

Step 1. Log into Sage Online

The screenshot displays the Sage Accounting dashboard. At the top, there is a navigation bar with the Sage logo, 'Accounting', and a '+ Create' button. To the right are links for 'Home', 'Notifications', 'Tasks', and 'Help'. Below this is a secondary navigation bar with menu items: 'Summary', 'Sales', 'Cashbook', 'Contacts', 'Banking', 'Adjustments', 'Reports', and 'Settings'. A 'Create +' button is also present in the top right of this bar.

The main content area starts with a greeting 'Hi, [redacted]' and a toggle for 'This Year' and 'This Month'. Below this are three summary cards: 'Money in' with an 'Add' button, 'Money out' with an 'Add' button, and 'Balance'. Each card contains a large blacked-out value.

The 'Invoices' section features a large blacked-out area on the left. To its right are two cards: 'Customers by outstanding invoices' and 'Customers by overdue invoices'. Both cards display the message 'No customers have outstanding/overdue balances.' with a link to 'Add a new sales invoice.'

The 'Banking' section at the bottom shows three cards, each with a bank icon and a 'Balance' label. The values are blacked out, and there are line graphs below each card.

Step 2. Editing registered address on invoice

Select Sales -> New invoice

Sage Accounting | [+ Create](#) | [Home](#) | [Notifications](#) | [Tasks](#) | [Help](#)

Summary | **Sales** | Cashbook | Contacts | Banking | Adjustments | Reports | Settings | [Create +](#)

Sales

Create, view and manage your sales invoices and credit notes.

[All](#) | [Outstanding](#) | [Overdue](#) | [Paid](#) | [Draft](#)

0 of 0 selected | | From To | [Search](#) | [New Invoice](#)

Number	Date	Customer	Telephone	User	Total	Outstanding	Issued	Status	Attachments	Actions
No Results To Display										

Show records | Page of 1 | 0 records

Step 3. Customising invoice

Select Customise -> Templates and Logos

The screenshot shows the Sage Accounting interface for creating a new sales invoice. The top navigation bar includes 'Sage Accounting', '+ Create', 'Home', 'Notifications', 'Tasks', and 'Help'. Below this is a secondary navigation bar with 'Summary', 'Sales', 'Cashbook', 'Contacts', 'Banking', 'Adjustments', 'Reports', and 'Settings'. A 'Create +' button is visible in the top right.

New Sales Invoice

Create a new invoice to send to your customer. To search for or to create a new customer, start typing in the Customer box.

Customer* **Invoice Date*** **Reference**

Description*	Category*	Price/Rate*	VAT Rate*	Total
<input type="text"/>	4900 - Misc Income	0.00		0.00

[Reorder lines](#)

Notes

Terms and Conditions
Payment terms: 30 days from date of invoice
Bank: [REDACTED]
Names: [REDACTED]
Sort Code: [REDACTED]
Acc No: [REDACTED]

Net	0.00
VAT	0.00
Total	0.00

[Preview](#) [Customise](#) [Save Invoice](#) [Cancel](#)

- Templates and logos
- Document preferences

Step 4. To view or edit the business details

Select 'View or edit business details'

Sage Accounting + Create Home Notifications Tasks Help

Summary Sales Cashbook Contacts Banking Adjustments Reports Settings Create

Templates and logos

Choose a template that best suits your brand, make changes and add a logo.

Business details

Check the business details shown on your invoices and other sales documents.


[View or edit business details](#)

CHOOSE TEMPLATE

Select the layout for your documents.


Add or change terms and conditions or notes displayed on your invoices from [Document preferences](#).

Onyx



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Midnight



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[Cancel](#) [Preview](#) [Save](#)

Step 5. Enter detail into Registration address.

Enter detail into Registration address section -> Confirm

Confirm your trading information

Company registration number
Registration number must be 8 characters, with letters and numbers.

Country of registration
England and Wales

Registration address
 Same as trading address

Registration address line 1

Address line 2

City or Town

County

Postcode
For example, AB12 3CD.

Do this later Confirm

Cancel Preview Save

Step 6. Check if details updated on invoice.

Select 'Preview'

Sage Accounting + Create Home Notifications Tasks Help

Summary Sales Cashbook Contacts Banking Adjustments Reports Settings Create +

Templates and logos ?

Choose a template that best suits your brand, make changes and add a logo.


Business details

Check the business details shown on your invoices and other sales documents. View or edit business details

CHOOSE TEMPLATE


Select the layout for your documents.
Add or change terms and conditions on your invoices from [Document preferences](#).

Onyx



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Midnight



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Cancel Preview Save

Step 7. Updated registered address

The updated registered address will appear at the bottom of the preview invoice (as indicated by the highlighted section)

Document Preview

Summary Sales Cashbook Contact

Templates and logos

Choose a template that best suits your brand, make

Business details

Check the business details shown on your invoices and other sales documents.

CHOOSE TEMPLATE

Select the layout for your documents.

Add or change terms and conditions or notes displayed on your invoices from [Document preferences](#).

Cancel

Description	Price/Rate	VAT %	Net
Your product or service description one			
Your product or service description two			
Your product or service description three			

VAT Rate	Net	VAT
Standard 20.00% (20.00%)		
No VAT (0.00%)		

Terms and Conditions:
Payment terms: 30 days from date of invoice
Bank: [REDACTED]
Names: [REDACTED]
Sort Code: [REDACTED]
Acc No: [REDACTED]

Registered in England and Wales No. [REDACTED], VAT Registration Number GB [REDACTED]
Registered Address Updated, Registered address, Update address, New town, UP7 4TE

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Preview Save