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Sage 50 Accounts Transaction Email

This guide explains the steps you need to follow in order to set up Transaction Email ready for use.

We'll then take you through the Transaction Email process, which you can use to send and receive paperless invoices and orders.

Note: You must have Microsoft® Outlook (v98 or later) installed on your computer to be able to use Transaction Email. This feature is not compatible with Outlook 97 or Outlook Express.

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Preparing to Use Transaction Email

Before you use Transaction Email, there are a number of steps you must complete in your Sage 50 Accounts Transaction Email software:

1. Make sure that every customer you will be dealing with using Transaction Email has a nominal code on their customer record.

Note: Sage 50 Accounts Transaction Email automatically gives each customer a default nominal code, so you won't need to check every one. If you do not use the default nominal codes but set up each customer nominal code manually, you should check that each customer record has a nominal code.

For more information, see the Sage 50 Accounts Transaction Email online help.

2. Check that all customers that you deal with have email addresses set up on their customer records.
3. Make sure that every supplier you will be dealing with using Transaction Email has a nominal code on their supplier record.

Note: Sage 50 Accounts Transaction Email automatically gives each supplier a default nominal code, so you won't need to check every one. If you do not use the default nominal codes but set up each supplier nominal code manually, you should check that each supplier record has a nominal code.

For more information, see the Sage 50 Accounts Transaction Email online help.

4. Check that these suppliers have e-mail addresses set up on their supplier records.
5. Check that all of your product records have a nominal code.

Note: Sage 50 Accounts Transaction Email automatically gives each product a default nominal code, so you won't need to check every one. If you do not use the default nominal codes but set up each product's nominal code manually, you should check that each product record has a nominal code.

For more information, see the Sage 50 Accounts Transaction Email online help.

6. Set up the default carriage nominal codes for delivery or postage costs for your goods, for your invoices, sales orders and purchase orders, where applicable.

Help

For more information, type 'Defaults' in the Index tab on your Sage 50 Accounts Transaction Email Help system, select 'Invoice' and double-click 'Invoice and Order

Configuring Transaction Email

Transaction Email uses information from your PC, detecting the settings from your Microsoft® Outlook software, and from your Sage 50 Accounts Transaction Email software so that you can use your Transaction Email system straight away.

This information allows your Transaction Email system to:

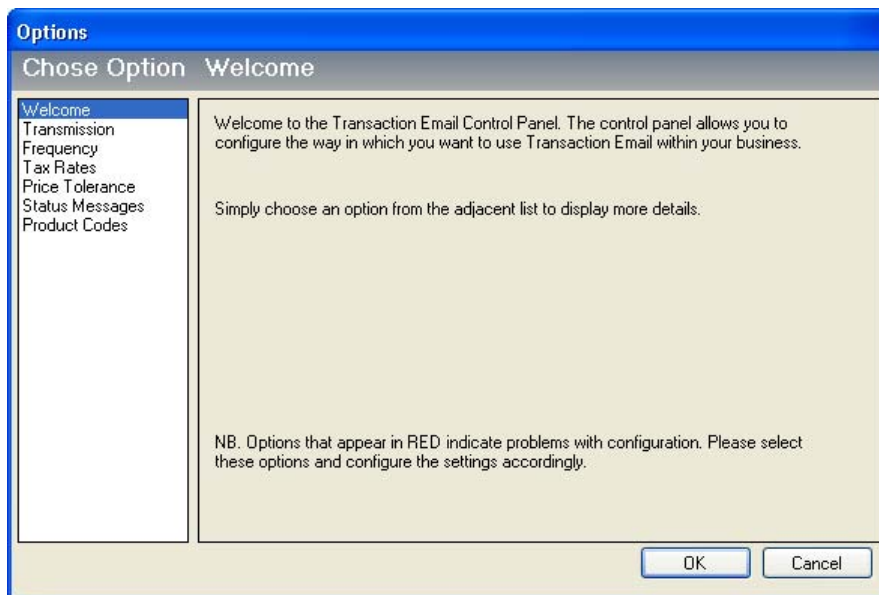
- Link with your Microsoft® Outlook software and configure the transmission settings for your transactions.
- Recognise the VAT rates that your Sage 50 Accounts Transaction Email system uses.
- Handle product price differences between your records and any invoices or orders you receive.
- Use status messages in your Transaction Email system.
- Recognise product codes that your Sage 50 Accounts Transaction Email system uses.

While you should be able to use your Transaction Email system immediately, you can change these settings if necessary. Use the following set of instructions if you want to do this.

To change the Transaction Email settings

1. From the main Transaction Email window, choose Tools from the menu bar and then select Options.

The Welcome to Transaction Email Control Panel appears.



