Talking Sage 200

talkingsage200.wordpress.com
Twitter: @talkingsage200

Sage 200
Navigating the Desktop

Contents

Preface

This document was written to give a general overview about how you are able to navigate around the Sage 200 2010 desktop. Tips are given to show how you can best utilise certain functions within the desktop.

It is not intended to give a full and detailed explanation about every function available on the desktop and is based on the functions of Sage 200, not the processes of any individual business or company.

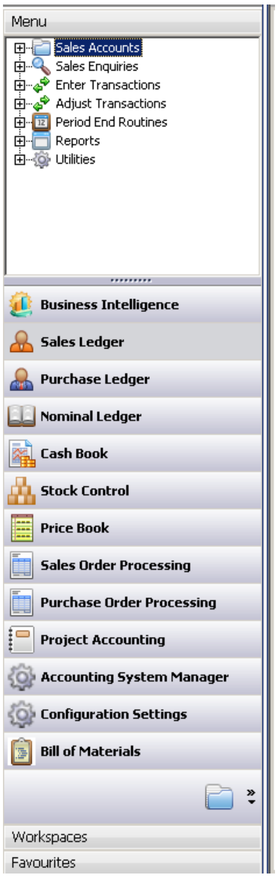
Desktop

Tool bar

Menu	Open the Menu view on the Navigation bar.
Favourites	Open the Favourites view on the Navigation bar.
Workspaces	Open the Workspaces view on the Navigation bar.
Print Report	Open the Spooler.
Refresh	Refresh the information on your Desktop.
Change Company	Open a different company.
Change User	Log off the current user, and log on as a different user.
Home Page	Display your Home Page.
Dashboards	Select the information to display in the work area.

Navigation bar

The Navigation bar appears on the left side of the Sage 200 desktop.



The Navigation bar has 3 views:

- The **Menu** view

Displays each Sage 200 module in a group. Each group has its own options displayed in a tree view at the top of the navigation bar. These allow you to perform tasks, run reports and view information.

- The **Workspaces** view.

Workspaces display information from your Sage 200 suite in separate interactive panels.

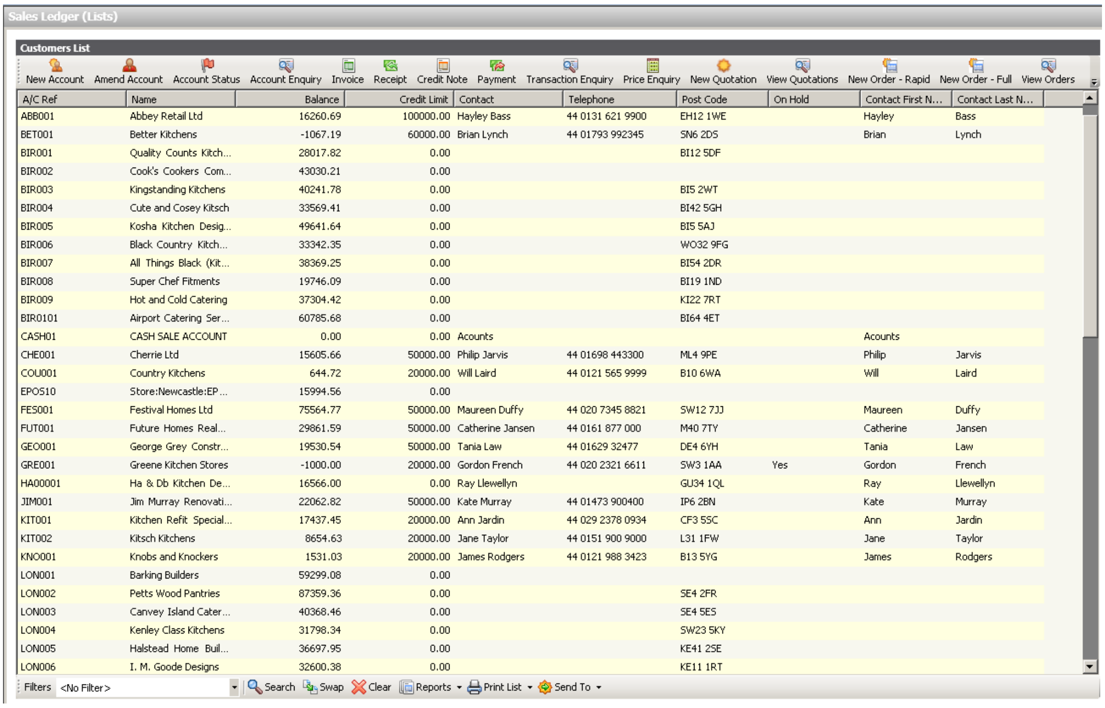
From each workspace you can perform tasks, run reports and view information.

