General

Can I link PlanManager with Sage 50 Accounting?

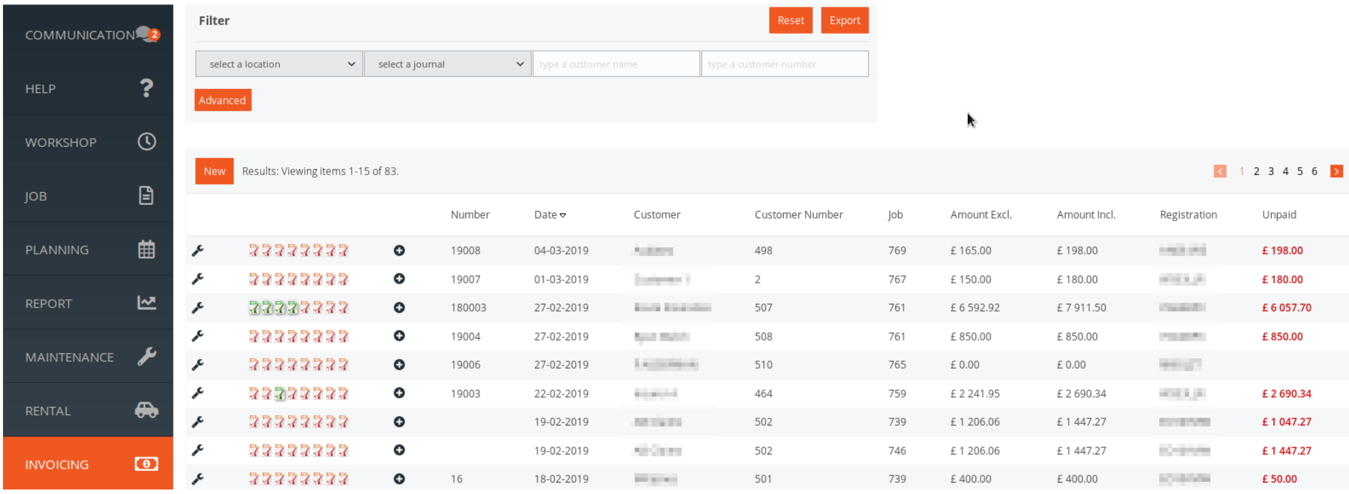
Yes, you can!

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

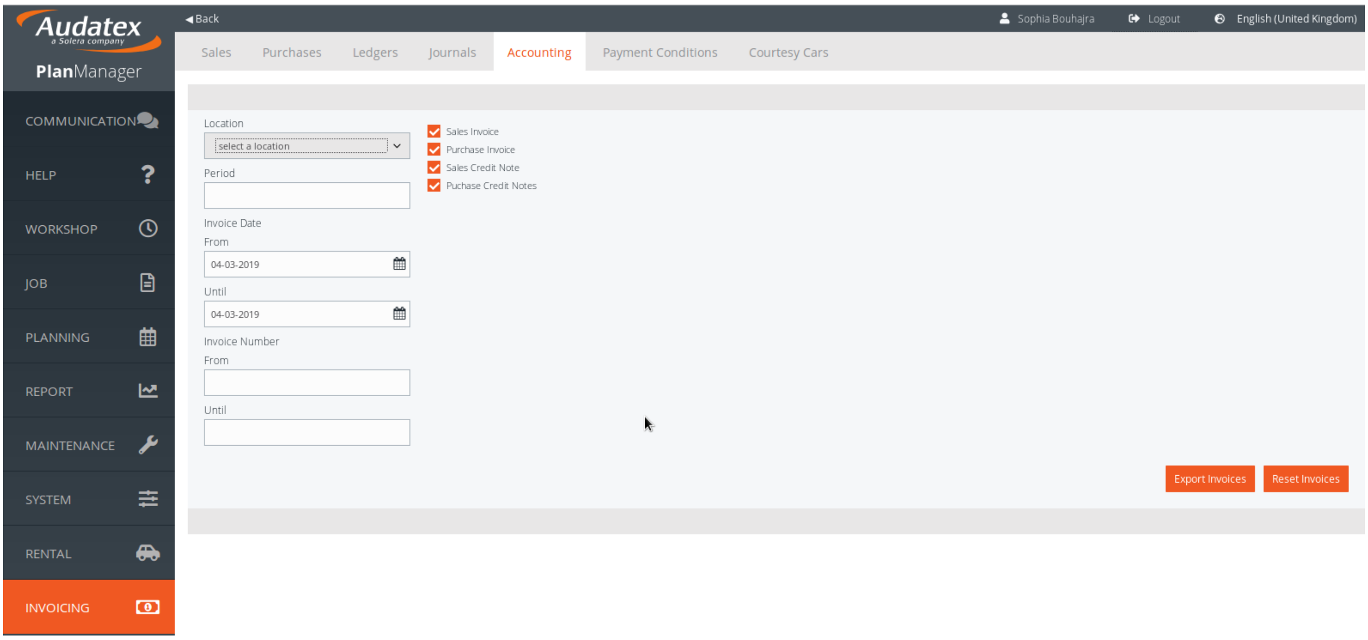
Send a email to support@insypro.com for enabling the use of this package in combination with PlanManager.

