Sage 200

Sage 50 Upgrade Guide

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About this Guide

This guide introduces you to the Sage 200 Suite and details the feature differences between Sage 50 and the Sage 200 Financials, CRM and Commercials modules. The guide is designed to help you realize the benefits of upgrading to a tightly integrated Suite of modules, including Sage 200 CRM which sits at the heart of the Suite. If you require an integrated system that can implement end to end business processes smoothly and effectively, or you simply feel you have outgrown your current software, contact us on 0845 111 9988 to see how Sage 200 can meet the changing needs of your business.

Outgrowing Sage 50

At Sage, we want to provide you with the software that works hardest for your business. However, company growth and development can put pressure on your software, leading to a system that no longer matches your requirements. Common changes undertaken by Sage 50 customers include expanding their product range, increasing their employee numbers, placing more emphasis on trading with overseas customers, and increasingly complex business processes. Changes like these are the trigger to reassess a business system and look at new ways of doing things.

Newer, market leading technologies are now available that have allowed us to apply our knowledge of financial and trading requirements to create the next generation accounts, trading and business wide software, ready to meet customers' challenges for many years to come. Sage 200 is built on a solid, modern technology platform, which we believe will help to future proof your business in this tough economic climate.

"The organisation was going through a tough spell. We lacked the management structure, processes and systems to operate efficiently. Our decision-making capability was seriously impaired and we were struggling to comply fully with the statutory requirements on charities. Radical change on all fronts became an urgent necessity. Sage 50 had been a good workhorse, but we needed to move fast in finding a replacement. Sage was our first port of call and when we presented our criteria, they were able to advise us on a suitable solution – Sage 200 Financials and Commercials. Without Sage 200 Financials and Commercials, we wouldn't have had the tools to manage what had become quite a critical situation. It's been a leap in terms of the quality of our financial management and information systems. We have progressed from being uncertain about our financial position at any given time to having accurate information readily available to help us make good quality decisions."

Joe Curran, Resources Director, INTERIGHTS

In addition, businesses are looking to deploy software across their entire business to interconnect data and processes end-to-end, enabling greater efficiencies. Sage 200 embodies this approach, tightly integrating a strong financial and commercial system with a market leading CRM system at the heart of a wider ranging suite of business software.

In a competitive market maintaining customer satisfaction is key to a successful business. Using several disparate systems makes it difficult to get a true picture of your customer, and can hinder customer satisfaction:

Sage Representative View of Customers
- Great customer
- Entitled to an additional 10% discount
- Has recently moved offices

Support Managers View of Customers
- Problem customer
- Over 20 calls using 30hrs of rep time
- Cost £1500 last month to support

Marketing Directors View of Customers
- Has received 5 marketing campaigns in 3 months
- Responded to 1 campaign
- Total spend £40, with 5% discount

Financial Directors View of Customers
- 90 days past due
- On credit hold
- Phone number is disconnected

In this guide you will learn about the Sage 200 Platform which includes Sage 200 CRM. Capitalising on the benefits of the Sage 200 Platform, will provide your business with the right tools to improve and maintain customer satisfaction. The Platform integrates CRM with the accounting and stock modules of the Suite, providing you with one view of your customers across your business. For example, sales and marketing, order despatch, project management or credit control. By integrating these business processes, Sage 200 allows staff to view the same data and time previously spent re-entering data is saved and accuracy is improved, while customer requirements can be identified and fulfilled quickly and profitably.

The Sage 200 Suite is made up of a number of powerful modules, supporting more complex business processes and offering deeper analysis. The Suite allows you to pick and choose the modules you require, so you have a solution which meets your individual requirements. Each application is designed to operate independently to fulfil your immediate needs, whilst giving you the option to continue to add complementary software within the suite, if and when required.

The Sage 200 suite – an overview

Sage 200 is comprised of powerful best of breed modules, designed to work together in a unique integrated suite, providing you with the means to implement business processes more smoothly and efficiently. The Sage 200 Suite includes the applications needed to manage information and processes in every corner of your business.

