## **Sage Training Manual**

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selecting deposits accounts payable 1 the purchase orders window 2 entering a drop shipment 3 select for purchase orders 4 the purchases receive inventory window 5 the payments window 6 the select for payment window 7 entering vendor credit memos managing inventory 1 building and unbuilding assemblies 2 making inventory adjustments 3 changing item prices creating payroll 1 adding employees 2 adding employee beginning balances 3 performance reviews and raise history 4 paying a group of employees 5 paying an employee account management 1 writing checks 2 voiding checks 3 reconciling bank accounts 4 changing the accounting period job tracking 1 setting up a job 2 creating custom fields for jobs 3 creating phases for jobs 4 creating cost codes for phases 5 entering beginning balances for a job 6 making purchases for a job 7 invoicing for job purchases 8 job tracking 9 entering change orders for a job time and billing 1 adding time ticket employees 2 entering activity items 3 entering charge items 4 entering time tickets 5 entering expense tickets 6 billing time and expense tickets settings and tools 1 changing the company info and posting methods 2 posting and unposting 3 memorized transactions 4 using the purge wizard 5 using the year end wizard 6 data verification 7 updating encryption 8 archiving a company 9 using and restoring an archive company 10 sharing a company using remote data access 11 connect to a shared company using remote data access 12 managing user and file access using remote data access 13 finding transactions 14 sync data in microsoft 365 15 email setup 16 writing letters reporting 1 the cash flow manager 2 the collection manager 3 the payment manager 4 the financial manager 5 find on report 6 previewing and printing preset reports 7 report groups 8 modifying reports 9 exporting reports to excel 10 importing and exporting data 11 exporting reports to pdf 12 modifying task window screen templates 13 modifying forms the internal accounting review 1 using the internal accounting review action items 1 events 2 to do items 3 alerts options 1 changing global options 2 changing the system date assets and liabilities 1 assets and liabilities 2 creating an other current assets account 3 subtracting value from an other current assets account 4 creating a fixed assets account 5 accumulated depreciation 6 liability accounts 7 paying on a long term liability 8 equity help 1 using search and help topics 2 using the sage 50 user s guide

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