

SAGE 50 Premium US Edition

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RentalPoint Interfaces with SAGE 50 Premium US Accounting (formerly known as Peachtree)

Setting Up RentalPoint

All inventory in RentalPoint should have a Revenue Code associated with it, otherwise the default Revenue code from Accounts Parameter 21 will be used

The screenshot shows the 'Edit Product Record' window for '8" Powered Speaker - Yamaha MSR100'. The window has several tabs: General, Picture, Rental Rates, Sales, Notes, Location, and Attachments. The 'General' tab is active, showing product information and options. The 'Revenue Code' field is highlighted with a red arrow pointing to the value '1234'. The 'Product Options' section includes checkboxes for 'For Individual Rental / Sale', 'Barcode Track', 'Don't allow product to be discounted', 'Product is a Generic Item', 'Expand When Added to a Booking', 'Auto Checkout this Item', 'Warehouse active', and 'When Cross rented, the cost is freight'. The 'Shipping' section has radio buttons for 'Single item', 'Package product', 'Macro product', 'Is shipped on it's own', 'Is a road case', 'Always shipped in a road case', and 'Is a rack'. The 'OK' and 'Cancel' buttons are at the bottom right.

Goto Setup--Parameters-->Accounts 21 and set your Parameters for PeachTree/SAGE 50 US

1. Export path will define where the export files are saved
2. Provide names for the Invoice and customer filenames
3. Tax Codes if left blank will utilize tax codes from the booking

4. Line item export

1. Disabled - will export totals for the invoice
2. Enabled - will export all line items from the booking when exporting the invoice. Default revenue code will be used where there is no revenue code against the product in Inventory Setup

5. Level of Integration

1. G/L - Exports Invoices, Credits, Debits, Payments and Payment Revenue
 2. A/R - Exports Invoices, Credits, Debits
6. Click 'use revenue code for sundries' to apply Default Revenue Code against Sundry line items
7. Check 'Use Multilocation account extensions' to apply Location specific revenue codes

RP Setup Account Export

Package by Location
 Off On

Accounting Package

- Disable Export
- Sage Accountant
- MYOB
- AccPac 4.5
- AccPac Plus 6.2
- Sybiz Elite II
- Peachtree / Sage 50 US
- Real World
- Quick Books Desktop
- Quick Books Online
- MYOB Australian Ver, Single User
- MYOB Australian Ver, Multi User
- MYOB NZ Ver, Single User
- MYOB NZ Ver, Multi User
- Account Edge 2015

Peachtree Export Path
C:\RentalPointV11\docs\Jobs\SAGE Exports

Export Filenames

Invoices Filename: Invoices.csv
Customer Filename: Customers.csv

Tax Codes

Tax Authority 1:
Tax Authority 2:

Line Item Exporting
 Disabled Enabled

Level of Integration
 G/L - Export Inv's, CR's, DR's, Pmnts and Pmnt Reven
 A/R - Exports Invoices, Credits and Debits

