White paper published by Invoice My Clients

From Sage 50 to Fast Order Entry: Cutting Wholesale Invoicing Time

A time model you can check, what replacement software must do for long orders, and how to move customer and product lists out of Sage 50

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Publisher disclosure: Invoice My Clients sells invoicing software; sections 8 and 9 describe how our product handles long orders, by plan, and section 7 says how our client import reads a Sage 50 customer export. Invoice My Clients is not affiliated with Sage, has no Sage connector and does not import or export Sage files. Sage steps and field names are quoted from Sage's own help pages and linked. The time figures are a model built on stated example inputs, not measurements of any customer; replace them with your own.

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1. Executive summary

A distributor whose orders run to 60 to 180 lines spends most of its order entry time on one task: reading a product code, a quantity and a price from a spreadsheet and typing them into an invoice. The order already exists in the spreadsheet. The typing adds nothing except the chance of a mistake.

This paper gives a time model a reader can check with a stopwatch. With the example inputs (15 orders a day, 120 lines an order), typing takes between 4 and 12.5 hours a day depending on speed, and pasting the same lines with code matching takes between 24 minutes and 2 hours 15 minutes. The model is arithmetic on stated assumptions, not a measurement of any customer.

It then lists what replacement software should do, the steps to move customer and product lists out of Sage 50 as CSV files using Sage’s own export tools, and how Invoice My Clients implements paste, code matching, separate promo invoices and order import, by plan, including what it does not do.

[6] Invoice My Clients: Paste Excel orders into invoices (use case)
[7] Invoice My Clients: Switching from Sage 50, a practical guide for wholesalers

2. Scope, assumptions and how to read this paper

The reader is a wholesaler or distributor that invoices long orders, uses or used Sage 50, and gets orders as spreadsheets, for example exported from a mobile ordering app. Shops that take a few lines per order will not see the same gain.

Every Sage statement in this paper is a step or a field name from Sage's own help pages, cited where it appears. Sage 50 differs by country and version; check the steps against the edition you run. Invoice My Clients is not affiliated with Sage, has no Sage connector and does not import or export Sage files.

[1] Sage 50 U.S. help: Export data from Sage 50

[5] Sage 50 Accounts (UK) knowledgebase: How do I export data?

The time figures are a model. Replace each input with your own number; section 5 shows how to measure them in an afternoon.

3. Where wholesale order entry time goes

Entering an order has fixed work (open the customer, set the reference, check delivery details, save) and per-line work (find the product, enter the quantity, check the price). For a 5-line order the fixed work dominates. For a 120-line order the per-line work is almost all of it, so that is where software can save time.

Two further costs scale with the number of lines. Keying errors: every retyped code or quantity can be wrong, and a wrong line usually costs a credit note and a phone call. Splitting: if promotional stock must be billed on its own invoice, someone pulls those lines out of the order and builds a second invoice by hand.

Neither cost is a defect of an accounting ledger. A ledger records transactions accurately. A distributor with long orders needs a fast way to get lines in, which is a different job.

4. A time model you can check

Typing time per day = orders per day × lines per order × seconds to type one line. The fixed work per order is the same in both methods, so it is left out of both.

Paste time per day = orders per day × fixed seconds per paste (copy, paste, check the columns and the preview, confirm) + orders per day × lines per order × share of codes that do not match × seconds to fix one unmatched line.

The three cases pair fast typing with a fast paste and slow typing with a slow paste, so each difference is conservative within its case. At the middle case over a 5-day week, typing takes 37.5 hours and pasting about 4 hours. The model leaves out keying errors, which only add to the typing side, and the minute or so it takes to build a separate promo invoice by hand.

Inputs used in the example

Example values, not data about any business. Replace each with your own measurement.

