

POWER TO RUN YOUR BUSINESS

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# Line50 Upgrade Guide

Powerful accounting software for growing businesses

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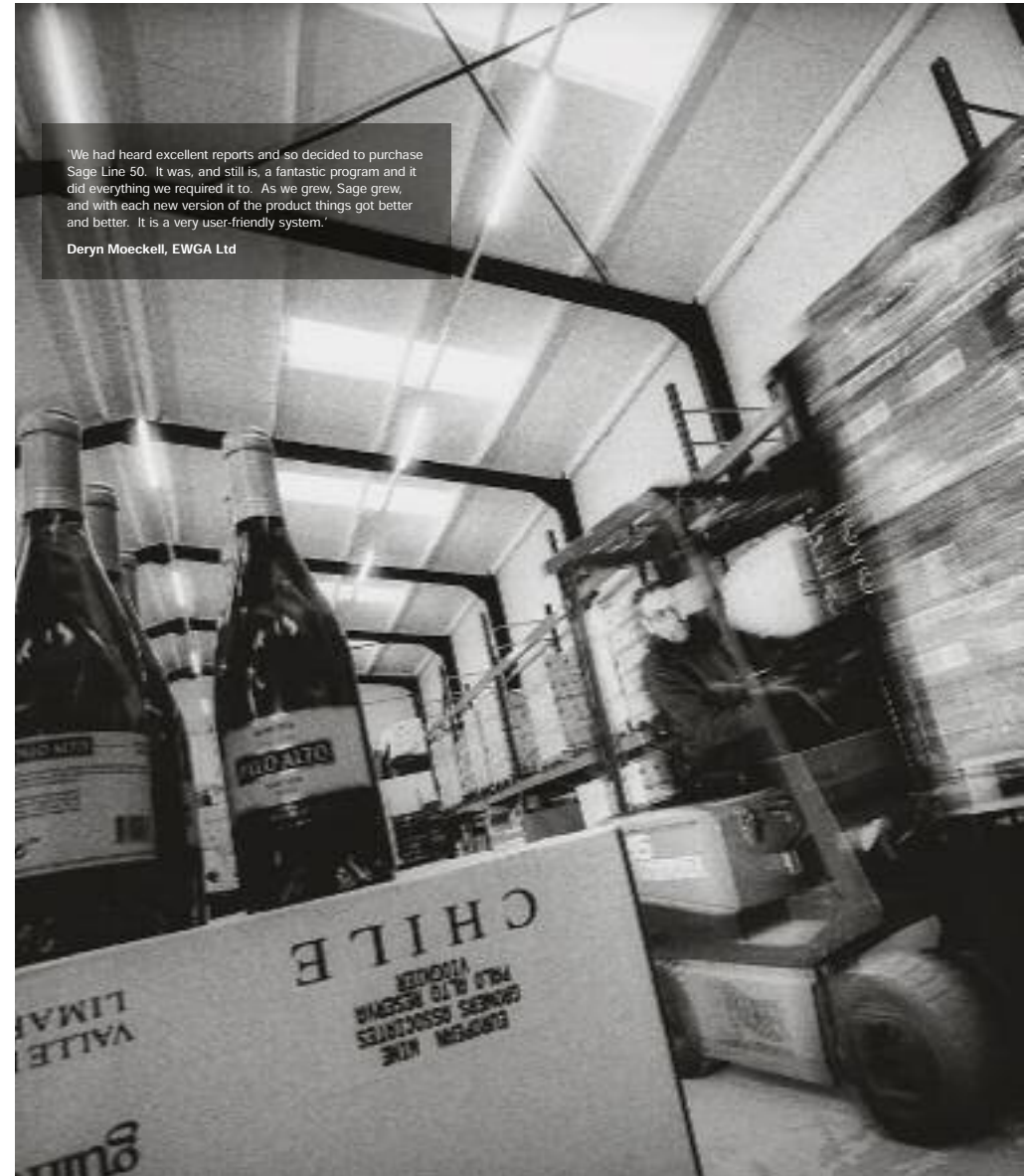
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## Introduction

This guide aims to provide you with the information you need to encourage your customers to upgrade their Sage Line 50 software, detailing the features introduced in successive version releases, with an overview table that shows a complete comparison between all versions.

### v4 and v5

Customers still using these early versions will probably be uncertain about upgrading and will need good advice, support and training to move up the range. It's likely these customers' businesses and software requirements will have changed since their last purchase of Sage Line 50. This is a great opportunity to give your customers an in-depth software and hardware health check.

### ■ From v4 to v5

The currency calculator allows users to now calculate the Euro value of invoices, and to generate quotations and proformas for customers. Users can also record details of interactions with customers on their Sage Line 50 system.

### ■ From v5 to v6

Purchase invoices can now be generated automatically from purchase orders and stock levels can now drop below zero. There is now more flexibility, with the ability to mix stock, non-stock and service on the same invoice.

