E-book

Sage for Accountants: what's new?

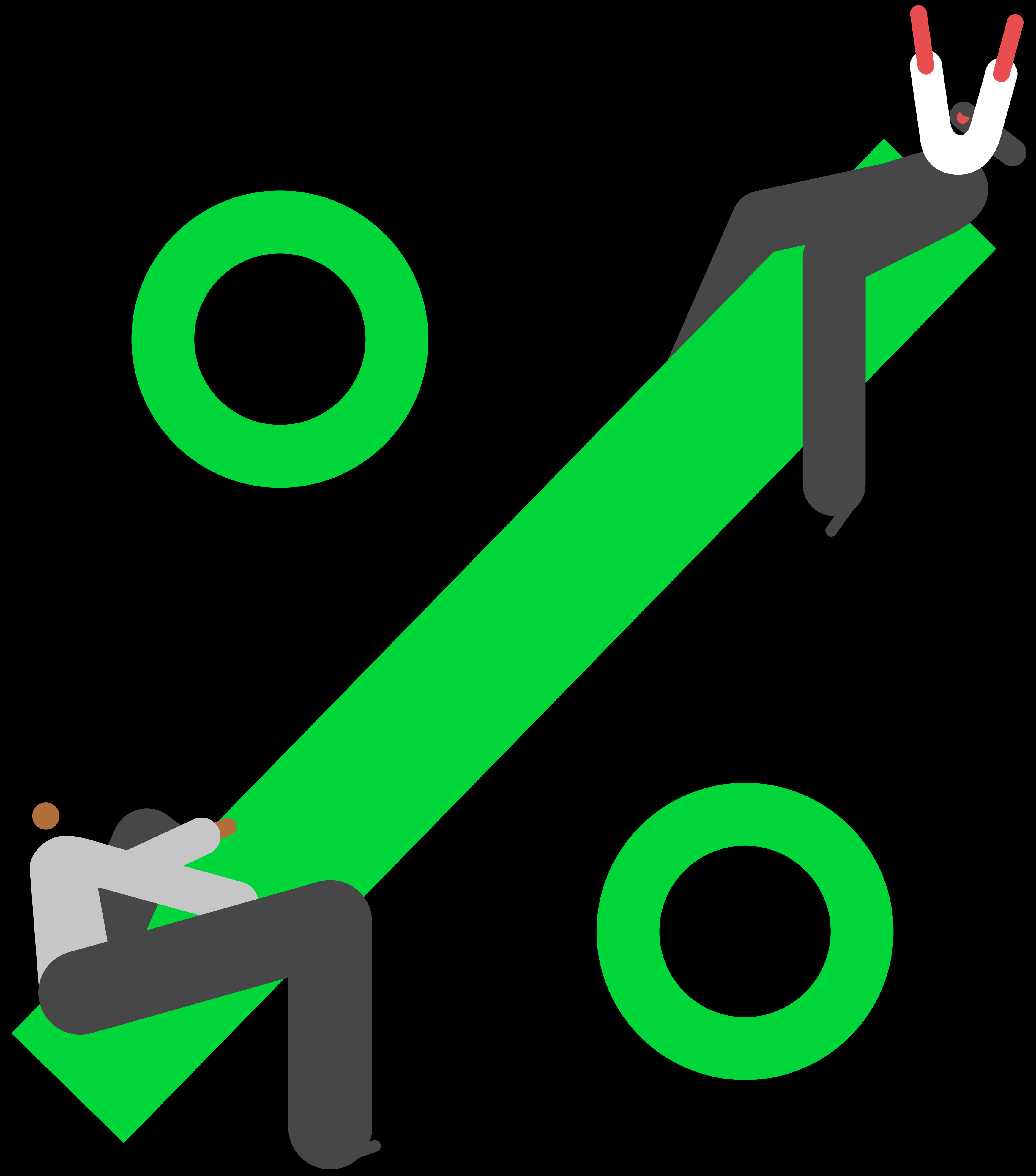
June 2023

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 2000 new customers signed up for the award-winning app—as voted for by real users at the 2022 LUCA Awards, hosted by the Institute of Chartered 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.
- 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.