- The **Favourites** view.

If you use particular forms and reports frequently, you can add shortcuts to them, so they can be accessed from the main Sage 200 desktop.

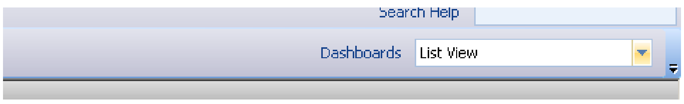
Work area

The Work Area is used to display information relating to the Sage 200 module that you are using.



A/C Ref	Name	Balance	Credit Limit	Contact	Telephone	Post Code	On Hold	Contact First N...	Contact Last N...
ABB001	Abbey Retail Ltd	16260.69	100000.00	Hayley Bass	44 0131 621 9900	EH12 1WE		Hayley	Bass
BET001	Better Kitchens	-1067.19	60000.00	Brian Lynch	44 01793 992345	SN6 2DS		Brian	Lynch
BIR001	Quality Counts Kitch...	28017.82	0.00			BI12 5DF			
BIR002	Cook's Cookers Com...	43030.21	0.00						
BIR003	Kingstanding Kitchens	40241.78	0.00			BI5 2WT			
BIR004	Cute and Cosey Kitsch	33569.41	0.00			BI42 5GH			
BIR005	Kosha Kitchen Desig...	49641.64	0.00			BI5 5AJ			
BIR006	Black Country Kitch...	33342.35	0.00			WO32 9FG			
BIR007	All Things Black (Kit...	38369.25	0.00			BI54 2DR			
BIR008	Super Chef Fitments	19746.09	0.00			BI19 1ND			
BIR009	Hot and Cold Catering	37304.42	0.00			KI22 7RT			
BIR0101	Airport Catering Ser...	60785.68	0.00			BI64 4ET			
CASH01	CASH SALE ACCOUNT	0.00	0.00	Acounts				Acounts	
CHE001	Cherrie Ltd	15605.66	50000.00	Philip Jarvis	44 01698 443300	ML4 9PE		Philip	Jarvis
COU001	Country Kitchens	644.72	20000.00	Will Laird	44 0121 565 9999	B10 6WA		Will	Laird
EPOS10	Store:Newcastle:EP...	15994.56	0.00						
FES001	Festival Homes Ltd	75564.77	50000.00	Maureen Duffy	44 020 7345 8821	SW12 7JJ		Maureen	Duffy
FUT001	Future Homes Real...	29861.59	50000.00	Catherine Jansen	44 0161 877 000	M40 7TY		Catherine	Jansen
GEO001	George Grey Constr...	19530.54	50000.00	Tania Law	44 01629 32477	DE4 6YH		Tania	Law
GRE001	Greene Kitchen Stores	-1000.00	20000.00	Gordon French	44 020 2321 6611	SW3 1AA	Yes	Gordon	French
HA00001	Ha & Db Kitchen De...	16566.00	0.00	Ray Llewellyn		GU34 1QL		Ray	Llewellyn
JIM001	Jim Murray Renovati...	22062.82	50000.00	Kate Murray	44 01473 900400	IP6 2BN		Kate	Murray
KIT001	Kitchen Refit Special...	17437.45	20000.00	Ann Jardin	44 029 2378 0934	CF3 5SC		Ann	Jardin
KIT002	Kitsch Kitchens	8654.63	20000.00	Jane Taylor	44 0151 900 9000	L31 1FW		Jane	Taylor
KNO001	Knobs and Knockers	1531.03	20000.00	James Rodgers	44 0121 988 3423	B13 5YG		James	Rodgers
LON001	Barking Builders	59299.08	0.00						
LON002	Petts Wood Pantries	87359.36	0.00			SE4 2FR			
LON003	Canvey Island Cater...	40368.46	0.00			SE4 5ES			
LON004	Kenley Class Kitchens	31798.34	0.00			SW23 5KY			
LON005	Halstead Home Buil...	36697.95	0.00			KE41 2SE			
LON006	I. M. Goode Designs	32600.38	0.00			KE11 1RT			