At the heart of the Sage 200 Suite sits the Sage 200 Platform. The Sage 200 Platform forms the base layer onto which you can build your Sage 200 solution- adding further modules as required. The Platform includes: Sage 200 CRM (1 user) and Sage 200 Financials (1 user). This means that when you upgrade to the Sage 200 Suite you automatically receive the Sage 200 CRM module.

The Sage 200 Platform tightly integrates a strong financial and commercial system with a market leading CRM system, providing efficiency and consistency across the business in areas such as customer service, marketing and sales. For example, customer facing personnel can interact with customers more effectively by utilising relevant financial data.

Sage 200 is a comprehensive management system for every aspect of your business, integrating information from finance, distribution, manufacturing and service operations.

Construction
- Construction
- CRM

Professional Services
- Project Accounting
- CRM

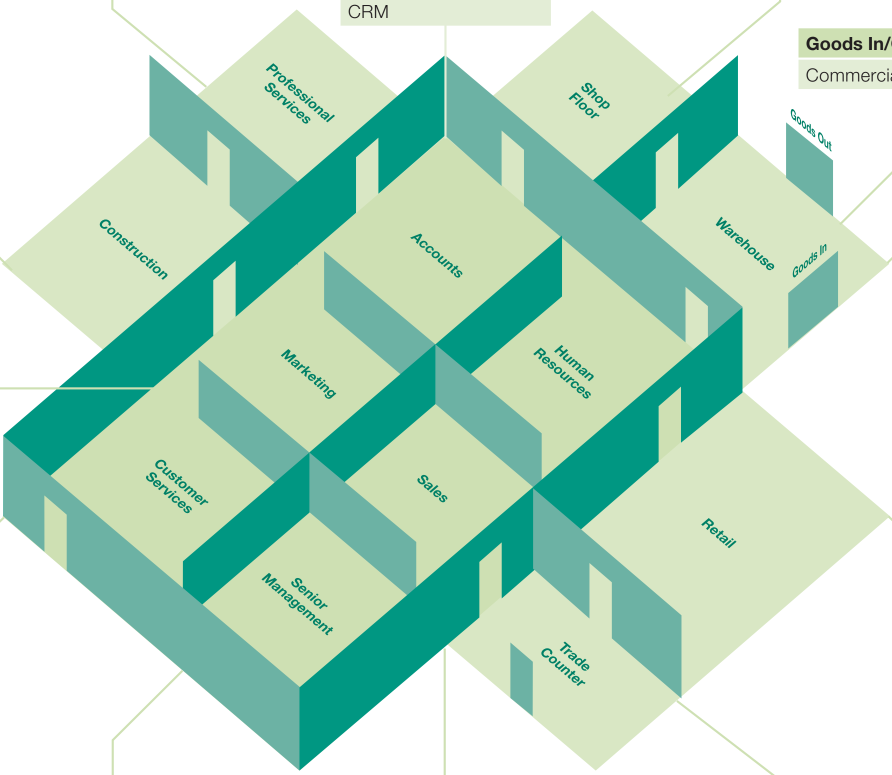
Accounts
- Financials
- Commercials
- Project Accounting
- CRM

Shop Floor
- Commercials
- Manufacturing
- Bill of Materials

Warehouse
- Commercials
- Bill of Materials
- Wholesale Retail

Goods In/Out
- Commercials

Marketing
- CRM



Customer Service
- CRM

Senior Management
- Financials
- Business analysis and forecasting
- Sage 200 Business Intelligence

Sales
- Commercials
- CRM
- Wholesale and Retail

Trade Counter
- Commercials
- Wholesale and Retail
- POS

Retail
- Commercials
- Wholesale and Retail
- POS

Notes
CRM - Customer Relationship Management
POS - Point of Sale

The Sage 200 Suite offers you:

- The ability to manage your processes from start to finish. For example, acquiring a new customer through to order fulfilment and customer service.
- An award-winning CRM module which has been specifically designed with the needs of the customer in mind, comprising sales, marketing and customer service automation, offering deep functionality and a broad feature-set
- The flexibility of being able to install standalone applications within the suite at different times means you can upgrade different areas of your business separately – minimising disruption.
- A fully customisable solution - each module is flexible and can be fully customised by a Sage Business Partner to suit your processes. In addition to the extensive range of functionality offered by the Sage 200 Suite, a broad range of complementary software is also available from third party developers, extending the system to your exact needs.
- The ability to support operations specific to specialist industries – particularly Construction, Manufacturing, Services, Retail and Wholesale/Distribution.
- Quick deployment - all applications within the suite can be quickly deployed and mapped to specific business requirements, ensuring that you are up and running quickly.

"Running a multichannel company in a competitive sector is a serious challenge. We need to be able to forget about our IT systems, while we concentrate on the business."

Alistair Barron, Founder and Managing Director, Weather Shop®

Sage 200 Suite is made up of a number of applications and modules, including the traditional accounting modules of Sage 200 Financials and Commercials:

Sage 200 Financials and Commercials Overview

The Sage 200 Financials and Commercials applications operate as powerful standalone accounts and trading modules whilst also forming part of the Sage 200 Suite. Built upon a platform of industry standard technology including Microsoft's SQL relational database technology, .NET architecture, Microsoft Windows Operating Systems and integration with Microsoft Office, these modules offer unrivalled usability and impressive scalability.

Straightforward and easy to learn, Sage 200 Financials and Commercials offer the ideal 'out of the box' support software to many companies with complex business processes, while their architecture offers enormous flexibility in customisation. As a result they can easily adapt to your businesses processes and requirements, with the capacity to develop in line with your future growth and development.

- Made up of powerful modules, designed to work together to help your business run more smoothly and efficiently. Interoperable with all other Sage 200 Suite modules.
- Sage 200 Financials comprises of the core financial ledgers to manage your fiscal processes.
- The Sage 200 Commercials module includes all the Sage 200 Financials modules, plus a set of modules to help you administer your day to day business operations including stock control, pricing, sales order processing and purchasing.
- Offers detailed reporting and analysis, to give you the information you need to make more informed business decisions.
- Provides you with unparalleled control over your distribution and supply chain.
- Flexes to match the way your business actually works.
- Quick to install and easy to use - you are up and running in days, with minimum disruption.
- Reliable, backed by over 25 years of Sage software development.
- Network-ready, supporting multiple users simultaneously.
- Built upon industry standard SQL relational database technology.
- Designed to utilise .NET architecture and integrate with your Windows operating system.
- Key information is available in the desktop, using Sage 200 views - with details just a click away
- Tight integration with Sage Payment Solutions enables credit control, and customer service staff, to quickly and easily accept credit card payments from customers
- Workspaces which have been designed to give you business critical information 'at a glance' on your desktop

Overview of the modules

Sage 200 CRM

Sage 200 CRM is an internet-based CRM solution, designed to bring the real benefits of Customer Relationship Management (CRM) to your organisation. It's designed to be easy to use and deploy, affordable and packed with useful features. With Sage CRM, you can quickly analyse, manage and synchronise sales, marketing and customer service activities across all points of contact.

Sage 200 Project Accounting

Sage 200 Project Accounting is a highly configurable and flexible costing module, ideally suited to businesses running projects or providing services. It can be adjusted to suit particular industry needs, whether the requirement is for a simple costing and analysis structure or for a more detailed one. Sage 200 Project Accounting provides you with in-depth analysis and reporting features, ensuring that projects remain on track and profit levels are maintained.

Sage 200 Web Time & Expenses (WTE)

The Sage 200 Web Time & Expenses (WTE) module allows Sage 200 Project Accounting users to enter and track their timesheet and expense claims remotely using a web browser. The system can be configured in a number of ways, for example supporting users who enter their timesheets and expenses online (using an internet connection) or through a company intranet.
One of the additional benefits of the Sage 200 WTE module is that the user does not require Sage 200 to be installed on their PC to allow the entry of timesheets and expenses.