To change any of the Transaction Email settings, select an option from the list in the left-hand panel.

Note: When you first run Transaction Email, the system attempts to link to your Microsoft® Outlook software automatically. If the link is unsuccessful, follow the steps in the online Help system to configure your Transaction Email system. From the Welcome screen of the Transaction Email Control Panel window, press F1 to launch the Help, then click the Configuring Book link in the Contents tab of your Help. Finally, click To Configure Outlook in the Your next step... section, near the bottom of the page for details.

To set up your transmission methods

Sage Transaction Email can import messages downloaded from a web shop or online marketplace and export messages to a folder, ready to be uploaded to a web shop or online marketplace. By default, Sage 50 Accounts Transaction Email downloads online orders to the folder:

Windows 2000, XP

C:\Documents and Settings\All Users\Application
Data\Sage\Accounts\2010\company.000\ACCDATA\TMail\Import

Windows Vista

C:\ProgramData\Sage\Accounts\2010\Company.000\ACCDATA\TMail\Import

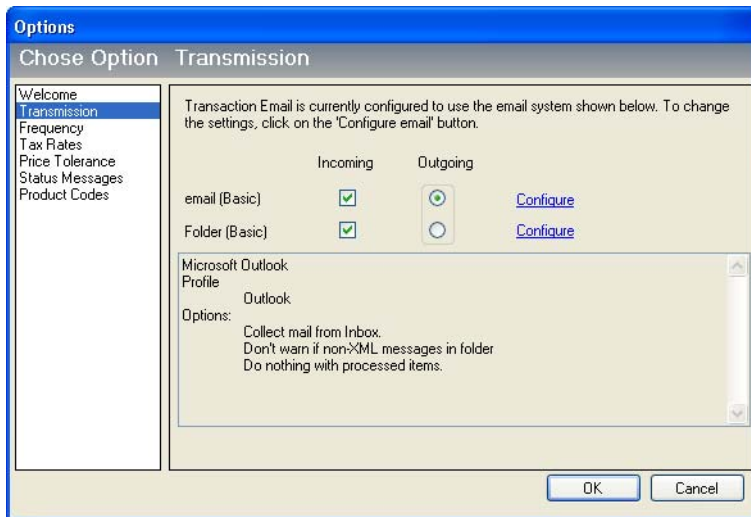
This assumes your software is installed into the default directory. However, you can change this if you require.

To configure Outlook for use with Transaction Email, or to change the Import, Export and Archive folders, or to specify how Transaction Email handles processed messages, click Transmission. Follow the instructions in the Outlook Setup Assistant or Folder Setup Assistant that appears.

Note: When you run Transaction Email for the first time, the system attempts to link to your Microsoft® Outlook software automatically. If the link is unsuccessful, follow the steps in the online Help system to configure your Transaction Email system. From the Welcome screen of the Transaction Email Control Panel window, press F1 to launch the Help, then click the Configuring Book link in the Contents tab of your Help. Finally, click To Configure Outlook in the Your next step... section, near the bottom of the page for details.

1. From the Transaction Email Control Panel window, click Transmission.

The Transmission window appears.



The window displays the transmission methods currently in use for your incoming and outgoing messages and allows you to configure your Outlook settings and your import and export folder options.

2. To change your Outlook settings, click Configure on the email (Basic) line of the Transmission table.

The Outlook Setup Assistant appears.

For details on using the Outlook Configuration Assistant to set up Outlook, refer to the Sage 50 Accounts Transaction Email Help system, as described earlier in this section.

3. To change the default import, export or archive folder, click Configure on the Folder (Basic) line of the Transmission table.

The Folder Setup Assistant appears.

4. To continue, click Next.

5. To select or amend the folder Transaction Email collects incoming messages from, click Change. Select the folder you want to use and click OK, then click Next to continue.

6. Specify what you want Transaction Email to do with messages after reading them. By default, Transaction Email moves the original message to the Archive folder after reading it. To change the folder, click Change and specify the folder you want to use.

Alternatively, if you want to delete the original message after processing, select the Delete the original message from the Import folder option.

7. To continue, click Next.

8. To select or amend the folder Transaction Email sends outgoing messages to, click Change. Select the folder you want to use and click OK, then click Next to continue.

9. To complete the Import/Export Folder Configuration Assistant, click Finish.

10. To continue entering or amending your Transaction Email settings, click Frequency. Alternatively, to proceed to the main Transaction Email window, click OK.