Orders per day
Value used: 15
How to get your own: Count a normal week of orders and divide by the working days

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Lines per order
Value used: 120 on average (60 to 180)
How to get your own: Average line count of the same week’s orders

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Lines per day
Value used: 1,800
How to get your own: Orders per day times lines per order

Seconds to type one line
Value used: 8, 15 or 25
How to get your own: Time someone typing 20 real lines and divide by 20

Fixed seconds per paste
Value used: 60, 90 or 180
How to get your own: Time three test pastes from copy to confirm

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Share of codes that do not match
Value used: 1, 2 or 5 in every 100 lines
How to get your own: Look up last week’s codes against your product export

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Seconds to fix one unmatched line
Value used: 30, 45 or 60
How to get your own: Time a few fixes: pick the right item or type a description

Time per day: typing versus pasting

Arithmetic on the inputs above, rounded to the minute. 1,800 lines a day in every case.

Fast case
Typing: 8 s a line: 4 h 0 min
Paste: fixed time: 60 s an order: 15 min
Paste: unmatched lines: 18 lines at 30 s: 9 min
Paste: total: 24 min
Difference per day: 3 h 36 min

Middle case
Typing: 15 s a line: 7 h 30 min
Paste: fixed time: 90 s an order: 23 min
Paste: unmatched lines: 36 lines at 45 s: 27 min
Paste: total: 50 min
Difference per day: 6 h 40 min

Slow case
Typing: 25 s a line: 12 h 30 min
Paste: fixed time: 180 s an order: 45 min
Paste: unmatched lines: 90 lines at 60 s: 1 h 30 min
Paste: total: 2 h 15 min
Difference per day: 10 h 15 min

5. Measuring your own numbers

Typing speed: ask the person who enters orders to type 20 lines from a real order while you time them, and divide by 20. Do it twice, at the start and the end of a day. Paste time: during a trial, time three pastes from copying the rows to confirming the preview.

Unmatched share: export your product list (section 7), put last week’s order lines next to it in a spreadsheet and look each code up. The share of codes not found is your unmatched rate on day one; it falls as you add missing codes to the catalog. Watch for codes that a spreadsheet has changed, such as dropped leading zeros or a code read as a date.

[4] Sage 50 U.S. help: Import/Export Tips

6. What fast order entry needs from software

Use the table as a trial script. Ask each vendor to show every row on one of your real orders, at full length.

Requirements and how to test them

A neutral checklist; it applies to any product, including ours.

Paste many lines at once
Why it matters: Removes the per-line typing
What to test in a trial: Paste a 150-line order copied straight from your spreadsheet

Match lines by product code
Why it matters: Brings in the saved item, description and price
What to test in a trial: Include codes in mixed case and with stray spaces

Flag codes that do not match
Why it matters: A silently dropped line is a lost sale
What to test in a trial: Include two codes that are not in the catalog

Respect fixed prices
Why it matters: A pasted price should not undercut a locked price
What to test in a trial: Turn on the price lock and paste a lower price

Separate invoice for a billing group
Why it matters: Promo stock often has to be billed apart
What to test in a trial: Mark some lines as promo and check both invoices and their reference

Import a file of many orders
Why it matters: One step for a day of orders
What to test in a trial: Load a file with several orders and a customer that does not exist yet

Handle long documents
Why it matters: A 180-line invoice must still open, print and send
What to test in a trial: Open, print and download the PDF of the longest invoice

Send totals to the ledger
Why it matters: Avoids re-keying into the books
What to test in a trial: Check what reaches your accounting system and what does not

7. Moving off Sage 50: data, ledger and timing

Decide first what stays in a ledger. Sage 50 keeps more than invoices: its inventory item export alone includes fields such as Costing Method, G/L Sales Account and G/L Inventory Account. If you rely on that, keep a ledger and move only order entry and invoicing.

[3] Sage 50 U.S. help: Inventory Item List Fields (Import/Export)

Customers and products leave Sage 50 as CSV files through Sage's own export tools (see the table). In the U.S. edition the customer export includes fields such as Customer ID, Customer Name, the bill-to address and Customer Email, and the item export includes Item ID, Description for Sales and up to ten sales prices. Keep the Customer ID: Invoice My Clients' client import reads a Customer ID column as each client's account code, and its order import finds the customer by that code first.

[1] Sage 50 U.S. help: Export data from Sage 50
[2] Sage 50 U.S. help: Customer List Fields (Import/Export)
[3] Sage 50 U.S. help: Inventory Item List Fields (Import/Export)
[5] Sage 50 Accounts (UK) knowledgebase: How do I export data?
[6] Invoice My Clients: Paste Excel orders into invoices (use case)

Protect product codes on the way through a spreadsheet. Sage's tips warn that a spreadsheet can drop a leading zero ("01" becomes "1") and read a value such as 10-25 as a date. Open the export with the code column set to Text before you save it again.

