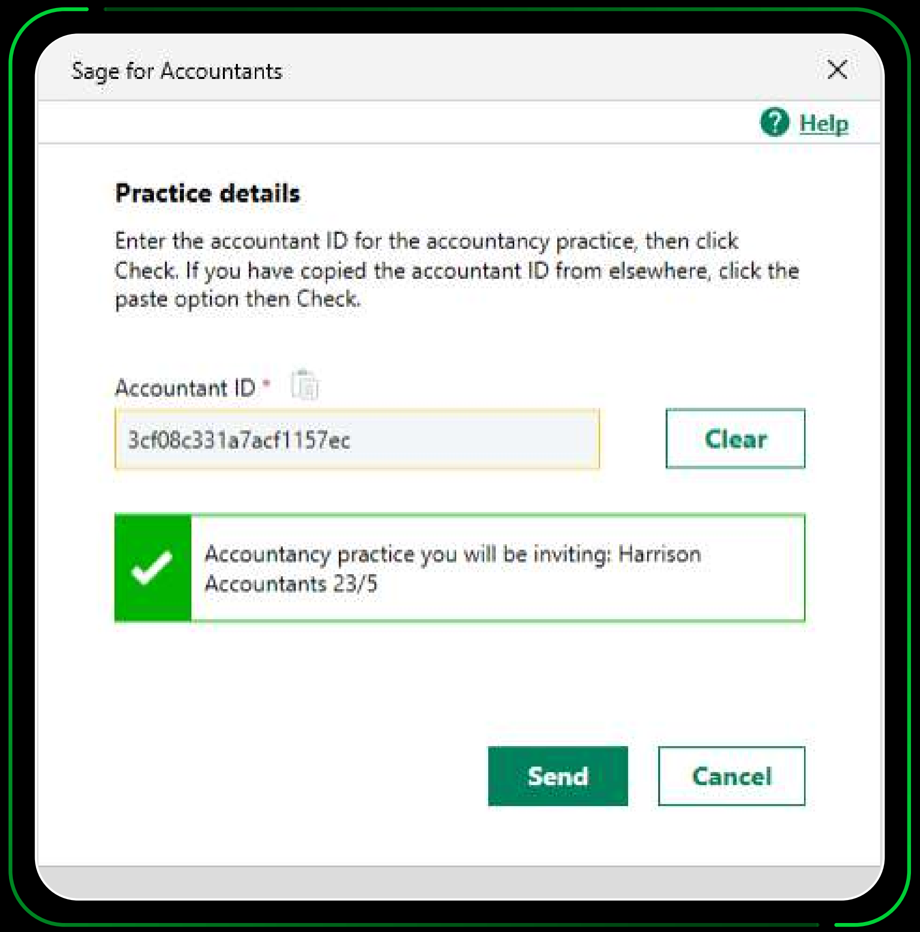
One central platform for all your needs

Sage for Accountants now works with Sage 50 Accounts, allowing you and your practice to add your Sage 50 customers to your single client list, providing one central platform for all your needs.

We know that it can be difficult to get a single clear view of all your clients. You need to use different platforms to access your desktop and cloud clients, all whilst managing a successful practice and helping your clients to achieve their goals. However, the future of accountancy is here—you can now connect and access your Sage 50 Accounts client list in Sage for Accountants, allowing you to manage your client work in one single platform.

Watch this short and simple video, where we'll show you how to connect and access your clients in one place through four easy steps. Plus, you can find out more about our new integration in the Sage **Support Hub**.