Use the Dashboard drop-down list on the toolbar, to select the information that you want to display in the work area.



List View	A list of the items related to the selected module, such as customer accounts.
Dashboard View	A selection of List windows, showing key information about the selected module. For example customer balances and outstanding sales invoices.
Process Map	The workflow of tasks relating to the selected module (not available in all modules).
Welcome Page	Shortcuts to some tasks, and help files.

Welcome pages

Welcome pages provide an introduction to a module. They are displayed in the work area when a module is first selected.

- The welcome page contains links to activities and help and support resources.
- Use the Activities links to run tasks or reports.
- Use the Information links to open the Sage website.

List views

The List View displays lists of information related to the selected module. For example, the Sales Ledger List View displays a list of customer accounts.

Hide or display columns in a list

1. **Right-click** on an item in a List.
2. Select **Columns** from the menu. A list of column headings is displayed.
3. Select the columns that you want to add or remove from the list.

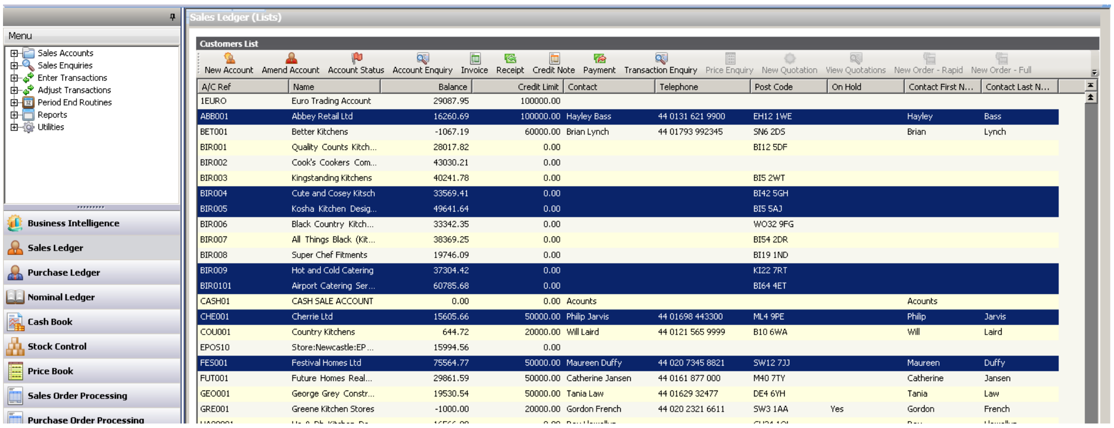
Move columns

Left click and hold down the mouse button on a column heading. Drag the column and release the button to drop the column in its new position on the list.