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

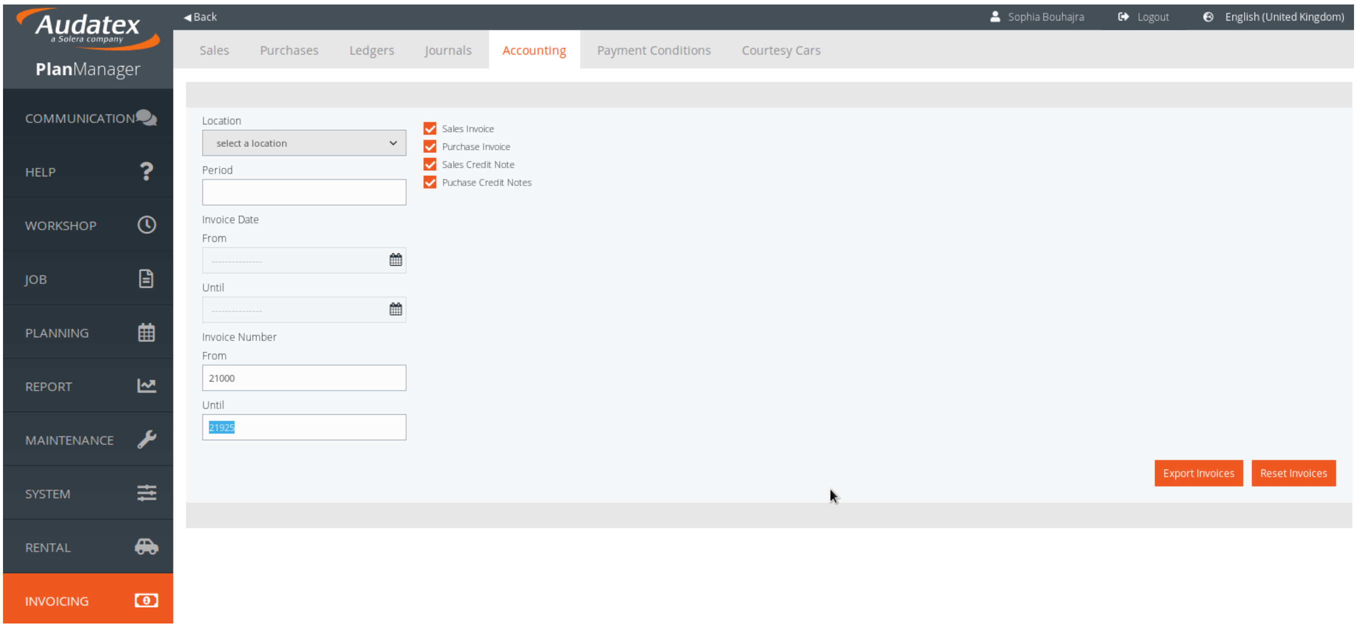
1. You go to 'Invoicing' in Planmanager.



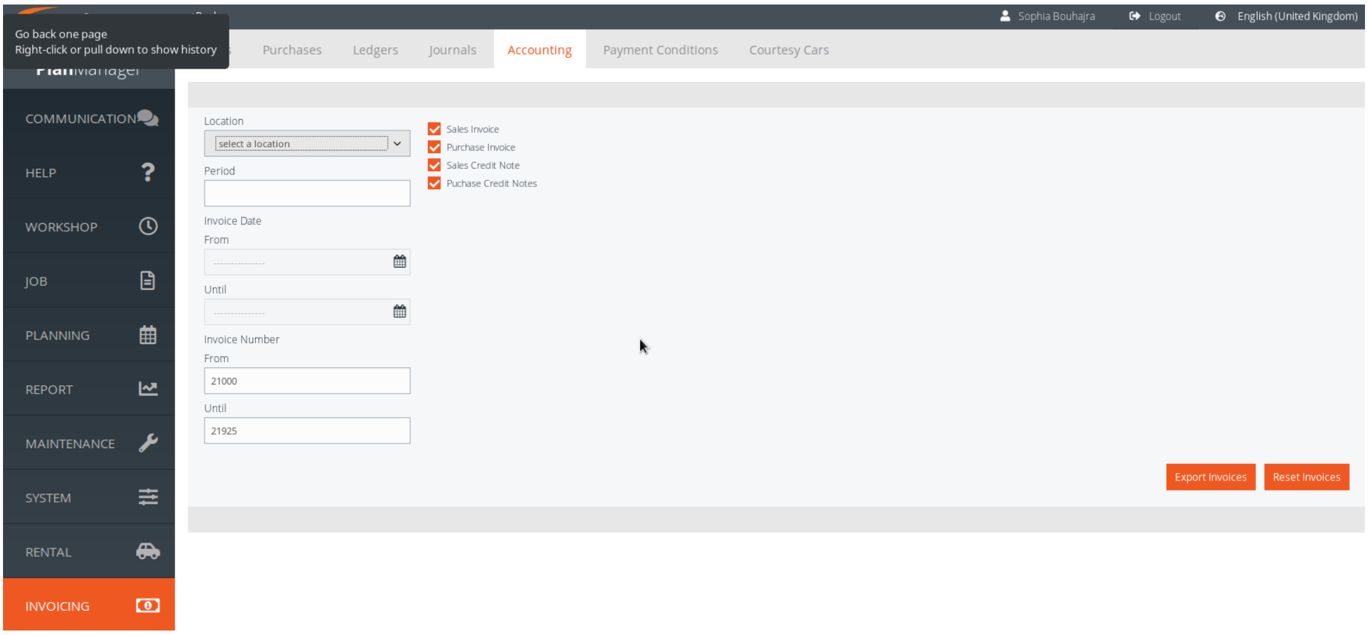
2. Go to 'Accounting'



