

Get your  
practice  
online

# 1 Getting your practice online with Sage

## Sky-high thinking for Accountants

Imagine freeing your business from the chore of chasing, gathering and entering client data. What if all your practice software was synced and client compliance took care of itself? These are the benefits you'll enjoy when you begin working on the cloud. That's why we've created this three-phase guide to moving online.

### Phase 1:

How to get your practice online

### Phase 2:

How to get your clients online

### Phase 3:

How to become an advanced Sage One user

## Step 1 Are you ready to adopt the 'cloud'?

Imagine what your practice could look like in 2020 - you're not spending your time chasing, gathering and entering client data. You no longer have the issues you used to with multiple software infrastructures to maintain and support within the practice. You're no longer concentrating on client compliance, because online software has advanced to such an extent that compliance now pretty much takes care of itself. Instead, you have become full-time business advisors and specialist consultants to your clients. This is where business is heading.

What do you already do 'in the cloud'? Does your practice bank online? Do you use Twitter or Facebook for business purposes? How much return on investment does your practice website provide for you in real terms?

If you're still pondering over the move online, visit [www.sage-exchange.co.uk/resources/sage-one](http://www.sage-exchange.co.uk/resources/sage-one) to view an infographic which might help you make your mind up. Also, have you ever considered how working online could give you more freedom to work when, and where you like? Visit [www.sage-exchange.co.uk/resources/sage-one](http://www.sage-exchange.co.uk/resources/sage-one) for more advice on working on the move.

### Checklist

- I know enough about the cloud to make the move (move on to step two)
- I still need more information about the cloud

## Step 2 Register for Sage One Accountant Edition

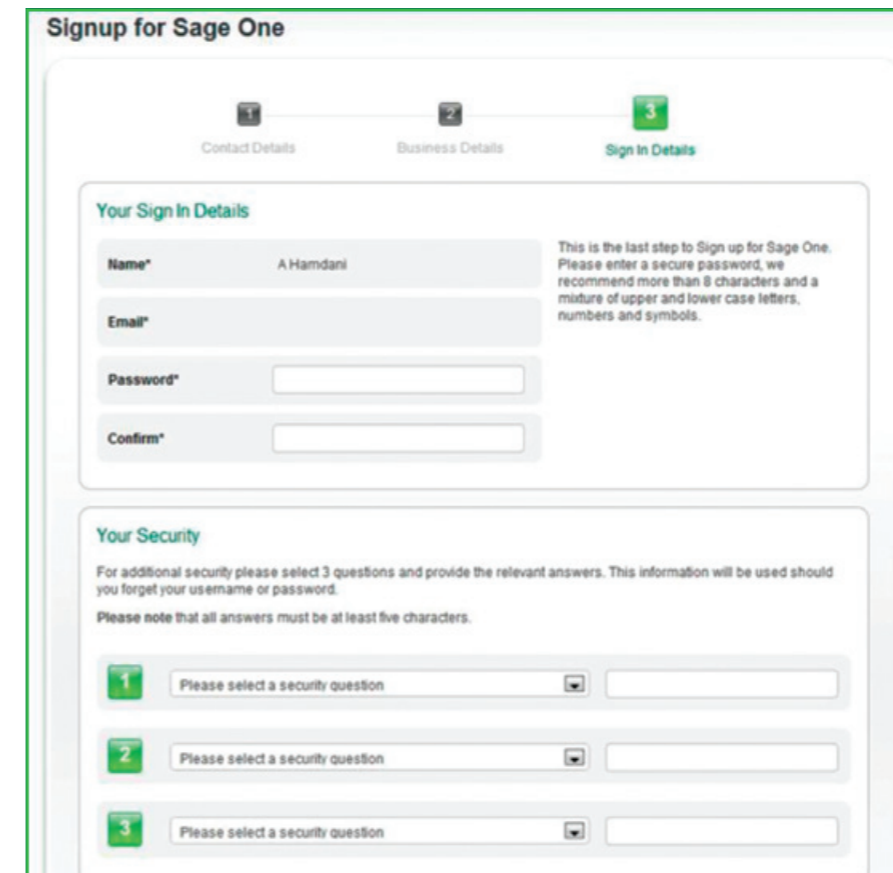
Have you decided that you are ready to get your practice online? It's time to register for Sage One Accountant Edition, simply call us on 0800 802 8091 and we will get you signed up within a few minutes.