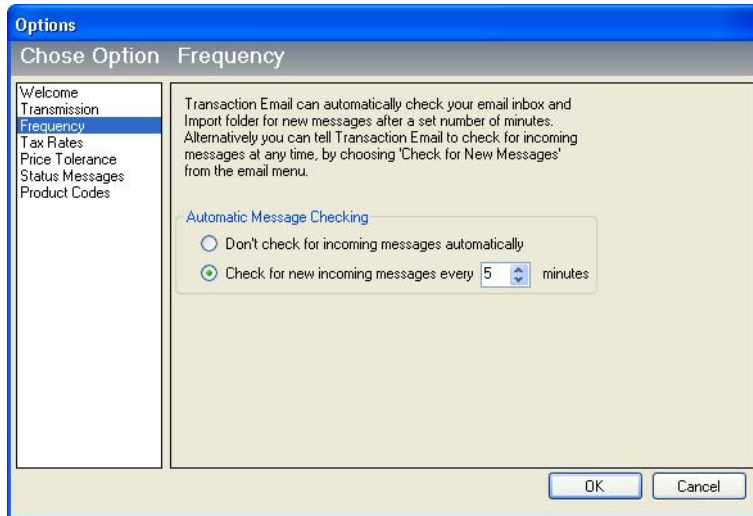
If at any time you want to re-configure your settings, click Tools on the Transaction Email menu bar, and select Options.

To enter your frequency settings

You can configure Transaction Email so that it checks your Outlook inbox and import folders periodically for new messages, or, if you prefer, you can set it so that it does not automatically check for new messages.

1. From the Transaction Email Control Panel window, click Frequency.

The Frequency window appears.



2. If you want Transaction Email to check your Inbox and import folder for new messages automatically, select the Check for new incoming messages every xx minutes option. Enter the time you want to leave between checks, in minutes, in the box provided.

Note: The minimum time between checks is 5 minutes.

Alternatively, if you do not want Transaction Email to check for new messages automatically, select the Don't check for incoming messages automatically option.

3. To continue entering or amending your Transaction Email settings, click Tax Rates. Alternatively, to proceed to the main Transaction Email window, click OK.

If at any time you want to re-configure your settings, click Tools on the Transaction Email menu bar, and select Options.

To set up your tax rates

Transaction Email uses the default tax codes in Sage 50 Accounts Transaction Email. When you receive an invoice or order, your Transaction Email system attempts to match the tax codes on the transaction with those listed in the Transaction Email system.

If you receive a transaction with an unknown tax rate, you will be prompted to match this tax code to an existing tax code listed in the Transaction Email system.

If you choose to match the tax code when prompted, the Configure Tax Rate Types window appears. Select the appropriate tax code from the list to match to the tax code on the invoice or order.

If at any time you want to re-configure your Transaction Email settings, click on Tools and then Options from within the Transaction Email window to open the Transaction Email Control Panel.

1. From the Transaction Email Control Panel window, click Tax Rates.

The Tax Rates window appears.

Options
Chose Option Tax Rates

Welcome
Transmission
Frequency
Tax Rates
Price Tolerance
Status Messages
Product Codes

To ensure that orders and invoices are allocated the correct rate of VAT you must define the type of the Tax Rates setup in your accounting system. For more information on setting up your Tax Rates press 'F1' to display on-line help.

	Rate	Used	EC Sale	EC Purch	Description	Rate Type
T0	0	True	False	False	Zero rated transactions	Zero
T1	15.0	True	False	False	Standard rated transa...	Standard
T2	0	True	False	False	Exempt transactions	Exempt
T3	0	True	False	False	Exempt	Exempt
T4	0	True	True	False	Sales to VAT register...	Exempt
T5	5	True	False	False	Lower Rate	None
T6	0	True	False	False		Exempt
T7	0	True	False	True	Zero rated purchases...	Exempt
T8	0	True	False	True	Standard rated purch...	Exempt

OK Cancel

2. Work your way down the list of tax codes (T0, T1 and so on) matching these codes to the appropriate tax rate, by using the Rate Type drop-down box. You should try to match at least one of each of the following Rate Types to the equivalent Sage 50 Accounts Transaction Email tax code:

Standard	This is equivalent to the default tax code T1.
Zero	This is equivalent to the default tax code T0.
Exempt	This is equivalent to the default tax code T2.
Lower	If you have set up a lower tax code than the 15.0% standard, for example, for use with fuel purchases, match it up with this. This is equivalent to the default tax code T5.
Higher	If you have set up a higher tax code than the 15.0% standard, match it up with this.
O/S Scope (outside of scope)	This is matched with any tax codes that are not covered by other codes. If you are in doubt, just assign this code to a Sage 50 Accounts Transaction Email tax code that you do not use, for example, T9.

3. To continue entering or amending your Transaction Email settings, click Price Tolerance. Alternatively, to proceed to the main Transaction Email window, click OK.