Sage 200 Manufacturing

With our vast industry experience, we are perfectly placed to provide integrated systems that control the whole manufacturing process, from planning materials to monitoring real-time works orders. Sage 200 Manufacturing will give companies greater control over their manufacturing processes through effective scheduling of work, close tracking of resource utilisation and improved business analysis.

Sage 200 Construction

Sage 200 Construction provides business-wide efficiency for companies operating in the construction sector. From helping you to keep within contract budgets, to complying with complex and ever-changing HMRC legislation, to reducing your costs and managing your cash flow, Sage 200 Construction is ideally suited to businesses with more complex contracting requirements. Many of your processes are supported, from receiving the initial enquiry to the final accounting, leaving you free to focus on building a profitable business.

Sage 200 Wholesale and Retail

Designed to enhance Sage 200 Commercials with retail, wholesale and trade counter functionality, this module provides invaluable support for any business operating within these environments. It offers you a complete stores, retail and merchandising management system that will enhance your back office control and point-of-sale effectiveness. In addition, Wholesale and Retail integrates with Sage 200 POS, so that changes in your stock file, prices and promotions need to be applied only in one system. This eliminates duplication of data entry and amendments.

Sage Point of Sale (POS)

Sage POS is an electronic point of-sale (EPOS) system suitable for any business that needs to conduct quick, accurate and secure transactions with its customers. Typical businesses already deploying Sage POS software include retailers, wholesalers, telesales operations, catering outlets, leisure centres and visitor attractions. User-friendly and fully customisable to suit your business processes, the software can be installed on a single till or on multiple tills at various locations. It supports hardware from several point of sale manufacturers.

Sage 200 Business Intelligence

The Sage 200 Business Intelligence (BI) solution enables you to extract real intelligence about business from data accumulated every day in the normal course of operations. Sage 200 BI provides a powerful analysis and reporting tool which transforms data into meaningful intelligence. Sage 200 BI can be used and understood by all users as there is no technical knowledge or pre-requisites required to use the tool. Initially Sage 200 BI enables analysis of financial data within Sage 200, with further analysis cubes reporting on Commercial and CRM data set to follow in 2009. Sage 200 BI ensures you receive the maximum benefit from your business systems and data helping organisations in all sectors to build a significant competitive advantage.

Tip! For each of the modules listed above we have produced a range of product brochures which provide more in depth information. For more information please visit our website at www.sage.co.uk/sage200suite

	Sage 200 Financials	Sage 200 Commercials	Sage 200 Project Accounting	Sage 200 CRM	Sage 200 Manufacturing	Sage 200 Bill of Materials	Sage 200 Wholesale and Retail	Sage 200 POS	Sage 200 Construction	Sage 200 Business Intelligence
Accounting and Payroll	✔		✔							✔
Supply chain and distribution		✔		✔		✔	✔			
Project management and billing	✔	✔	✔	✔						
Sales management		✔		✔						
Contact Management				✔						
Customer management, service and support				✔						
Marketing management				✔						
Retail and wholesale		✔					✔	✔		
Construction	✔	✔		✔					✔	
Manufacturing and production		✔			✔	✔				
Business forecasting, reporting and analysis	✔			✔						✔

To find out more about each Sage 200 component, visit the Sage website or request one of our product brochures by calling our Customer Development Team on 0845 111 9988.

Sage 200 Features and Benefits

The following tables highlight the key features of the overall Suite, and looks at the Sage 200 Financials, Commercials and CRM modules in depth. These tables represent enhancements to functionality between Sage 200, above and beyond Sage 50.