## Step 3 Have you activated Sage One Accountant Edition?

Have you activated? We've sent you an email containing an activation link. Simply click on this link and set your password and security details before clicking to complete your sign up and get logged in.

If you'd like to check out the T&Cs before you activate, visit [www.sage-exchange.co.uk/SageOne](http://www.sage-exchange.co.uk/SageOne). If you've lost your email or don't think you've been sent one, just get in touch and we'll send you another one.



### Checklist

- I've activated and am ready to move on (move onto step 3)
- I need help activating my account (Call us on 0800 802 8091)

## Step 4 Sage One Rewards - are you up to speed?

When you activate your Sage One Accountant Edition service, the first time you log in, you'll be directed to the Billing Settings area. This is because we want to give you a chance to sign your practice up to our great Sage One Rewards programme, visit [www.sage-exchange.co.uk/SageOne](http://www.sage-exchange.co.uk/SageOne) to find out more. This enables you to start earning commission as and when you sign clients up to a Sage One service, the great news is there's no catch, so take a look at the information, and contact us if you have any questions.

### Checklist

- I've entered my bank and VAT details in the software **and** I've completed and returned my Self-Billing agreement
- I've entered my bank details in the software but I'm not VAT-registered so there's no need for a Self-Billing agreement
- I'm not ready to join Sage One Rewards just yet - I may come back to this later
- Sage One Rewards isn't for me at this stage

## Step 5 Overcoming your fears about moving online

Think back to when you opened your first online banking account - the concerns you had back then are probably the same concerns you have when you consider moving your practice and your clients online. However, online banking has been around for 15 years now, and we can guarantee industry standard 128-bit encryption to keep your data protected.

You might be concerned about the storage of your data, and that of your clients - where does it go? In reality, data stored online is just as safe, if not safer, than data stored by more traditional means. Watch [www.sage-exchange.co.uk/datasecurity](http://www.sage-exchange.co.uk/datasecurity) to find out why.

Worried about legal issues, such as data ownership or intellectual property rights? Visit [www.sage-exchange.co.uk/resources/sage-one](http://www.sage-exchange.co.uk/resources/sage-one) to put your mind at rest.

We can alleviate all these concerns and more - visit [www.sage-exchange.co.uk/resources/sage-one/](http://www.sage-exchange.co.uk/resources/sage-one/) to view your dedicated Sage One Resources area, or contact us and we can put your mind at ease.

### Checklist

- My main fears have been alleviated - I'm confident about moving online
- I still have some concerns I'd like to clear up before I make a commitment

## Step 6 Get to Grips with Sage One Accountant Edition

When you log in to your Sage One Accountant Edition, if you click on the home button, you'll be taken to your Client List. This is where your Sage One clients will appear as and when you start linking with them online. To get you started, we've provided you with two demo clients - George, our Sage One Cashbook user, and Sophie, a florist using Sage One Accounts. These demo clients have been pre-loaded with data so you can play around with them and get used to the idea of working with clients in an online environment.

At this stage, it's a great idea to sign up for our webinar on 'Getting Started with Sage One - for accountants and bookkeepers', visit [www.sage-exchange.co.uk/news](http://www.sage-exchange.co.uk/news) to sign up. It'll give you tips on what's available to you now that you're signed up. We'll show you how easy it is to collaborate online with your clients.