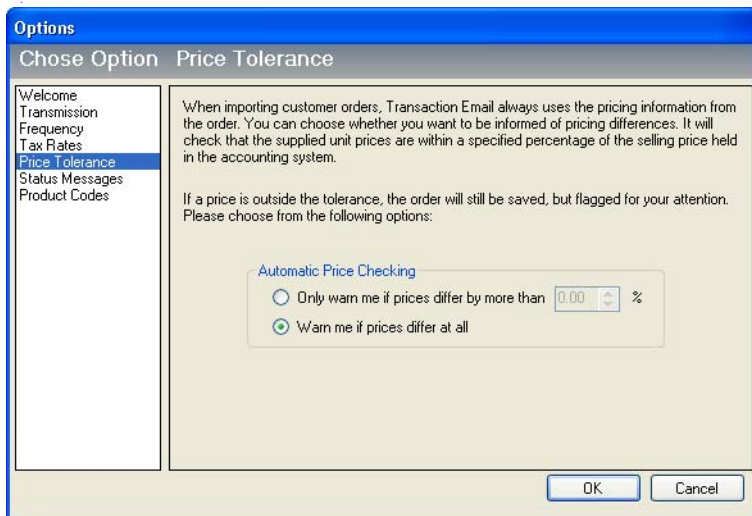
If at any time you want to re-configure your settings, click Tools on the Transaction Email menu bar, and select Options.

To set up the price tolerance

By default, if there is a difference between the price on the customer order and the order price on the product in Sage 50 Accounts Transaction Email, you will receive a warning when you try to process the transaction. You will still be able to complete the order, but you will get the message 'Price Warning'.

If you want some leeway so that you do not get this message every time an order has a slightly different price, you can set up a pricing tolerance level. You can set a percentage amount that the price can differ by, before the warning message appears.

1. After choosing the Price Tolerance option from the left side of the Transaction Email Control panel, the following window appears:



2. Select one of the options on the Price Tolerance screen. If you select the first option, you must specify the percentage difference by entering a figure in the box.
3. To continue entering or amending your Transaction Email settings, click Status Messages. Alternatively, to proceed to the main Transaction Email window, click OK.

If at any time you want to re-configure your Transaction Email settings, click Tools on the Transaction Email menu bar, and select Options.

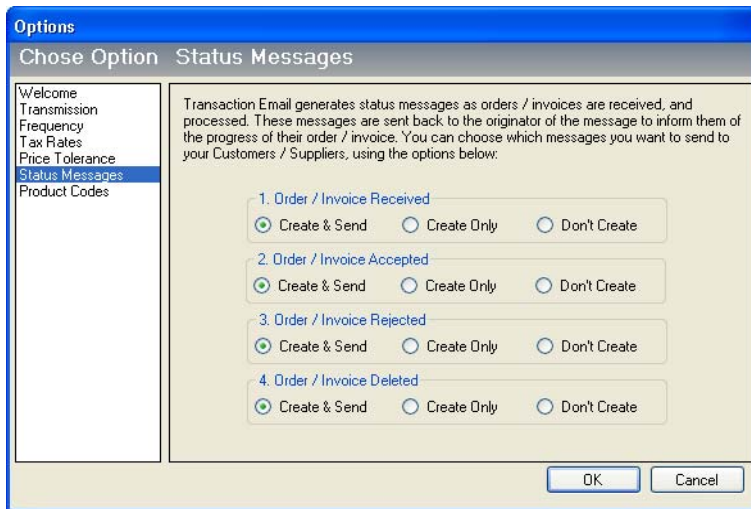
To set up status messages

When your Transaction Email system is processing the orders and invoices it receives, it can also create and send messages back to the customers and suppliers who have sent you the Transaction Emails depending on your Status Message settings. These messages let your customers and suppliers keep track of their transactions.

By default, you will receive an e-mail confirmation message whenever a customer or supplier receives, accepts, rejects or deletes an order or invoice. To change these settings, open the Tools menu and then select Options.

Note: Transaction Email uses the email address from the original Outlook message to send a Status Message back to the customer or supplier. For messages downloaded from the Import folder, no original email address exists. If a downloaded message contains the customer's email address for an order or the supplier's e-mail address for an invoice, Transaction Email uses this to send the Status Message. If no email address exists on the downloaded message, Transaction Email does not send a Status Message. When you send an invoice generated from a downloaded order, the Status Message uses the customer's default e-mail address as usual.

1. To view the message options, click Status Messages on the main Transaction Email Control Panel window. The Status Messages window appears.