Enter revenue codes for sundries

Default Revenue Code: 4000

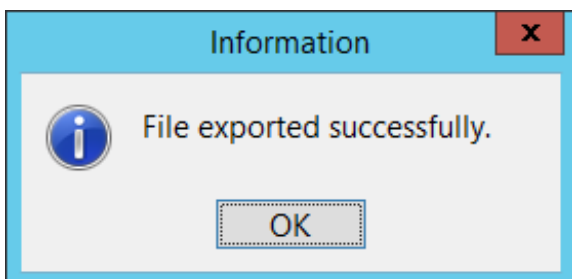
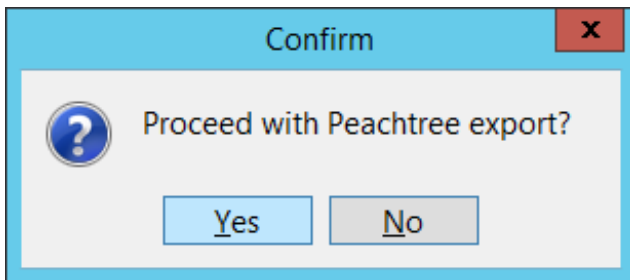
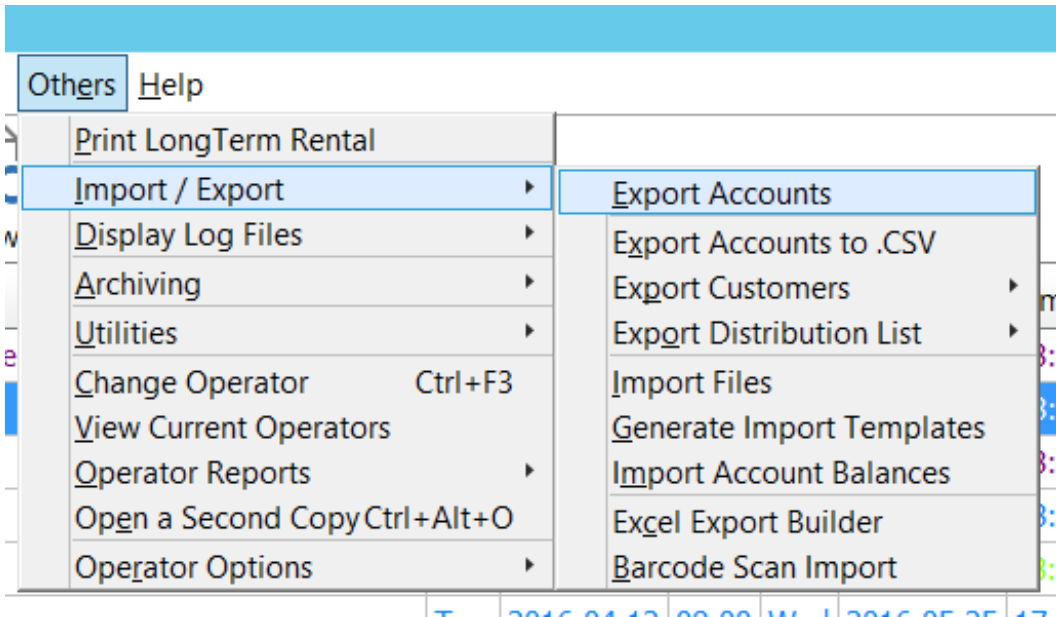
Use Multilocation Account Extensions (Eg. 4000-01 instead of 4000.)

Apply Close

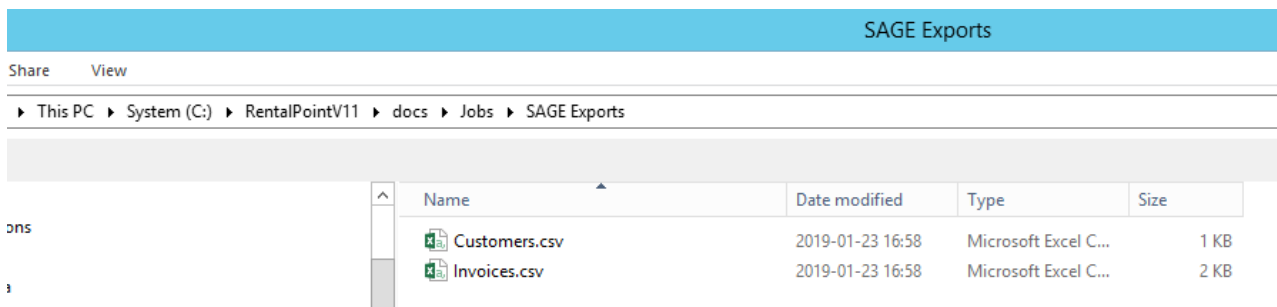
How it Works

Based on your parameter settings, each time you print an invoice/credit/debit or enter a payment, RentalPoint will write details to the SAGE export file.

