

# Can I link PlanManager with Sage 50 Accounting?

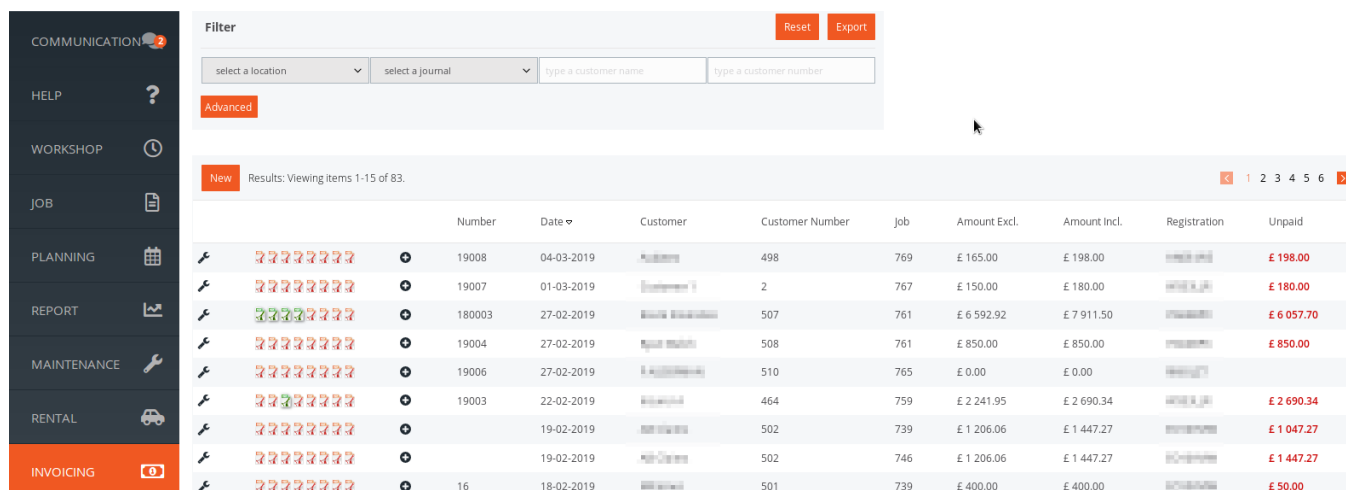
Yes, you can!

PlanManager can be linked with Sage 50 Accounting. A Sage 50 account is needed for this functionality.

Send a email to [support@insypro.com](mailto:support@insypro.com) for enabling the use of this package in combination with PlanManager.

How do I export my invoices and import them into Sage50?

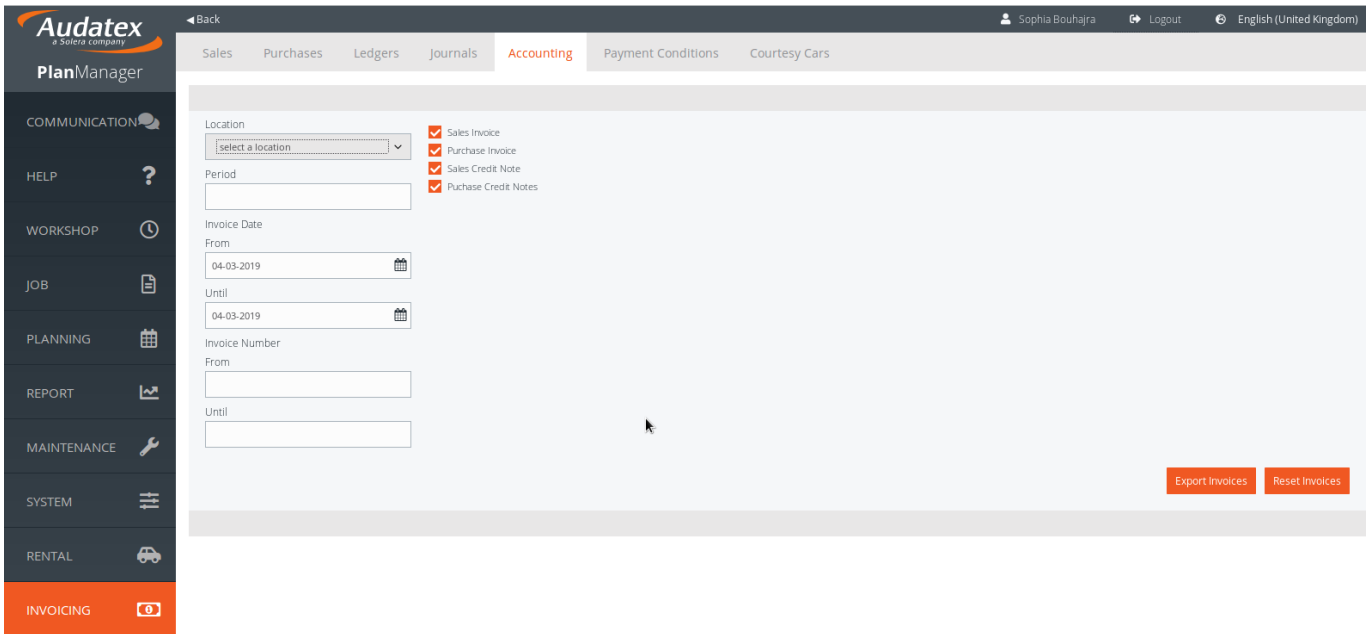
1. You go to 'Invoicing' in Planmanager.