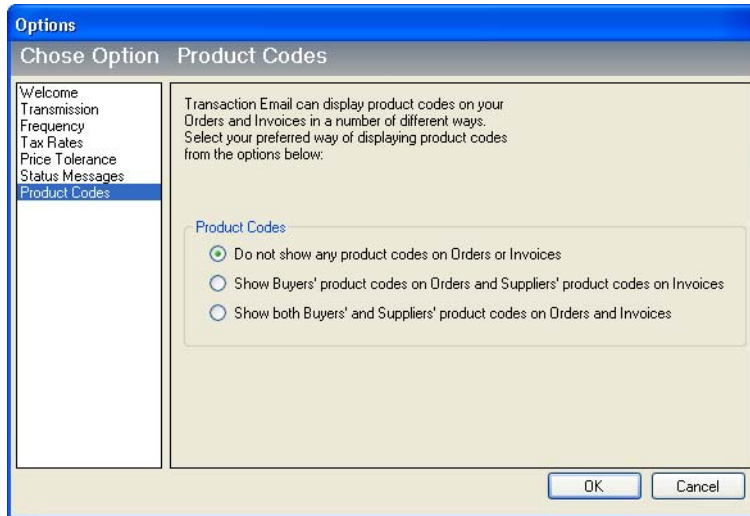
From this window, you can choose if you want to send these status messages automatically, if you want Transaction Email to hold these messages, so that you can send them yourself, or if you don't want these messages created at all.

2. For each type of message, select the Create & Send option to send the message automatically, choose Create Only to hold the generated message in Transaction Email until you decide to send them, or choose Don't Create to stop the messages being produced.

- When you have finished, click Product Codes to continue to configure your Transaction Email system. Alternatively, to proceed to the main Transaction Email window, click OK.

To set up product codes

Product codes on your invoices (and orders) are displayed in your Transaction Email system depending on the option you select in the Product Codes area of the Transaction Email Control Panel.



There are three options:

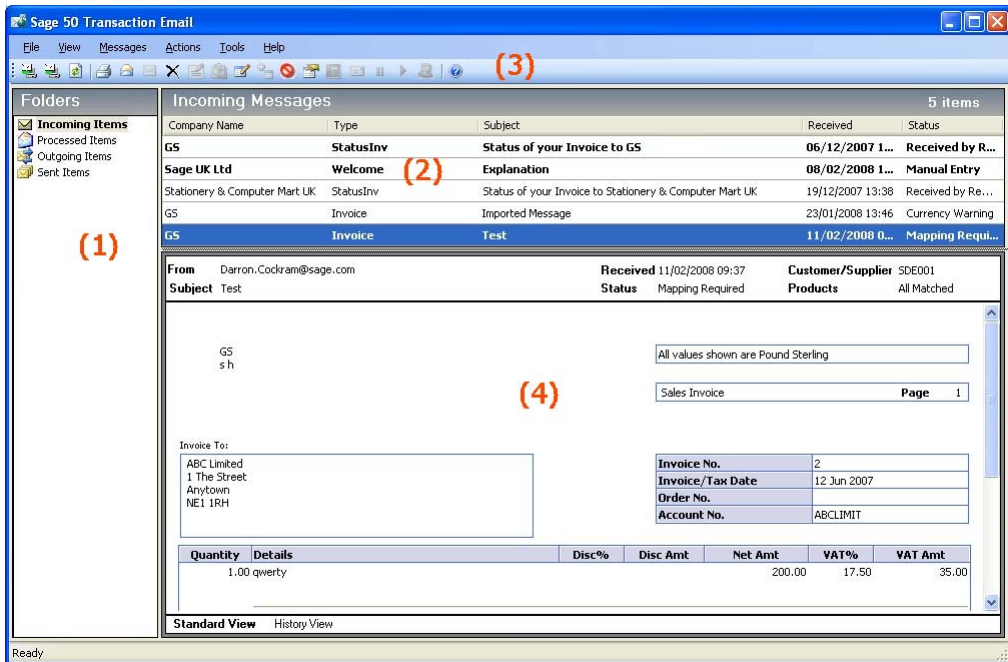
- Do not show any product codes on orders or invoices
- Show Buyers' product codes on orders and suppliers' product codes on invoices
- Show both Buyers' and Suppliers' product codes on orders and invoices

Select the way that you want to display your product codes, then click OK to confirm your choice.

You have now configured your Transaction Email system.

Using Transaction Email

You can use Transaction Email to send and receive invoices and orders using email. You can send purchase orders and product or service invoices to a customer or supplier, using your Microsoft® Outlook email system. You can also import messages from a web shop or online marketplace, and export messages to a folder ready to be uploaded to a web shop or online marketplace. Transaction Email then automatically updates your Sage 50 Accounts Transaction Email records with the invoices and orders that you receive.