Get started in Sage for Accountants



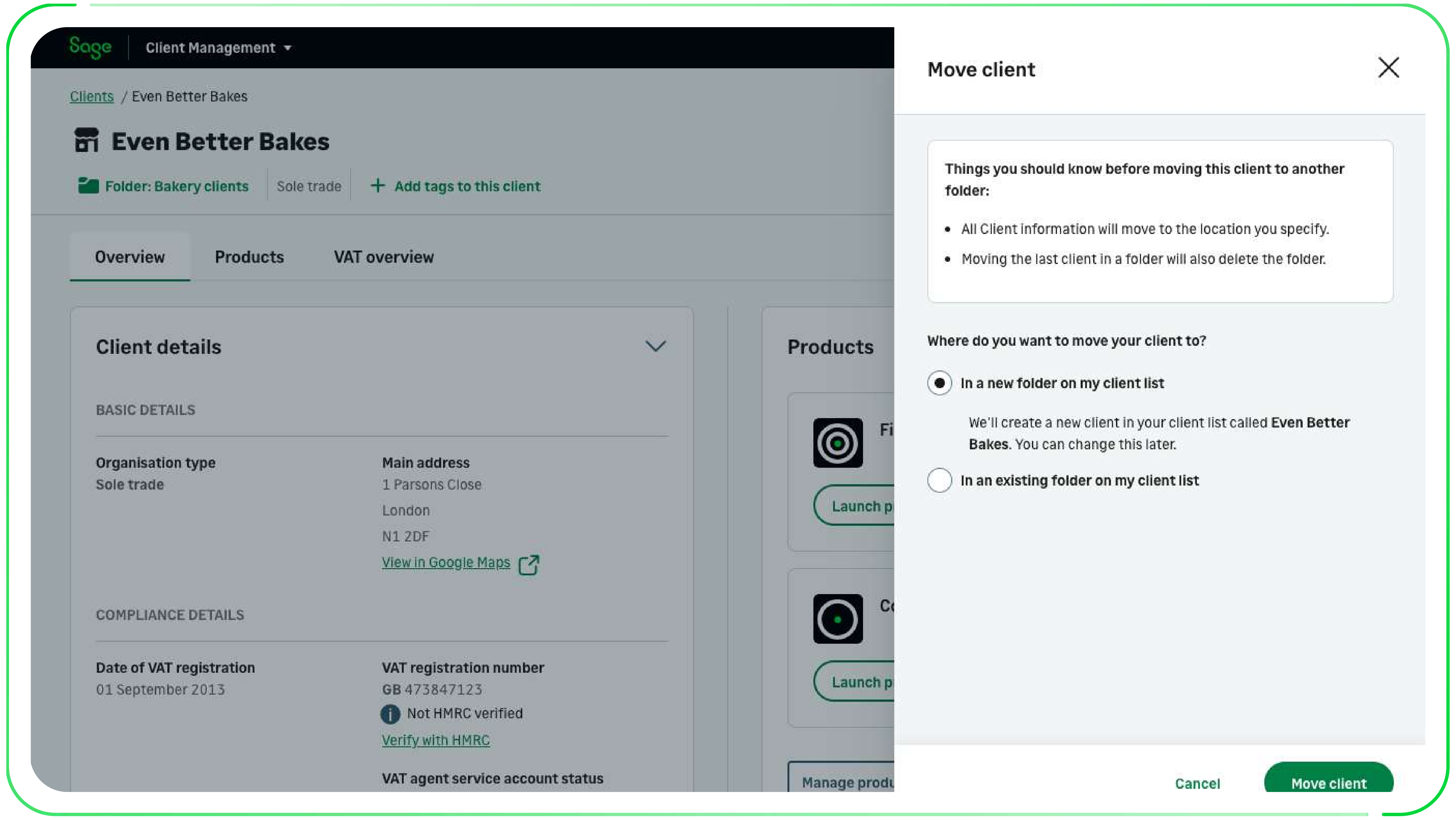
Your feedback drives our progress

We believe in listening to the voice of the customer to understand their needs and expectations better. At Sage, we continuously improve our solutions to make the customer experience the best it can be, aiming to exceed expectations by tailoring our products and services based on each and every one of our clients' feedback.

Recently, Sage made a few small, but powerful changes to Client Management:

- Clear notifications for importing client data during an ongoing import process to prevent data duplication.
- Improved clarity on actions being taken when cancelling comments without saving changes.
- Streamlined the process of moving clients to another folder, reducing unnecessary clicks.
- Enhanced the user journey for deleting clients, contacts, and prospects, making it more streamlined and efficient.
- Made the list view of the client list scalable and accessible for all screen sizes, ensuring consistent width resize behaviour.

These improvements reflect our commitment to meeting customer needs and delivering a better customer experience, each time.