Description	Explanation	Benefit
Sage Payment Solutions Integration	Sage 200 is now integrated with Sage Payment Services, allowing you to record credit card payments against transactions. All credit card details are held outside of Sage 200, therefore posing no security risk around storing these details.	You can quickly and easily record credit card transactions against orders and invoices, from within Sage 200. This eliminates the need to do two separate transactions in separate applications, improving efficiency and reducing the margin for human error.
Workspace Designer	Ten standard 'out of the box' workspaces are available along with a workspace designer tool that allows for configuration or creation of new workspaces. Workspaces can pull information from any source including applications external to Sage 200.	Workspaces have been designed to give you business critical information 'at a glance' on your desktop. Their design makes it quicker and easier to access related information. The designer tool enables advanced users to configure user defined workspaces to meet your specific requirements, allowing each individual user to have a customised workspace. For example, a user may want to combine order entry with data from a Microsoft Excel spreadsheet, or a web interface and workspaces can bring this together in one user friendly screen.
Sage 50 data conversion	A data checking and migration tool will quickly transfer your Sage 50 data into Sage 200	You can carry your data forward with confidence.
Built on the .Net framework	Sage 200 is built upon a platform of industry standard technology, including the .NET architecture	Adoption of the .NET technology future proofs Sage 200 facilitates exploitation of web services and reduces development time.
SQL Server Database	Data entered into Sage 200 are stored in a 'best of breed' relational database.	Sage 200 is built upon industry standard relational database technology. This technology provides a number of benefits including scalability, security, self tuning, improved data integrity and integration with other applications (for example Microsoft Excel®).
Multiple users	Support for higher user counts (typically up to 50 users although there is no 'hard' limit - it depends on system usage).	Supports growth in a business where additional users are required.
Security	Advanced security options allowing tailored menus per user. Access to certain other functions is also controlled by user permissions, for example Sales Order Entry options, Accounting Period and Multi-Currency set-up. In the latter two, full auditability allows you to see who has done what, and when.	Access to each area of the system is precisely controlled. A junior purchasing staff member only has access to supplier enquiry screens plus certain Purchase Order processing screens. The Nominal Ledger, with sensitive data, is off limits.
Advanced Multicurrency	Sage 200 Financials and Commercials contains advanced multi-currency features. This allows you to specify the exchange rate for a given date range, as well as allowing the usage of a spot exchange rate.	Where an increasing proportion of your trade is with foreign-currency suppliers and customers, Sage 200 Financials and Commercials offer advanced capabilities.
Amendability	Both Sage 200 Financials and Commercials can be amended to remove and add screens, fields and custom controls.	Sage 200 Financials and Commercials can be customised to specific business requirements - fields, labels, tabs, buttons and other form objects can be added, changed and removed.
Alerts	Intelligent, colour-coded alerts appear in the relevant field when a user's action could cause a problem. Amber alerts are advisory and allow the user to continue, while red alerts do not allow the user to proceed. In either case an explanation of the problem appears when the cursor is placed over the alert.	Help prevent input errors without interrupting workflow. For example, an invoice amount being entered will take a customer over their credit limit. The invoice amount is highlighted in amber and advisory text appears when the cursor is hovered over it. This particular user is allowed to override credit limits so can carry on if they wish.
Archiving	When information is archived in Sage 200 Financials and Commercials it can be easily accessed and viewed in the same way as current information.	Information can be archived off to speed up the 'live' system but the same enquiry screens are used to access live and archived information - saving time when searching for specific information.

Microsoft Excel® Integration

Enhanced Microsoft Excel integration allows information from Sage Financials and Commercials to be quickly and easily pulled into an Excel spreadsheet without the need to re-key or manually export or import data. A library of Excel functions is supplied to allow information to be pulled directly from Sage 200 into Microsoft Excel for analysis. Sample spreadsheets are supplied for Profit and Loss, Balance Sheet and Key Performance Indicators. It is easy to amend these or create new spreadsheets to suit your own business.