Select multiple items

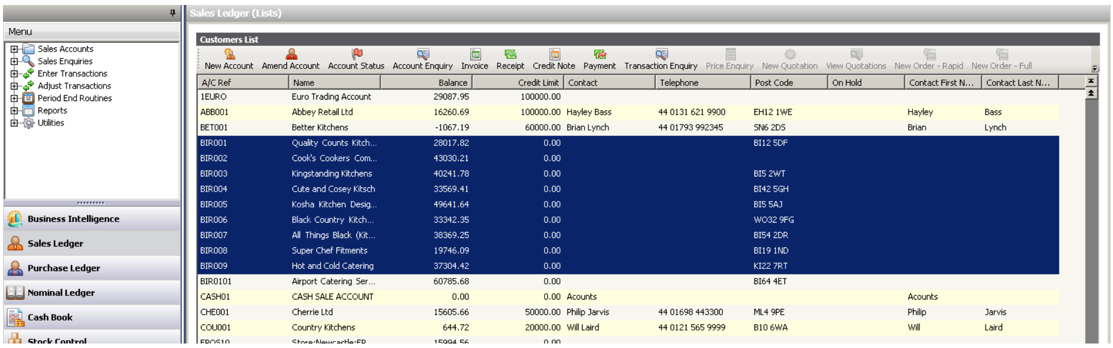
Use Ctrl and Left Click

(random select)

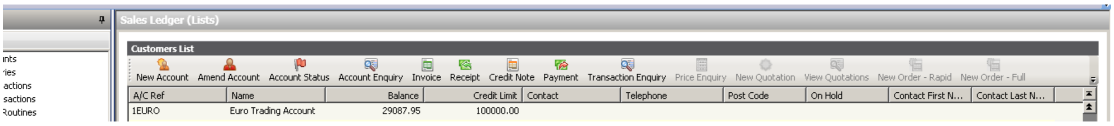


or Shift and Left Click

(batch select)



Use the toolbar options to perform an action on the selected items. For example, select Amend Account to edit each selected account in turn.

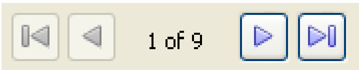


Processing multiple list items

When you select multiple items in a list, you are able to process them together:

- Select several items and click Amend. For example, from the Sales Ledger list, select a group of customers and click Amend Account.

  The Account Details for the first customer in the list appears. You can scroll through the remainder of the accounts, using the scroll buttons at the foot of the window.

- Select several items and click Reports. This generates a report for the selected items.
- Select several nominal accounts in the Nominal Ledger list and click Journal. This generates a journal entry containing the selected nominal accounts.
- Select several customer records in the Sales Ledger list and click Invoice. This generates a batch of invoices for the selected customers.

Creating Filters

Use **Search** to set up filters to display a selection of items from the List.

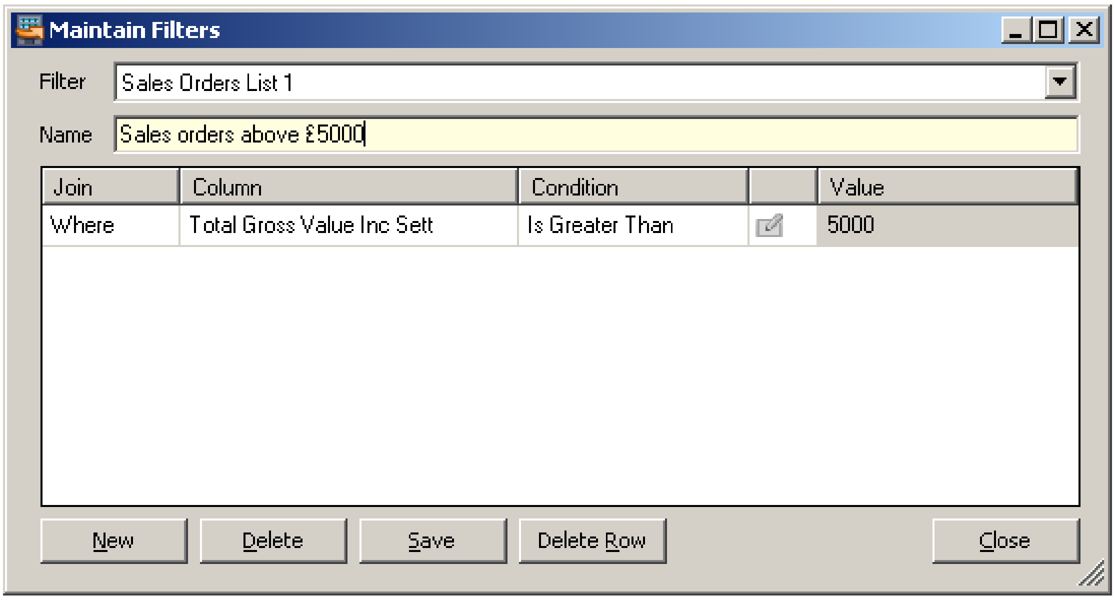
If there is a large amount of information in a list, you can use search filters to limit what is displayed.