[4] Sage 50 U.S. help: Import/Export Tips

Leave opening balances where they are. Open invoices and customer balances stay in the system that raised them and are collected there. Start new invoices in the new system from a set date, and run both for one billing cycle, comparing totals, before you stop entering orders in the old one.

If the ledger moves to QuickBooks Online or Xero, invoices, customers and payments can sync to it. If Sage 50 stays the ledger, plan with your accountant how invoice totals get into it, because there is no connection between the two.

[10] Invoice My Clients: QuickBooks Online sync
[11] Invoice My Clients: Xero sync

Exporting lists from Sage 50 as CSV

Steps as Sage's help pages describe them; menus differ by edition and version.

Sage 50 U.S. Edition
Customers: File, Select Import/Export, customer list template, Export; tick Include Headings. Default file CUSTOMER.CSV
Products: Same route with the inventory item list template. Default file ITEM.CSV
[1] Sage 50 U.S. help: Export data from Sage 50

[2] Sage 50 U.S. help: Customer List Fields (Import/Export)

[3] Sage 50 U.S. help: Inventory Item List Fields (Import/Export)

Sage 50 Accounts (UK)
Customers: Customers, Reports, Customer details, Customer Record CSV, then export as CSV
Products: Products and services, Reports, Product details, Product Record CSV
[5] Sage 50 Accounts (UK) knowledgebase: How do I export data?

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8. How Invoice My Clients implements fast order entry

Paste lines (Starter and above): on an invoice, an estimate or (on Business and above) a purchase order, choose Paste lines and paste rows copied from Excel, Google Sheets or Numbers into a review grid. A header row is detected and columns are mapped to Code, Description, Quantity, Unit price and an optional Bill separately group; the mapping is remembered for the account on any computer. Up to 500 rows per paste. Paste lines is in the web app.

[6] Invoice My Clients: Paste Excel orders into invoices (use case)

[8] Invoice My Clients: Pricing and plan comparison

Code matching: each code is looked up in the account's active catalog items by item code, ignoring case and surrounding spaces. A matched line takes the item, and its description and price when the paste has none. A pasted price is used unless Lock catalog prices or Only allow saved items is on, in which case the catalog rules apply and are enforced on the server. An unmatched code is flagged on its row: keep it as a typed line, pick a catalog item, or skip it. Nothing is saved until the owner confirms a preview with the row count, matched and unmatched lines and totals; then all lines are saved in one step.

[6] Invoice My Clients: Paste Excel orders into invoices (use case)

Bill separately and Import orders (Professional and above): when a paste on an invoice holds more than one billing group (from a pasted column or a saved item's Bill separately as setting) and Bill each group on its own invoice is on, the preview says how many invoices the order becomes, and each extra group becomes a draft invoice for the same client with the same reference, linked to the original and numbered in the normal sequence. Import orders takes a CSV or XLSX file, or a paste, with one row per line grouped by order number, matches each customer by account code first, then email, then name (a code, email or name shared by more than one client is flagged for the owner to pick, never guessed), previews how many draft invoices will be created, then makes them with progress shown while the page is open (leaving pauses the import, and it continues from Recent imports), and flags an order number that was already imported. Pasted rows can be tab-separated, as copied from a spreadsheet, or comma- or semicolon-separated text with quoted cells kept whole; the separator is detected and shown, the owner can change it, and if a comma could be part of a number (such as 12,50) the owner confirms the columns before the preview. Limits: 100 orders and 10,000 rows per file, 500 lines per order, 5 MB per file. Nothing is sent to clients.

[6] Invoice My Clients: Paste Excel orders into invoices (use case)

[8] Invoice My Clients: Pricing and plan comparison

Client account code (every plan): each client can carry the account code the business already uses in its books and ordering app, such as a Sage 50 Customer ID. It is shown and searchable in the client list, a code used by another client is flagged, and the client CSV import reads columns headed Account code, A/C Ref, Account Ref, Customer code, Customer number, Cust No or Customer ID. The code is not printed on invoices and is not synced to QuickBooks Online or Xero.

