Sage Advisor

sage

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.

Did you know?

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

- 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