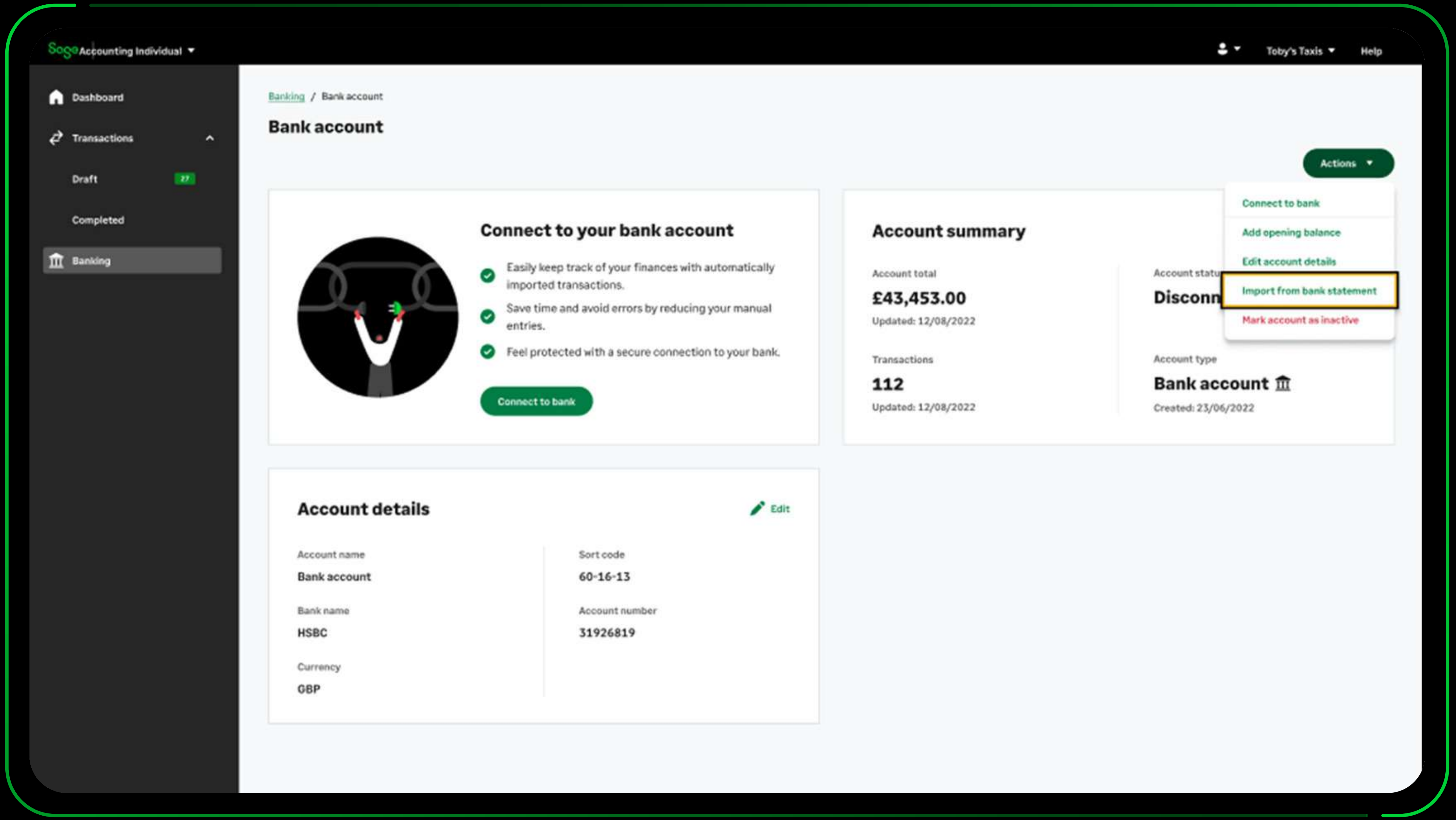


Easy, streamlined transaction entry

Sage Accounting (Individual)
This new functionality streamlines banking statement imports and data issue resolution, enhancing the customer experience, saving time, and improving your efficiency. Within Sage for Accountants, you can now effortlessly import clients' banking transactions as drafts, while clients themselves can import statements in different formats. This ensures smooth transaction entry and allows for easy edits if required. Additionally, the system identifies possible duplicate transactions, furthering accuracy and usefulness.