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.



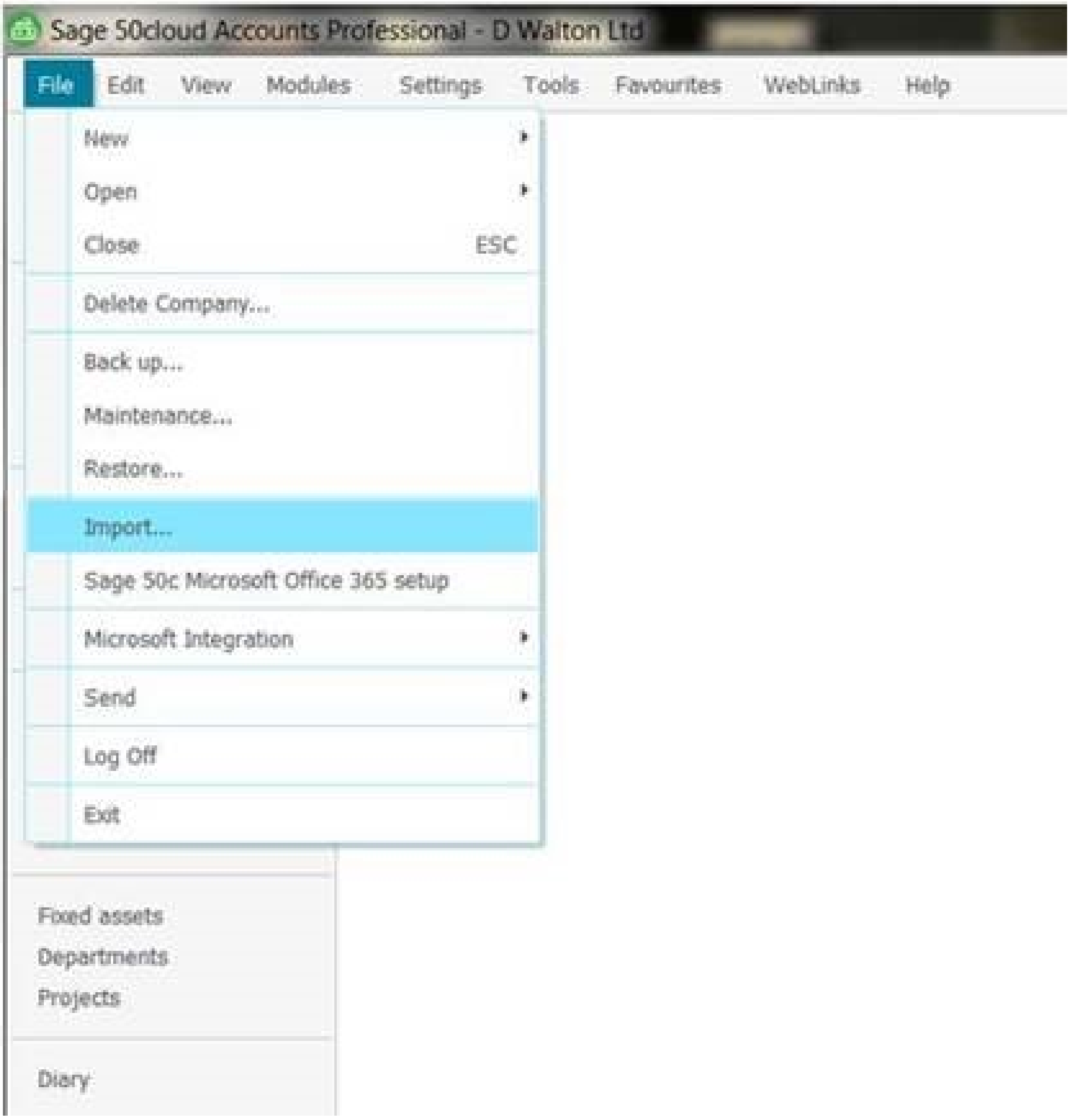
4. Click on ‘Reset invoices’ (first) and then ‘Export invoices’