For example, you can set up a search filter to display sales orders with a value over £5,000.

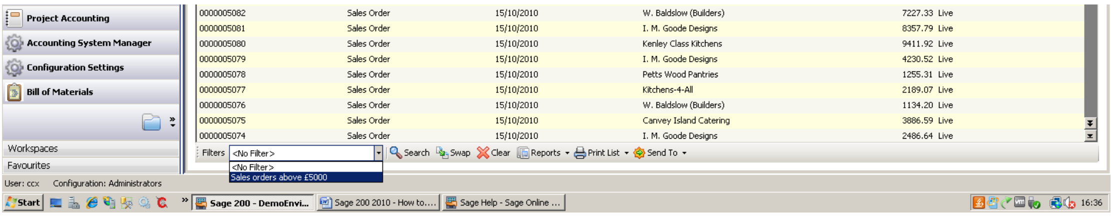
The search filters are saved, so you can create a set of filters that you use regularly.

To use search filters to find records

1. Click **Search**.
2. To create a new search filter, click **New**.
3. Enter a Name for the search filter.
4. Specify the search criteria. For example, to display sales orders with a value over 5,000:
   - Select **Total Gross Value** from the Column drop-down list.
   - Select **Is Greater Than** from the Condition drop-down list.
   - Enter the Value as **5000**.
   - If you add more than one line, specify how to handle the conditions from the Join drop-down list:
     - Select **And** for both conditions to be met.
     - Select **Or** where either of the conditions is met.



5. Click **Save** and then **Close**.
6. To apply the filter to the list, select it from the Filters drop-down list.



To remove the search filters

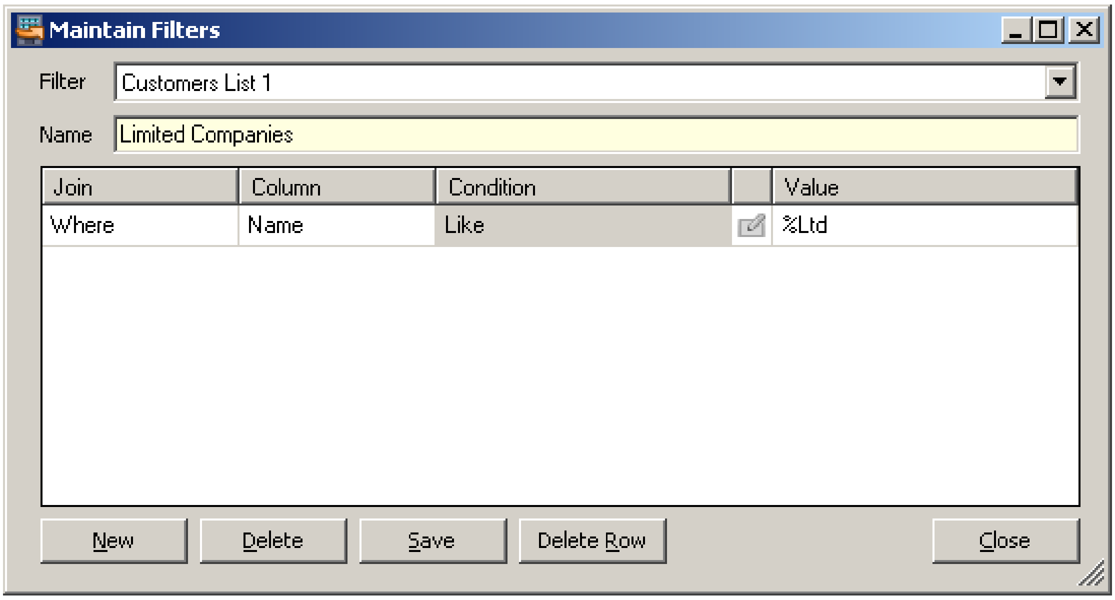
7. Click **Clear Filters**.

