

## SortMyBooks Comparison with Sage 50 Accounts Suite

Feature	SortMyBooks unlimited users, unlimited computers Support included From €290-€490 per year	Sage 50 Accounts 2 user including Support Upfront: €1938 Annual: €850	Sage 50 Accounts Plus 2 user including support Upfront: €2447.09 Annual: €1025	Sage 50 Accounts Professional 2 user including support Upfront: €2953.13 Annual: €1150	Questions to consider
Upfront Cost	X	✓	✓	✓	Would I prefer to pay a small monthly or annual fee or have a big initial outlay plus annual fees?
Extra Charge for Support	X	✓	✓	✓	Would I rather have transparent pricing where my subscription cost covers support
Extra Charge for Upgrades	X	✓	✓	✓	Would I rather have upgrades as soon as they're ready included in the price of my subscription or
Backups included	✓	X	X	X	Am I comfortable taking care of my own backups or would I like to know that my accounts are automatically backed up?
Need to have a Server	X	✓	✓	✓	Do I want to pay for a server and then have to fork out for computer services to help maintain it or do I want to access my accounts from any internet connected computer or tablet?
Available on any internet connected computer or tablet	✓	X	X	X	Do I need to be able to access my accounts from different locations? Do I have staff located in different places? Do I want to cut down on server and computer services costs?
Multi-User	✓ Unlimited	Max 2 user	Max 2 user	Max 10 user	Do I need more than 1 person to be able to access and update the accounts?

Add additional users for free	√	X	X	X	Do I want to have to pay every time I want someone else to have access to the accounts
Available on a Tablet computer eg. iPhone, Samsung Galaxy or similar	√	X	X	X	Would it be useful for me to have my accounts at my fingertips while I'm out and about or travelling for business?
Smartphone App for capturing receipts	√	X	X	X	Do I want to be able to photograph receipts as I incur expenses and have them stored safely online for me or even for a small extra fee have someone type them in for me?
DropBox Integration (or being able to attach source documents to transactions)	√	X	X	X	Would it be useful to me if I could connect my source documents (eg. Purchase Invoices and Sales Contracts) with my Purchase and Sales Invoices. Very handy for tracking newly purchased Fixed Assets instead of having to post copies over to your Accountant's office.
PayPal Link on Sales Invoices for accepting Credit Card payments (Sage does have a similar facility if you pay a monthly fee for Sage Pay)	√	X	X	X	Do I want to be able accept Credit Card payments from my customers? Do I want to pay Sage a monthly fee whether I take a customer payment by Credit Card or not? Or would I prefer to have no standing charges and only pay a fee per transaction?
APIs	√	X	X	X	Do I want to be able to integrate my accounts with other online applications?
Multi-Currency	√	X	X	√	Do I have Customers abroad that I need to invoice in their own currency? Do I have foreign currency bank accounts?
At A Glance Dashboard	√	X	X	X	When I log into my accounts do I want to be able to see Sales this month, Costs this month, how much VAT I owe, how much Payroll tax I owe, who Owes me money, what's in the bank
Payroll Integration	X	√	√	√	SortMyBooks has an automatic journals feature for Payroll and will soon be including a Payroll import facility so that you can continue to use your favourite

					Payroll software.
Sales Invoicing	√	√	√	√	
Email Sales Invoices and Customer Statements	√	√	√	√	Do I want to save money on stamps by emailing Sales Invoices and Customer Statements.
Accept 1 payment for more than 1 invoice	√	√	√	√	Do my customers pay me for more than 1 invoice at a time
Automatic Discounts Facility	√	X	X	X	Do my customers sometimes round off their payment leaving me with a few cents or euro outstanding that I need to be able to write off easily
Invoice History	√	X	X	X	Do I want to see who made what changes to my Sales Invoices without having to wade through an Audit Trail?
Upload logo on to Sales Invoice	√	√	√	√	
Choice of Invoice templates	X	√	√	√	
Quotations	√	√	√	√	Would it be useful to my business if I could email out Quotations, track their status and convert them to Sales Invoices when I win the business
Purchase Orders	√	√	√	√	Would I have more control over my business if I used Purchase Orders to track orders with Suppliers
Purchase Invoices	√	√	√	√	
Make 1 payment for more than 1 Invoice	√	√	√	√	Do I ever pay Suppliers for more than 1 invoice with just 1 payment?
Automatic Discounts Facility	√	X	X	X	Do I ever round off payments to Suppliers leaving a few cents or Euro outstanding that I need to be able to write off easily.
Retailer Cash-up	√	X	X	X	Am I a retailer? Does my business track sales using a cash drawer or Till that I need to cash up each day. Eg. what was today's float? What cash/credit cards/cheques came in? What got paid to Suppliers, staff, petty cash out of the Till and what got lodged to