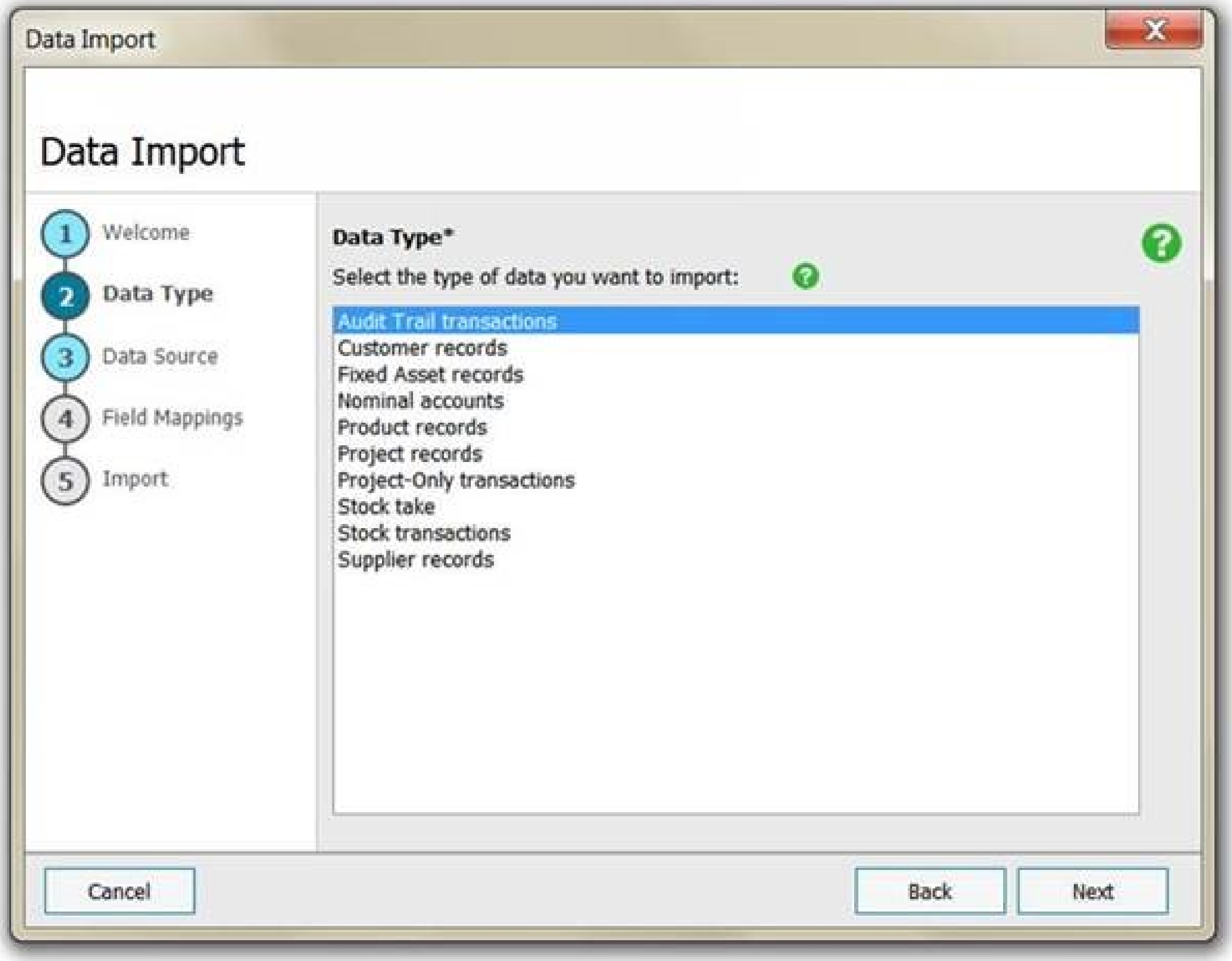
5. A CSV-file will be exported. It should be this format:

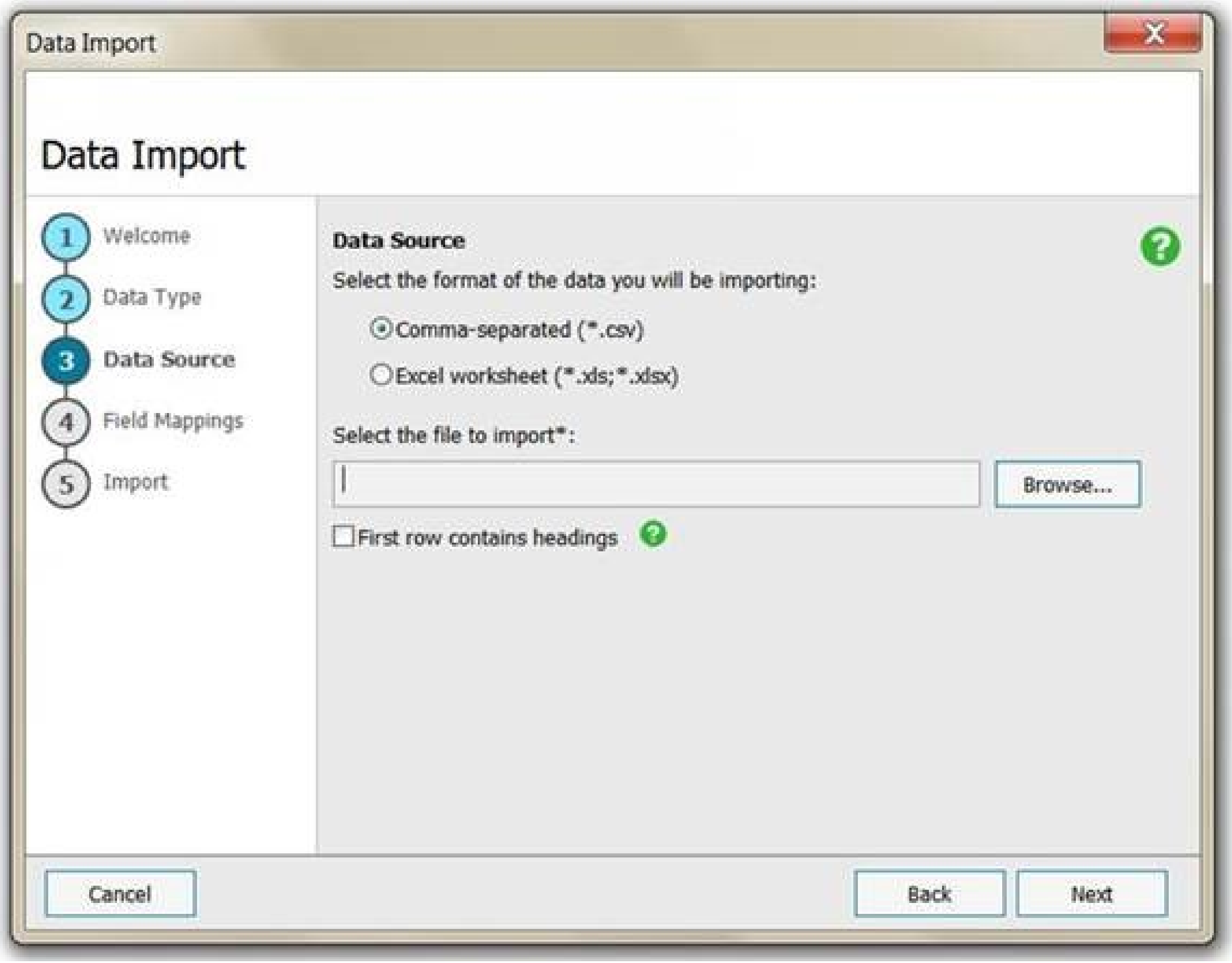
TYPE, CLIENTCODE, LEDGERNR, 'RANDOMNUMBER'// Empty field, DATE, INVOICENUMBER, 'DETAILS', //Description (filenr\licenseplate\claimnr), NETAMOUNT, 'TAXCODE', //VAT code, 'VATAMOUNT'//VAT amount

