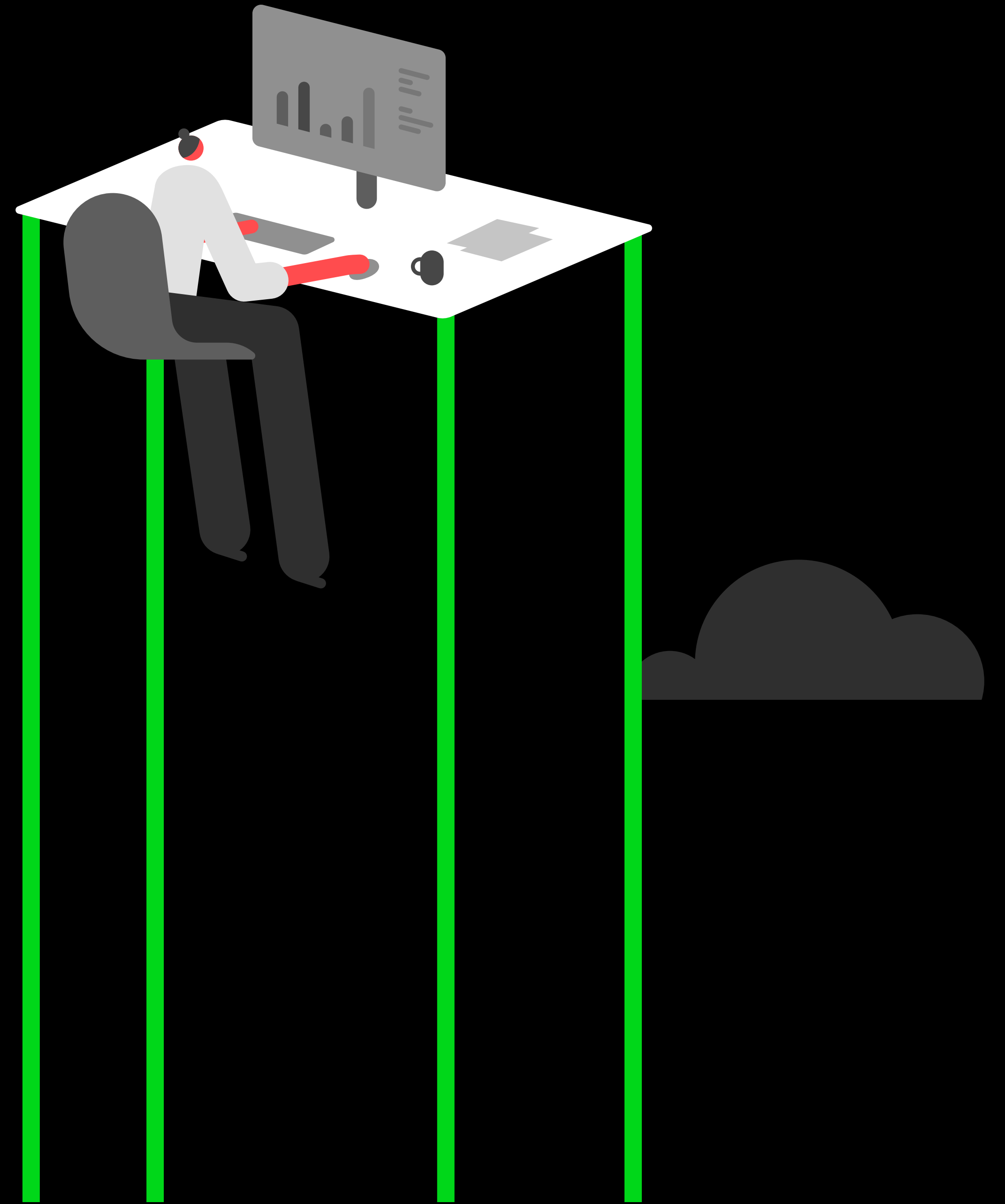


Guide

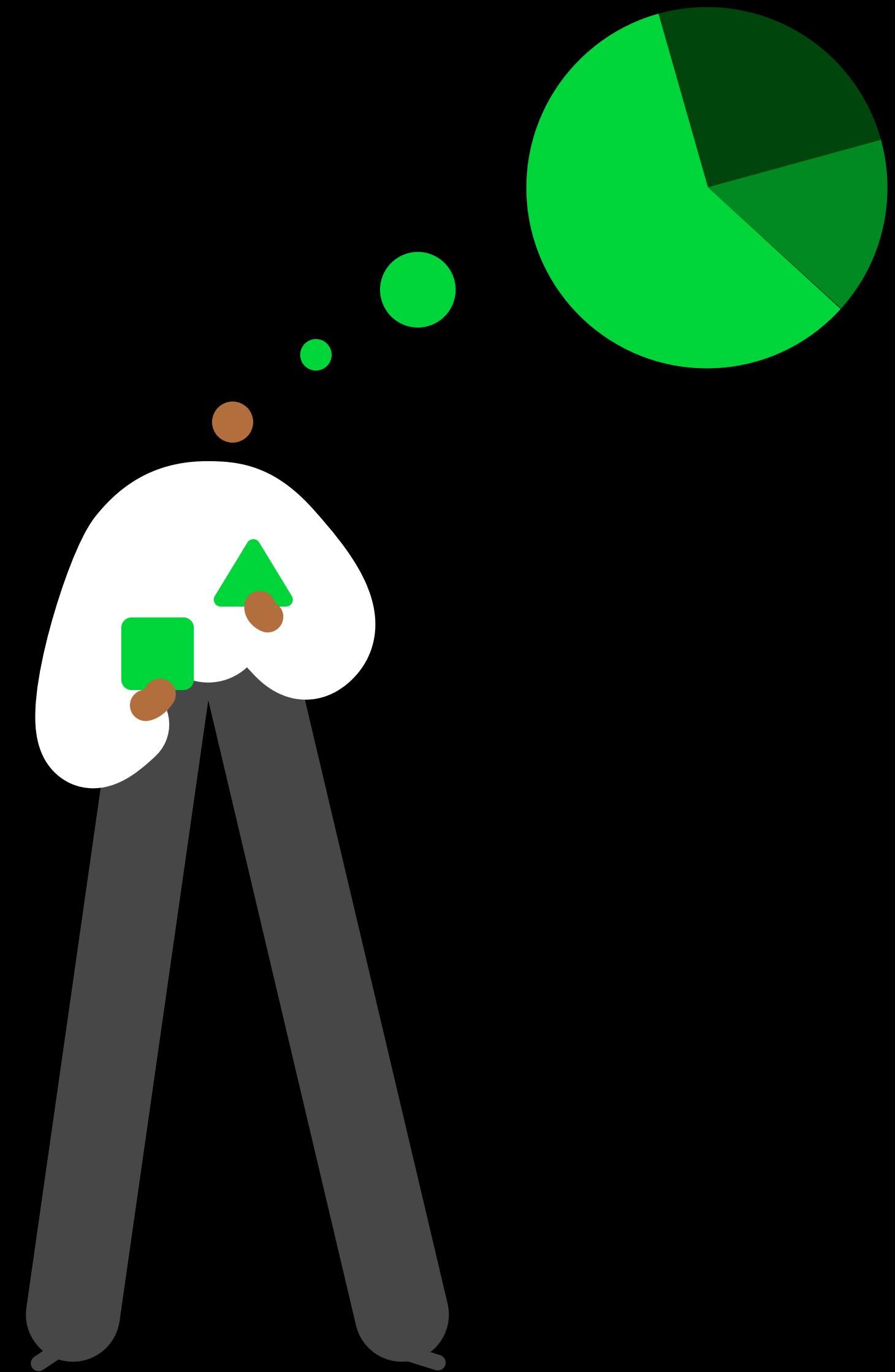
# Your guide for upgrading to Sage for Accountants