Filter Wildcard Symbols

When creating a filter **Wildcards** are special characters you can substitute for other characters when populating the Value field.

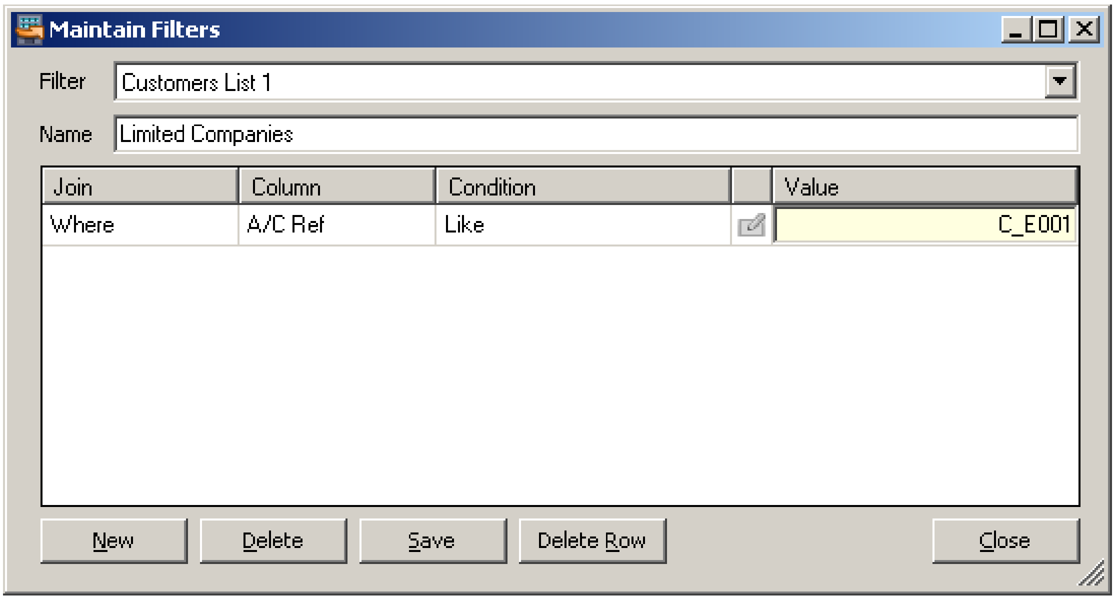
Using wildcards allows you to search for items that contain a particular set of characters.

The **%** (percent) character can be used to substitute for zero or more characters.



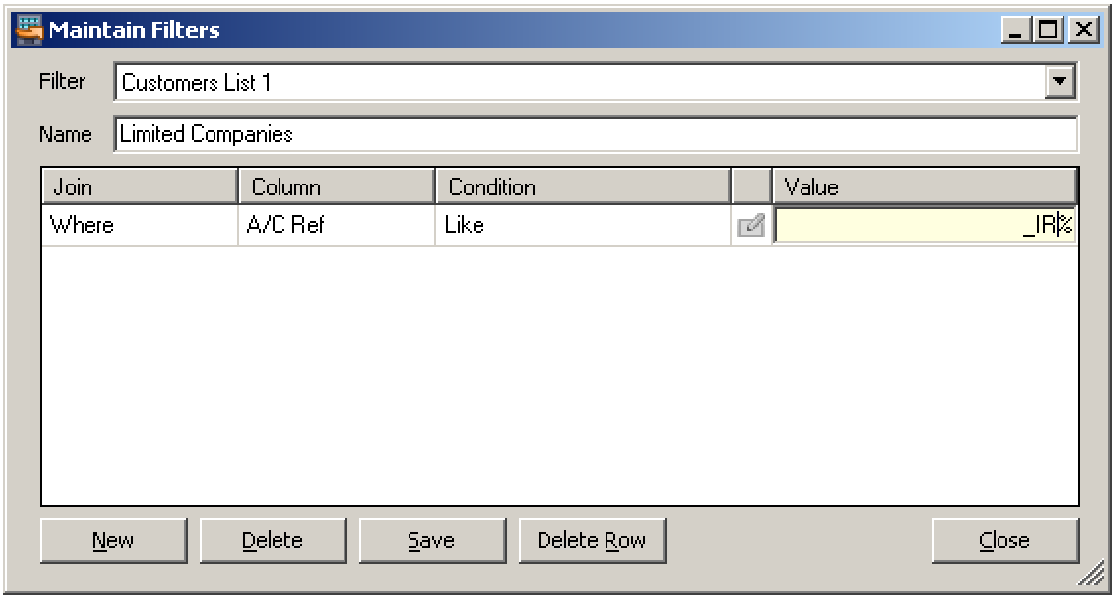
The above example will find all customer accounts where the Name ends 'Ltd'.