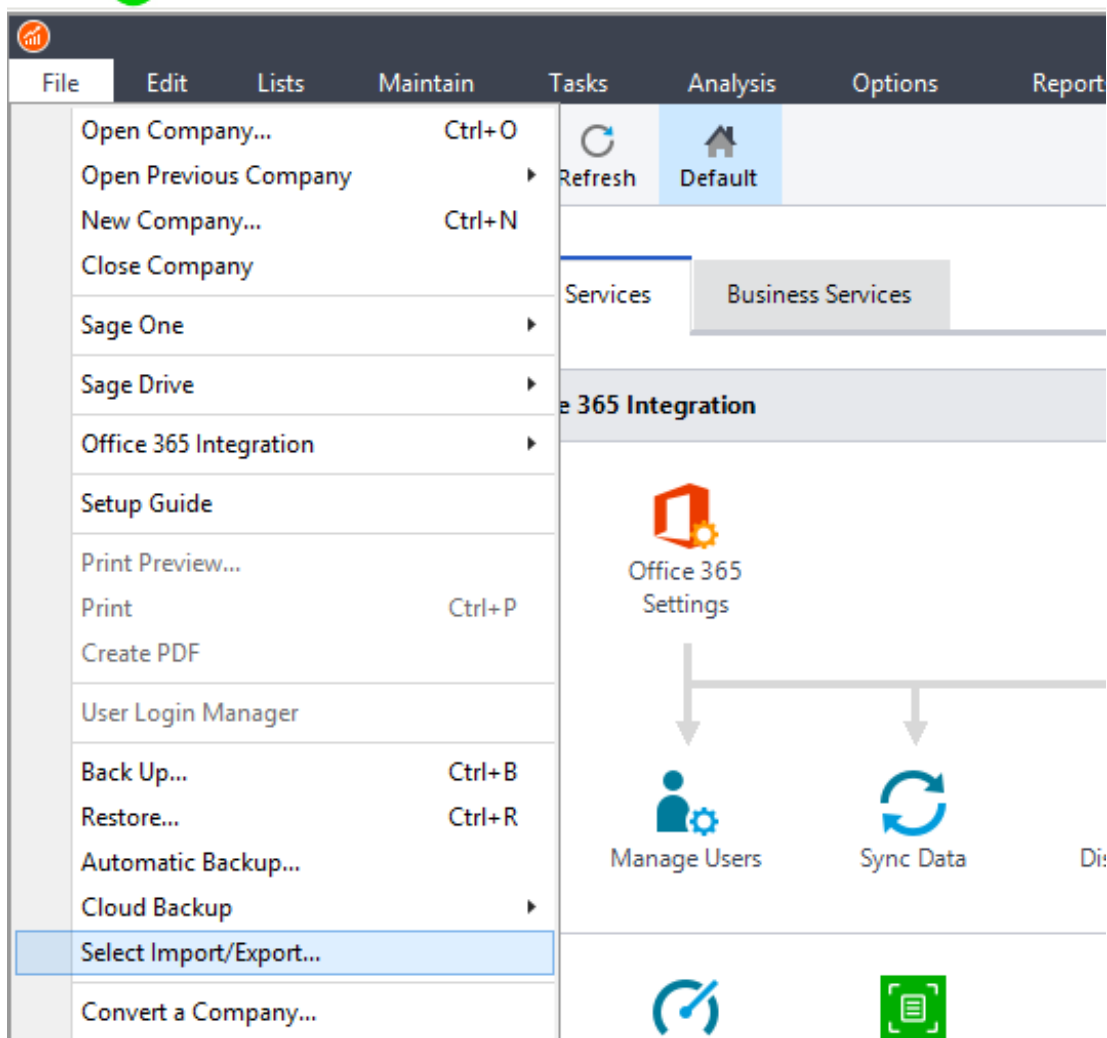
When you're ready to bring your transactions across to SAGE, simply export from RentalPoint per screenshots below and import to SAGE