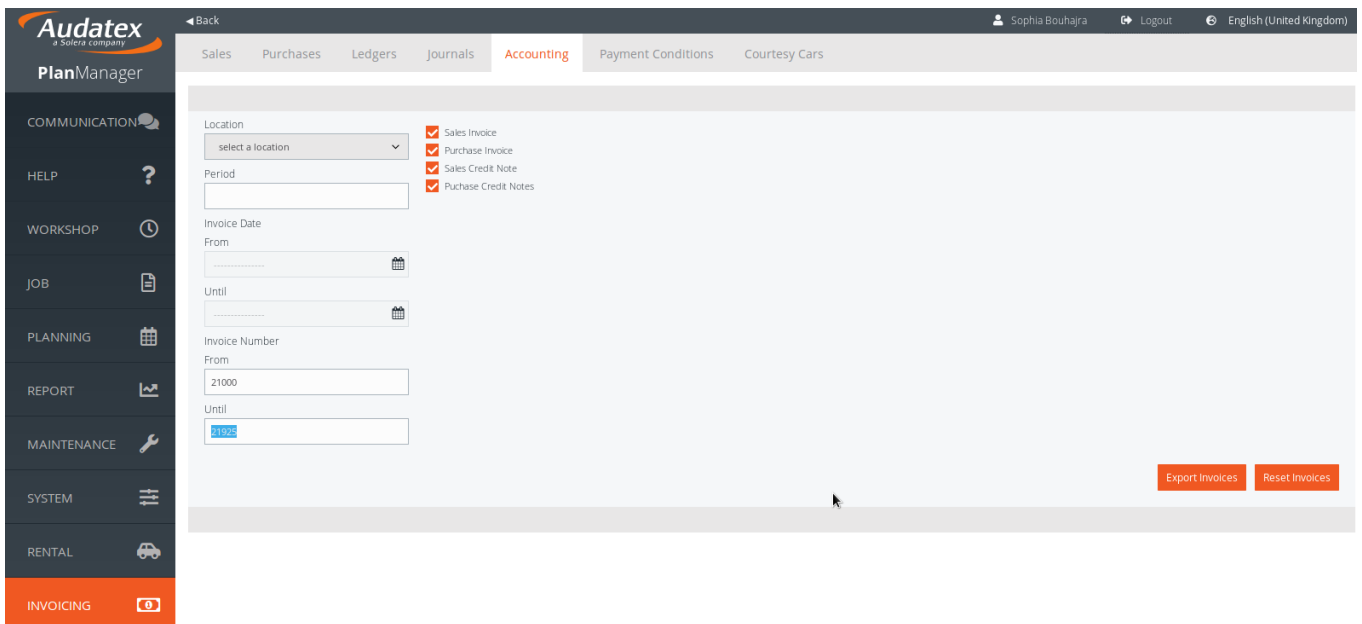
The screenshot shows the 'Invoicing' section of the PlanManager software. On the left is a dark sidebar with navigation options: COMMUNICATION (2), HELP (?), WORKSHOP (clock icon), JOB (document icon), PLANNING (calendar icon), REPORT (line graph icon), MAINTENANCE (wrench icon), RENTAL (car icon), and INVOICING (9). The main area has a 'Filter' section with 'Reset' and 'Export' buttons, and input fields for 'select a location', 'select a journal', 'type a customer name', and 'type a customer number'. Below the filter is a table of invoices. The table has columns: Number, Date, Customer, Customer Number, Job, Amount Excl., Amount Incl., Registration, and Unpaid. The 'Unpaid' column shows values in red text. The table shows 15 items, with the first 10 visible in the screenshot.

	Number	Date	Customer	Customer Number	Job	Amount Excl.	Amount Incl.	Registration	Unpaid
✂	19008	04-03-2019	Customer	498	769	£ 165.00	£ 198.00	INVOICE	£ 198.00
✂	19007	01-03-2019	Customer 1	2	767	£ 150.00	£ 180.00	INVOICE	£ 180.00
✂	180003	27-02-2019	Blue Services	507	761	£ 6 592.92	£ 7 911.50	INVOICE	£ 6 057.70
✂	19004	27-02-2019	Blue Services	508	761	£ 850.00	£ 850.00	INVOICE	£ 850.00
✂	19006	27-02-2019	Blue Services	510	765	£ 0.00	£ 0.00	INVOICE	
✂	19003	22-02-2019	Blue Services	464	759	£ 2 241.95	£ 2 690.34	INVOICE	£ 2 690.34
✂		19-02-2019	Blue Services	502	739	£ 1 206.06	£ 1 447.27	INVOICE	£ 1 047.27
✂		19-02-2019	Blue Services	502	746	£ 1 206.06	£ 1 447.27	INVOICE	£ 1 447.27
✂	16	18-02-2019	Blue Services	501	739	£ 400.00	£ 400.00	INVOICE	£ 50.00