Sage

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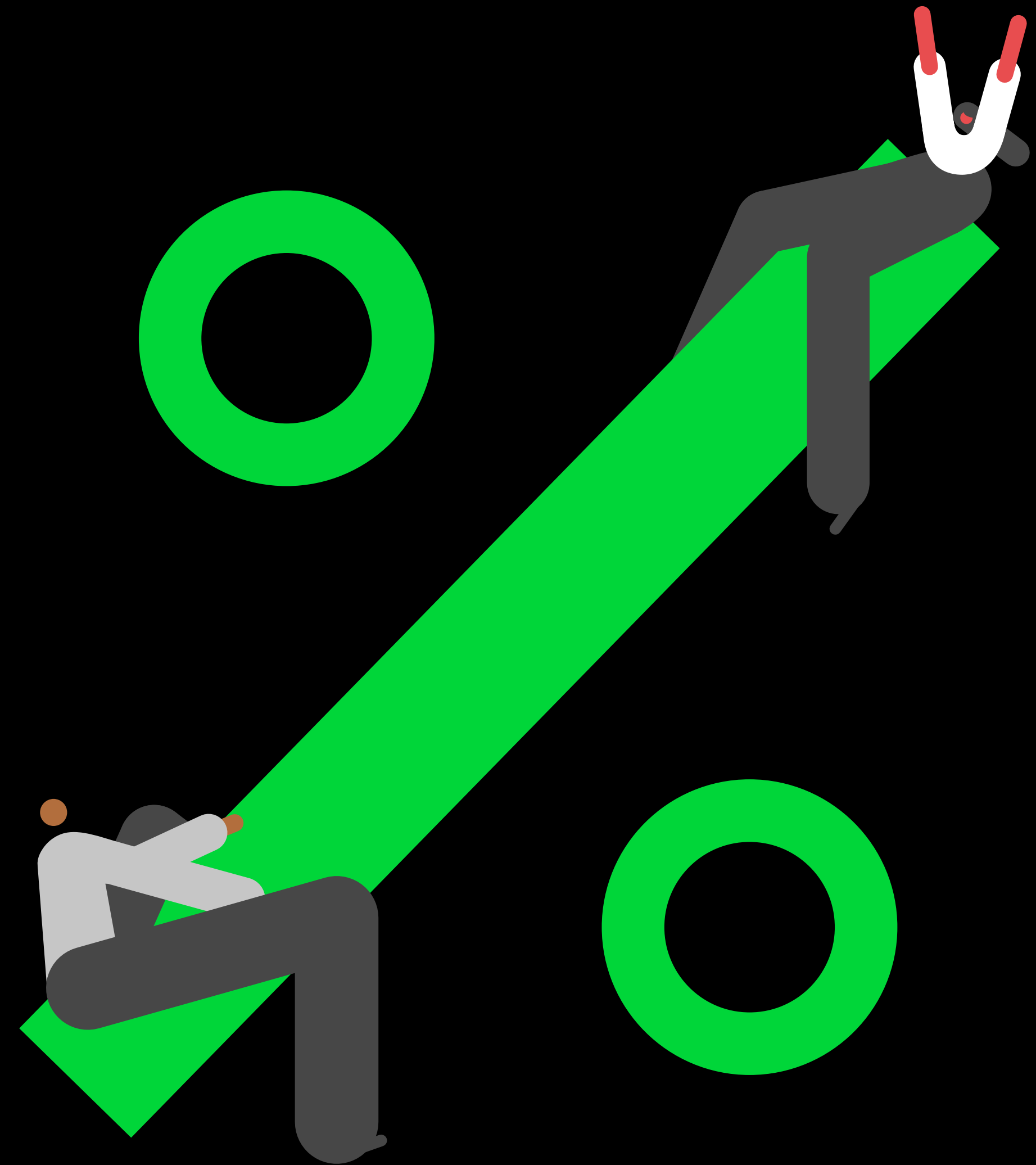


# Introduction

Sage for Accountants is our single solution for accountants and bookkeepers. We've combined cloud technology with our expert support, giving you everything you need to take control of your practice and lead your clients through Making Tax Digital for ITSA.

