SAGE UK Interface

Last Modified on 31/08/2026 1:01 pm EDT

SAGE 50 ACCOUNTS, PLUS and PROFESSIONAL 2013 and 2014 are supported.

- RentalPoint Software Users should proceed through the directions in this document for detailed instructions on SAGE Interface. Sage UK PDF
- Our support staff are available to help with final integration if necessary (see staff document accessible via RP Staff OnTime Login in WIKI)

SAGE UK Online

SAGE 50 UK has been discontinued, in order to avail of updated software SAGE UK customers must move to SAGE UK Online.

What's changed?

- Only new customers can be imported, existing customers will be rejected as duplicates
- Some of the import field names and order have been changed

How to use the Existing SAGE 50 UK RentalPoint export files for import to SAGE UK Online

1. First, use SAGE UK 50 export parameter settings Per Sage UK PDF
2. Then, modify the files exported from RentalPoint before importing them to SAGE UK Online.
3. Next, use the Import Quick Entries option in SAGE Online to import the files.

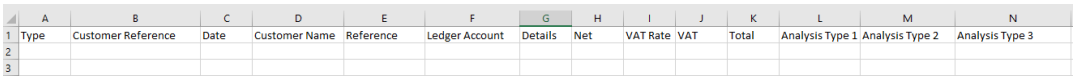
Customers

- Since SAGE Online will only import new customers, it is recommended that throughout the month, when you enter new customers into Rentalpoint, you should enter them into SAGE using the same customer code. New customers must exist in SAGE before their invoices can be imported.
- Alternatively, should you have a lot of new customers, you may choose to modify your customers export file from Rentalpoint following instructions at this link, however you must ensure all customers already existing in SAGE are removed from the file before importing Import Customers to SAGE UK Online

Invoices

- Before importing Invoices
    - Set up a Quick Entries template Download SAGE Online Quick Entries template OR create one as outlined below
        - The new expected format looks like the sample below. To create this new file, open

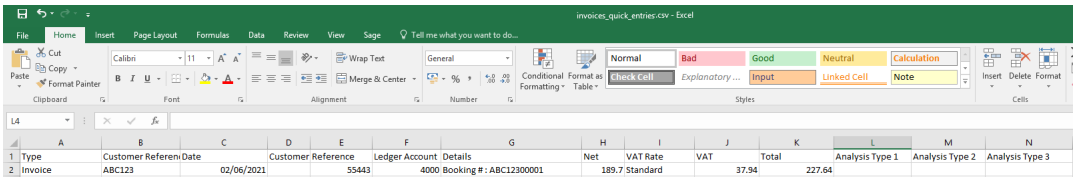
a new blank Excel File and copy in the headings for cells A through N, so it looks like the image below



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Type	Customer Reference	Date	Customer Name	Reference	Ledger Account	Details	Net	VAT Rate	VAT	Total	Analysis Type 1	Analysis Type 2	Analysis Type 3
2														
3														

- Headings
  - Cell A = Type
  - Cell B = Customer Reference
  - Cell C = Date
  - Cell D = Customer Name
  - Cell E = Reference
  - Cell F = Ledger Account
  - Cell G = Details
  - Cell H = Net
  - Cell I = VAT Rate
  - Cell J =VAT
  - Cell K = Total
  - Cell L = Analysis Type 1
  - Cell M = Analysis Type 2
  - Cell N = Analysis Type 3

- Complete the Quick Entry template
  - ***do not change any of the headings. Move the data from your RentalPoint export file to your new Quick entries file as follows***
  - Sample



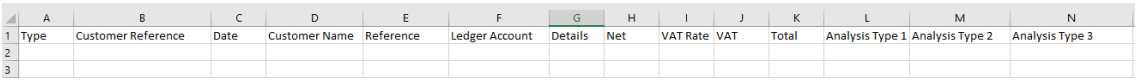
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Type	Customer Referen	Date	Customer	Reference	Ledger Account	Details	Net	VAT Rate	VAT	Total	Analysis Type 1	Analysis Type 2	Analysis Type 3
2	Invoice	ABC123	02/06/2021		55443	4000	Booking # : ABC12300001	189.7	Standard	37.94	227.64			