Description	Explanation	Benefit
Sample reports provided 'out of the box'	The Microsoft Excel integration means that new reports can be built from scratch to suit the customer's exact requirements, however a number of prewritten reports are included with the product.	Customer can get immediate benefit from this feature. For example, Key Performance Indicators, Profit and Loss, Balance Report, Sales by Product.
Microsoft Excel reports can be accessed from within Sage 200 Financials and Commercials	From either Sage 200 Financials or Commercials menu, the pre-written Microsoft Excel reports can be accessed directly. Microsoft Excel is started with the appropriate report open. Subsequently-written reports can also be added to the menu for direct access.	Quick access to functionality.

Sage 200 Financials - Features and Benefits

Managing the day to day running of your business, this fully integrated package has been developed to provide you with unrivalled business control and management reporting, utilising information held in the Nominal Ledger, Cash Book, Sales and Purchase Ledgers.

"Our extensive customer research shows that customers want suites of integrated software that work together across their business and their processes. With the Sage 200 suite, we aim to provide our customers with that software, helping them to become as efficient as possible and get real insights into what is happening in their business."

Brendan Flattery, Managing Director,
Mid Market Division, Sage (UK) Limited.

Nominal Ledger

The Sage 200 Nominal Ledger allows you greater flexibility, analysis, and visibility whilst reducing time wastage.

Description	Explanation	Benefit
Support for Open Period Accounting with up to 20 periods	Periods can be open, closed and re-opened as required; the following years period structure can also be set up in advance. Tight controls can be provided through a user access table and full auditability.	As a business currently using Sage 50, you may wish to continue using 12 open periods; alternatively you have the option of adopting a more flexible model by utilising analysis, with up to 20 periods in each financial year, or, opting for closed period accounting.
Management analysis	A flexible nominal code structure including departments and cost centres. The coding structure can be created code by code or by using an automated creation routine to create a range of nominal codes, cost centres and departments.	Allows a greater depth of analysis for all management reports and enquiries. The enquiries can also use a hierarchical structure, giving combined views for all cost centres and departments. In a kitchen company, ready-made items are sold as well as bespoke items. There's only one sales department, but P&L's for the two different types of sales need to be tracked and enquired upon. If a new item is introduced the coding required for the new item can be created quickly and easily.
Flexible profit and loss and balance sheet reporting	Compare actual against budgets or prior year/prior period, utilising cost centre and departmental breakdown.	See the performance of individual areas of your business.
Budget control	Track and control budgets. Annual budgets can be assigned and custom budget profiles created so you can calculate monthly budgets by percentage.	Quickly create monthly budget profiles based on expected quiet and busy trading months. For example, you load the sales budget for each quarter end with a big 'push' at year end.
Currency handling	For each Nominal Ledger transaction, the value in base currency (for example sterling) is stored along with the currency and exchange rate of the originating document – for example a sales invoice raised in Euros. Sage 200 Financials allows you to store foreign currency exchange rates as spot rates, period rates or a combination of both.	Management reports reflect the value of transactions in base currency and in the exchange rate applicable at the time of posting. Revaluations are therefore more accurate.

Description	Explanation	Benefit
Transactional analysis	Transactions raised from Sage 200 Financials can be associated with an analysis code.	You can report across Nominal Codes, Cost Centres and Departments for example to track a particular job or project. For example, a newspaper company produces fortnightly free newspapers and would like to track the profit/costs associated with each run. Rather than creating a separate cost centre and department for each fortnightly edition, they can use a transactional edition analysis code for each transaction and therefore quickly gain the reports they require.
Group accounts	Create custom group accounts to summarise the balance of many nominal accounts. These group accounts can be reported upon.	Retain a great degree of 'granularity' by maintaining multiple nominal accounts for similar business activities, but easily view balances across these accounts for a quick, clear view. For example, you have different nominal codes for business expenses for different departments, but group them together for reporting purposes.
Consolidation	Merge Nominal Ledger data from two or more separate companies for financial reporting, in different currencies if required.	If subsidiary companies operate in a different base currency to the head office, business-wide accounts can still be consolidated.
Batch journal entry	Place transactions on hold for authorisation before finally committing them to the Nominal Ledger.	Higher degree of control.
Graphical representation of nominal data	Bar charts and line graphs can be used to show balance and budget for current and up to 5 previous years.	Quickly see how actuals compare with budgets.