# 2 You and your clients on the cloud

## Working together with Sage

By now you should have completed Phase 1. Now your practice is on the cloud, it's time for Phase 2 - working online with your existing and future clients. As a Sage One Accountant you can collaborate online with clients who have signed up to a Sage One service. Giving you real-time access to clients' finances, this will save you time and bring greater convenience to your role.

After completing  
Phase 2, you can  
move onto >>>>

Phase 3:  
How to become an  
advanced Sage One user

# Step 1 Profiling your clients - where's the opportunity?

As a Sage One Accountant (or Bookkeeper), you can collaborate with your clients online. Simply sign them up to a Sage One service and gain instant access to their data.

We currently offer four Sage One services for small and growing businesses in the UK - your existing and future clients. Sage One has been designed for businesses to allow them to:

- Do their books or payroll anywhere, on any device
- Provide real time access to you, their accountant
- Have peace of mind knowing their data is securely backed up and stored
- Produce the reports they need in seconds
- Auto calculate VAT
- Produce VAT submissions in four clicks
- Have access to free UK based 24/7 telephone support 365 days a year

Our Sage One bookkeeping range (Cashbook, Accounts and Accounts Extra) has been designed specifically for the following types of clients:

Start-Ups	Micro/Sole Traders (0-4)	SMEs (0-49)
Sage One Cashbook/Accounts		Sage One Accounts Extra



# One step payroll



Sage One Payroll is simple, legislatively compliant payroll software, currently available for up to 15 employees.

If you have any sole trader or small business clients, or wish to attract them in the future, then Sage One is perfect.

2013's Sage Pulse Survey told us that your clients want to work more closely with you. When SMEs were asked how their relationship with their accountant could be improved, the top answers were more frequent contact by phone/email, followed closely by getting to know their business better.

So what if you, as their accountant, could have secure access to their live financial data? You could keep an eye on the numbers, enabling your clients to get on with running their business.

- Over 3.5 million businesses in the UK with 0-4 employees are currently not using any accounting software
- Around 100,000 businesses in the UK fitting the same criteria are now doing their accounts online - in today's ever-changing business environment, more and more businesses are looking for software that enables them to work on the move. Anywhere, anytime, wherever there's an internet connection

## So, who can you target?

**Manual** - if you're fed up of receiving a shoebox or plastic bag full of receipts at the end of every quarter, then think about how much time both you and your client could save by switching to Sage One.

**Excel** - your clients using excel to record their transactions could instead be inputting data into Sage One in a way that makes sense to them, and in a format they understand.

**Inactive desktop software** - do you have any clients who have a desktop licence but don't really use it? Sage One might be just the solution for them.

Visit [www.sage-exchange.co.uk/resources/sage-one](http://www.sage-exchange.co.uk/resources/sage-one) to view the Online & Desktop comparison chart, which will help you identify the best fit - whether it's a Desktop or an Online solution - for your clients.

## Checklist

- I know exactly which clients to introduce to Sage One

## Step 2 What's available for your clients?

You can use your free Collaborate functionality to share messages and data files securely online - simply create a client and start collaborating (keep a look out for Phase 3 of our guides, which contains more detailed information on how to use the Collaborate functionality).

However, if you sign your clients up to one of our Sage One bookkeeping and/or payroll services, then you'll have instant, live access to their data, whenever and wherever you like. So, what's available?

### Sage One Cashbook

(£5 plus VAT per month)

Ideal for clients that operate a cash-based business:

- Track income and expenses
- Send statements
- Profit and loss report
- Record cash deposits to the bank
- Store customer and supplier records
- Keep compliant with HMRC's Cash Based Accounting rules

### Sage One Payroll

(Between £5 and £15 plus VAT per month, depending on the number of employees)

Ideal for businesses employing up to 15 employees

- Simple, step-by-step processes, easily explained - process a pay run in under 5 minutes
- Available for weekly, fortnightly, monthly, or four-weekly pay runs
- HMRC-recognised and fully compliant
- Ready to deal with RTI legislation
- Automatic calculations
- Easily manage holidays and sickness
- Easy to make corrections
- Automatic integration with Sage One Accounts