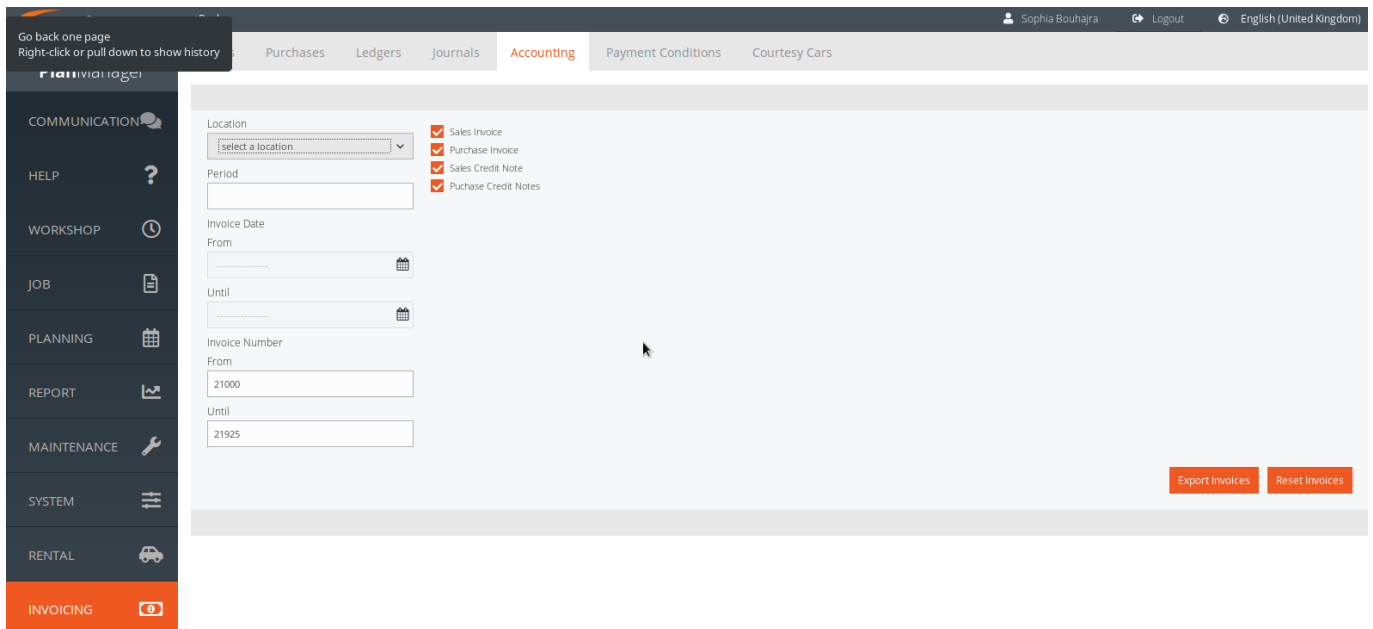
2. Go to 'Accounting'



3. Select the location and fill in the invoices dates you want to export. You can choose to export the invoices by date or by invoice number.