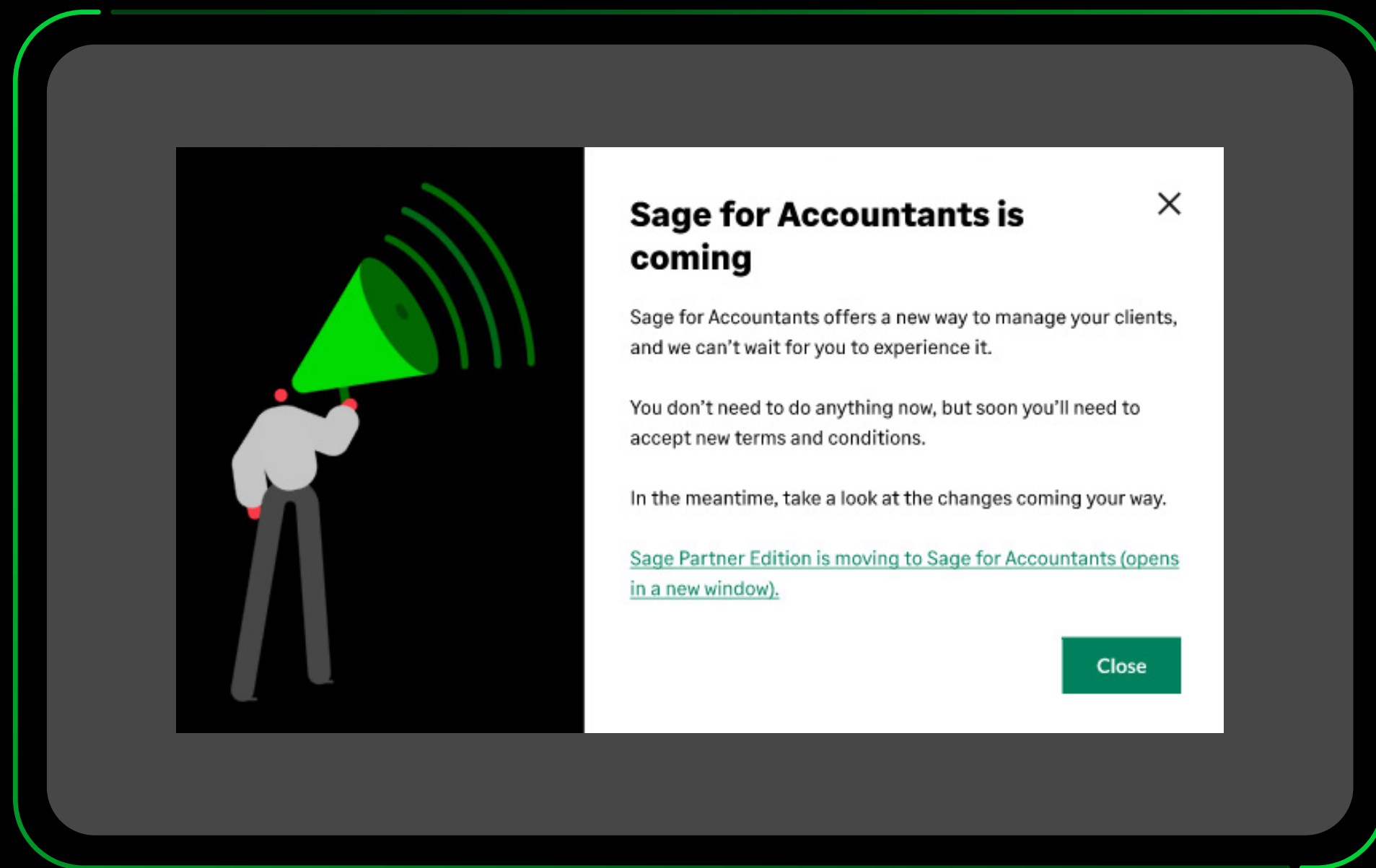
We launched Sage for Accountants in 2021 for new-to-Sage accountants. For the past year, we've been working hard to ensure all the features you love from Partner Edition are also in Sage for Accountants, plus much more. We'll make sure the change is as simple and seamless as possible.

To get you started with your upgrade, we've detailed some key steps to ensure you have a smooth transition...

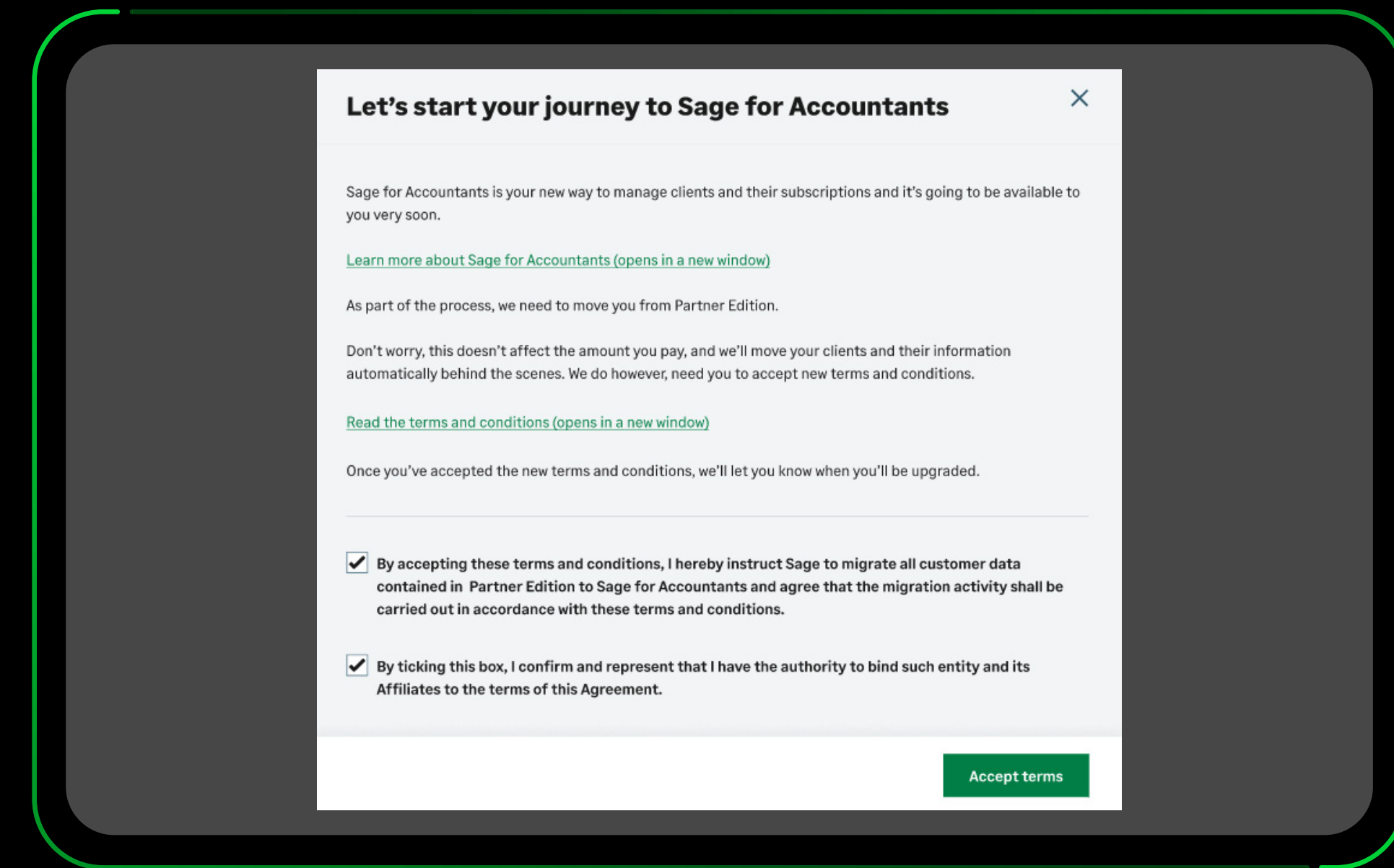


# Step 1: We'll let you know when you're eligible to upgrade

Once you're able to upgrade, we'll let you know both in Partner Edition and via email. To move forward, we need you to accept the new terms and conditions.