### v6 and v7

Customers using these versions will probably be undertaking the same old routines. They will need to be shown how the extra features of the next versions could help them save time and create a more efficient work process.

### ■ From v6 to v7

Products can now have a different price for each different customer, allowing users to offer discounted prices for regulars. Users can also store multiple customer, supplier and delivery addresses and can pay suppliers by BACS. V7 also integrates with Microsoft Office, allowing users to send Sage Line 50 data to Excel, Word and Outlook.

### ■ From v7 to v8

The VAT process is enhanced, with more reports and the option to preview VAT returns before printing. The report designer function is enhanced, and a new wizard helps with month and year-end activities. Recurring entries can be set to save time and users can also check for stock shortfalls against current orders.

### v8 and v9

Customers using these versions will probably be operating their accounts fairly smoothly, and will need to be shown how the next versions form a complete business management system. The major improvements and new features brought in at this stage focus on accessing information held in the accounting software, to help improve the way a business runs.

### ■ From v8 to v9

The Management Information System allows users to see important data in table and graph format. Improved reporting enables them to instantly compare data from current and previous years, e.g. profit and loss detail. Users can now customise their Sage Line 50 desktop for easier navigation, and can archive all company information at the end of the financial year. The introduction of foreign currency support in Financial Controller provides key functionality to users.

### ■ From v9 to v10

With a new look and feel, v10 makes it easier to find and view key information, and the Accounts Analyser provides instant, onscreen snapshots of data. The My Business Set-Up allows each company to tailor the system set-up to suit their particular business needs, while the Audit Assistant helps users prepare for audits and check for anomalies in their accounts. The Cash Flow Planner enables users to better manage their money, seeing what payments are outstanding and what can be paid off to free up cash flow.

### v10

Customers using this version could already be taking advantage of many of the business management features and efficiencies offered by the program; however, v11 has been improved and developed further and contains a wealth of great new features you can promote to your customers to help their businesses run even more smoothly.

### ■ From v10 to v11

Excel Integrated Reporting now allows those without access to or knowledge of Line 50 to view data as management reports in Excel. Enhanced credit control features, such as Credit History, help users keep complete records of all credit control-related dealings with both customers and suppliers. The Copy facility and Batch Change capability help take the effort out of creating new transactions and accounts - handy for repeat customer orders, for example. For more advanced security, user identity is now password protected and logged against each activity, so any changes can be tracked back to ensure their validity. The new Project Costing capability (Accountant Plus and Financial Controller only) allows businesses that operate on a project basis (e.g. builders) to clearly allocate and analyse costs and resources for each project. The Financial Controller variant now has advanced Sales and Order Processing, as well as enhanced foreign currency features, with Intrastat support to ensure legislative compliance.

We have also introduced a new version of Line 50 specifically for accountants in practice, Line 50 Client Manager. Client Manager integrates with Accountant, Accountant Plus and Financial Controller v11 to help accountants and their clients work together more efficiently.

All features are correct at time of print, however may be subject to change.

## Version comparison table

Feature	Description	v5	v6	v7	v8	v9	v10	v11
Increased field sizes	Data entry fields increased in size	■	■	■	■	■	■	■
Quotations and proformas	Ability to generate for customers	■	■	■	■	■	■	■
Cheque generator	Print cheques and remittance for any payments made	■	■	■	■	■	■	■
Currency calculator	Calculate the Euro value of invoices or sterling value of invoices received	■	■	■	■	■	■	■
Contact manager	Record any contacts with customers such as time, date, duration and details	■	■	■	■	■	■	■
Purchase order update	Purchase invoices automatically generated from PO's		■	■	■	■	■	■
Negative stock	Allows stock levels to drop below zero		■	■	■	■	■	■
Individual customer pricing	Each product can have a price for each customer			■	■	■	■	■
Multiple delivery address	Store multiple customer, supplier and company delivery addresses			■	■	■	■	■
Sales order fulfilment	Notification of shortages			■	■	■	■	■
Integration with Microsoft Office	Send Line 50 record and financial information to Excel, Word and Outlook			■	■	■	■	■
Report designer changes	New wizard, manual included			■	■	■	■	■
E-payment	Pay your suppliers through BACS			■	■	■	■	■
Electronic bank reconciliation	Make sure your accounts data ties up with your bank statement			■	■	■	■	Improved
E-mail	E-mail orders, statements and orders			■	■	■	■	■
Delivery charges	Default delivery charge for invoices and order can be automatically assigned when creating invoice / order			■	■	■	■	■
e-Banking*	Connect Line 50 to your bank's Internet or PC banking software			■	■	■	■	■