The _ (underscore) character can be used to substitute for a single character.



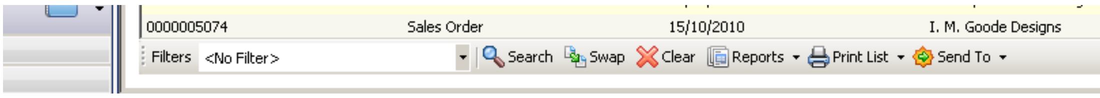
The above example will find any customer account that is 6 characters long, starts with the letter 'C', has any character 2nd, and ends 'E001'.

You can use different combinations of wildcards to search.



The above example will search for values with three or more characters which have ‘IR’ as the second and third characters.

Other options at the bottom of the List view



Use **‘Swap’** to reverse the selected items.

Use **‘Clear’** to deselect the highlighted items.

Use **‘Reports’** to run reports on the selected items. Select the relevant report from the pop-up menu.

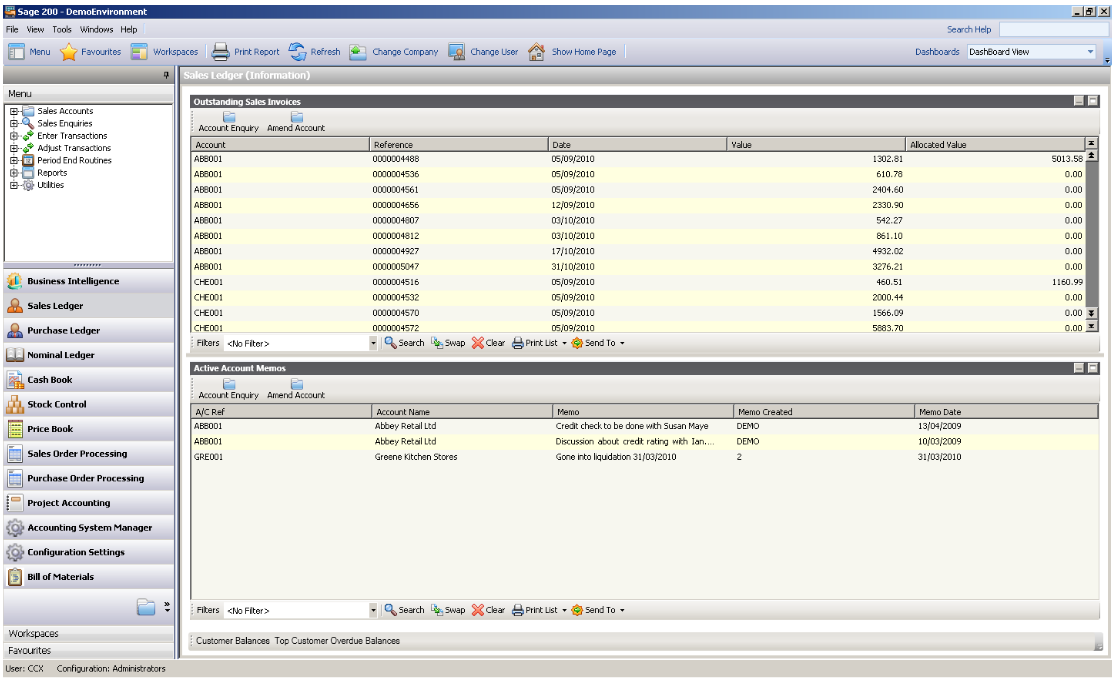
Use **‘Print List’** to print the items in the list.