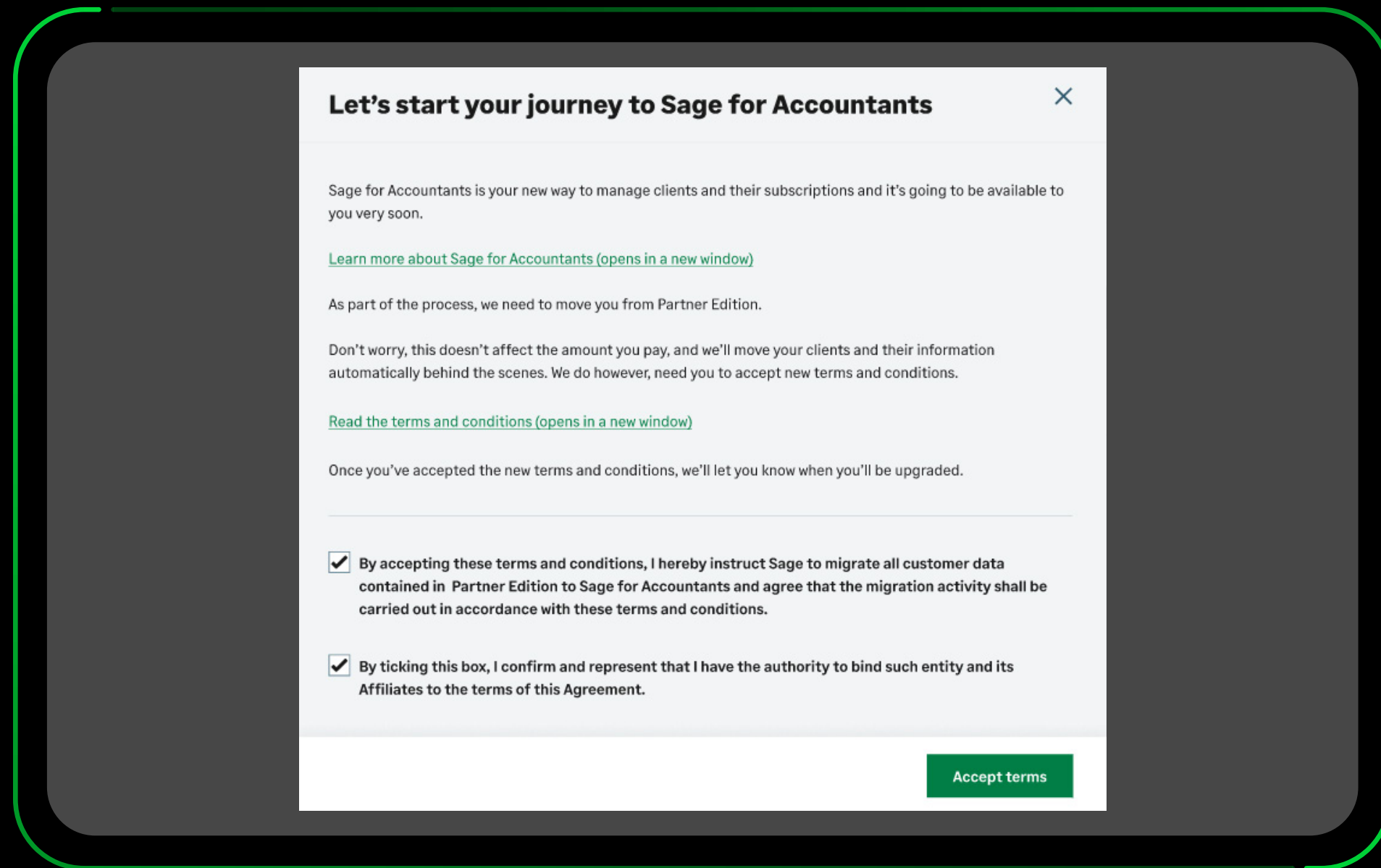
You can find the Terms and Conditions once you log into Partner Edition.



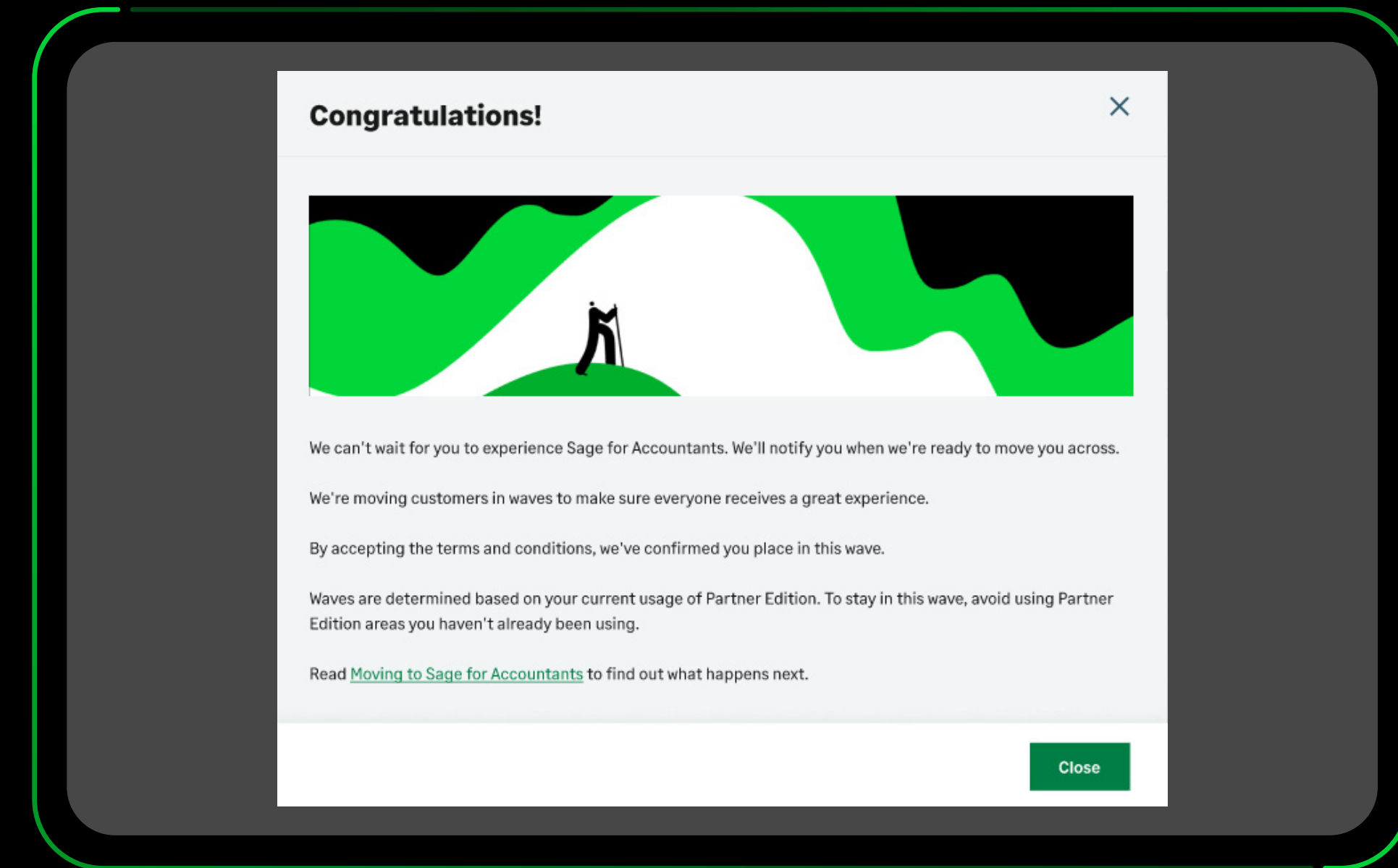
When you log in, you'll see the above pop-up.

