



Invoice Importer

» **Automating Manual Invoicing Tasks**

Sage Business Partner


Solutions
for **Accounting**

Do you manually re-key Sales Invoices into Sage from another system?

With a click of a button, you can import all your data into Sage 50cloud Accounts!

Solutions for Accounting' Invoice Importer tool takes line items from a spreadsheet and imports them into the Invoices and Credits section of Sage 50cloud Accounts. These can then be emailed or printed as required.

You can group the invoice data in multiple ways ensuring that your Invoices in Sage appear exactly as required. This can help you to automate a previously manual task, saving time and reducing errors.



FEATURES:

- Allows you to group your invoices in a variety of ways
- Import Product/Service Invoices/Credits/Proformas/Quotes
- Includes Carriage information
- Compatible with multi-currency
- Provides users access to be able to import invoices without having to access the rest of Sage

BENEFITS:

- ✓ Import multiple records in one go from either Excel or .csv
- ✓ Headings in file map the data easily to Sage Accounts fields
- ✓ Full data validation as part of processing
- ✓ Can be used at the same time as other users being logged into Sage
- ✓ Can be run from the Sage Toolbar or opened from a separate program
- ✓ Compatible with the UK version of Sage 50/50cloud (versions 18-26)

ADDITIONAL INFORMATION:

- ✓ Line items by Customer Account/ Purchase Order number/ Invoice number/ Sales Order number
- ✓ Product separate document for each line item
- ✓ Group by values in 'group together' column
- ✓ Default emailed flag (setting to prevent if required)
- ✓ Overwrite non-updated invoices (setting to prevent if required)
- ✓ Include zero value items (setting to prevent if required)
- ✓ Allow description to be imported rather than Sage description (setting to prevent if required)
- ✓ Decide where to import Customer PO number (Customer Order No, Comment 1, Comment 2)
- ✓ Use Invoice Date from import file OR select a date to be used during import

- ✓ Multiple line items per import row available (setting)
- ✓ Sales Invoices are created in Sage and then these are updated to the ledger as a separate process
- ✓ Invoice documents can be generated and sent out to customers
- ✓ Fund ID, Currency and Exchange Rate are fields that you cannot import in Sage, but can via our importer
- ✓ Include zero value items (setting to prevent if required)
- ✓ Use three name parts (first, middle, surname) to make up the name (setting)





WHY CHOOSE US?

Whichever option you choose, be sure to know that **Solutions for Accounting** will be there every step of the way, to make sure you receive a best-in-class experience.

We are extremely proud of everything we deliver for our customers, which is shown in our recent [customer success stories](#).

“A client of mine uses Sage 50 Accounts and Microsoft Dynamics CRM and were looking for a user-friendly solution to create invoices in CRM and import to Sage.

Having looked around and trialed a few products the clear winner was Solutions for Accounting’ Invoice Importer.”

Require more information?



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