

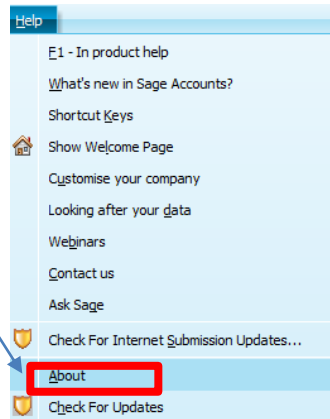
Sage 50 Accounts

How to add Custom reports and layouts

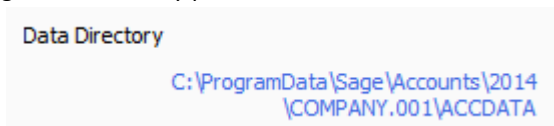


Where do I find the Layout and report folder?

- To locate your report and layout folders you need to know where your sage data is stored;
- A quick way to check this is by looking at your data path by going to : Help -> About;



- Look at the Sage data directory path;



- Click on the link, to go to your Sage data;

Name	Date modified	Type
ACCDATA	20/02/2015 09:37	File folder
ARCHIVES	22/01/2015 10:07	File folder
Attachments	22/01/2015 16:31	File folder
CRITERIA	22/01/2015 09:46	File folder
Defaults	22/01/2015 09:45	File folder
Exports	22/01/2015 09:46	File folder
Imports	22/01/2015 09:46	File folder
INVOICES	22/01/2015 09:46	File folder
Journals	22/01/2015 09:45	File folder
Labels	22/01/2015 09:45	File folder
Layouts	16/02/2015 16:38	File folder
Letters	22/01/2015 09:45	File folder
MEMO	22/01/2015 10:07	File folder
Reports	22/01/2015 09:45	File folder
TaskOpt	22/01/2015 09:46	File folder
Template	22/01/2015 09:45	File folder
VATRtns	22/01/2015 09:46	File folder
Line50Events	18/02/2015 16:34	Text Document
ManufacturingBackup	29/01/2015 16:01	Text Document

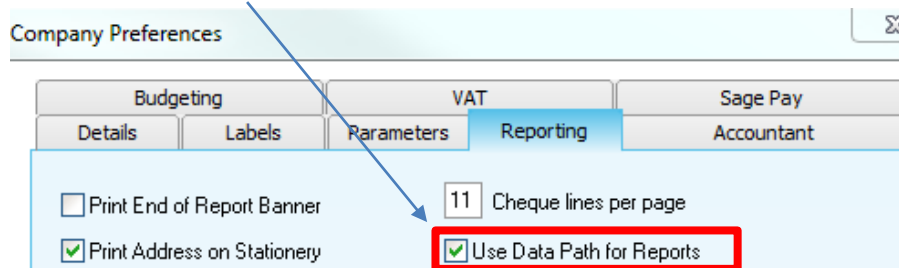
- Here you can see the folders for both reports and layouts;

- Learn where the folders are located for reports
- Learn where the folders are located for layouts
- Learn how to add custom built reports and layouts into Sage 50 Accounts

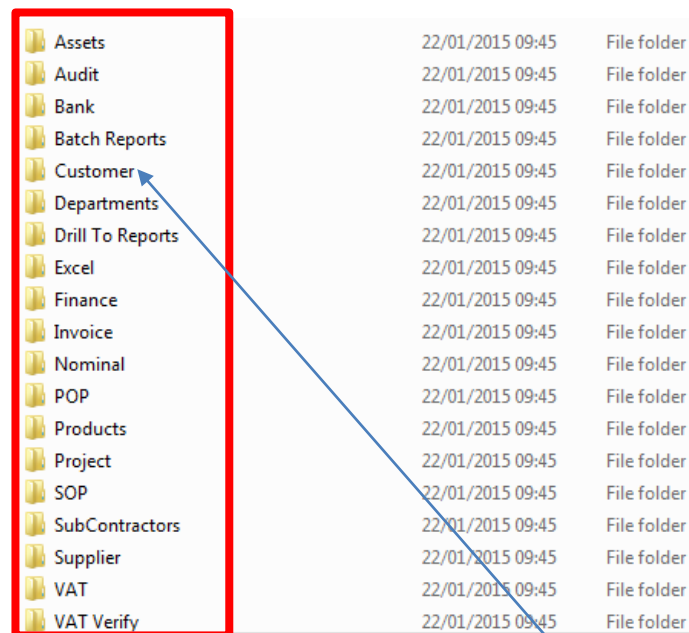


How do I add reports to Sage 50 Accounts?