[6] Invoice My Clients: Paste Excel orders into invoices (use case)

Purchase orders (Business and above) take the same paste and a one-row-per-line import grouped by PO number, and turning a PO into an invoice lets the owner tick the lines to bill and keeps each line’s item code. QuickBooks Online and Xero sync is on Professional and above.

[9] Invoice My Clients: Purchase orders

[10] Invoice My Clients: QuickBooks Online sync

[11] Invoice My Clients: Xero sync

Fast order entry in Invoice My Clients, by plan

Plan names as on the pricing page. Free has none of the paste, split or import tools and keeps manual entry.

Item catalog and catalog import from a spreadsheet
Plan: Every plan, Free included
Limits and notes: Re-importing updates items with the same item code
[8] Invoice My Clients: Pricing and plan comparison

Client account code, used first to match imported orders
Plan: Every plan, Free included
Limits and notes: Up to 40 characters; client CSV import reads Customer ID, A/C Ref and similar columns
[6] Invoice My Clients: Paste Excel orders into invoices (use case)

Paste lines with code matching on invoices and estimates
Plan: Starter and above
Limits and notes: Up to 500 rows per paste; web app
[6] Invoice My Clients: Paste Excel orders into invoices (use case)

[8] Invoice My Clients: Pricing and plan comparison

Bill separately (one invoice per billing group)
Plan: Professional and above
Limits and notes: Invoices only; same client and reference; linked drafts
[6] Invoice My Clients: Paste Excel orders into invoices (use case)

[8] Invoice My Clients: Pricing and plan comparison

Import orders from CSV, XLSX or a paste
Plan: Professional and above
Limits and notes: 100 orders and 10,000 rows per file; customers matched by account code, then email, then name; duplicates flagged
[6] Invoice My Clients: Paste Excel orders into invoices (use case)

[8] Invoice My Clients: Pricing and plan comparison

QuickBooks Online or Xero sync
Plan: Professional and above
Limits and notes: Invoices, customers and payments
[10] Invoice My Clients: QuickBooks Online sync

[11] Invoice My Clients: Xero sync

Purchase order paste, line import and choosing lines to invoice
Plan: Business and above
Limits and notes: Keeps item codes from PO to invoice
[9] Invoice My Clients: Purchase orders

[8] Invoice My Clients: Pricing and plan comparison

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9. What Invoice My Clients does not do

Invoice My Clients is invoicing and accounts receivable software. It is not a full replacement for an accounting package such as Sage 50.

[12] Invoice My Clients: Facts at a glance (what it is and is not)

Not included

Each item is a current limitation, not a promise of future work.

A Sage connector, or reading or writing Sage files
What to do instead: Export CSV files from Sage 50 and use the client and catalog importers
[12] Invoice My Clients: Facts at a glance (what it is and is not)

General ledger, journals and financial statements
What to do instead: Keep a ledger: QuickBooks Online or Xero sync, or your current system
[12] Invoice My Clients: Facts at a glance (what it is and is not)

[10] Invoice My Clients: QuickBooks Online sync

[11] Invoice My Clients: Xero sync

Stock quantities and costing
What to do instead: Keep an inventory system; the catalog is a price list with codes
[12] Invoice My Clients: Facts at a glance (what it is and is not)

Payroll and bank feeds
What to do instead: Keep them in your accounting or payroll system
[12] Invoice My Clients: Facts at a glance (what it is and is not)

AI reading of a spreadsheet or a photo of an order
What to do instead: Paste or import the spreadsheet itself

Paste lines in the Android app
What to do instead: Paste on a computer in the web app

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10. Conclusion

For a distributor with long orders, the time is in the lines. Measure your own seconds per line and your unmatched share, put them into the model in section 4, and test any replacement on a full-length order before you move. Keep a ledger for what an invoicing tool does not do, move customers and products as CSV files, leave old balances where they are, and run both systems for one cycle.

Sources and references

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https://www.invoicemyclients.com/white-papers/sage-50-to-fast-order-entry