# Step 2: Accept the new Terms and Conditions

To get things moving and get you upgraded, just accept the T&Cs when they're presented to you in Partner Edition.



Once agreed, our team will start working on your upgrade to Sage for Accountants.



Don't worry—we'll do all the hard work in the background! In the meantime, you can carry on using Partner Edition like always.

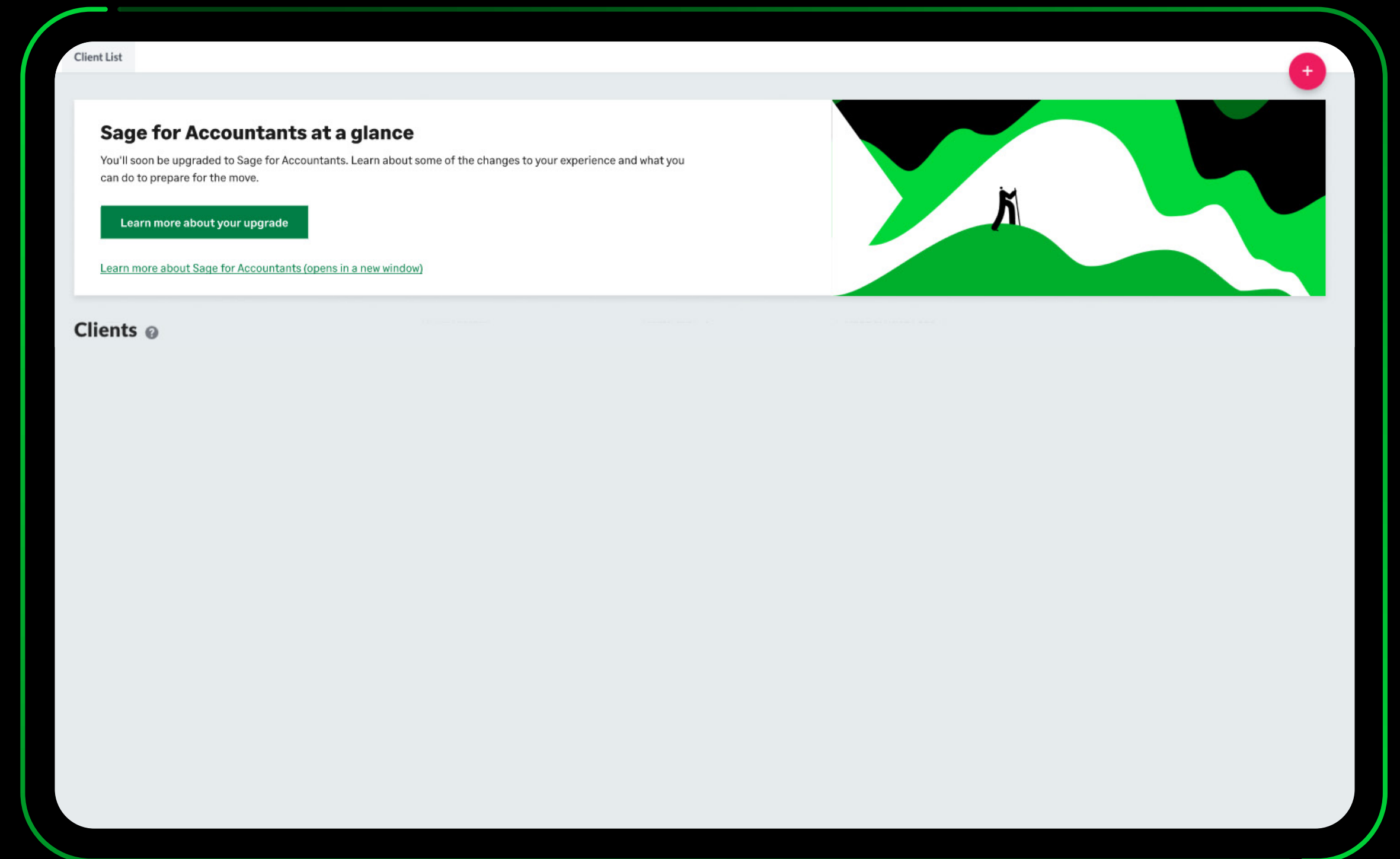
# Step 3: Plan and prepare

Before you upgrade, it's important to take some time to get yourselves and your colleagues up to speed on how things will work and what may change.

To help you with this, our experts have created a whole host of support materials for you to use, including handy bite-sized videos to show you how Sage for Accountants works and how to perform key tasks with ease.

During this time you can keep on using Partner Edition as usual.