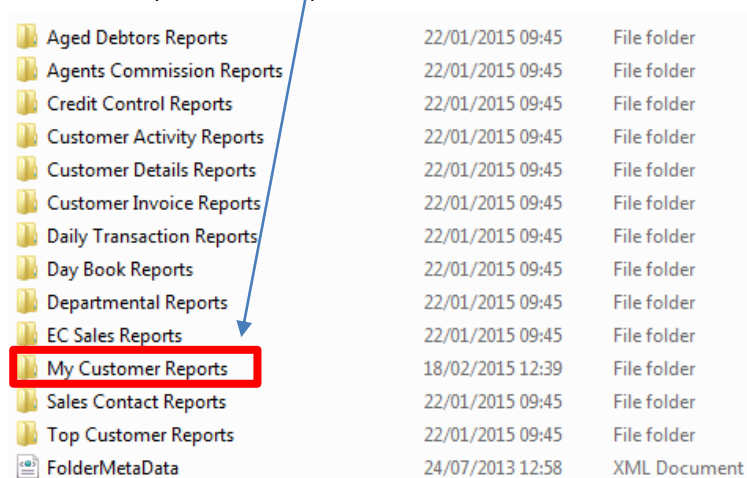
- If your data is stored on a server go to: Settings -> Company Preferences -> Reporting;
 - Ensure "Use data path for reports" is ticked (Leave un-ticked for local installation);



- Go into the reports folder;
- Identify the relevant folder for your report;



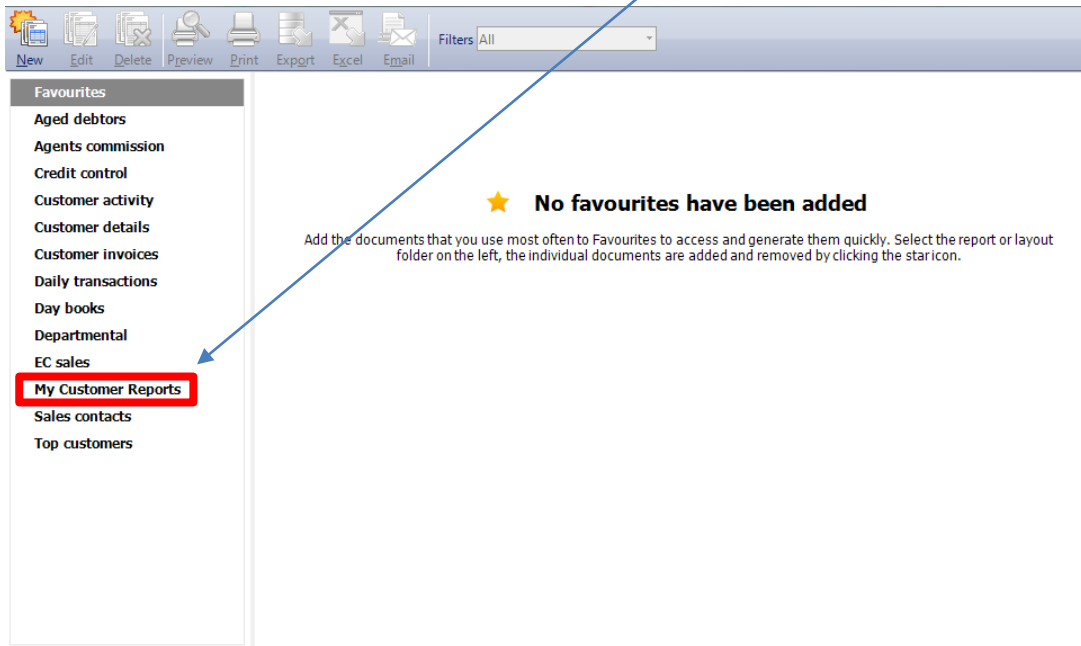
- Go into the appropriate folder
 - For this example I am adding a Customer report, so will use the "Customer" folder;
- Inside the customer folder find "My Customer Reports";