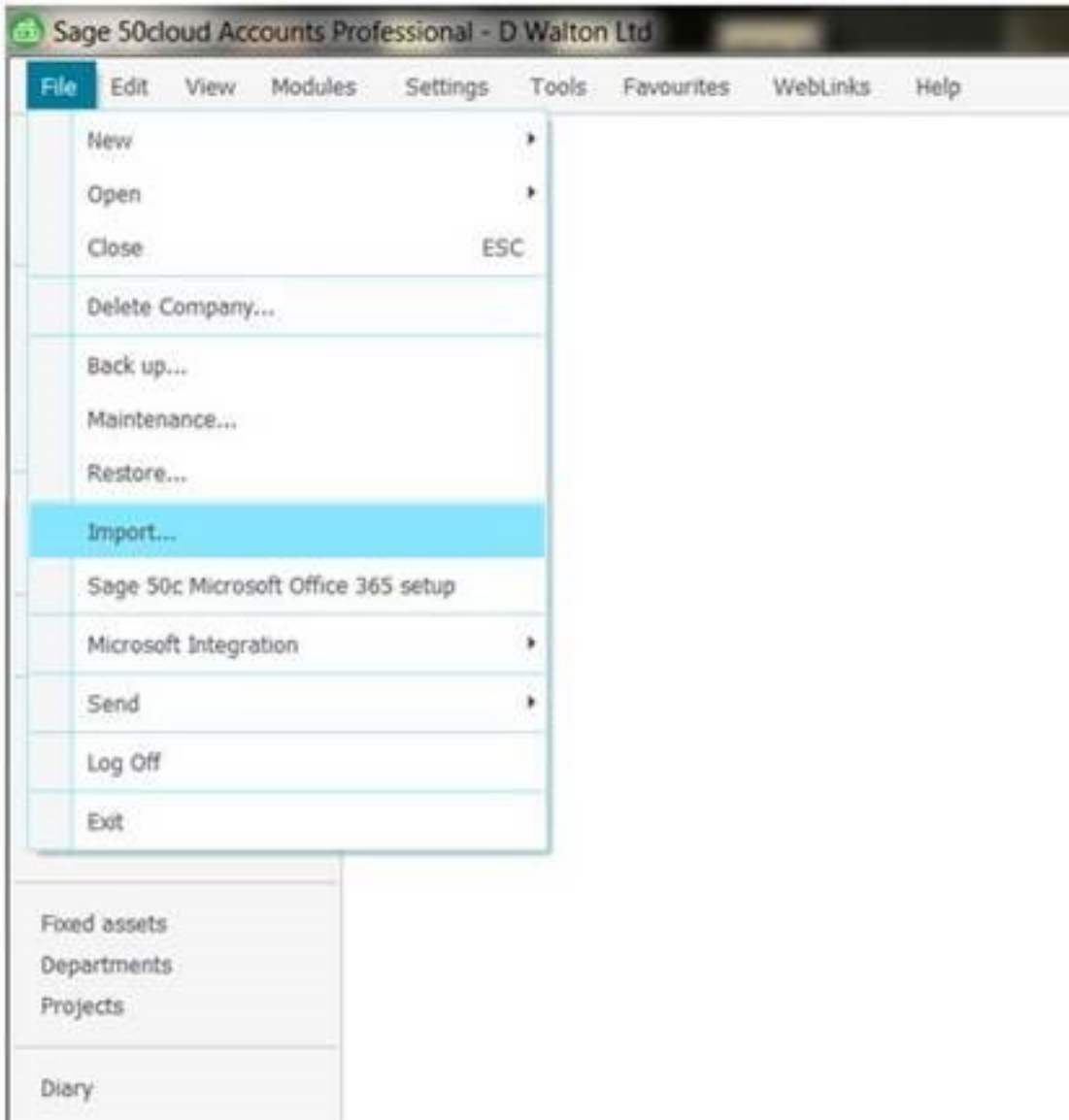
4. Click on 'Reset invoices' (first) and then 'Export invoices'



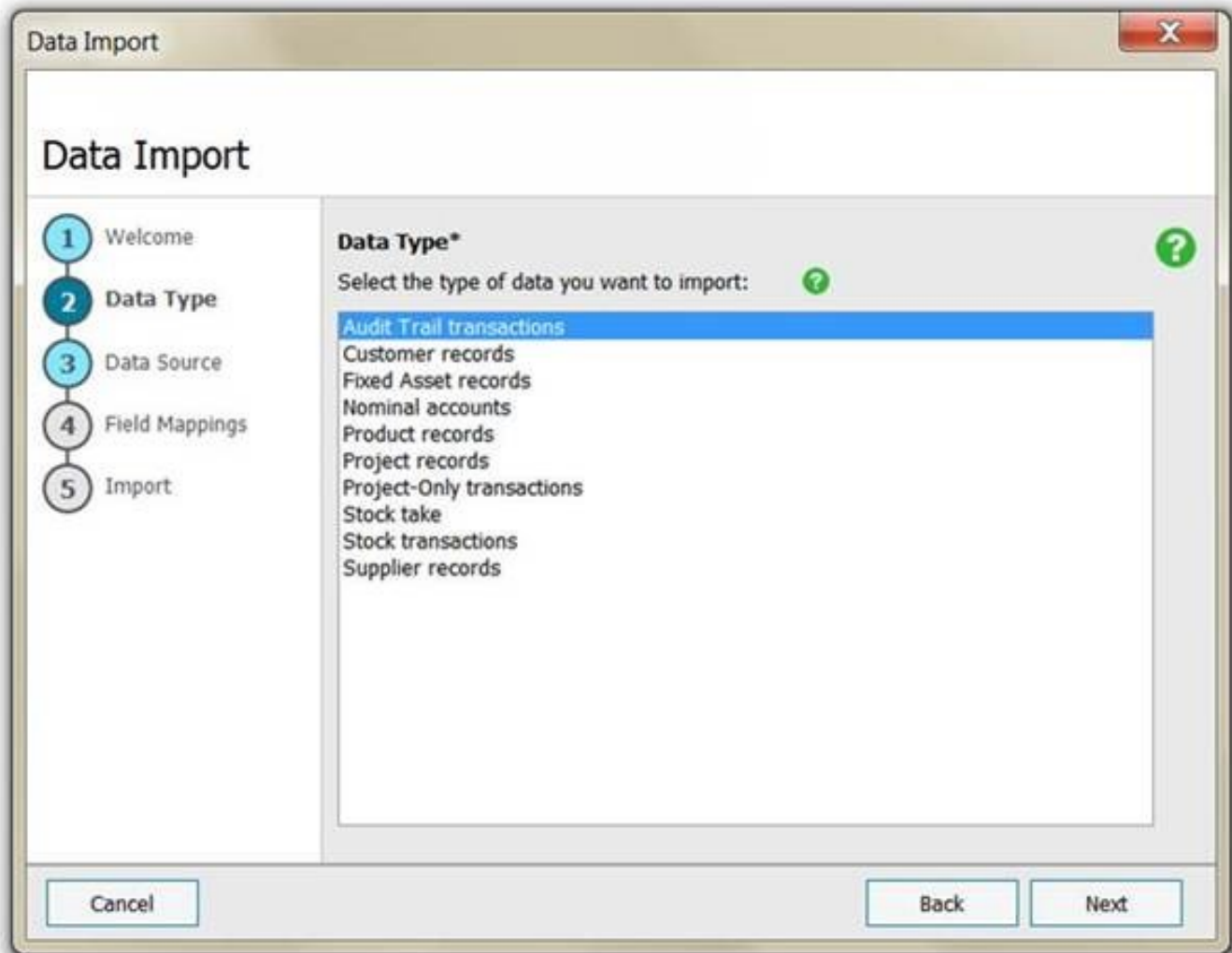
5. A CSV-file will be exported. It should be this format:

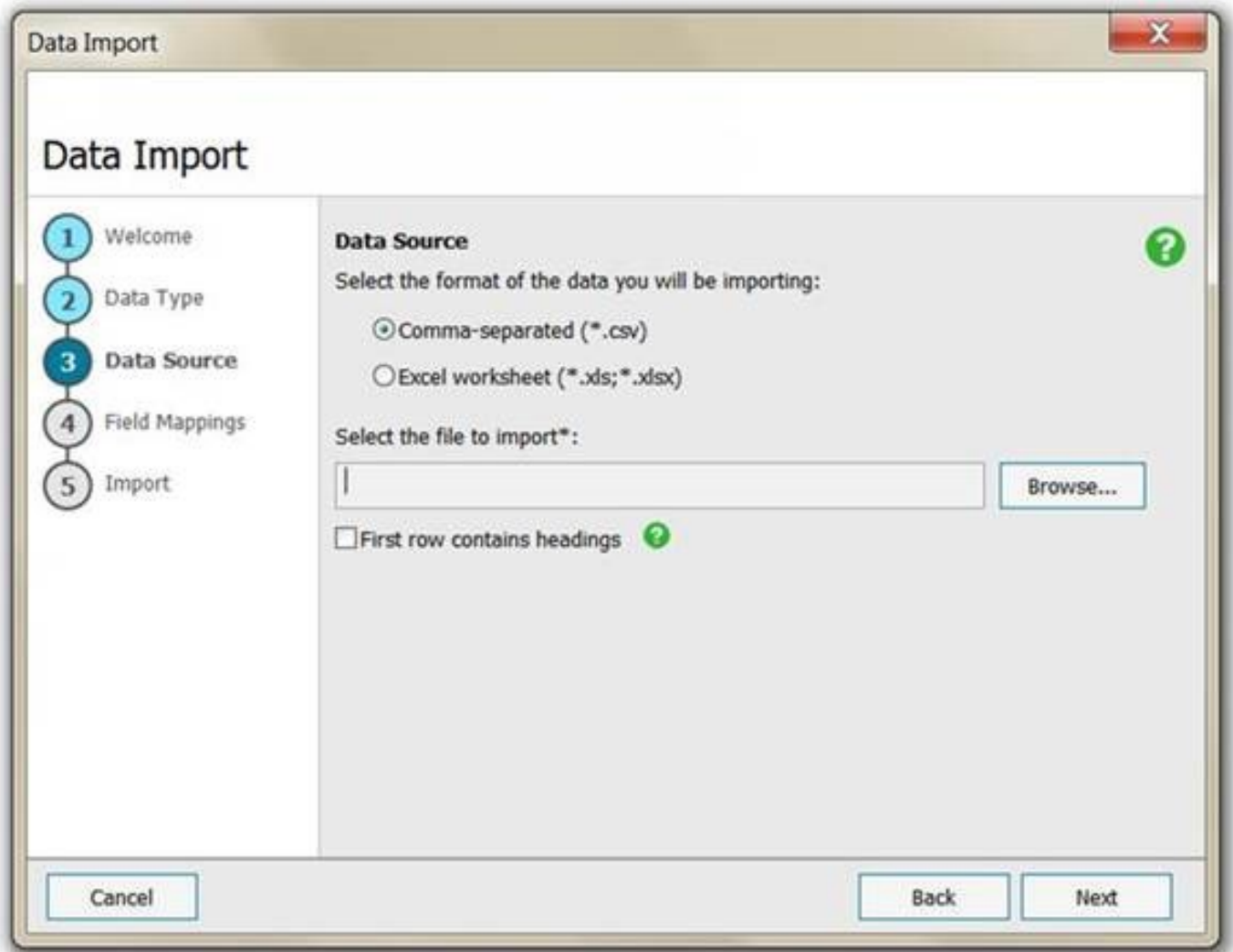
TYPE, CLIENTCODE, LEDGERNR, 'RANDOMNUMBER'// Empty field, DATE, INVOICENUMBER, 'DETAILS',  
//Description (filenr\licenseplate\claimnr), NETAMOUNT, 'TAXCODE', //VAT code, 'VATAMOUNT'//VAT  
amount