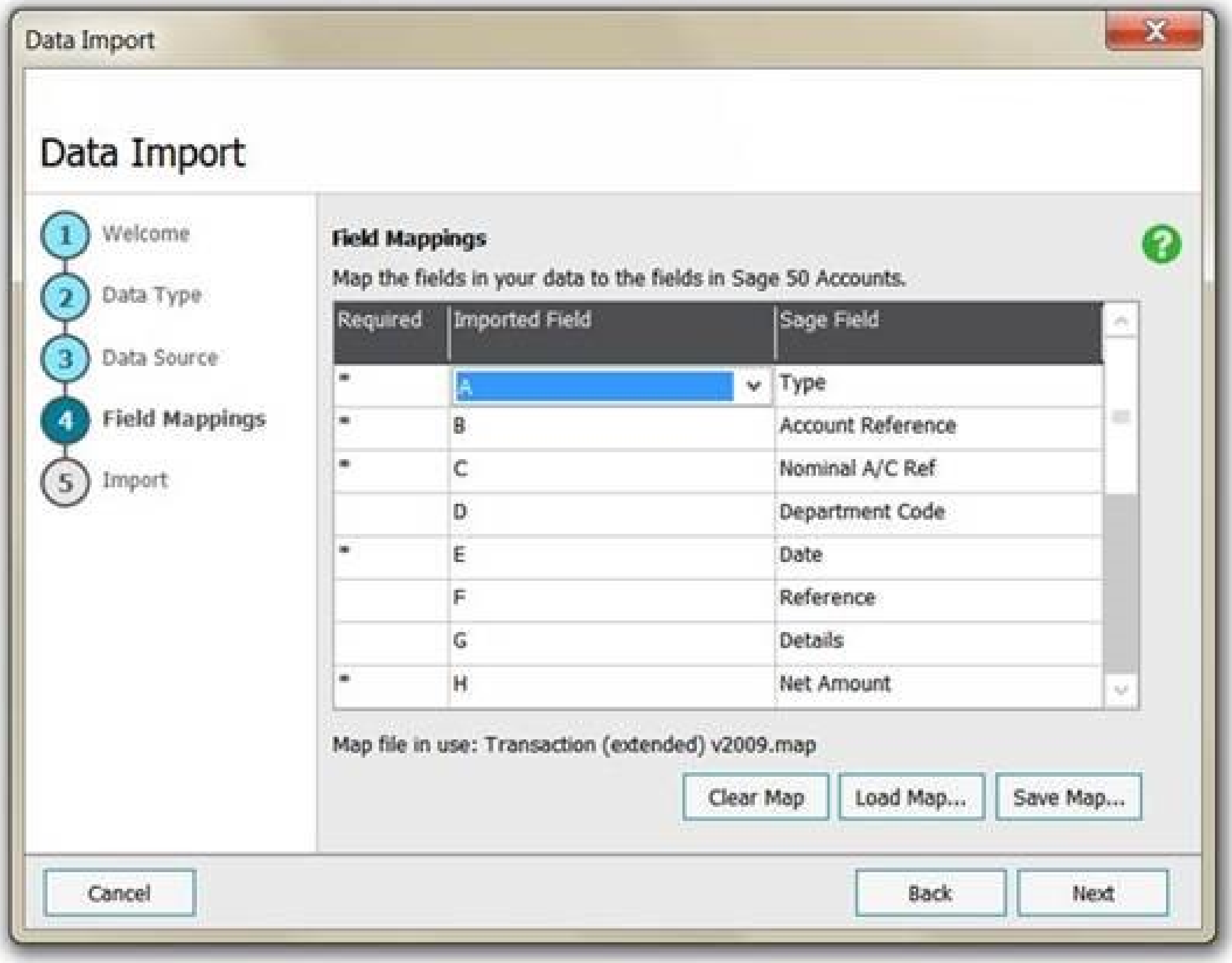
6. When the CSV-file is exported, when can import the file into Sage50. Click on ‘Import transactions’