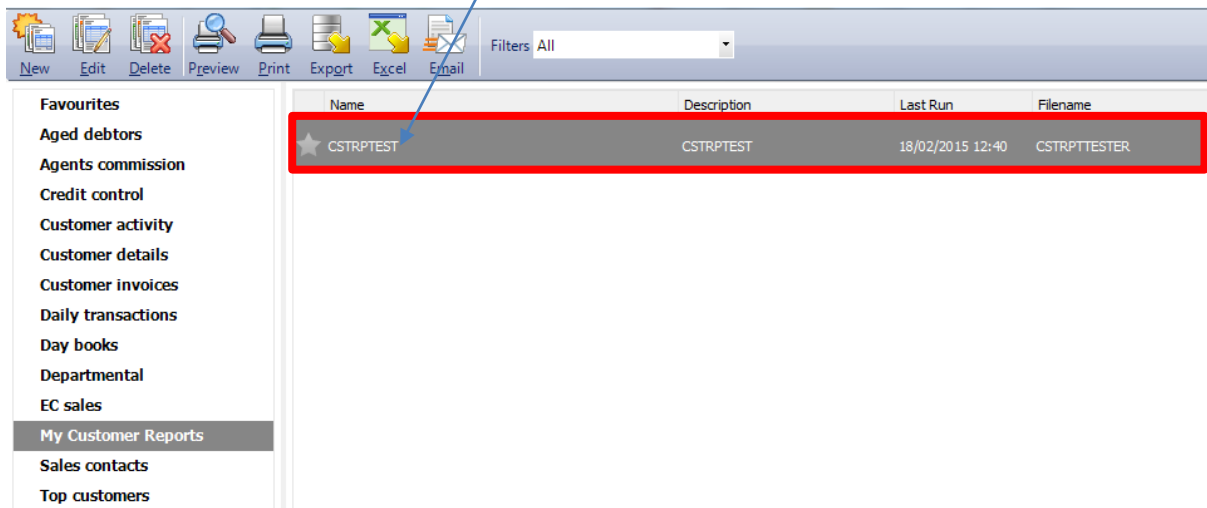
- Copy and paste the report into this folder;




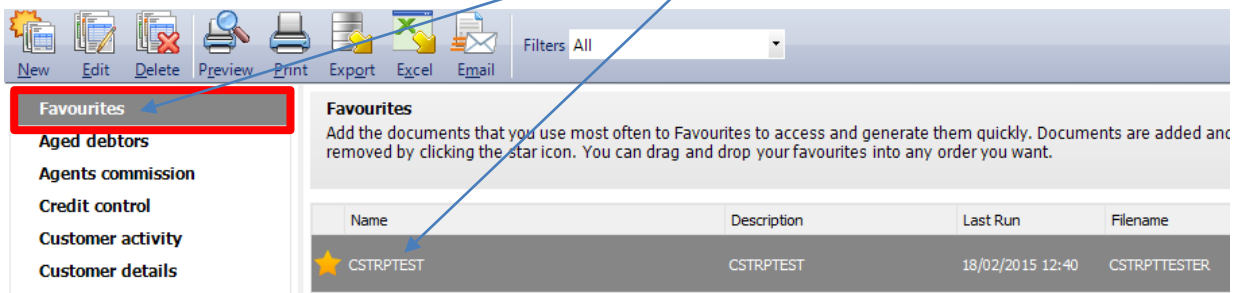
- In the Customer report module in Sage 50 Accounts go into the “My Customer Reports” tab;



- The report has been added in and is ready to use;