Sales Ledger

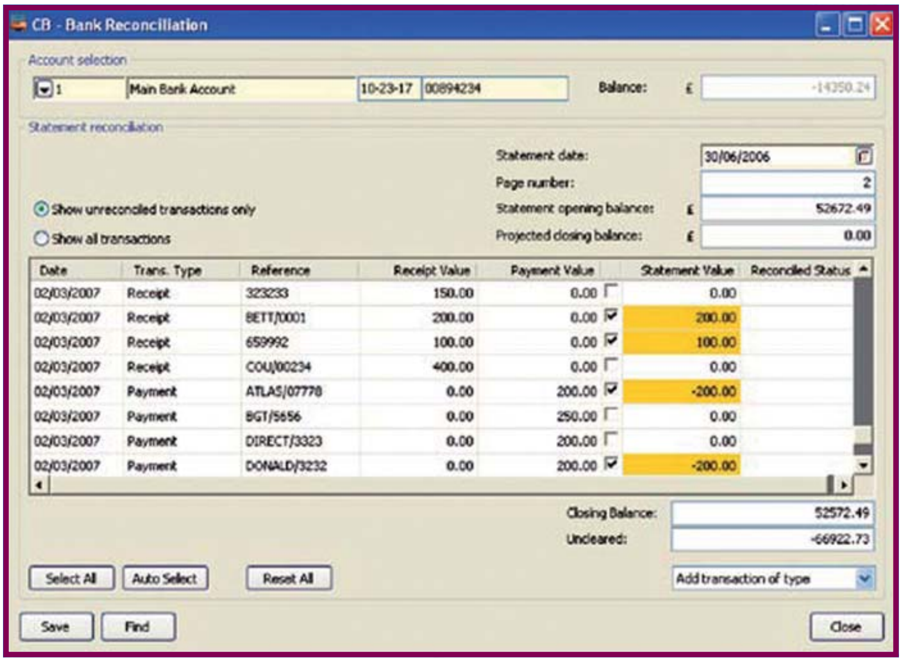
The Sage 200 Sales Ledger offers users a full suite of tools including bad debt provision, credit management, batch transactions, with flexibility in foreign exchange and trading periods.

Description	Explanation	Benefit
Unlimited analysis codes	Each customer can be categorised using unlimited analysis codes.	Detailed analysis can be produced using the unlimited analysis codes provided in Sage 200 Financials. The codes created can be linked to the Sales or Purchase Ledger and a list of valid values provided to ensure accuracy of the data captured. For example region, sales representative, industry type, customer rating, account manager, partner etc.
Trading periods	The Sales Ledger can utilise trading periods which can match the opening period accounting structure or have their own date range structure.	Flexibility. The Sales Ledger can be configured to match the open period accounting structure or to support a different structure for example daily, weekly, fortnightly, monthly or a mixture.
Advanced currency handling	The Sales Ledger will maintain turnover details of an account in both the operating currency of the customer (utilising period and spot rates) and the base currency equivalent. Transactions raised in the operating currency against an account can be revalued and a full audit of all currency loss or gains is available to you via a drill-down or report.	You can see the difference in aged debt due to exchange rate fluctuations and choose whether to revalue the debt or not. The system will also deal with both realised and unrealised exchange rate differences, providing a full audit of all losses or gains against a transaction. For example, a customer pays you in $US. Based on the daily or period exchange rates you can revalue the debt at a time that suits you. If the payment is received at a different exchange rate to the invoice Sage 200 Financials will post the realised gain or loss at that point.
Batch data entry	Amend, add to or delete entries of batches of transactions, before finally committing them to the Sales Ledger.	Keeps the system running quickly, as large batches of transactions can be kept as 'pending' until you choose to commit them to the ledger.
Head office statement facility	You can specify whether statements should be copied, or sent exclusively, to a customer's head office.	Flexibility to fit in with your customers' business processes.