Note: Orders are only available to users with the Sage 50 Accounts Professional version.

Read the following sections for more information on how to set up and use the Transaction Email feature.

Processing Incoming Orders and Invoices in Transaction Email

The way you accept and process your orders and invoices depends on the version of the Sage Accounts software that you and your customers and suppliers use. For more information about the Transaction Email process between different versions of Sage software, please refer to the help system that accompanies your Sage 50 Accounts Transaction Email software.

When you start Transaction Email, the system checks for any messages that have been received. If it detects that a sales order or purchase invoice has arrived, Transaction Email automatically imports it and displays the details in the Incoming Messages area of the system.

If the details of an order or invoice are not known to Transaction Email, the status of the imported order or invoice is set to Matching Required. See *Matching in Transaction Email* on page 16 for more instructions about the matching process.

If the order or invoice details are recognised, the status of the imported message is set to Pending Acceptance. From here, you can then select the transaction and add it to your Sage 50 Accounts Transaction Email accounts.

To add an order in Transaction Email to Sage 50 Accounts Transaction Email

1. Click Incoming Items in the top left-hand pane in Transaction Email, then from the Transaction Email toolbar, click Collect Incoming Messages.



Transaction Email automatically checks the details on the incoming order with the details on your Sage 50 Accounts Transaction Email software. This process is known as

Matching.

- If the details on the order match the details in your accounts, Transaction Email sets its status to Pending Acceptance. Proceed to step 2.
- If the details on the order do not match the details in your accounts, Transaction Email sets its status to Matching Required. You must match the transaction details before you can add the order to your accounts. When you have matched the order details correctly, Transaction Email sets the transaction status to Pending Acceptance and you can proceed to step 2.

For more information about the Matching process, see *Matching in Transaction Email* on page 16.

2. From the Incoming Messages folder, select the matched transaction you want to add to your accounts.
3. From the Transaction Email toolbar, click Add to Accounts.



Transaction Email adds the order to your accounts. The order is imported into Sage 50 Accounts Transaction Email as an invoice. The status of the order in Transaction Email changes to Accepted and the order moves into the Processed Items folder.

From the Processed Items folder in Transaction Email, you can print the order by clicking Print Message from the toolbar.



You can now process the sales order in Sage 50 Accounts Transaction Email. For more information about Sales Order Processing, refer to your Sage 50 Accounts Transaction Email online help.

To add a purchase invoice in Transaction Email to Sage 50 Accounts Transaction Email

1. Click Incoming Items in the top left-hand pane in Transaction Email, then from the Transaction Email toolbar, click Collect Incoming Messages.



Transaction Email automatically checks the details on the incoming invoice with the details in your Sage 50 Accounts Transaction Email software. This process is known as Matching.

- If the details on the invoice match the details in your accounts, Transaction Email sets its status to Pending Acceptance. Proceed to step 2 to continue adding the invoice to your accounts.
- If the details on the invoice do not match the details in your accounts, Transaction Email sets its status to Matching Required. You must match the transaction details before you can add the invoice to your accounts. When you have matched the invoice details correctly, Transaction Email sets the transaction status to Pending Acceptance, and you can proceed to step 2.

For more information about the matching process, see *Matching in Transaction Email* on page 16.

2. From the Incoming Messages list, select the matched transaction you want to add to your accounts.
3. From the Transaction Email toolbar, click Add to Accounts.



Accounts and Accounts Plus users: Transaction Email adds the purchase invoice to your accounts. The status of the selected invoice changes to Accepted and the invoice moves to the Processed Items folder.

You have now added the invoice to your accounts. This completes the process and you do not need to follow steps 4 and 5.

Accounts Professional users: If Transaction Email cannot find a match for the selected invoice, for example if the original purchase order no longer exists in Sage 50 Accounts, a warning message appears.

Proceed to steps 4 and 5 to continue adding the invoice to your accounts.

4. Click OK to accept the warning message.

The Choose Related Purchase Order window appears, listing all of the incomplete purchase orders in Sage 50 Accounts.

5. From the Choose Related Purchase Order window, select the order that corresponds with the invoice, and click Select.

- If the purchase order and invoice match exactly - that is, the prices are the same on the invoice and the order, and the products are listed in the same order on both, Transaction Email adds the invoice to your accounts.

The status of the selected invoice changes to Accepted and the invoice moves to the Processed Items folder.

- If the purchase order and invoice do not match, a warning message appears. If this happens, click OK to accept the message and re-match the invoice to the order with the correct details.

If this is not possible, for example, if the purchase order no longer exists in your accounts, or if you want to add the purchase invoice directly to a supplier account without linking it to a purchase order, then from the Transaction Email toolbar, click Enter by Hand.