Feature	Description	v5	v6	v7	v8	v9	v10	v11
Mix and match invoice and SOP	Mix and match stock, non-stock and service on same invoice				■	■	■	■
Screen print	Print any ledger or activity screen without running report or export				■	■	■	■
Stock shortfall facility	See what stock is short				■	■	■	■
New invoice / order entry screen	Create invoices is one process, more detailed VAT breakdown and can be printed on invoice				■	■	■	■
Invoice profit button	'How much will I make?' option				■	■	■	■
Journal reversal	Change journal details that have been entered incorrectly				■	■	■	■
Recurring entry	Can be set against customer or supplier accounts, recorded for different time periods, etc.				■	■	■	■
Goods received notes	Assign a reference to indicate when ordered goods have been received				■	■	■	■
Stock take reports	Reports which can be filled in by the user when doing a stock take. Manual adjustments can be made in Line 50				■	■	■	■
Spell checker	Facility to spell check text based fields				■	■	■	■
Memorise batch					■	■	■	■
Period end wizard	Takes users to each screen needed for month and year end				■	■	■	■
Pre-printing remittance	Remittances can now be re-printed after the payment is saved				■	■	■	■
Financials find button	Search the audit trail to locate a specific transaction				■	■	■	■
Bank reconciliation data	Storage of the data a transaction is reconciled in the bank				■	■	■	■
VAT report enhancements	9 new EC VAT reports available				■	■	■	■
VAT return preview	Ability to preview VAT return before printing				■	■	■	■

Feature	Description	v5	v6	v7	v8	v9	v10	v11
Invoice ageing	The ageing of an invoice can now be started from first day of month after transaction date				■	■	■	■
Report designer enhancements	Variable character length, add attachments to e-mails, CSV specification, hyper links on reports				■	■	■	■
Company archiving	Archive all company information at the end of a financial year					■	■	■
Plain paper printing	Print onto normal A4 paper					■	■	■
MIS (management information system)	Allows the user to see key features of their company data as a series of tables and graphs					■	■	■
Task based navigation	Allows the user to customise their Sage Line 50 desktop to list the core tasks that they use the most frequently					■	■	■
Improved reporting	Produce reports including information from previous financial years, providing 'at-a-glance' comparisons of profit and loss figures, balance sheet, and other financial indicators from one financial year to another					■	■	■
New reports tree view	All reports are now organised into groups					■	■	■
Transaction e-mail*	Transaction e-mail allows the user to send and receive invoices, sales orders and purchase orders from a customer or supplier who is also using Sage Line 50 version 9 or above					Financial Controller only	All variants	All variants
Foreign trader (Financial Controller only)	Deal more easily and effectively with overseas customers and suppliers, by creating quotations, invoices and orders in foreign currencies					■	■	■
Smart link	Offers intelligent navigation allowing user to access all customer/supplier transactions from one screen						■	■

Feature	Description	v5	v6	v7	v8	v9	v10	v11
Accounts analyser	Displays the nominal ledger as a comprehensive on-screen set of charts that can be investigated in more depth by drill-down from the same screen with just one click						■	■
New and improved look and feel	New look using a more intuitive interface. Displays information clearly in maximised screens						■	■
My business set-up	Enables user to tailor the set-up of your Line 50 to suit your individual needs						■	■
Audit assistant	Helps to check data accuracy and therefore prepare for any audit with confidence. Applies business logic to identify any suspect transaction. Contains a suite of VAT audit reports approved by HMCE						■	■
Cash flow planner	Payment scheduler that enables forward cash flow planning displaying at a glance all outstanding payments - what's due in and due out						■	■
Repeat orders (Financial Controller only)	Automation of recurring transactions. Enables users to set up automatic production of regular bills						■	■
Repeat invoices	Automation of recurring transactions. Enables user to set up automatic production of regular bills						■	■
Batch conversion of quotes and proformas (Accountant Plus and Financial Controller only)	Allows multiple quotes and proformas to be converted into orders and invoice						■	■
Foreign currency price lists (Financial Controller only)	Records prices in foreign currency as base currency. Enables user to maintain agreed prices with customers and suppliers, regardless of currency exchange rate fluctuations						■	■
Project costing	Allows costs associated with projects to be tracked							■

Feature	Description	v5	v6	v7	v8	v9	v10	v11
Excel integrated reporting	Allows other people in the company to access information from the accounts - for management reports, etc							■
Credit control	Provides a full record of all credit control dealings with customers' and suppliers'. Also supports suggested supplier payments and helps analyse credit control performance							■
Document management	Allows documents to be associated with Line 50 entries - allowing easier management of interactions with customers, suppliers, etc							■
PDF generator	Incorporated PDF generator							■
Client Manager	Allows easy interaction between accountants and their clients							■
New nominal view	Improves usability of information in Nominal Ledger							■
Order tabs on supplier	Easily view all the purchase orders associated with suppliers							■
Smart columns	Improves usability of grids by allowing user-defined configuration							■
EC trade support/ Intrastat support	Improves foreign currency operation and handles Intrastat declarations and the EC sales lists required by HMCA							■
Inter-currency bank transfers	Improved foreign currency support							■
Smart totals for grids	Allows simple totalling by clicking on data							■
Import customer prices	Import CSV or TXT price list files							■
Copy facility	Allows simple copying of repeat transactions							■
Batch changes	Perform batch changes of main ledger entries							■

\* Additional charges apply