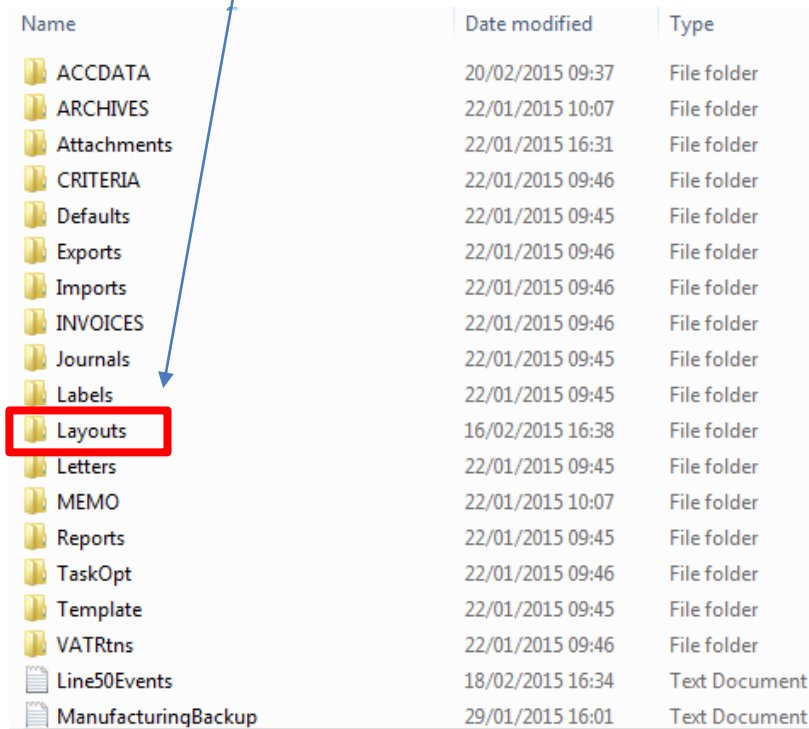


- For ease of use click the  next to the report to add it to favourites;



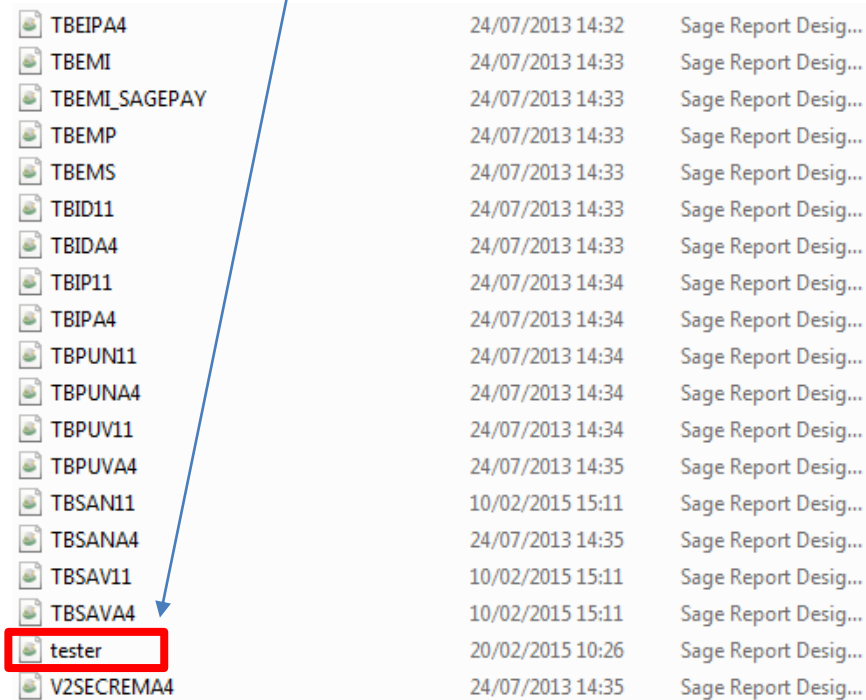
How Do I Add Layouts To Sage 50 Accounts?

- Copy and paste the layout into the “Layouts” folder in the company data file;



Name	Date modified	Type
ACCDATA	20/02/2015 09:37	File folder
ARCHIVES	22/01/2015 10:07	File folder
Attachments	22/01/2015 16:31	File folder
CRITERIA	22/01/2015 09:46	File folder
Defaults	22/01/2015 09:45	File folder
Exports	22/01/2015 09:46	File folder
Imports	22/01/2015 09:46	File folder
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Template	22/01/2015 09:45	File folder
VATRtns	22/01/2015 09:46	File folder
Line50Events	18/02/2015 16:34	Text Document
ManufacturingBackup	29/01/2015 16:01	Text Document

- As an example I am using a layout called “tester”;
- Once the file is in the layouts folder it can be accessed in Sage 50 Manufacturing;