You are prompted to manually enter the appropriate reference number from Sage 50 Accounts. The selected message is updated, the status of the selected invoice changes to Accepted and the invoice moves to the Processed Items folder.

You have now added the invoice to your accounts. This completes the process.

Matching in Transaction Email

Matching is the process where the details in the Transaction Email system are matched with the details in your Sage 50 Accounts Transaction Email software.

It is unlikely that your customer, supplier and product details will match the equivalent details sent to you from your suppliers and customers. For example, you may buy bolts from a supplier that have a code on your Sage 50 Accounts Transaction Email software BOLT001, whereas the supplier that you buy the bolts from may have the same bolts listed on their system with a product code of BOLTS1.

Once your Transaction Email system receives an order or invoice, the details are checked to see if they match the details in your Sage 50 Accounts Transaction Email software. If any of the details are not held in your Sage 50 Accounts Transaction Email software, the details cannot be matched automatically, and the transaction will be listed in your Transaction Email system with a status of Matching Required. You must check through the transaction, manually matching any details that are not already matched.

The manual matching process allows you to link these records together, so the next time you receive an invoice from the supplier for your order of bolts, Transaction Email will know that the code on the invoice relates to the code on your Sage 50 Accounts Transaction Email system, even though they are different.

When you first use your Transaction Email system, you may have to manually create these associations. However, once you have been running Transaction Email for a few months, the matching process for the majority of times will be automatic.

If you are setting up your accounting system for the first time, the matching process will be made easier if you contact the customers and suppliers who also use the Transaction Email system and agree to use the same reference codes.

To use the manual matching facility for customer orders

If the automatic matching process fails on a customer order, the transaction details will be listed in the Incoming Messages folder with a status of Matching Required.

1. From the Incoming Messages folder, highlight the transaction.
2. From the Transaction Email toolbar, click Click Match Message.



Transaction Email takes information from the transaction and compares the message to the information in your Sage 50 Accounts Transaction Email software. The Transaction Email system attempts to find an exact match.

The Match Customer Order Details window appears. This window displays all of the transaction details, split into two sections; Choose Customer and Choose Products.

The Choose Customer section displays the customer details from the order. If there is no match in place, you must select a customer manually from your Sage 50 Accounts Transaction Email system.

3. In the Choose Customer section of the window, select an account in the A/C box using the drop-down button, or by manually entering a code that you know exists in your Sage 50 Accounts Transaction Email system.

The Choose Products section displays all of the products on the order, line by line. Each product record that does not have a match in your Sage 50 Accounts Transaction Email software will have the text Choose Product alongside it. If there is an existing match, the Choose Product changes to Check Product. You must choose a match between the products on the order and the products in your Sage 50 Accounts Transaction Email system to complete the order process. Each individual product listed in the Choose Products area of the window must have a link to an equivalent product in your Sage 50 Accounts Transaction Email software.

4. Click Choose Product in the bottom half of the window, for every product that is not matched.

The Match Order Line window appears.

5. Select the Sage 50 Accounts Transaction Email product code that you want to match to the product in your Transaction Email system, by selecting a code in the Product Code box.

6. To save the link and return to the Match Order Line window, click OK.

If Transaction Email detects that the price on the product you have matched is outside of the pricing tolerance level that you set when you first configured your Transaction Email system, then the Unit Price of the product appears in red, if the order price is less than the sales price, or in green if the order price is more than the sales price. Select the unit price to display the View Price Tolerance Information window and see more information about the price difference.

For more information about configuring your Price Tolerance settings, see *To set up the price tolerance* on page 10.

7. If more than one product on the order requires matching, repeat steps 4 to 6 until every product on the order is matched.
8. To confirm the customer and product matchings, click Save.

The main Transaction Email window appears. The status of the order now appears as Pending Acceptance, or as Price Warning if any of the products on the order showed a price that was outside of your pricing tolerance level.

Note: If a product's unit price is outside your pricing tolerance level and the order consequently shows a status of Price Warning, you can still add the order to your accounts. However, when you select Add to Accounts, a warning message appears:

The order you are currently adding to your accounting system contains the following warning:

There is 1 line on this order where the product pricing is outside the specified price tolerance.

Do you still want to proceed with adding this order to your accounting system?

NB. Once the order has been added you can make changes using your accounting system.

You can still add the order to your accounts by clicking OK. If you want to make any changes to the prices on the order, you can do so in Sage 50 Accounts Transaction Email once you have added the transaction to your accounts. Alternatively, click Cancel to return to the Incoming Messages folder if you want to re-check the pricing difference information.

You have now completed the matching process.

