

Feature	SortMyBooks	SageOne	Questions to Ask Yourself
Smartphone App for capturing receipts	✓	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	✓	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 Integration	✓	X	Would I like to be able to email out Sales Invoices to my Customers with a link where they can pay me by Credit Card without me having to go to the expense and hassle of setting up a merchant account?
Multi-Currency	✓	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	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	✓	We do have 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.
Bank Import Facility	✓	X	Would it save time if I could upload my online banking

			transactions to SortMyBooks instead of having to type them all in manually.
Cash Receipts Basis for VAT	✓	✓	Is my turnover less than 1.25 Million per year?
Sales Invoicing	✓	✓	
Email Sales Invoices and Customer Statements	✓	✓	Do I want to save more than the cost of my subscription by emailing Sales Invoices and Customer Statements.
Accept 1 payment for more than 1 invoice	✓	X	Do my customers pay me for more than 1 invoice at a time
Automatic Discounts Facility	✓	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	Would it be useful to track what changes were made by who to my Sales Invoices
Upload logo on to Sales Invoice	✓	✓	
Choice of Invoice templates	✓	✓	We'll have this feature coming on stream within the next few months
Quotations	✓	X	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
Sales Orders	✓	X	Is it helpful to track Sales Orders separately and then convert them to Sales Invoices when the Order is complete?
Pro-Forma Sales Invoices	✓	X	Do I sometimes need to send Pro-Forma Invoices to my Customers?
Purchase Orders	✓	X	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	✓	X	Do I ever pay Suppliers for more than 1 invoice with just 1 payment?
Automatic Discounts Facility	✓	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	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	Do I track time on jobs and invoice my customers according to the amount of time spent.
Multi-user	✓	X	Are there other people in my business that need access to the accounts?
Sharing	✓	X	Do I want to be able to share with my Accountant for free no matter what software they use?
Permissions	✓	X	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.
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	✓	X	Do I need to track the quantity of items that I've sold

			and how many are on hand?
Product and Service Reports	✓	X	Do I want to be able to see how much I've sold of each item to each Customer?
Profit Margin Reports	✓	X	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?
Sub-Contractors Reverse Charge VAT	✓	X	Do I ever work as a Sub-Contractor or am I a Principal Contractor
This Year/Last Year Comparisons	✓	X	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	✓	X	Do I want more control over the information that I get back from my accounts?
Chart of Account Templates for different industry sectors	✓	X	Do I want a Chart of Accounts that is tailored to my industry?
VAT Summary on Invoice	✓	X	Do I sometimes invoice my Customers in more than 1 VAT rate? If yes then you'll need a VAT Summary on the bottom on the Sales Invoice
Annual Return of Trading Details Report	✓	X	Will my accountant have to charge extra for producing this report at year end?
Automatic Handling of EU contra for VAT	✓	X	Do I ever buy items from other EU countries?
Nominal Ledger show all transactions with drilldown back to Transaction entry	✓	X	Will my accountant be able to get the information they need to verify my accounts data?
Profit and Loss month on month	✓	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)	✓	X	Do I want to be able to compare our Sales and Costs this year with the same time period last yeat?
Balance Sheet multi-format (year in months, comparison with last year, year to date)	✓	X	Will my accountant be able to get the information they need to verify my accounts data?
VAT Control Report	✓	X	Will my accountant be able to get the information they need to verify my accounts data?
Purchases Control Report	✓	X	Will my accountant be able to get the information they need to verify my accounts data?
Sales Control Report	✓	X	Will my accountant be able to get the information they need to verify my accounts data?
Lodgment Control Report	✓	X	Will my accountant be able to get the information they need to verify my accounts data?
Payments Control Report	✓	X	Will my accountant be able to get the information they need to verify my accounts data?
Fixed Asset Tracking	✓	X	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	✓	X	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	✓	X	Will my accountant be able to get the information they need to verify my accounts data?
Purchase Analysis Reporting	✓	X	Will my accountant be able to get the information they need to verify my accounts data?
Journals	✓	X	Will my accountant be able to get the information they need to verify my accounts data?
Nominal Activity Report	✓	X	Will my accountant be able to get the information they need to verify my accounts data?

Audit Trail	√	X	Will my accountant be able to get the information they need to verify my accounts data?
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