					the Bank.
Time-Tracking	√	X	X	X	Do I want to track time spent on projects and convert those timesheets into Sales Invoices?
Sharing my accounts for free	√	X	X	X	Do I want to be able to share my accounts with my Accountant or Bookkeeper without them having to pay for software licenses or install anything?
Sharing without data transfer	√	X	X	X	Do I want to be able to share my accounts with my Accountant or Bookkeeper without me having to email files and risk having data corruption issues if either of us makes changes?
Permissions	√	√	√	√	Would it be useful to me to assign tasks to different people eg. allow someone to enter my Purchase Invoices but keep them away from sensitive information like Bank balances, Sales and Profits.
Bank Statement Import and Automatic Reconciliation	X	X	X	X	SortMyBooks will have bank imports and automatic integrations available in the next 2 months.
Department/Job-costing	√	X	√	√	Would it benefit me to be able to see the Profit I make on different sectors of my business or different projects?
Stock Count	√	√	√	√	Do I need to track the quantity of items that I've sold and how many are on hand?
Product and Service Reports	√	√	√	√	Do I want to be able to see how much I've sold of each item to each Customer?
Profit Margin Reports	√	√	√	√	Do I want to see what Profit Margin I am making when I'm doing up Sales Invoices? What my Gross Profit is overall and what my Profit Margin is on each product?
This Year/Last Year Comparisons	√	√	√	√	Do I want to be able to compare my Sales, Costs and Profits to the same time period last year?
Customise the Chart of Accounts	√	√	√	√	Do I want more control over the information that I get back from my accounts?
Create unlimited sub-levels and headings in Chart of	√	X	X	X	Sage Line 50 has the facility to have 3 Levels – Heading, Sub-Heading and then Detail – SortMyBooks

Accounts					can go to any number of headings.
Chart of Account Templates for different industry sectors	√	X	X	X	Do I want a Chart of Accounts that is tailored to my industry?
Cloning Settings	√	X	X	X	Do I want to be able to create a default Chart of Accounts for different industries and then Import that into new files or similar businesses?
Automatic Handling of EU contra for VAT	√	√	√	√	Do I ever buy items from other EU countries?
Nominal Ledger show all transactions with drilldown back to Transaction entry	√	√	√	√	Will my accountant be able to get the information they need to verify my accounts data?
Profit and Loss month on month	√	X	X	X	Do I want to have information on my monthly performance?
Balance Sheet	√	√	√	√	
Trial Balance	√	√	√	√	
Profit and Loss multi-format (year in months, comparison with last year, year to date)	√	√	√	√	Do I want to be able to compare our Sales and Costs this year with the same time period last year?
Balance Sheet multi-format (year in months, comparison with last year, year to date)	√	√	√	√	Will my accountant be able to get the information they need to verify my accounts data?
VAT Control Report	√	X	X	X	Will my accountant be able to get the information they need to verify my accounts data?
Purchases Control Report	√	X	X	X	Will my accountant be able to get the information they need to verify my accounts data?
Sales Control Report	√	X	X	X	Will my accountant be able to get the information they need to verify my accounts data?
Lodgment Control Report	√	X	X	X	Will my accountant be able to get the information

					they need to verify my accounts data?
Payments Control Report	√	X	X	X	Will my accountant be able to get the information they need to verify my accounts data?
Fixed Asset Tracking	√	√	√	√	Will my accountant be able to get the information they need to verify my accounts data?
Reports showing Quantities and Profit Margins on Items sold	√	√	√	√	Do I want to see how much of each item I've sold and to what Customers? Or how much I've bought from each Supplier and what the margins and costs were?
Sales Analysis Reporting	√	√	√	√	Will my accountant be able to get the information they need to verify my accounts data?
Purchase Analysis Reporting	√	√	√	√	Will my accountant be able to get the information they need to verify my accounts data?
Journals	√	√	√	√	Will my accountant be able to get the information they need to verify my accounts data?
Nominal Activity Report	√	√	√	√	Will my accountant be able to get the information they need to verify my accounts data?
Audit Trail	√	√	√	√	Will my accountant be able to get the information they need to verify my accounts data?
Customer Credit Terms	√	√	√	√	Do I want to offer credit terms to my Customers and track the overdue Invoices?
Supplier Credit Terms	√	√	√	√	
Customer Credit Limits	X	√	√	√	
Supplier Credit Limits	X	√	√	√	
Price List per Customer	X	X	X	√	
Attach a Department to a Customer	X	X	X	√	
Attach a Currency to a Customer	√	X	X	√	
Project Budget	X	X	X	√	

Credit Control Letters	X	√	√	√	
Sales Order Processing	X	X	X	√	
Purchase Order Processing	X	X	X	√	
Nominal Ledger	√	√	√	√	
Budget (cash flow projections)	X	X	√	√	
Intrastat Return	X	X	X	√	
Project budgets	X	X	X	√	