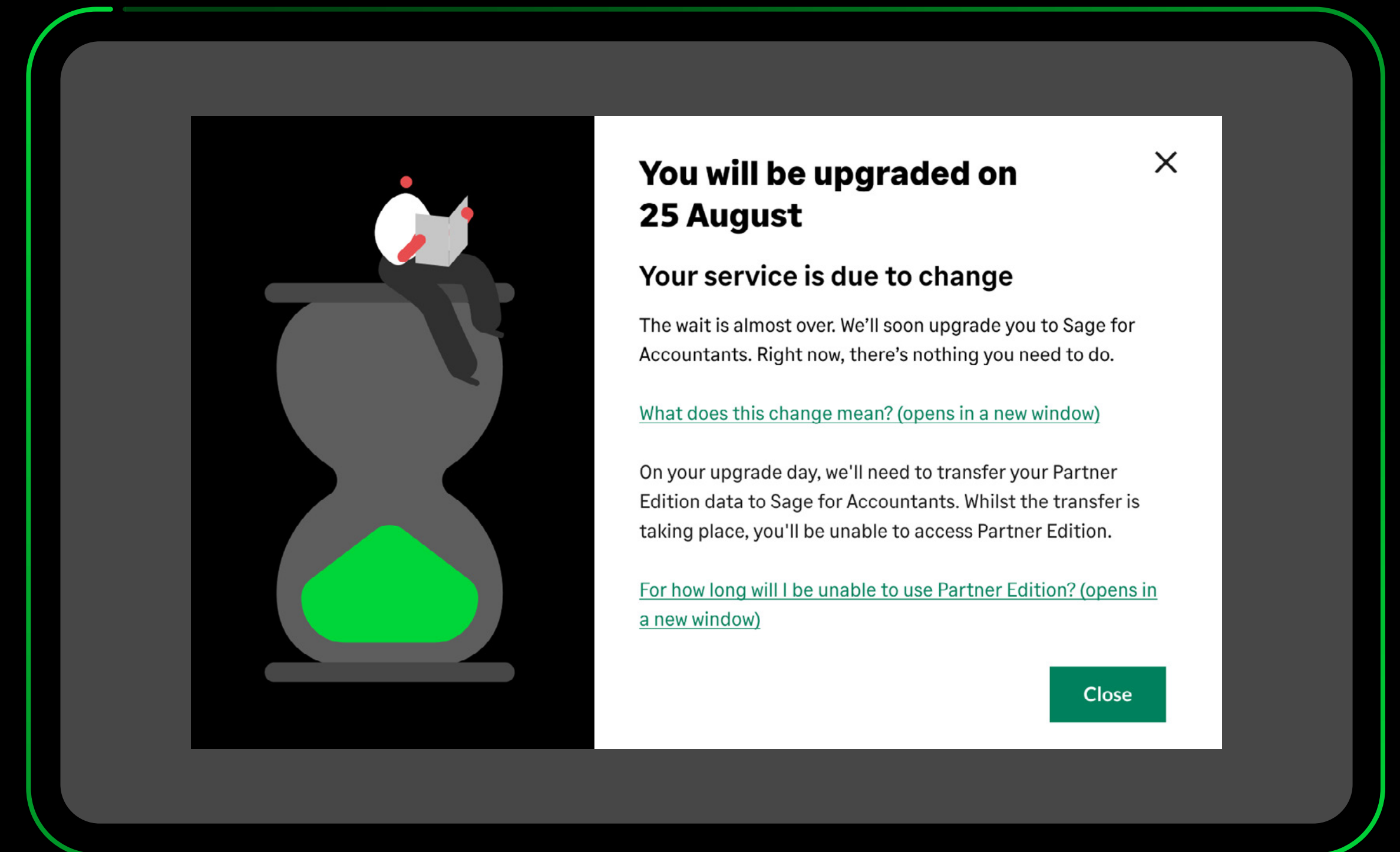
[Access the resources here](#)



# Step 4: Get—and note —your upgrade date

You'll be notified of your upgrade date within your Partner Edition software, with at least 5 days notice to give you time to plan and prepare. It's important to note this date down and share it with colleagues as you won't be able to access Partner Edition during this time.

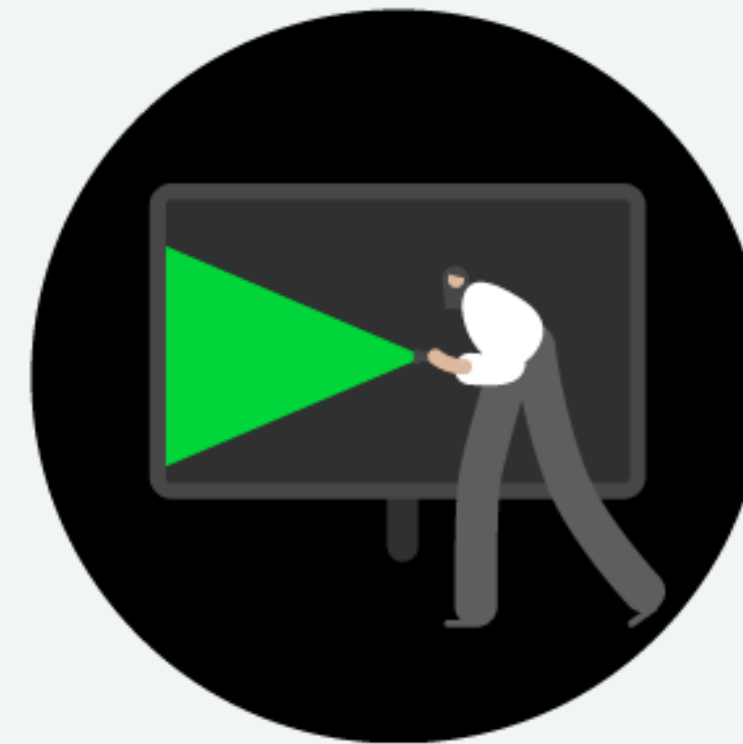
Once your upgrade is complete, you can use Sage for Accountants straight away! We'll make your upgrade as simple and seamless as possible. All you need to do is get ready to use your new platform.



# Step 5: It's your upgrade day

The day has arrived for you to upgrade to Sage for Accountants. Our expert team will now work on the final steps before we officially welcome you into Sage for Accountants.

During this, you won't be able to access Partner Edition, but you can put your feet up as there's nothing else you need to do until we let you know you've been successfully upgraded. Depending on how many clients you have, this could take between a couple of hours and one working day.



## We are upgrading your service to Sage for Accountants

- You won't be able to access Partner Edition at this time.
- Once upgraded, we'll notify you by email.

[For how long will I be unable to use Partner Edition? \(opens in a new window\)](#)



# Step 6: We'll tell you when you're successfully upgraded

Welcome to the future of accountancy! Now you've upgraded, it's time to get to know Sage for Accountants and how we can help your practice thrive.