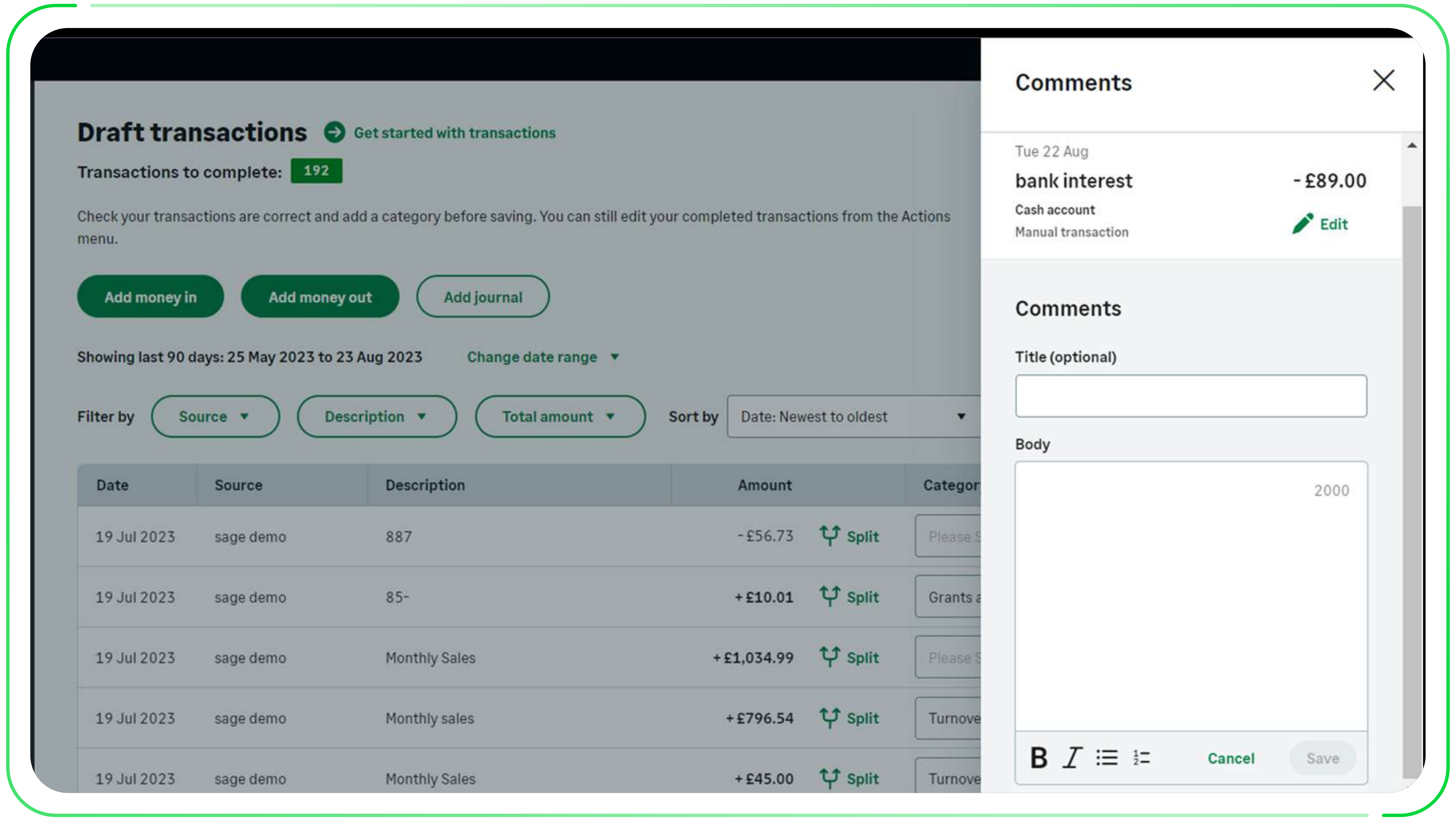
Import bank statements to record transactions

- Use existing bank statement imports to what clients are familiar with today in the other Accounting plans.
- Import a bank statement in a desired format (available via the banks)—OFX, QIF, CSV, or XLS.
- Easily understand any errors within the file, edit these, and resubmit the file for processing.
- Be notified when transactions are imported that are duplicated already within the product.



Enhanced transaction insights

Sage Accounting (Individual)
The ‘Notes on transactions’ feature meets the requirement of accountants and bookkeepers to include extra details with digital transactions, greatly improving record keeping, analysis, communication, and compliance in financial data management. This offers advantages such as comprehensive record creation, facilitating precise monitoring of income, expenses, and financial transactions—providing insights, effective communication to stakeholders and collaborators, and furnishing transaction documentation for regulatory or legal purposes.