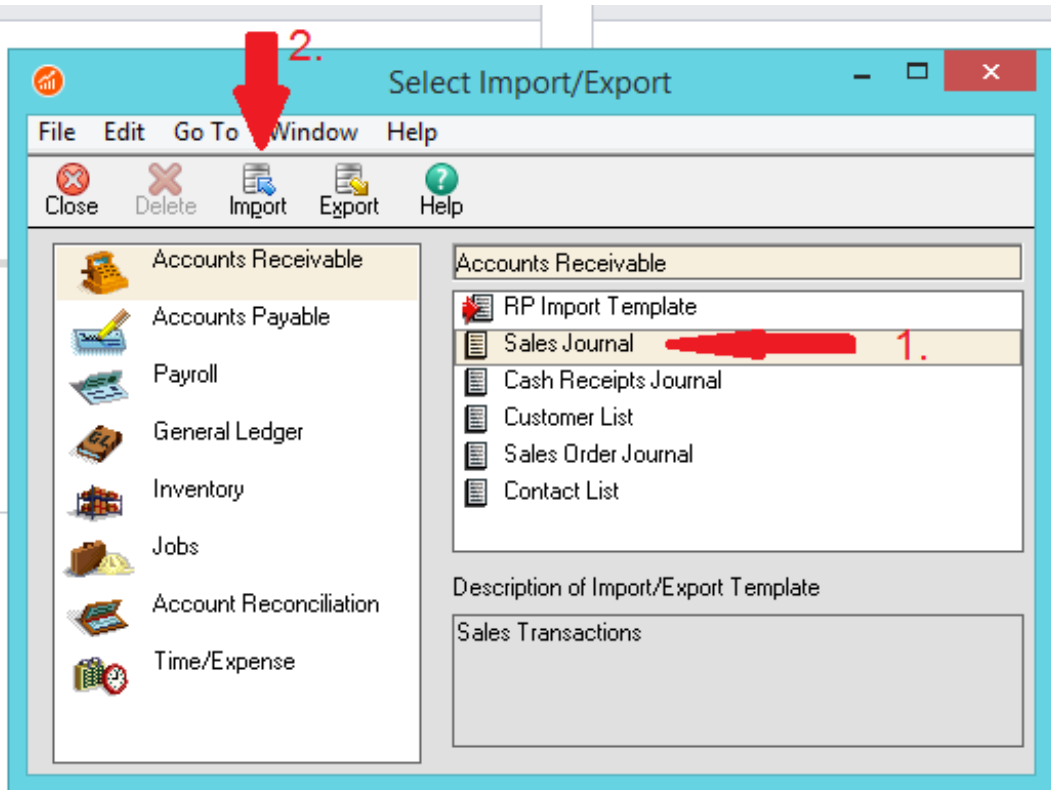
The files will be stored in your designated Export Folder



