

Using the Setup Advisor

Available in All Versions of Sage 50 Accounting

Quick Reference Guide

What is the Setup Advisor?

The Setup Advisor is a tool that gives you helpful advice and tips for setting up your maintenance records in Sage 50. It is docked to the right side of maintenance windows to guide you in setting up your customers, vendors, employees, inventory, and other records.

Why should I use it?

If you are a new user, the Setup Advisor makes setting up your records easier. It helps you understand what information you need to enter in a particular field and how that information is used in Sage 50. Even if you are an experienced user, the tips and other information in the Setup Advisor can help you understand and use Sage 50 more effectively.

How do I use it?

When you are setting up or entering information for your records, you will receive assistance each time you select a field.

Vendor Type
This is an additional category that you enter to help you identify and group your vendors. You can use whatever types make sense for your business.
This allows you view information about your vendors by type since vendor type is available on most vendor reports. You can also use vendor types to filter some vendor reports.
[Show me some examples.](#)

Keep in Mind

- You can enter a vendor type into this field or choose one from the drop-list. Whenever you enter a vendor type and save the vendor, that vendor type gets added to the drop list so you can select it for a different vendor without having to retype it.
- You don't have to enter anything in this field if you don't need to use vendor types.

Did you know?

- You can hide the Setup Advisor by clicking the X on the panel.

Vendor ID
Think of the Vendor ID as a unique way to refer to the people and companies you buy products and services from. These products and services could be inventory items, office supplies, utilities, etc. IDs are especially useful if you have two or more vendors with the same name.

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- The Setup Advisor will assist you with setting up and maintaining the following records:

All versions of Sage 50

- Customers
- Vendors
- Employees
- Chart of Accounts

Sage 50 Pro and higher

- Inventory
- Jobs
- Budget

Sage 50 Premium and higher

- Change Orders

Sage 50 Premium Accounting for Manufacturing, Distribution, and Sage 50 Quantum

- Quantity Discounts
- Units/Measures

For more info, visit: Sage.com
or contact us at 866-996-7243