7. Select the file you want to import.

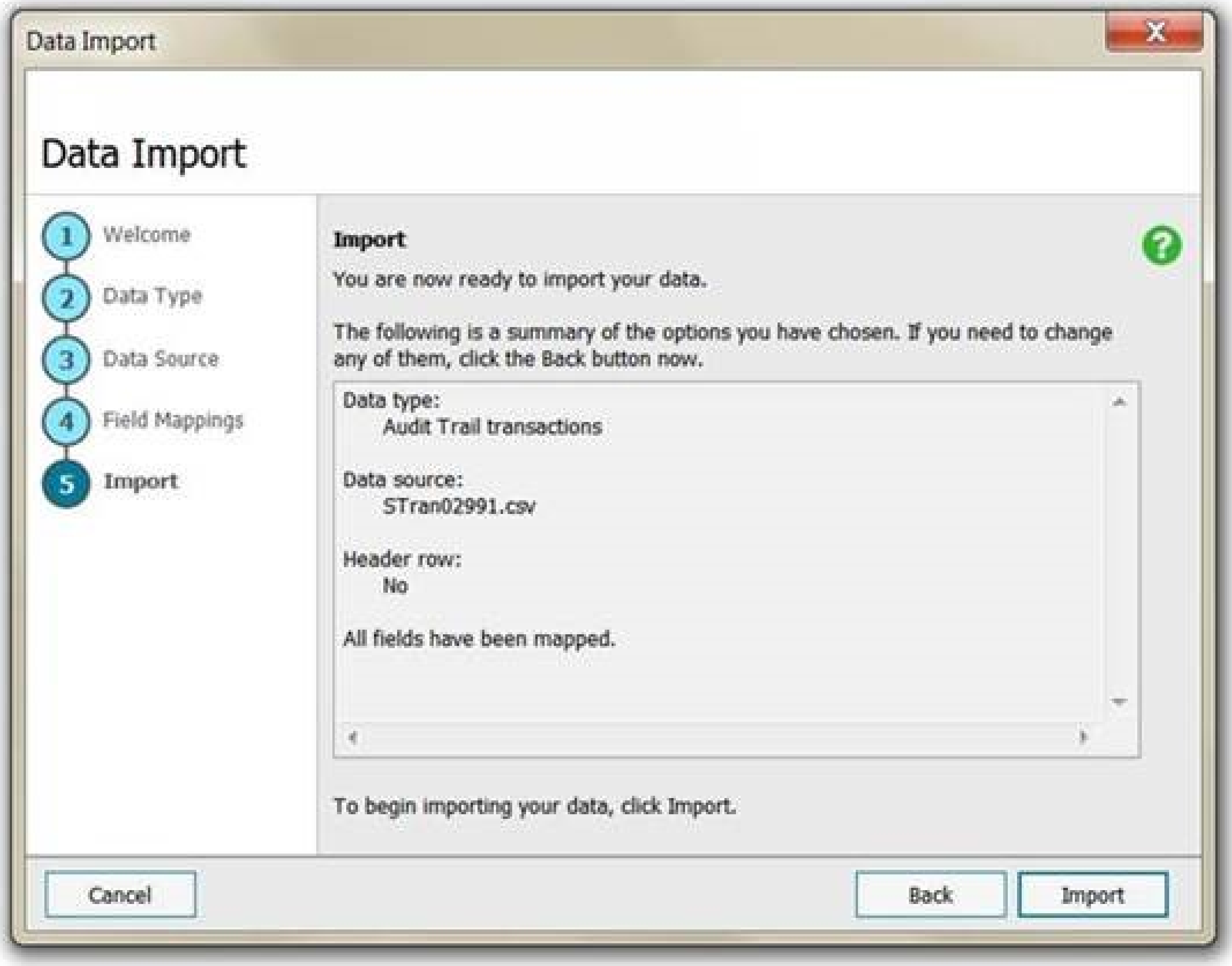

Data Import
Data Import
1 Welcome
2 Data Type
3 Data Source
4 Field Mappings
5 Import
Data Type*
Select the type of data you want to import:
Audit Trail transactions
Customer records
Fixed Asset records
Nominal accounts
Product records
Project records
Project-Only transactions
Stock take
Stock transactions
Supplier records
Cancel
Back
Next