All of the Sage One services available for your clients include:

- Free and unlimited UK based phone and email support 24 hours a day, seven days a week, 365 days a year
- Free SSL secure and automated data backups stored within the British Isles
- Free real time access for you, the accountant
- Access anywhere, anytime on any device with internet connectivity
- No set-up fees, installations, upgrades, contracts or maintenance
- Free integration to powerful Add-On applications

Visit [www.sage-exchange.co.uk/resources/sage-one](http://www.sage-exchange.co.uk/resources/sage-one) to download this booklet which will provide you with more information on the Sage One services available for you and your clients.

### Sage One Accounts

(£10 plus VAT per month)

Ideal for VAT-registered businesses that want an invoicing facility

- Reconcile the bank
- Create unlimited online or paper-based invoices
- Take unlimited payments online\*
- Calculate VAT and submit to HMRC
- Additional reporting options
- Personalised invoicing

\*using the Sage Pay add-on

### Sage One Accounts Extra

(£20 plus VAT per month)

Ideal for growing businesses that want a flexible, complete accounting solution

- Unlimited users with access control
- Multi-currency
- Remittances and Quotes
- Calculate Cross Border VAT
- Quick data entry screens (for batch entry)
- Cash flow Management
- Deeper financial analysis capability

#### Checklist

- I know what's available for my clients
- I'd like a bit more advice (Call us on 0800 802 8091)

## Step 3 Client acquisition: How do you attract online clients?

A recent survey found that 72% of the 17-35 year old demographic said they'd consider leaving their accountant if they didn't offer cloud-based services. You've already made the first step by signing up to Sage One Accountant Edition and gaining an online presence in the market. Visit our dedicated support [www.help.sageone.com/uk/](http://www.help.sageone.com/uk/) and practice resources [www.sage-exchange.co.uk/resources/sage-one](http://www.sage-exchange.co.uk/resources/sage-one) which will help you make that next step.

By working online, you can boast an attractive proposition to new clients. Working online gives you the opportunity to:

- Be more efficient and more effective
- Increase your practice capacity and work with a higher volume of clients

To read more about how one Sage One Accountant, Tree Accountancy, has embraced the online world, visit [www.sage-exchange.co.uk/news](http://www.sage-exchange.co.uk/news)

Do you promote your practice on Twitter or Facebook? Clients who work online also search online. To find out more how one Sage One Accountant benefits from being active on social media, read [www.sage-exchange.co.uk/news](http://www.sage-exchange.co.uk/news)

The Sage One Directory [www.uk.sageone.com/find-an-accountant/](http://www.uk.sageone.com/find-an-accountant/) will put you in front of thousands of small businesses and sole traders in the UK - simply call us on 0800 802 8091 and we can talk you through this.

#### Checklist

- I am ready to on-board new online clients to my practice
- I'd like some more help and advice - contact us and we can set up a 1-on-1 meeting with one of our online experts










