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ACCOUNTING

2016 Review of Sage One

Sage One, offered by software pioneers Sage Software offers a multi-platform product that can be accessed from a variety of devices including iPad's, iPhones, tablets, Android devices, and desktop systems.

Mary Girsch-Bock • Jun. 14, 2016

sage

One

www.sageone.com

From the 2016 Review of **Accounting Systems for Small Businesses**.

Best Fit: Sage One is a good fit for micro-businesses and sole proprietors that desire accounting functionality in a product that can be easily accessed from anywhere.

Product Strengths:

- Low monthly cost for unlimited users
- Good invoicing functionality
- Offers over a dozen global versions and accepts foreign currencies
- Easy import functionality

Potential Limitations:

- Does not offer check printing capability
- No Payroll functionality

Sage One, offered by software pioneers Sage Software offers a multi-platform product that can be accessed from a variety of devices including iPad's, iPhones, tablets, Android devices, and desktop systems.

Basic System Functions: 4.5 Stars

100% cloud-based, Sage One allows users to choose from 14 different countries when they initially sign up for the product. Initial sign up is accomplished in less than two minutes. Once place of business is established, sales tax information for the jurisdiction your business resides in is set up as well. The user dashboard provides access to system options, such as Summary, Sales, Expenses, Contacts, Products & Services, Banking, Journals, Reporting, and Settings.

The Getting Started option provides new users with easy system setup, including setting up customers, bank accounts, vendors, and the chart of accounts. Users can opt to use the default chart of accounts, or customize it to reflect their needs, though industry specific charts of accounts are not available. The Getting Started screen also offers features that users can choose to implement if they wish, including the ability to customize invoices, add products, set up department and cost codes, and invite collaborators. Users can also import customer and vendor lists if desired. Data entry screens are clean and uncluttered, with users able to navigate through the system with ease.

Both quotes and estimates can be processed in the Sales function of the product, and the contacts option allows users to track basic information about their customers. Sage one works on PC's, Mac's, and iPads, and a mobile app is also available that works with iPhones, and Android devices.

Core Accounting Capabilities: 4.5 Stars

Sage One allows users to easily invoice customers. Just click on the New Sales Invoice option and enter the appropriate data. Users can easily customize invoices with company logos, and even custom formatting, with numerous templates available for use. Products and services can be entered on the fly from the invoicing screen, and discounts and tax, or a tax overrides can be easily applied as well. The Invoice List

screen provides users with a quick view of all invoices that have been entered in the system, and their current status.

Invoices can be emailed to customers, or printed to quick mailing. They can also be saved as a PDF file if desired. Businesses with international customers will appreciate the ability to invoice customers in 32 global currencies, and users can also include any billable time for services in any invoice created. The product supports online bill payment with the use of Sage Payment Solution or a PayPal integration feature – both available as add-ons. System users receive an alert when invoices are past due, with a quick option to resend an invoice.

Users can easily process vendor invoices, enter payments made on any invoices received, and choose to pay vendors electronically by setting up banking information in the vendor file, though there is no function in place that automates that process. In addition, there is no check printing option – instead users can simply write a check and record it in Sage One. Payroll functionality is not included in the product, but multiple currencies are accepted, and as mentioned earlier, users can bill in multiple currencies as well. The product is available in U.S. as well as 13 other global versions, and multiple users can easily access the system with no additional licensing required.

Day-to-Day Operations: 4.25

Designed for the sole proprietor that sells little to no products, neither point-of-sale nor shipping support is offered in Sage One. Users can track products and services offered in the sales option, but the product is not designed to manage large amounts of inventory, though users can assign offer multiple pricing levels for products entered, with multiple pricing levels available for services offered as well. A basic CRM feature tracks both customer and vendor information, including payment details. Tax rates can also be assigned to each customer, so out of state customers can have the correct sales tax rate used. Neither inventory nor purchasing options are available in Sage One, with Sage has promised additional apps will be available in the future.

Users can link their bank accounts and credit cards directly to Sage One, with the ability to automatically import all bank transactions if desired. The banking feature also allows users to enter manual transactions, such as a check not written on the linked bank account, or an expense paid by another credit card. Completely mobile, Sage One can be accessed from just about anywhere, and users can also opt to access the product from desktop systems as well.

Management Features: 4.75 Stars

Sage One offers a series of dashboards, including the Getting Started dashboard, where all data is entered and managed. The Sales dashboard offers users a look at all outstanding invoices, including those that are overdue. The Sales dashboard also offers a look at quotes and estimates. The Expenses dashboard looks at all vendor bills, provides a breakdown of expenses by account number, and provides a list of Top 5 vendors.

A Cash Flow Statement provides users with a fast glance at all cash activity, opening and closing balance, and net cash balance. A Cash Flow Forecast is available as well. Reporting options are decent, with users able to access reports from a single screen. Frequently run reports can be saved as favorites, and all reports can be customized with a business logo and choice of report filters. All Sage One reports can be exported to a CSV file for customization, or saved in the system as a PDF file.

Integration/Import/Export: 4.5 Stars

Users can import customer, vendor and chart of accounts data directly into Sage One using a CSV template that is provided with the product. The mobile app increases system accessibility, and though the product only offers two apps right now: Sage Payment Solutions and PayPal, other apps are expected to be added in the future. An accountant's version of Sage One is available, with accountants provided with a complimentary account, as well as discount pricing for clients wishing to switch to the product.

Help and Support 5 Stars

Clicking on the Help icon at the top of the screen will take new users to the Sage One Help page, which provides help functionality in a variety of categories including Getting Started, Contacts, Sales, Products & Services, Expenses, Banking, Reporting, and Settings. The Resources option on the Sage One website offers access to a series of How-To videos, the Sage City user community, and the option to download a 30-day product trial. Users can easily contact support by clicking on the phone or email icon to the right of the screen. System updates can be downloaded directly from the Sage One website, and a customer chat line is available for users 24/7.

Summary & Pricing:

Ideally designed for sole proprietors, or those offering client/customer services, Sage One is available for \$10.00 a month, and includes complete online access, unlimited

invoicing, and multiple users.

2016 Overall Rating – 4.5 Stars

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