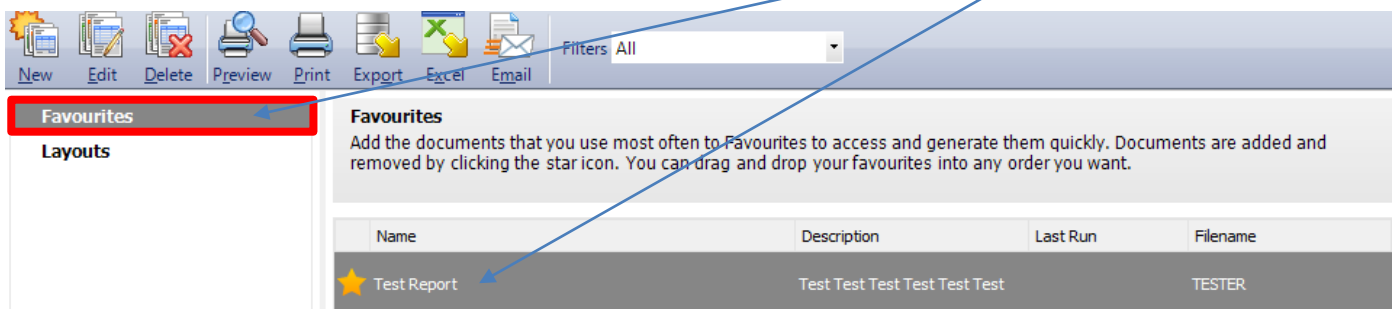
TBEIPA4	24/07/2013 14:32	Sage Report Desig...
TBEMI	24/07/2013 14:33	Sage Report Desig...
TBEMI_SAGEPAY	24/07/2013 14:33	Sage Report Desig...
TBEMP	24/07/2013 14:33	Sage Report Desig...
TBEMS	24/07/2013 14:33	Sage Report Desig...
TBID11	24/07/2013 14:33	Sage Report Desig...
TBIDA4	24/07/2013 14:33	Sage Report Desig...
TBIP11	24/07/2013 14:34	Sage Report Desig...
TBIPA4	24/07/2013 14:34	Sage Report Desig...
TBPUN11	24/07/2013 14:34	Sage Report Desig...
TBPUNA4	24/07/2013 14:34	Sage Report Desig...
TBPUV11	24/07/2013 14:34	Sage Report Desig...
TBPUVA4	24/07/2013 14:35	Sage Report Desig...
TBSAN11	10/02/2015 15:11	Sage Report Desig...
TBSANA4	24/07/2013 14:35	Sage Report Desig...
TBSAV11	10/02/2015 15:11	Sage Report Desig...
TBSAVA4	10/02/2015 15:11	Sage Report Desig...
tester	20/02/2015 10:26	Sage Report Desig...
V2SECREMA4	24/07/2013 14:35	Sage Report Desig...

- Go into the Layouts Module within Sage 50 Manufacturing and locate your layout;

Layouts
Use these layouts to print out or email. Each group of layouts typically contains the same information, with certain layouts containing extra detail or designed for different types of paper and uses.

Name	Description	Last Run	Filename
★ e-Mail Statement - O/S Only	Outstanding transactions, with transactions shown itemised, line by line. Shows just the statement across the whole page. For HTML output.		EMASTOS
★ Security Mailer Statement - Grouped and O/S Only	To be used with Sage Secure Mailer stationery. Only outstanding items, showing an overview of the transactions. Shows just the statement across the whole page.		SECMAILSTAT
★ Self Seal A4 Statement (Grouped & O/S Items Only)	To be used with Sage Self Seal stationery. Only outstanding items, showing an overview of the transactions. Shows just the statement across the whole page. For use when sending in a self sealing A4 envelope.		SELFSEALA4GROUPEDOS
★ Test Report	Test Test Test Test Test Test		TESTER

- As with the reports, for ease of navigation click on the  to add the layout to the favourites tab;



The screenshot shows the Sage 50 Manufacturing interface. At the top, there is a toolbar with icons for New, Edit, Delete, Preview, Print, Export, Excel, and Email. Below the toolbar, the 'Favourites' tab is selected and highlighted with a red box. The 'Favourites' section contains a table with the following data:

Name	Description	Last Run	Filename
★ Test Report	Test Test Test Test Test Test		TESTER

For further information or a demonstration please contact Red Business Systems
www.redbusinesssystems.com . Tel 01242 516885.