To use the manual matching facility for supplier invoices

If the automatic matching process fails on a supplier invoice, the transaction details will be listed in the Incoming Messages folder with a status of Matching Required.

1. From the Incoming Messages folder, highlight the transaction.
2. From the Transaction Email toolbar, click Match Message.



Transaction Email takes information from the transaction and compares the message to the information in your Sage 50 Accounts Transaction Email software. The Transaction Email system attempts to find an exact match.

The Match Supplier Invoice Details window appears. This window displays all of the transaction details, split into three sections; Choose Supplier, Choose Matching Option and Match Invoice Lines..

The Choose Supplier section displays the supplier details from the order. If there is no match in place, you must select a supplier manually from your Sage 50 Accounts Transaction Email system.

3. In the Choose Supplier section of the window, select an account in the A/C box by clicking the drop-down button, or by manually entering a code that you know exists in your Sage 50 Accounts Transaction Email system.

The Choose Matching Option section is where you select the way that you use the matching option for this invoice.

4. Select one of the three Matching Options:
 - Choose Match ALL Invoices from this Supplier to Nominal Account, to match all invoices from the supplier to a single nominal account. In the future, all invoices from this supplier will be posted to this nominal account. After selecting the option, use the drop-down list to select the nominal account where all invoices will be posted.
 - Choose Match this Invoice only to the following Nominal Account, to match this invoice to a specific nominal account. After selecting the option, use the drop-down list to select the nominal account where this invoice will be posted.
 - By default, the third option - Match each line on this Invoice to a different Nominal Account or Product within your accounting system - is selected. This option allows you to select a separate nominal account for each product on the invoice. You can change the nominal account details in the Match Invoice Line section of the window.

Finally, you must match the product details on the invoice with the product details in your Sage 50 Accounts Transaction Email data. You can do this in the Match Invoice Lines area of the window.

The Match Invoice Lines section displays all of the products on the order line by line. Each product record that does not have a match in your Sage 50 Accounts Transaction Email software will have the text Match Line alongside it. If there is an existing match, there will

be no text in the left side of the Choose Products area. You must choose a match between the products on the order and the products in your Sage 50 Accounts Transaction Email system to complete the order process.

5. Click Match Line in the bottom half of the window, for every product that is not mapped. The Product details from Supplier Invoice window appears.

Each individual product listed in the Choose Products area of the window must have a link to an equivalent product in your Sage 50 Accounts Transaction Email software.

6. Select the Sage 50 Accounts Transaction Email product code that you want to match to the product in your Transaction Email system, by selecting a code in the Product Code box.
7. To save the link and return to the Match Invoice Line window, click OK.
8. Once all of the supplier and product details have been matched, click Save to confirm the matching.

The main Transaction Email window appears.

You have now completed the matching process.

Processing Outgoing Orders and Invoices in Transaction Email

Details are provided in the Sage 50 Accounts Transaction Email Help system.

The Maintain Matchings Option

The Maintain Matchings option allows you to edit or remove any matches that you had set up when you processed previous orders and invoices.

You can access the Maintain Matchings options from the Tools menu on the main Transaction Email window.

For more information about the Maintain Matchings option, please refer to the Sage 50 Accounts Transaction Email online Help.

Statistics

The Statistics option, accessed from the Tools menu, uses default values for the average cost of processing a single invoice or order and calculates the savings Transaction Email brings to your business. The Statistics window displays a breakdown of the savings in the form of a table:

Saving Statistics

Chose Option Current Financial Year

	Quantity	Value	Direct Savings	Indirect Savings	Total Savings
Purchase Orders Out	0	0.00	0.00	0.00	0.00
Sales Orders In	0	0.00	N/A	0.00	0.00
Sales Invoices Out	0	0.00	0.00	0.00	0.00
Purchase Invoices In	0	0.00	N/A	0.00	0.00
Savings	NaN	NaN	NaN	NaN	NaN

Choose 'Settings' for an explanation of how these values have been calculated and to make changes to the defaults

Print OK Cancel

The table shows the number of invoices or orders processed in Transaction Email for the financial year to date, together with their total value and the associated direct and indirect savings. To view or change the individual direct and indirect cost values used in these calculations, click Settings.

Click Previous Financial Year to view the savings you made last year.

When you run your Year End in Sage 50 Accounts Transaction Email, you can transfer the Current Financial Year values into the Previous Financial Year table using the Year End button, located in the Settings option.

Help with Transaction Email

If at any point you need help with Transaction Email, you should consult the Sage 50 Accounts Transaction Email Help system. Press F1 to open the help file. The Help system has a comprehensive list of topics and also contains a large section of Frequently Asked Questions.