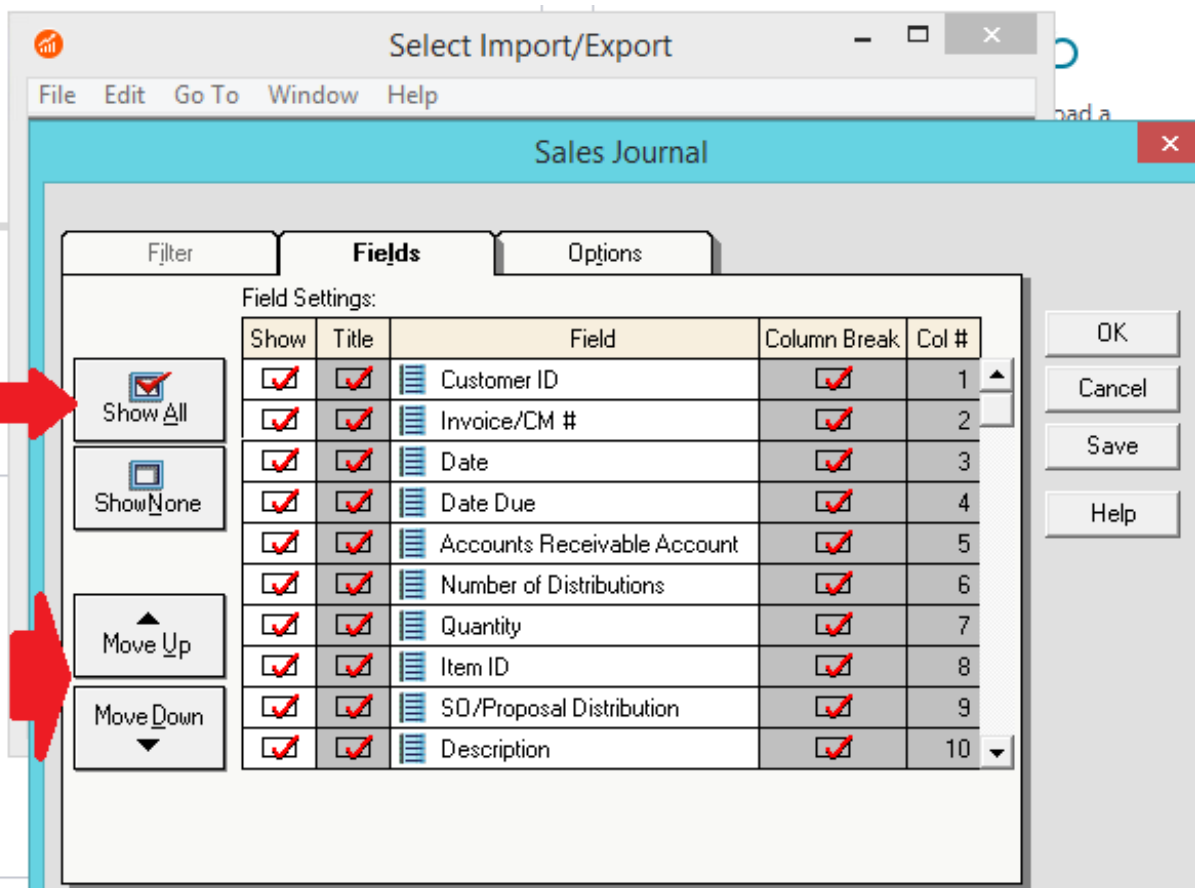
Importing Transactions to SAGE 50 US



When importing for the first time you will need to set up a template, so click Sales Journal



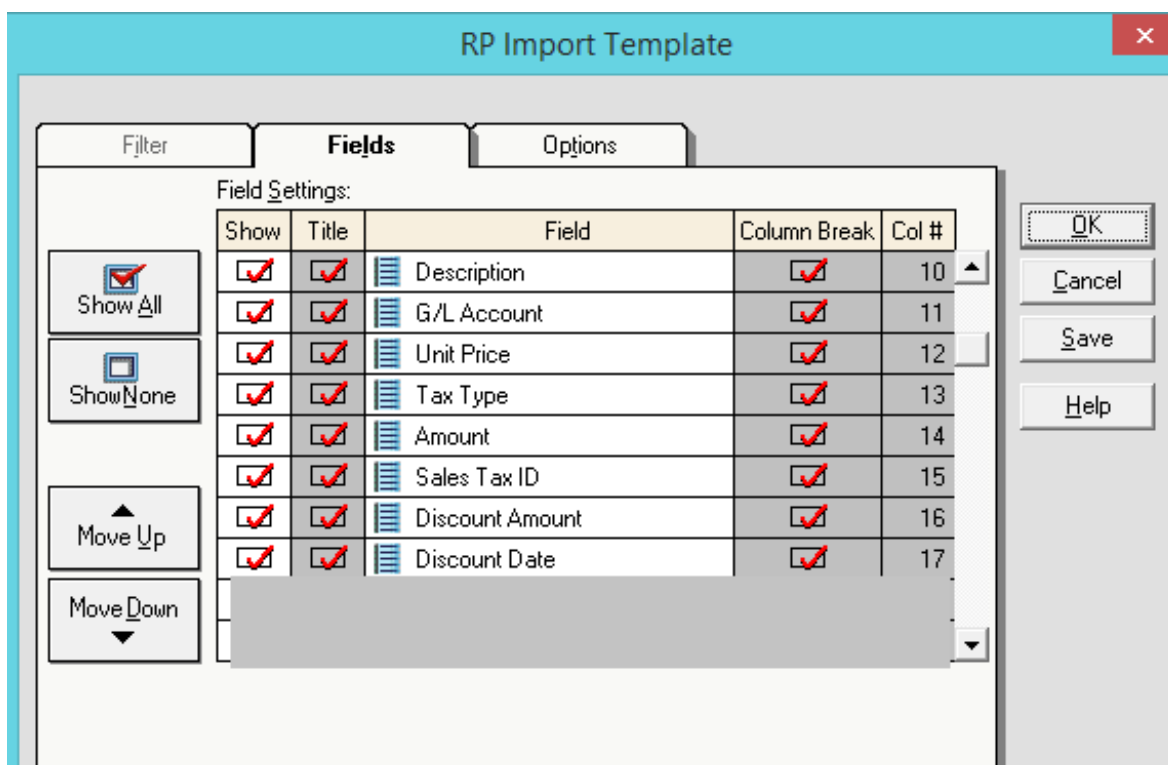
1. Click Show All to show only the fields you select
2. Use the Move up/down keys to move your fields to the top of the template in the order below, there are 17 fields in total