## Step 4 In practice: how to sign up your clients to a Sage One service



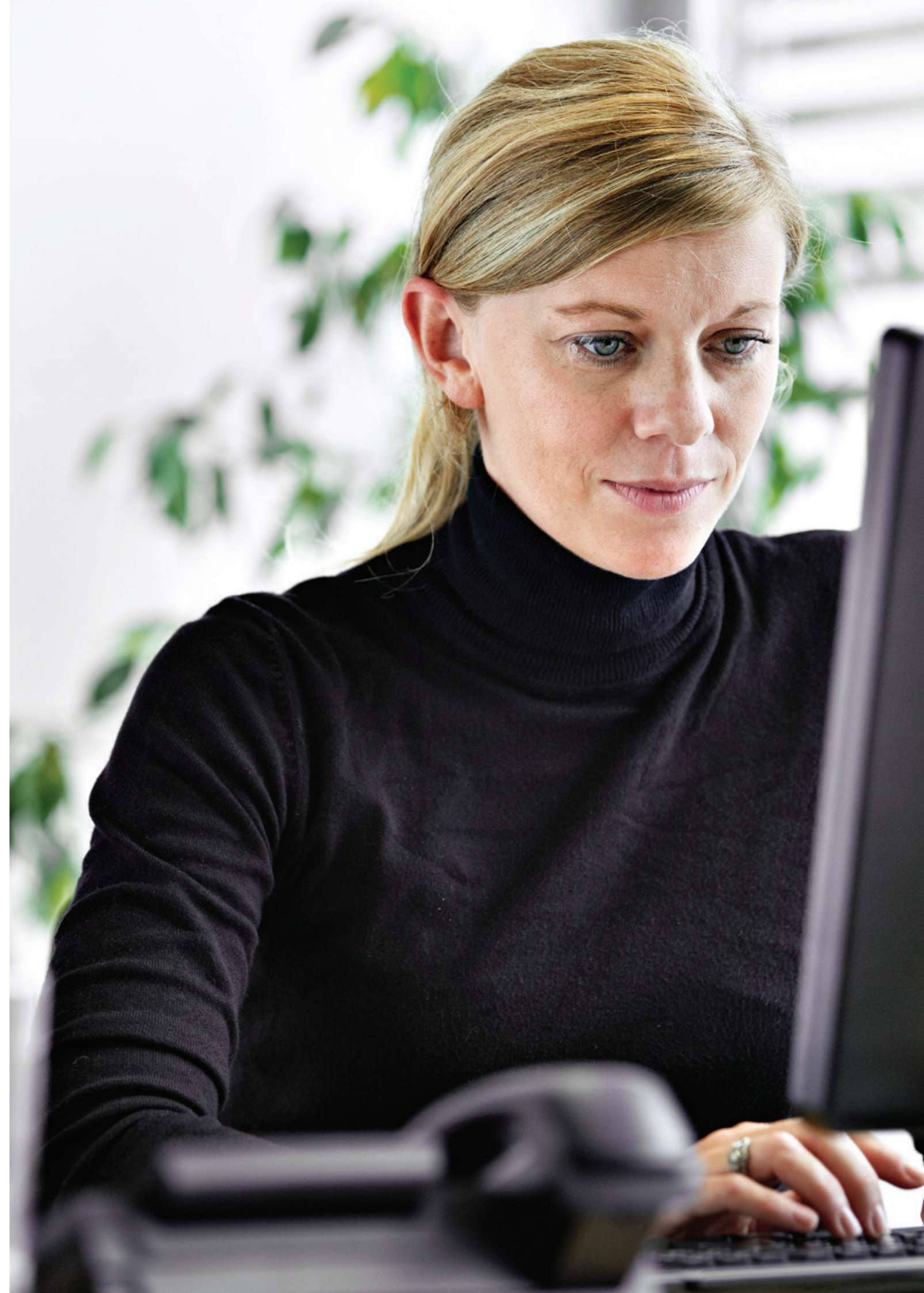
You can use your Sage One Accountant Edition to view and manage your clients' data remotely. You can accept invites from existing Sage One clients in order to log into their data, or **you can invite clients yourself to use Sage One** (this way, you can start earning commission with Sage One Rewards!).

It's really simple to invite a client. When you sign into Sage One Accountant Edition, the first thing you'll see is your Client List (which is also accessed from wherever you are by clicking on the 'Home' icon). Then, just follow the steps below:

1.  Click **Create Client**.
2.  Enter your client's Business details and address (at this stage, only the details with an asterisk next to them need to be completed).
3.  Click **Save**. (At this point, you're able to start sharing data with your client using Sage One Collaborate).
4.  Click **Manage Services**.
5.  Choose a service to subscribe your client to by clicking the service name in the list, and then clicking **Subscribe**. A tick will appear next to the selected service/s. (If you subscribe your client to one of our three bookkeeping options - Cashbook, Accounts or Accounts Extra - you're prompted to enter additional information about the client's VAT scheme and account details).
6.  Once you've selected the relevant service/s, click **Continue**. You'll navigate to the Summary area which shows how much the client will pay each month, following the initial 30 day trial.
7.  Check that the information is correct, then click **Finish**. An email will be sent to the email address you entered for the client. This invites them to activate their Sage One service. Once they've activated, you can login to their service and work on their data... **in real time!**