Use **‘Send To’** to transfer the information from the List to another application, such as Excel.

Dashboards

The Dashboard View displays key information related to the selected module.

For example, the Sales Ledger Dashboard View displays the Top Customer Overdue Balances, Customer Balances, Outstanding Sales Invoices, and Active Account Memos windows.



The dashboard view can initially seem quite cluttered; however you are able to view each Dashboard in the full work area by clicking the Maximise icon on each list window. The other Dashboard options become tabs at the bottom.

NB. Hold *Ctrl* and click on a tab to restore it in the work area.

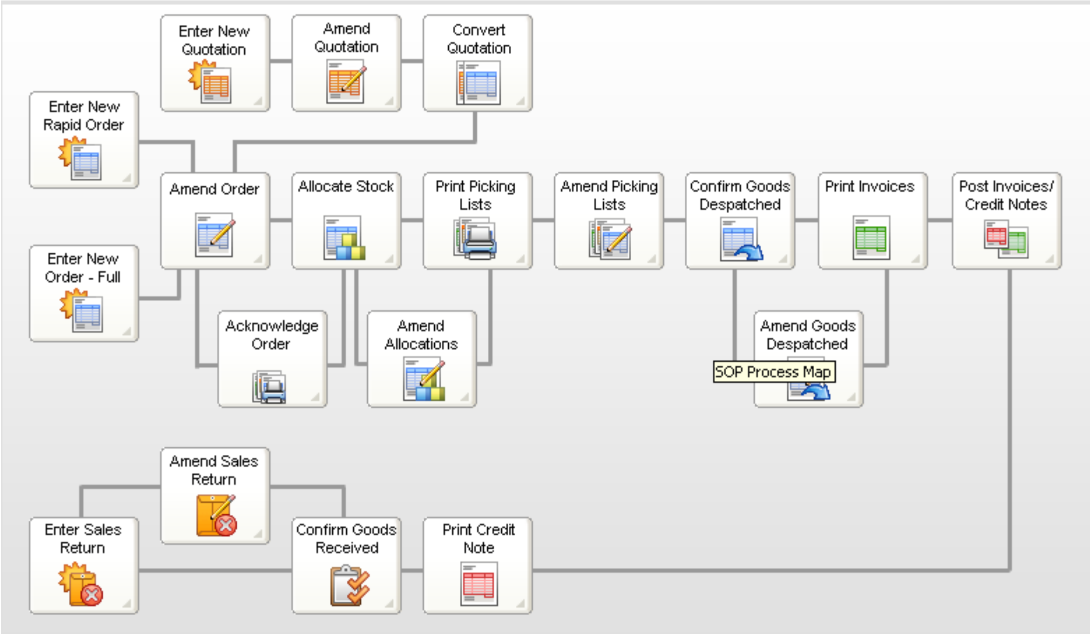
Click the tabs at the bottom of the work area to switch between the other dashboard windows.

Each dashboard window acts as a List view and has all the similar options, i.e. Filters, Move and Hide Columns, select multiple items etc.

Process maps

Process maps show the workflow associated with a particular module. For example, the Purchase Ledger process map shows the flow of tasks from entering a new supplier account, producing invoices and credit notes, to making payments.

Each of the icons represents a function in Sage 200. To access the function, click on the icon.



There are process maps available for the following modules; Sales Ledger, Purchase Ledger, Nominal Ledger, Cash Book, Stock Control, Sales Order Processing, Purchase Order Processing, Project Accounting and Accounting System Manager.