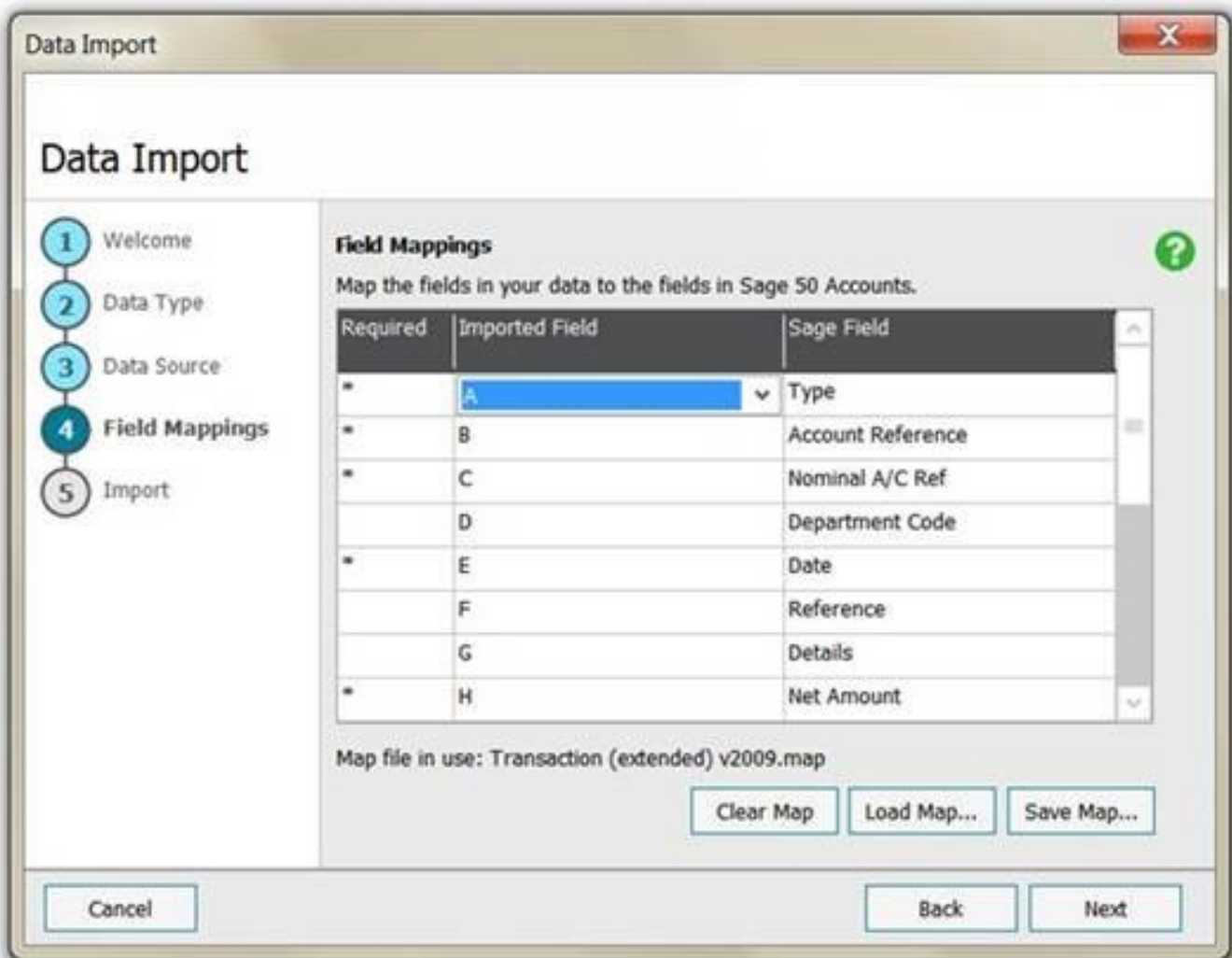
6. When the CSV-file is exported, when can import the file into Sage50. Click on  
'Import transactions'