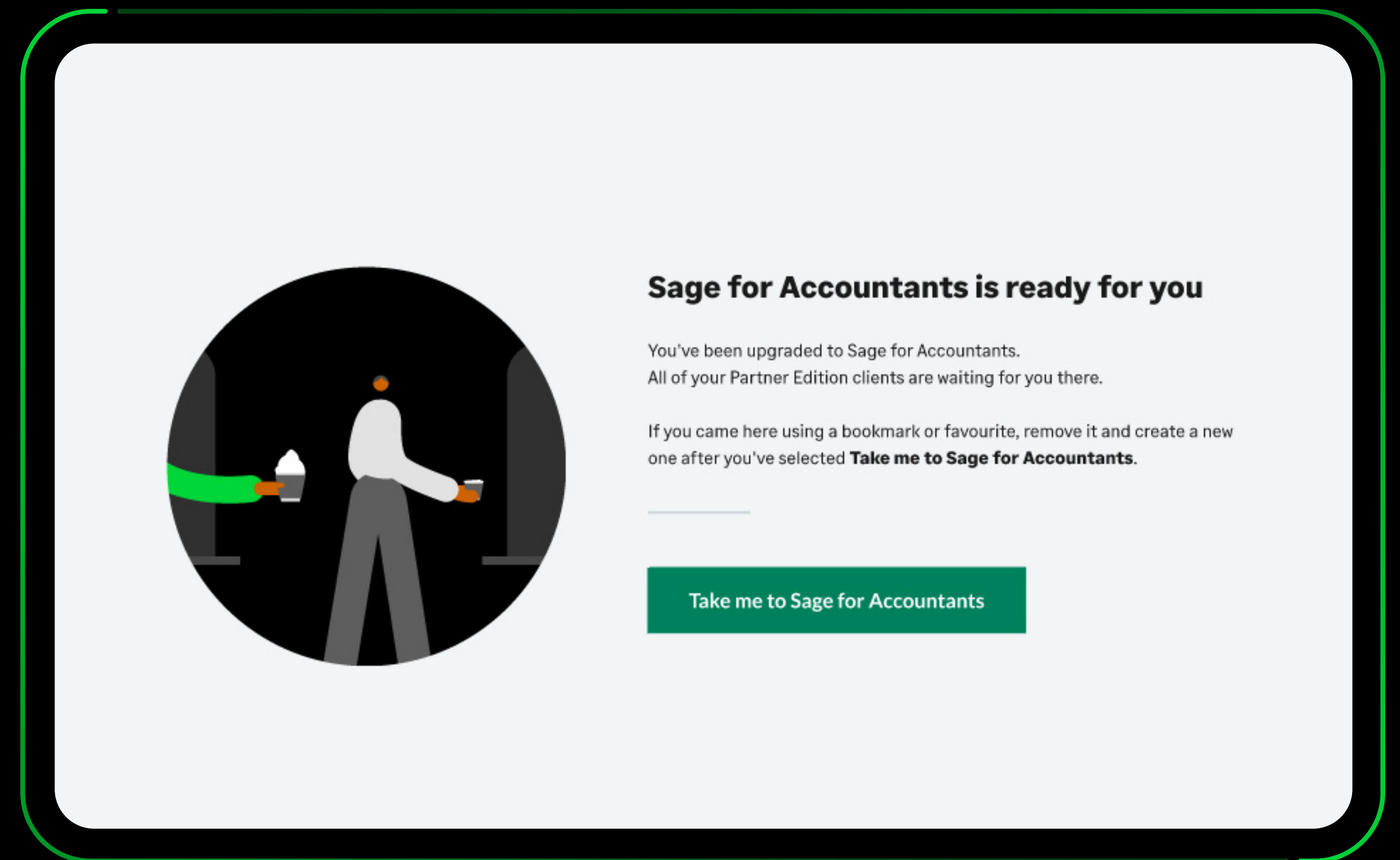
## What can you expect from Sage for Accountants?

For the first time, we have one proposition for accountants and bookkeepers.

This means you'll be on a flexible, easy-to-use, fully cloud-based solution that lets you self-serve subscriptions and manage clients all in one place.

**Client Management** is at the heart of Sage for Accountants. You'll get an easy way to organise all your clients in one place, with added features like five fully customisable categories for you to tag your clients.

You can also easily **self-serve subscriptions** to your clients, and with our simple, transparent, and consistent pricing, you'll always know what you're paying. This new pricing will be at no extra cost to you, and you'll also benefit from free compliance solutions—that's Final Accounts, Personal and Corporation Tax, for any clients you add into Sage for Accountants.



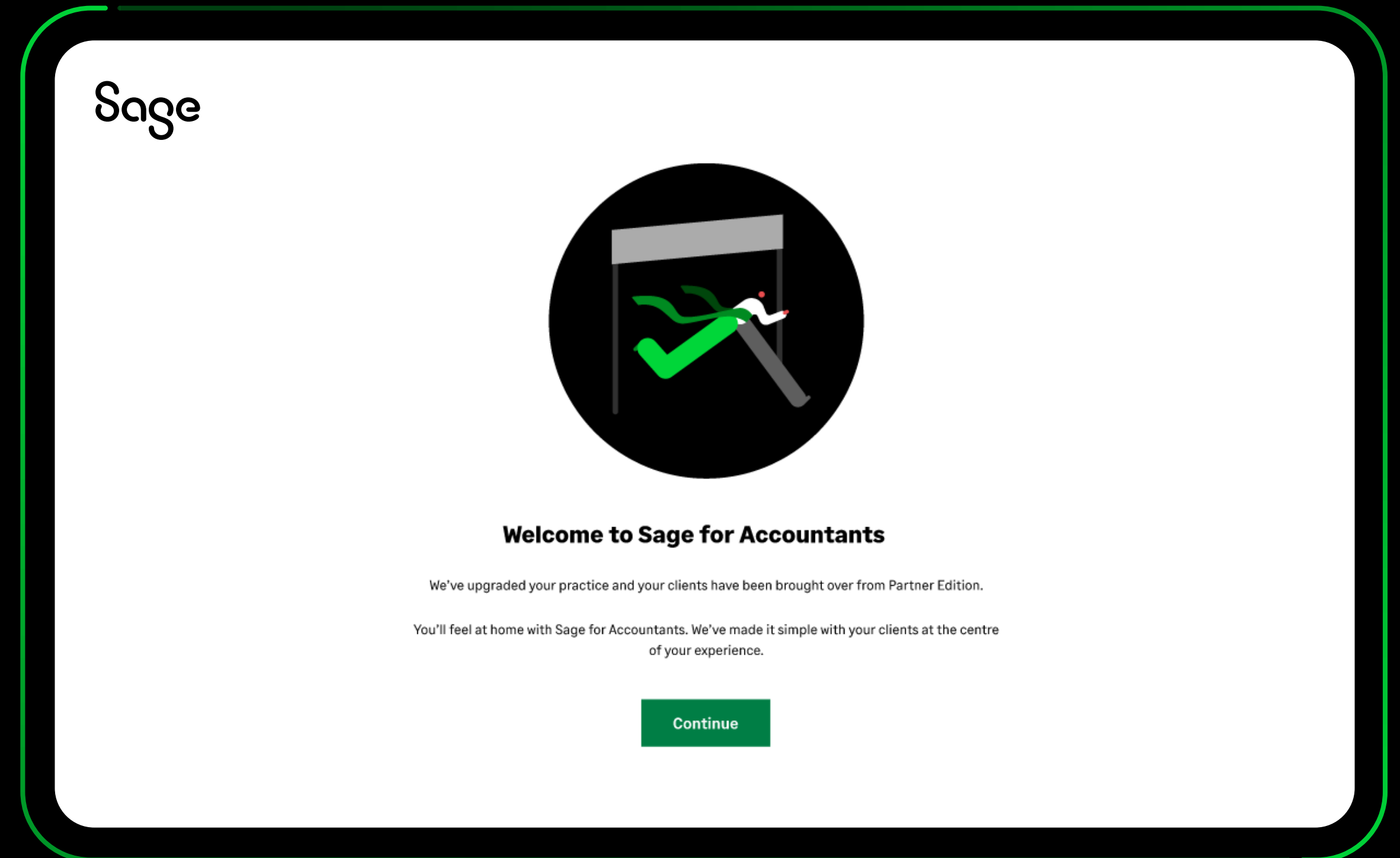
**Sage Points** are automatically applied on each purchase. The more Sage Points you earn, the greater discount you unlock—that's for existing clients as well as new ones.