  - Cell A Type - Enter 'Invoice' (no quotes) for every line
  - Cell B Customer Reference - Copy 'Account Reference' from your RentalPoint Sage export file and paste to column B in your template file
  - Cell C Date - Copy 'Date' from your RentalPoint Sage export file and paste to column C in your template file
  - Cell D Customer Name - Leave blank
  - Cell E Reference - Copy 'Reference' from your RentalPoint Sage export file and paste to column E in your template file
  - Cell F Ledger Account - Copy 'Nominal A/C Ref' from your RentalPoint Sage export file and paste to column F in your template file
  - Cell G Details - Copy 'Details' from your RentalPoint Sage export file and paste to column G in your template file
  - Cell H Net Amount - Copy 'Net Amount' from your RentalPoint Sage export file and

paste to column H in your template file
        - Cell I - Enter 'Standard' (no quotes) for every line
        - Cell J VAT - Copy 'Tax Amount' from your RentalPoint Sage export file and paste to column J in your template file
        - Cell K - line 2 - Use the formula ' = SUM(H2,J2)' (no quotes) and copy it for every line
        - Ensure there are no blank lines after the last line
        - 'Save as' csv, give it a new name so the original is preserved as a backup
    - Import to SAGE UK online using import Quick Entries option (See how in Step 3 at this link)

Credits

- Before importing Credits
    - Set up a Quick Entries template Download SAGE Online Quick Entries template OR create one as outlined below
    - The new expected format looks like the sample below. To create this new file, open a new blank Excel File and copy in the headings for cells A through N, so it looks like the image below



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Type	Customer Reference	Date	Customer Name	Reference	Ledger Account	Details	Net	VAT Rate	VAT	Total	Analysis Type 1	Analysis Type 2	Analysis Type 3
2														
3														

    - Headings
        - Cell A = Type
        - Cell B = Customer Reference
        - Cell C = Date
        - Cell D = Customer Name
        - Cell E = Reference
        - Cell F = Ledger Account
        - Cell G = Details
        - Cell H = Net
        - Cell I = VAT Rate
        - Cell J =VAT
        - Cell K = Total
        - Cell L = Analysis Type 1
        - Cell M = Analysis Type 2
        - Cell N = Analysis Type 3
- Complete the Quick Entry template
    - ***do not change any of the headings. Move the data from your RentalPoint export file to your new Quick entries file as follows***
    - Sample
    -

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Type	Customer	Date	Customer Name	Reference	Ledger Account	Details	Net	VAT Rate	VAT	Total	Analysis Type 1	Analysis Type 2	Analysis Type 3
2	Cr Note	ABC123	13/02/2020		45789	4000	Booking # : ABC12300002	250	Standard	50	300			

- Cell A Type - Enter 'Cr Note' (no quotes) for every line
- Cell B Customer Reference - Copy column B from your RentalPoint Sage export file and paste to column B in your template file
- Cell C Date - Copy column E from your RentalPoint Sage export file and paste to column C in your template file
- Cell D Customer Name - Leave blank
- Cell E Reference - Copy column F from your RentalPoint Sage export file and paste to column E in your template file
- Cell F Ledger Account - Copy column C from your RentalPoint Sage export file and paste to column F in your template file
- Cell G Details - Copy column G from your RentalPoint Sage export file and paste to column G in your template file
- Cell H Net Amount - Copy column H from your RentalPoint Sage export file and paste to column H in your template file
- Cell I - Enter 'Standard' (no quotes) for every line
- Cell J VAT - Copy column J from your RentalPoint Sage export file and paste to column J in your template file
- Cell K - line 2 - Use the formula ' = SUM(H2,J2)' (no quotes) and copy it for every line
- Ensure there are no blank lines after the last line
- 'Save as' csv, give it a new name so the original is preserved as a backup

◦ Import to SAGE UK online using import Quick Entries option (See how in Step 3 at this link)