### Checklist

- I have signed a client up to a Sage One Service
- I have signed five clients up to a Sage One Service





# 3 Become a Sage One Expert

## Getting the most out of Sage One

Thank you for completing Phase 2. As you are successfully working online with your clients, now's the time to discover how to make the most of Sage One.

### Right now, you can benefit from:

- Accountants Business Cloud is an online marketing suite that lets you create, send and measure the effectiveness of email marketing campaigns
- The Sage Online Directory - promote your practice on the Sage One website
- Sage One hints and tips for you and your clients
- Add ons - integrate third party applications with Sage One

# Step 1 Making the most of your online resources

We're developing the resources we make available to you in order to ensure that you have the help and support you need to effectively promote Sage One to your client base. We'll let you know when we add new resources, so let us know about anything that would be really useful to you.

Right now, you can benefit from the following online resources:

### • Sage One Resources

Videos, thought leadership pieces, infographics, brochures and articles that give you more information about Sage One. To read more visit [www.sage-exchange.co.uk/resources/sage-one](http://www.sage-exchange.co.uk/resources/sage-one)

### • Sage One Help

Our intuitive online help area contains hundreds of comprehensive articles and step-by-step videos that will answer many of your questions about Sage One. We've organised the help area by Sage One service, to make things even easier. To read more visit [www.help.sageone.com/uk/](http://www.help.sageone.com/uk/)



Watch this video [www.sage-exchange.co.uk/abc-steps](http://www.sage-exchange.co.uk/abc-steps) if you'd like to find out more. Accountants Business Cloud will be available for members of Sage Accountants' Club from May 2014, to register your interest visit [www.sage-exchange.co.uk/news](http://www.sage-exchange.co.uk/news)

Coming soon, we also have an exciting new offering called **Accountants Business Cloud**. This is an online marketing suite that will let you create, send and measure the effectiveness of email marketing campaigns.

We'll give you access to pre-loaded campaigns, and it's really simple to create your own too. You'll be able to use the tool to create fantastic looking newsletters, promote your practice to prospective clients, or even create your own bespoke campaigns. The tool allows you to schedule emails so that you can, for example, set them to send on a day when you're out of the office (or even on holiday!). There's also a host of reporting capabilities available to you with just a few clicks of a mouse, which can be downloaded and extracted.

### Checklist

- I know how to access the resources available to me
- I'd like more support and advice
- I'm interested in ABC, and have submitted my interest via Sage Exchange

# Step 2 How to get the most out of Sage One



As a Sage One Accountant or Bookkeeper, you should by now have a log-in for Sage One Accountant Edition.

So, what's next? Well, the good news is that this log-in is all you'll need in order to collaborate with your Sage One clients and work on their data in real time. To learn about how the Sage One Collaborate functionality works, simply watch the short video below:

- Sage One Collaborate – Product Tour [www.sage-exchange.co.uk/collaborate-tour](http://www.sage-exchange.co.uk/collaborate-tour)

### Checklist

- I've watched the video and am ready to get started
- I'm already collaborating with at least one live client in Sage One
- I'd like someone to come to my practice for a more personal, customised experience (Call us on 0800 802 8091)

## Step 3 Growing your online client base

In Step 1, we introduced you to Accountants Business Cloud, which we hope will help you to attract online clients. Of course, it's completely up to you how you do this.

Did you know that you also have the opportunity to join our Sage Online Directory? Visit [www.uk.sageone.com/find-an-accountant/](http://www.uk.sageone.com/find-an-accountant/). This allows you to promote your practice on the Sage One website, so that potential Sage One clients can find you!