**And we're not stopping there.** We have lots more exciting features planned, including integration with your favourite app partners and so much more!

# Step 7: Welcome to Sage for Accountants

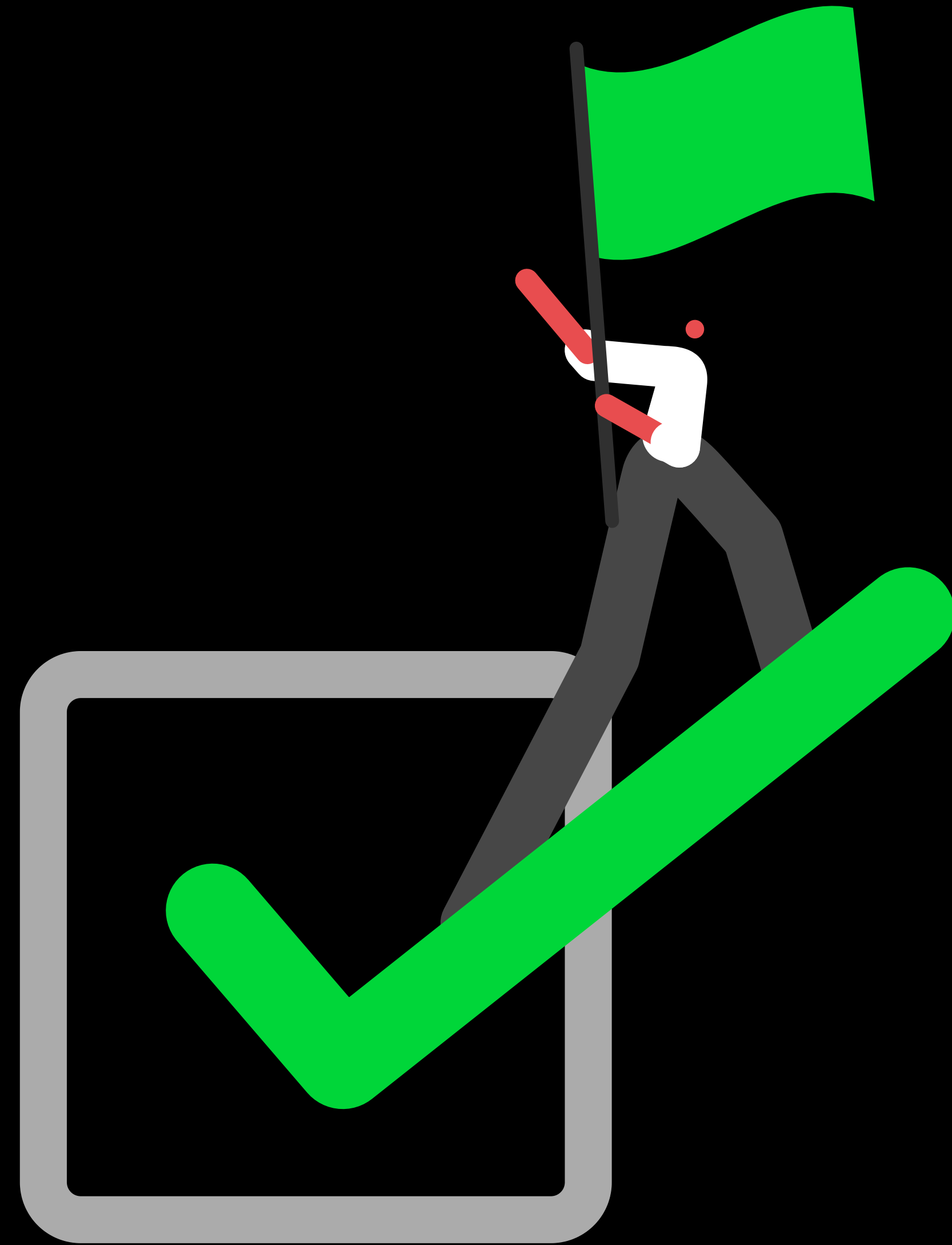
To access your brand new Sage for Accountants solution, all you need to do is visit the link below, and you're in. You'll be greeted with the following message, along with our simple product tour where you can learn what Sage for Accountants has to offer.

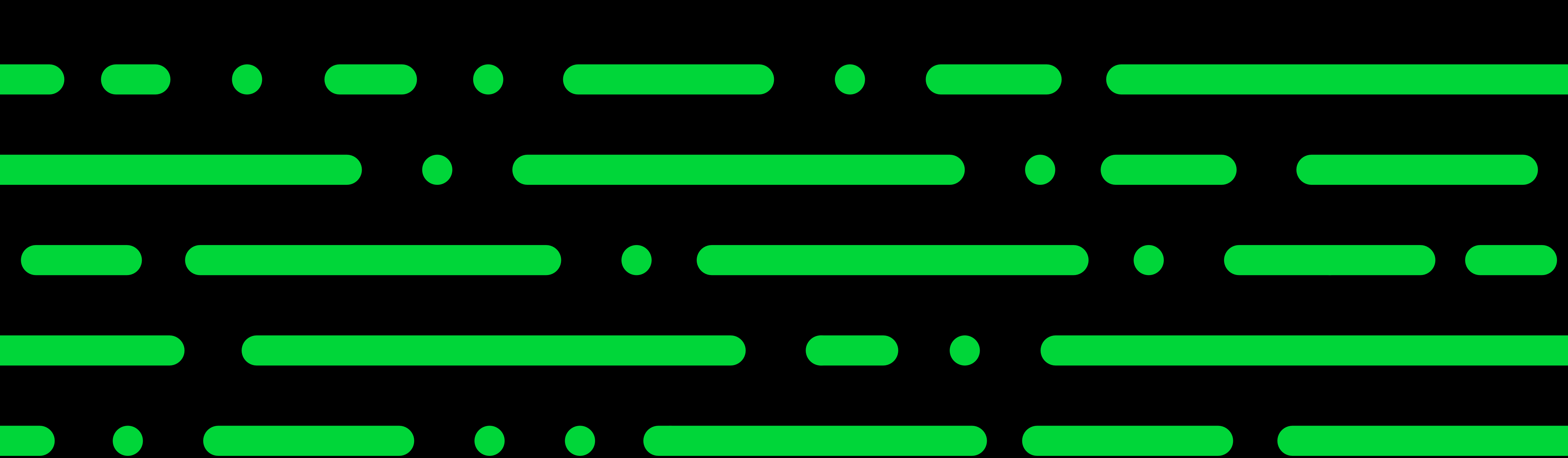
[Visit Sage for Accountants](#)



# Conclusion

We hope you enjoy all the features Sage for Accountants has to offer. Whether your goal is to stay compliant, win clients, or boost productivity, **success starts here.**





**sage.com**  
**0191 479 5988**

**Sage**

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