You can now record notes on transactions:

- Ability to record notes to a transaction, view, edit, and delete.
- Ability to restrict access to notes actions based on permissions. (Accountant/Administrator full access, customised access, restricting access to create, delete, edit notes, and give read only access.)
- Ability to tag users within a note that will be notified of their tag.
- Use the feature with no collaboration or collaborating with multiple people, and/or combination.
- Available in both web and mobile to facilitate easy collaboration.

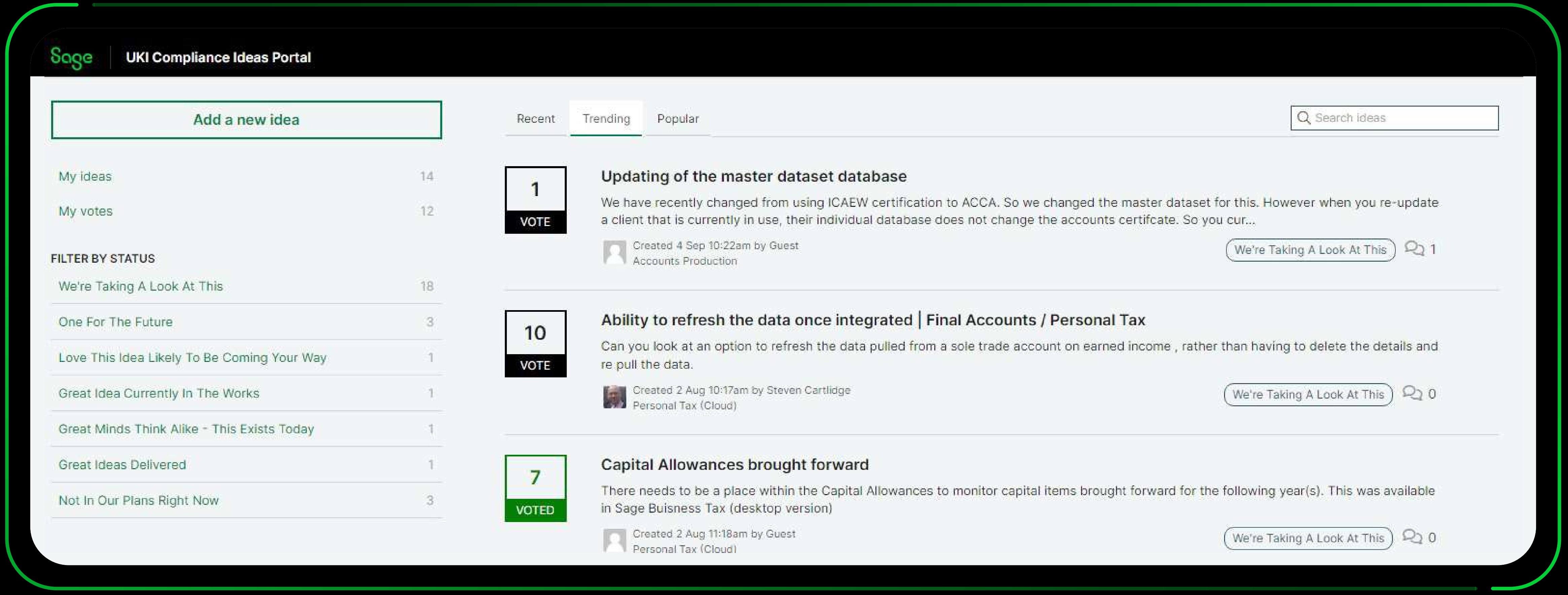
Sage Compliance

Relieve the pressure of year-end and tax with a single data flow from capture to tax
Ease the year-end burden by streamlining data flow and simplify the process by seamlessly importing Sage Accounting data into Final Accounts online, enabling effortless year-end tax returns and direct HMRC submission.

Achieved through Trial Balance integration via Smart Reporting, it empowers accountants to complete year-end accounts and statements efficiently and further use the existing Personal and Corporation Tax Online integration for clients' tax return completion and submission.

Streamlining customer feedback and idea sharing with the launch of Aha Ideas Board
We have introduced a customer-oriented Aha Ideas Board aimed at streamlining feedback and product enhancement. This combines feedback, efficiently gathers customer input, and implements new ideas from concept to design.

This feature is seamlessly integrated within Sage products, empowering users to suggest new ideas. Each idea triggers a tracked ticket and when we implement a new feature, customers who voted are notified, and the system allows tailored feedback without navigating away from the software.



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