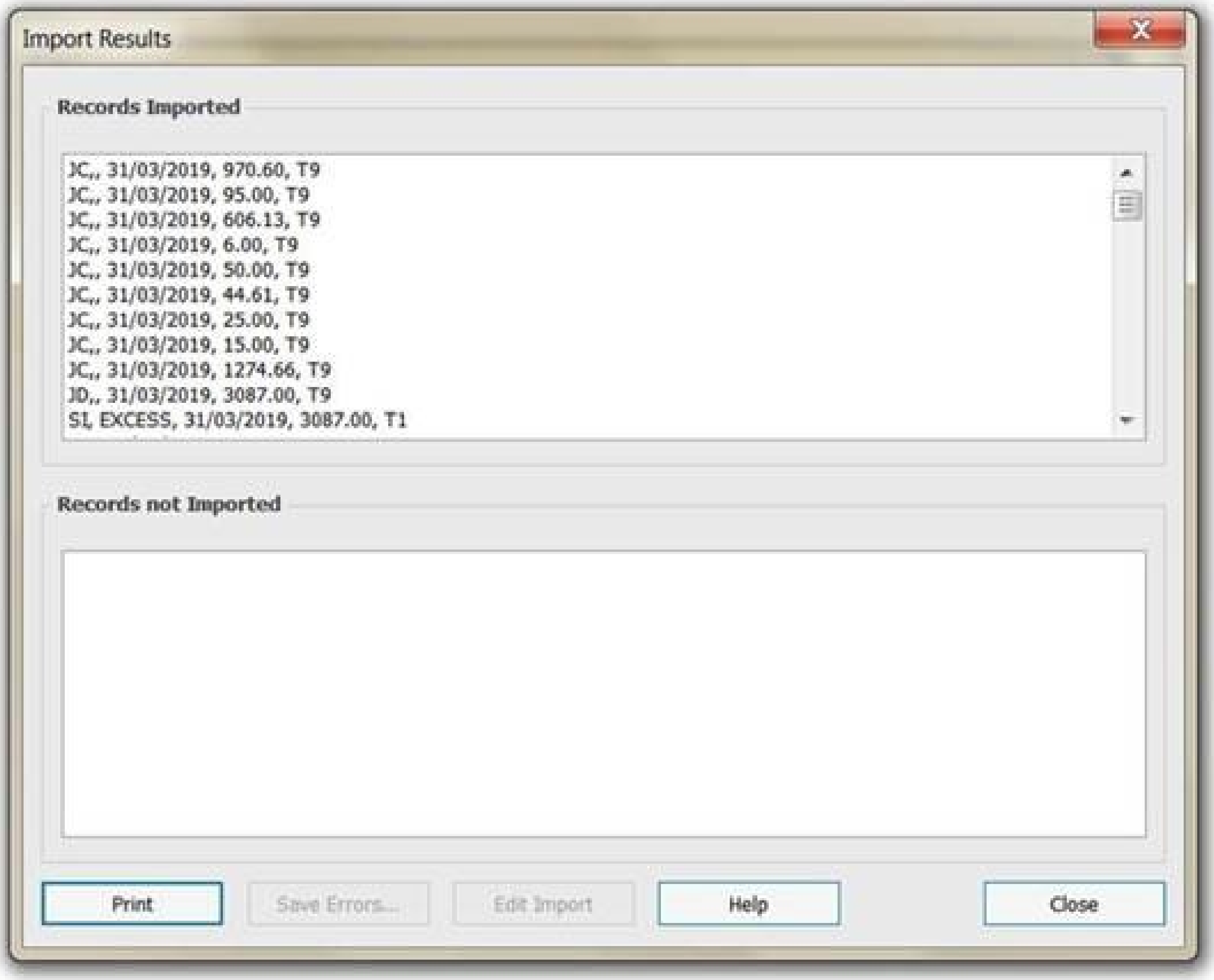

Data Import
Data Import
1 Welcome
2 Data Type
3 Data Source
4 Field Mappings
5 Import
Data Source
Select the format of the data you will be importing:
Comma-separated (*.csv)
Excel worksheet (*.xls;*.xlsx)
Select the file to import*:
Browse...
First row contains headings
Cancel
Back
Next



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.

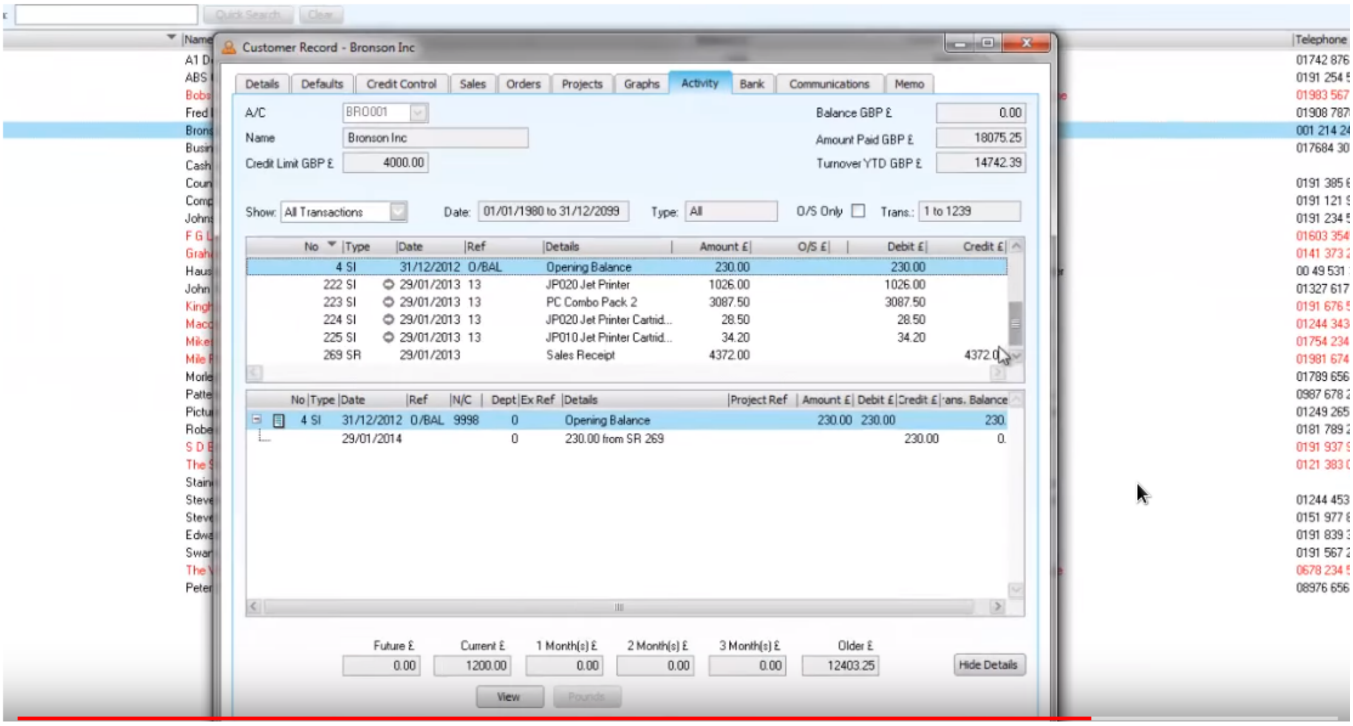
9. Import the file into Sage50.


Data Import
Data Import
1 Welcome
2 Data Type
3 Data Source
4 Field Mappings
5 Import
Import
You are now ready to import your data.
The following is a summary of the options you have chosen. If you need to change any of them, click the Back button now.
Data type:
Audit Trail transactions
Data source:
STran02991.csv
Header row:
No
All fields have been mapped.
To begin importing your data, click Import.
Cancel
Back
Import



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.



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