



## Award Winning Online Accounting Software

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This link will take you straight to the Knowledge Base but remember you can also access it direct from within SortMyBooks at any time by clicking on the Help button on the top right hand side of the screen. <https://sortmybooks.zendesk.com/hc/en-us>

How to set up SortMyBooks the right way – this is the place to start! Make sure you go through these before you start entering in transactions. It will save you a lot of time later. <https://sortmybooks.zendesk.com/hc/en-us/articles/235882248-SortMyBooks-Online-Startup-tasks>

How to input Opening Balances from my previous accounting system. <https://sortmybooks.zendesk.com/hc/en-us/articles/235882548>

Sales Invoices <https://sortmybooks.zendesk.com/hc/en-us/articles/235884128>

Sales for Retailers <https://sortmybooks.zendesk.com/forums/20656592-Retailer>

Purchase Invoices <https://sortmybooks.zendesk.com/entries/20405717-Purchase-Invoices>

Paying Purchase Invoices <https://sortmybooks.zendesk.com/entries/20402958-Payments-to-Suppliers>

Receiving Money from Sales <https://sortmybooks.zendesk.com/hc/en-us/articles/235884368>

Customer Statements <https://sortmybooks.zendesk.com/hc/en-us/articles/235883628>

Supplier Statements <https://sortmybooks.zendesk.com/hc/en-us/articles/235883688>

Best Practice for VAT Reporting <https://sortmybooks.zendesk.com/hc/en-us/articles/235884548>

Recording Payments <https://sortmybooks.zendesk.com/hc/en-us/articles/235883168>

Recording Lodgments <https://sortmybooks.zendesk.com/hc/en-us/articles/235883148>



## Award Winning Online Accounting Software

Recording Payments to Revenue for VAT and Payroll Tax

<https://sortmybooks.zendesk.com/hc/en-us/articles/235884508>

<https://sortmybooks.zendesk.com/hc/en-us/articles/235883308>

Recording Refunds from Revenue for VAT and Payroll Tax

<https://sortmybooks.zendesk.com/hc/en-us/articles/235884488>

Account Transfers [https://sortmybooks.zendesk.com/hc/en-us/articles/235882728-](https://sortmybooks.zendesk.com/hc/en-us/articles/235882728)

[Account-Transfers](https://sortmybooks.zendesk.com/hc/en-us/articles/235882728) Use this when you are transferring money from one bank account to another eg. From the Current Account to the Credit Card Account, from the Current Account to the Loan Account. You can also use this method to record money you've put into the company, eg. From the Director Loan account to the Current Account or from the Drawings Account to the Current Account.

## Limited company versus Sole Trader handling of salary and drawings

Sole Traders <https://sortmybooks.zendesk.com/hc/en-us/articles/235882808-How-To-use-the-Drawings-Account-for-Sole-Traders>

Directors of Limited Companies – expenses for mileage and subsistence

<https://sortmybooks.zendesk.com/hc/en-us/articles/235881968-How-to-enter-Director-Expenses-for-Mileage-and-Subsistence>

Director Loan – How to keep track of money you've loaned to your company

<https://sortmybooks.zendesk.com/hc/en-us/articles/235882788-Directors-Loan-Account>

Finding records once you've entered them <https://sortmybooks.zendesk.com/hc/en-us/articles/235883588-How-do-I-find-something-I-have-already-entered->

How to do Bank Imports <https://sortmybooks.zendesk.com/hc/en-us/articles/235883028-Can-I-import-information-from-my-online-banking->

How to do a manual bank reconciliation – consider using Bank Imports instead, it's faster, easier and more accurate. But in case for some reason that's not possible for you, then read here for how to do a manual bank reconciliation. Bank Reconciliations

<https://sortmybooks.zendesk.com/hc/en-us/articles/235882968-How-do-I-do-a-bank-reconciliation->



## Award Winning Online Accounting Software

Entering in Fixed Assets new Purchase <https://sortmybooks.zendesk.com/hc/en-us/articles/235882268-Fixed-Assets>

Entering in Purchase Invoices from outside of Ireland  
<https://sortmybooks.zendesk.com/hc/en-us/articles/235882028-How-to-enter-an-EU-Purchase-Invoice>

Entering in Reverse Charge VAT Invoice for sub-contractors  
<https://sortmybooks.zendesk.com/hc/en-us/search?utf8=%E2%9C%93&category=204608868&query=reverse+charge+vat>

Tracking the RCT Account for Sub-Contractors <https://sortmybooks.zendesk.com/hc/en-us/articles/235881988-How-to-handle-C35-Withholding-Invoices>

Entering Sales Invoice for outside of Ireland <https://sortmybooks.zendesk.com/hc/en-us/articles/235884528-VAT-on-Sales-outside-of-your-own-country>

Entering Credit Notes and Refunds <https://sortmybooks.zendesk.com/hc/en-us/articles/235884028-Credit-Notes-Refunds>