7. Select the file you want to import.

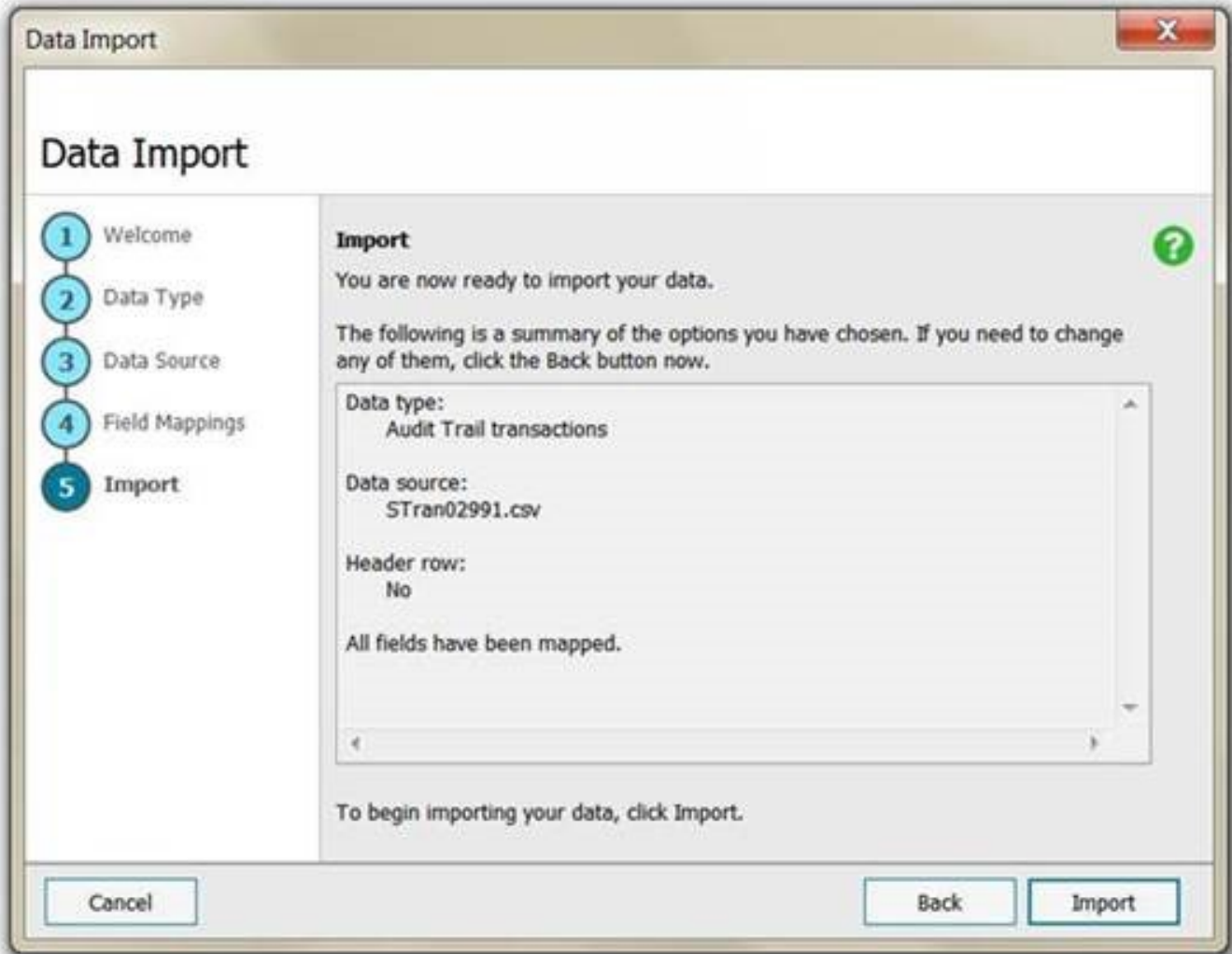




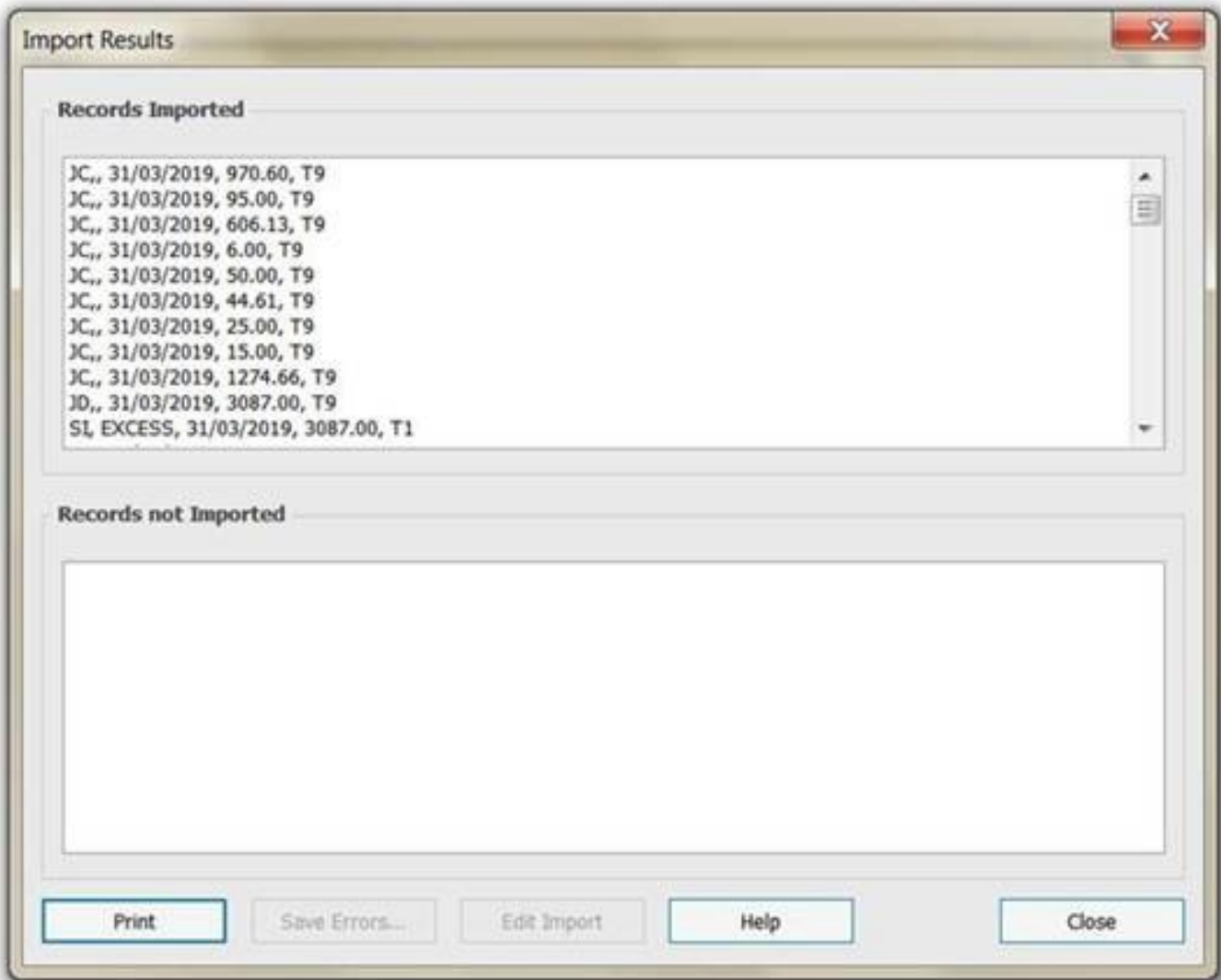


8. In case of any issue, you'll receive an error message when you try to import the file. You need to fix the issue first before importing the file again.

9. Import the file into Sage50.







10. Open Sage50 and go to the 'Customer Record'

11. Open the 'Customer record' and open the 'Activity'. The invoices lines should be shown here.

Customer Record - Bronson Inc

Details Defaults Credit Control Sales Orders Projects Graphs Activity Bank Communications Memo

A/C: BR0001 Balance GBP £: 0.00  
 Name: Bronson Inc Amount Paid GBP £: 18075.25  
 Credit Limit GBP £: 4000.00 Turnover YTD GBP £: 14742.39

Show: All Transactions Date: 01/01/1980 to 31/12/2099 Type: All O/S Only  Trans.: 1 to 1239

No	Type	Date	Ref	Details	Amount £	O/S £	Debit £	Credit £
4	SI	31/12/2012	0/BAL	Opening Balance	230.00		230.00	
222	SI	29/01/2013	13	JPO20 Jet Printer	1026.00		1026.00	
223	SI	29/01/2013	13	PC Combo Pack 2	3087.50		3087.50	
224	SI	29/01/2013	13	JPO20 Jet Printer Cartid...	28.50		28.50	
225	SI	29/01/2013	13	JPO10 Jet Printer Cartid...	34.20		34.20	
269	SR	29/01/2013		Sales Receipt	4372.00			4372.00

No	Type	Date	Ref	N/C	Dept	Ex Ref	Details	Project Ref	Amount £	Debit £	Credit £	ans. Balance
4	SI	31/12/2012	0/BAL	9998	0		Opening Balance		230.00	230.00		230
		29/01/2014			0		230.00 from SR 269				230.00	0

Future £: 0.00 Current £: 1200.00 1 Month(s) £: 0.00 2 Month(s) £: 0.00 3 Month(s) £: 0.00 Older £: 12403.25

View Round

Unikátní ID: #2147  
 Autor: Jean Claude  
 Aktualizováno: 2019-10-08 12:15