Client management

Effortlessly handle and manage prospect records.

Convert prospects to clients based on successful acquisitions within a single client list.
Improve the overall client management process, streamline operations, and enhance productivity within your practice.

Streamlined client data tracking: create, track, and manage prospective clients within a single client list. Ensure client data is live, up-to-date, and easily accessible.

Conversion based on success: convert prospects to clients based on successful acquisitions, simplifying the transition from prospects to clients, eliminating manual data transfer, and reducing administrative tasks.

Enhanced client management: handle prospect records seamlessly within the client management system. Easily view, edit, and manage prospect information from a centralised location, improving efficiency, and productivity.

Customise your client list view
Now in **Sage for Accountants**, you have the ability to quickly customise your client list view. We enable you to create and save your own default view of your client list, so you can choose how you want to view your list based on your preferences every time you log in via your favourites.

Sage Payroll

Track and control payroll errors.

Monitor payroll error corrections.
A more user-friendly and transparent corrections experience.

Corrections mode: enter a dedicated mode where you can make payroll error corrections for better peace of mind. Edit pay and absences separately, making it easier to update completed pay runs.

Save and display options: have more control and flexibility in managing corrections. Easily adjust employees' pay and choose whether to display corrections in the current period or the next on the payslip.

Quick and secure employee verification.

Reduce admin with fewer payroll information requests.
Enable Employee Verification for Payroll clients. Instantly give employees the power to securely access and share employment information for mortgage applications, loan approvals, and rental agreements. Faster credit approval with less legwork.

Integration with Experian and Equifax: Sage Payroll can access their robust databases and verification services, enabling users to securely retrieve and share accurate employment and income information for verification purposes.

Streamlined employee application process: employees often struggle to gather and share information for employment verification. This gives them the power to securely access and share their chosen payroll data.

Quick credit approval: employees can swiftly submit applications for proof of employment and income verification by sharing accurate and up-to-date payroll data and reducing time-consuming manual processes.

Reduced administrative queries: employers can give employees direct access to their payroll data, eliminating the need to contact their employers for employment verification purposes.

Futrli by Sage

Faster delivery of advisory services with reporting templates.

Increased advisory penetration within accounting practices, and improved ROI from clients.
Deliver advisory conversations with greater speed across the firm's portfolio with Reporting Templates, providing a smart and efficient way to generate client insights and drive revenue generated from value-driven work with minimal effort.

- Pre-made report templates: a library of templates that cover various advisory topics, such as accounting advisory work and SME operational analysis, designed to deliver instant value to clients and provide deep usage possibilities.
- Easy integration and customisation: save time and effort while ensuring personalised and impactful reporting for every client. Easily drop a pre-made report template into a client's reporting area, choose when you want to send with scheduling functionality or customise further before sending.
- Value-driven work and collaboration: quickly deliver advisory conversations with instant value by leveraging the pre-made report templates. Spend less time on report preparation and more time focussed on client needs with templates that provide a foundation for impactful reporting opportunities, enabling collaboration and discussions of client operations.

Automate and streamline advisory work with scheduled reports and document manager.

Easily manage and monitor client communication, reporting, document organisation and review, with a consistent and simple approach.
Efficiently provide better insights and drive greater client value, enhance document management, and ultimately increase practice revenue while deepening the adoption and provision of advisory services.

- Streamline advisory processes: save time and effort and create capacity resulting in opportunities to extend the reach of advisory services within the practice, leading to higher revenue potential.
- Drive greater client value: communicate client insights with minimal effort, providing a customer-centric review ensuring the accuracy and quality of reports before they are sent.
- Effortlessly track and manage reports: efficient document management with a clear searchable view, where reports are categorised based on their status, such as "to be sent," "ready for review", and "successfully sent".
- Easily access, manage and review: a centralised location for accessing and reviewing historical PDF reports facilitates easy retrieval of information and supports on-going advisory analysis.
- Increased Revenue and Advisory Proliferation: automation of processes and streamlined document management means you can drive increased revenue by delivering efficient advisory services. Expand advisory reach, and enhance the penetration and proliferation of advisory services.

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