1.



2.

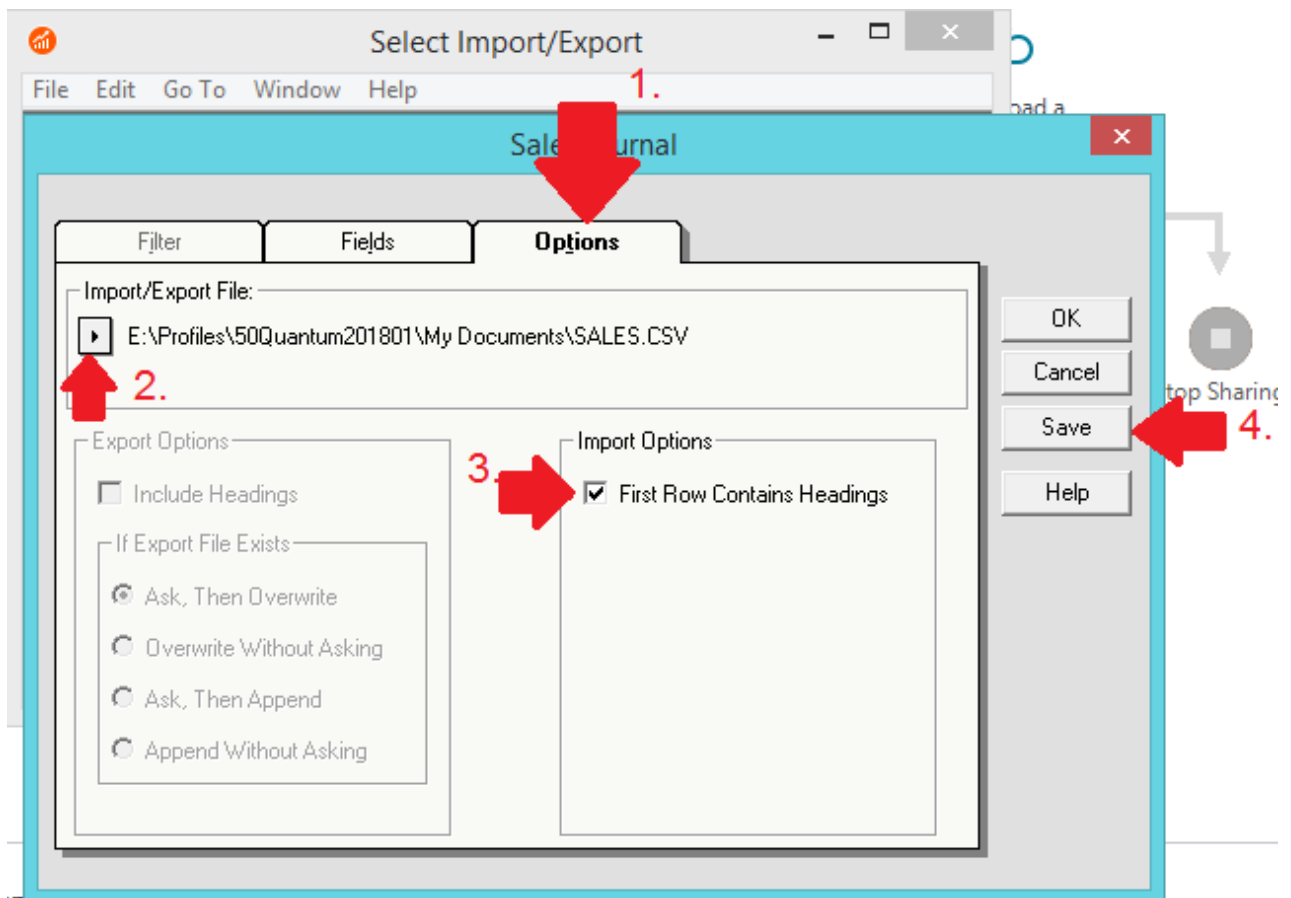


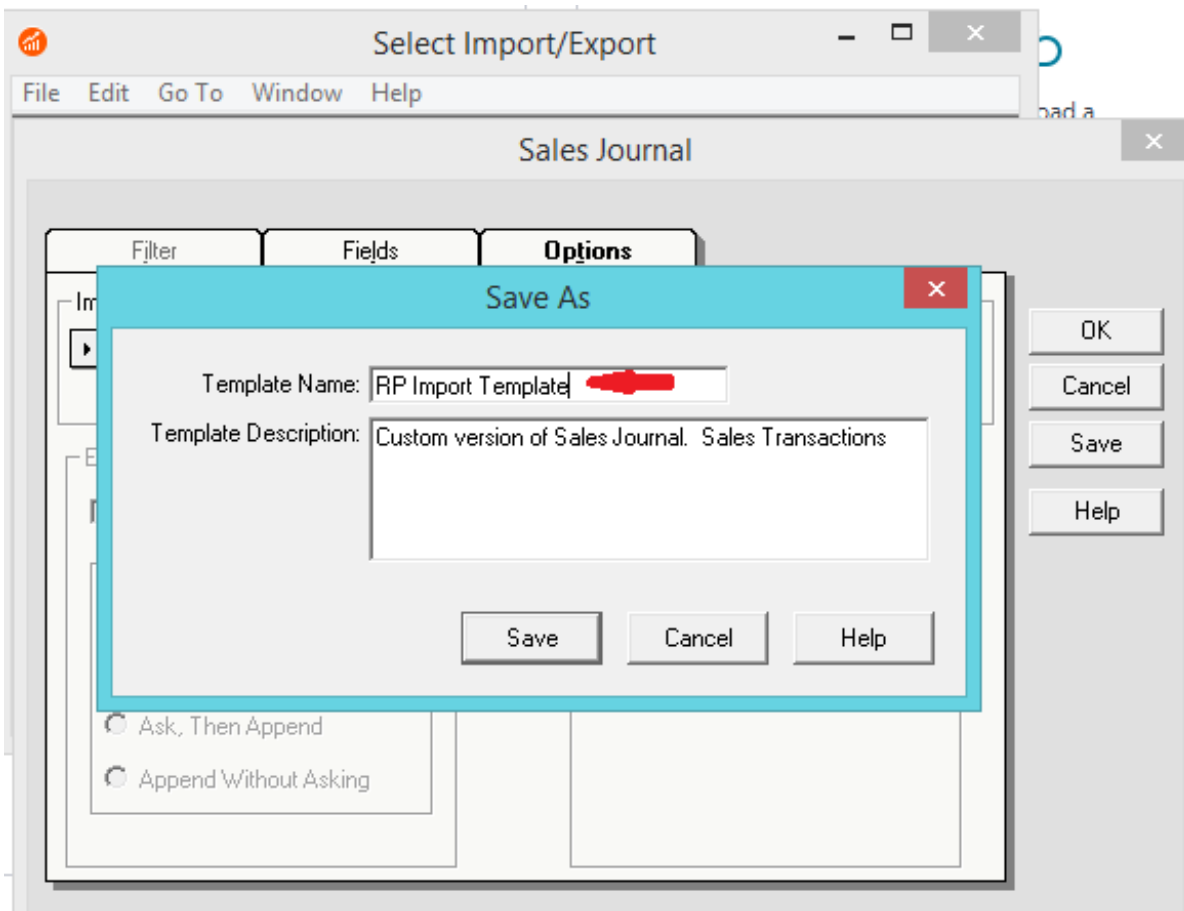
1. Click on the options tab

2. Select the path to find the import file

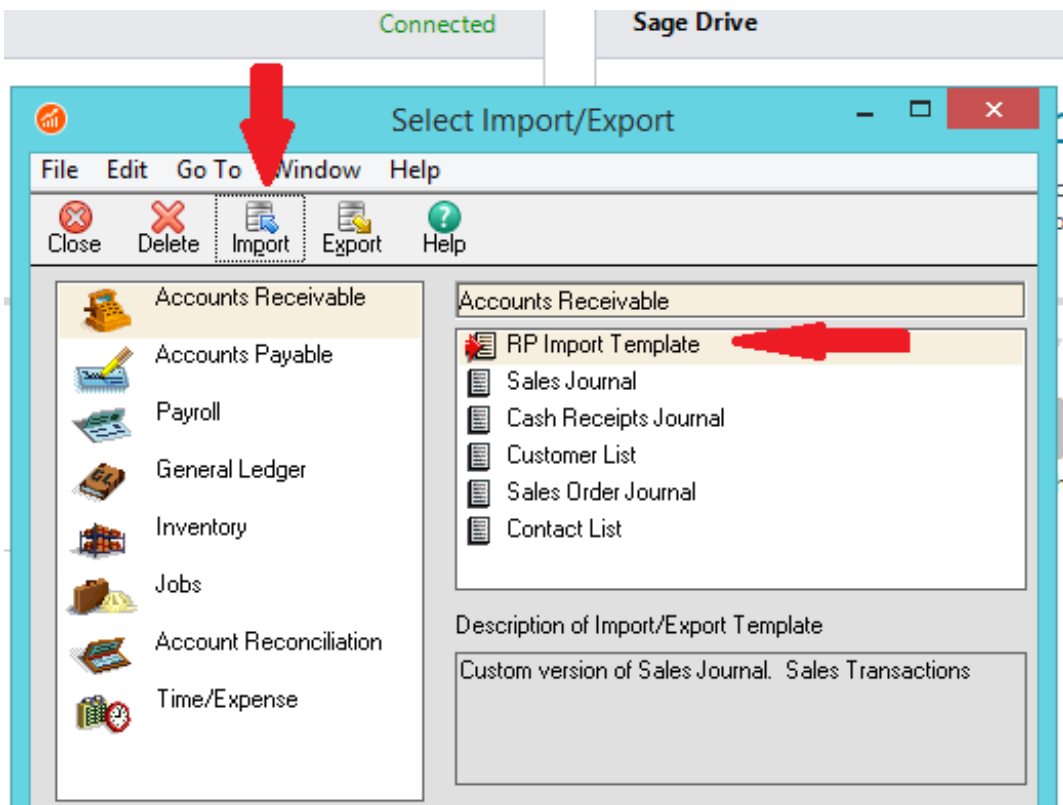
3. Click 'First Row contains Headings'

4. Save your template





You can now use that template for future imports



Click YES to import when you have a backup of your company file.