If you'd like to add your details to this directory, simply fill in your details on this page [www.sage-exchange.co.uk/resources/sage-one/sign-up-sage-one-directory](http://www.sage-exchange.co.uk/resources/sage-one/sign-up-sage-one-directory)



### Checklist

- I'd like to join the Sage Online Directory, and have submitted my request via Sage Exchange

## Step 4 Hints and Tips



We've designed Sage One to be very simple and straightforward for you and your clients to use. As you'll know, there's no installation required and any feature or compliance updates undertaken will simply be available to you the next time you log in.

However, we also know that it can be a big step to get started, especially if you or your clients haven't used online solutions before. That's why our support team have put together some helpful hints and tips for you and your clients to use, in order to get the most from Sage One.

To read the whole article visit [www.sage-exchange.co.uk/news](http://www.sage-exchange.co.uk/news). Alternatively, read on for some quick tips:

- Each and every client that you invite to use a Sage One service will automatically receive a **free 30 day trial**, so you can be sure that the software is the right fit for their business needs
- **Sage One Accounts** clients you're linked to won't be able to do the following things, but you will: Post journal adjustments, customise the Chart of Accounts, produce and export a nominal account activity report
- **Sage One Cashbook** clients you're linked to won't be able to do the following things, but you will: Create and submit online VAT Returns, produce financial reports, post journal adjustments, customise the Chart of Accounts, create and send sales and purchase invoices
- **Sage One Accounts Extra** clients have the same access rights as you, but you have full system manager access, which means that you have the ability to control the access for any additional users, therefore taking control of the data, should you want to

### Checklist

- I'd like to know more - I'm interested in a 1-2-1 webinar (Call us on 0800 802 8091)
- I'd also like more information about what's coming next (Watch this space!)

## Step 5 The sky's the limit - Introducing Add-ons



Visit [www.uk.sageone.com/add-ons/](http://www.uk.sageone.com/add-ons/) to read more about how Add-ons allow you and your client to manage all aspects of your business processes through the integration of third party applications with Sage One.

We give businesses the opportunity to become Sage One Developers, and then use our platform to build useful tools that you and your clients will benefit from.

For example, read more on how Sage Pay now integrates with Sage One [www.uk.sageone.com/add-ons/](http://www.uk.sageone.com/add-ons/). This integration will allow your clients using a Sage One bookkeeping service to accept credit and debit card payments online or over the phone, and even go as far as adding a 'Pay Now' button to invoices produced in Sage One, which customers can then click and pay using a card or even PayPal. We've found that businesses using this feature tend to receive payment from their customers at least 30% faster.

For more information on the Sage One Add-ons we currently have available for your practice, visit [www.sage-exchange.co.uk/resources/sage-one/sage-one-add-ons](http://www.sage-exchange.co.uk/resources/sage-one/sage-one-add-ons) to take a look at our brochure.

### Checklist

- I'm interested in Add-ons for my practice (navigate to our Add-ons page and contact your chosen provider directly to get started)
- I'm interested in Add-ons for my Sage One clients (navigate to our Add-ons page and contact your chosen provider directly to get started)

## Final Checklist

### Checklist

- My practice has adopted the 'cloud'
- I am signed up to Sage One Rewards
- I am recommending Sage One to the relevant clients
- I have linked with clients through my Sage One Accountant Edition
- I have started to collaborate with my clients using Sage One
- I am using the resources available to me on [www.sage-exchange.co.uk/resources/sage-one](http://www.sage-exchange.co.uk/resources/sage-one)



Getting your practice online with Sage

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To find out more visit [www.sage-exchange.co.uk/SageOne](http://www.sage-exchange.co.uk/SageOne)  
or call us on 0800 802 8091

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Your 3 stage guide to getting your Practice Online with Sage

Phase One - Getting your practice ready

Phase Two - Get your clients ready

Phase Three - Become a Sage One Expert

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