Cash Book

The Sage 200 Cash Book allows a far greater choice of trading facilities through automated transactions, entry of payments in over 100 currencies and graphical representations of bank accounts.

Description	Explanation	Benefit
Process foreign currency transactions	Receipts and payments for your suppliers and customers can be entered through either the Cash Book or the Sales and Purchase Ledgers in up to 100 currencies, utilising period or spot rates.	The receipt/payment screens are simple to use, with foreign currency-related options automatically only appearing if a customer/supplier operates in a different currency.
Automate Standing Orders and Direct Debits	Arrangements can be made to automate transactions on a monthly, quarterly or user defined basis.	You can instantly view all Standing Orders and Direct Debits, with details of the day they are paid, frequency, number of payments made, number still to pay etc.
Graphical representation of bank account data	Your bank balances can be displayed graphically.	Quickly view the liquidity of all of your accounts.
Grouped transactions in Cash Book	Improvements to the Cash Book group transactions function, allows the user to drill down from the paying in slip to the individual postings.	The individual postings that make up a grouped Cash Book transaction can be clearly and easily viewed.



Cash Book: The bank reconciliation screen is clear and concise – the tick box and use of colour help identify which transactions have been reconciled.

Purchase Ledger

The Sage 200 Purchase Ledger allows you greater flexibility to fit in with your suppliers, for configuration of your accounting processes, and speeding up your payment processes.

Description	Explanation	Benefit
Automated payments routine	Quickly identify all invoices overdue for payment and those that, if paid, will attract an early settlement discount. Payments can then be made electronically or cheques and/or remittance advice printed.	Assists in cash flow management and speeds up payment processing.
Unlimited analysis codes	Each of your suppliers can be categorised using unlimited analysis codes.	Detailed analysis can be produced using the unlimited analysis codes provided in Sage 200 Financials and Commercials. The codes created can be linked to the Sales or Purchase ledger (or both) and a list of valid values provided to ensure accuracy of the data captured. Detailed reports are produced from the Purchase Ledger using a number of analysis codes for example, region, sales representative, industry type, customer rating, account manager, partner etc.
Advanced currency handling	The Purchase Ledger will maintain turnover details of an account in both the operating currency of the supplier (utilising period and spot rates) and the base currency equivalent. Transactions raised in an operating currency against an account can be revalued and a full audit of all currency loss or gains is available via a drill-down or report.	You can see the difference in aged credit due to exchange rate fluctuations and choose whether to revalue the debt or not. The system will also deal with both realised and unrealised exchange rate differences, providing a full audit of all losses or gains against a transaction. For example, you pay a supplier in $US based on the daily or period exchange rates you can revalue the debt as required. If the payment is made at an exchange rate different to the invoice Sage 200 Financials will post the realised gain or loss at that point.
Trading periods	The Purchase Ledger can utilise trading periods which can match the opening period accounting structure or have their own date range structure.	Flexibility. The Purchase Ledger can be configured to match the open period accounting structure or to support a different structure for example daily, weekly, fortnightly, monthly or a mixture.
Factor house facility	Link suppliers to a factor house who recovers payment on their behalf.	Flexibility to fit in with your suppliers' business processes.
Multiple trader contacts	Sage 200 Financials now allows the storage of an unlimited number of contacts, roles, telephone numbers and other contact information.	More customer and supplier contacts details can now be stored and retrieved giving greater flexibility, improved contact visibility and more informed staff.

Sage 200 Commercials – Features and Benefits

The Sage 200 Commercials package includes all of the Sage 200 Financials modules, plus a set of modules to help you administer your day to day business operations including stock control, pricing, sales order processing and purchase order processing.

Stock Control

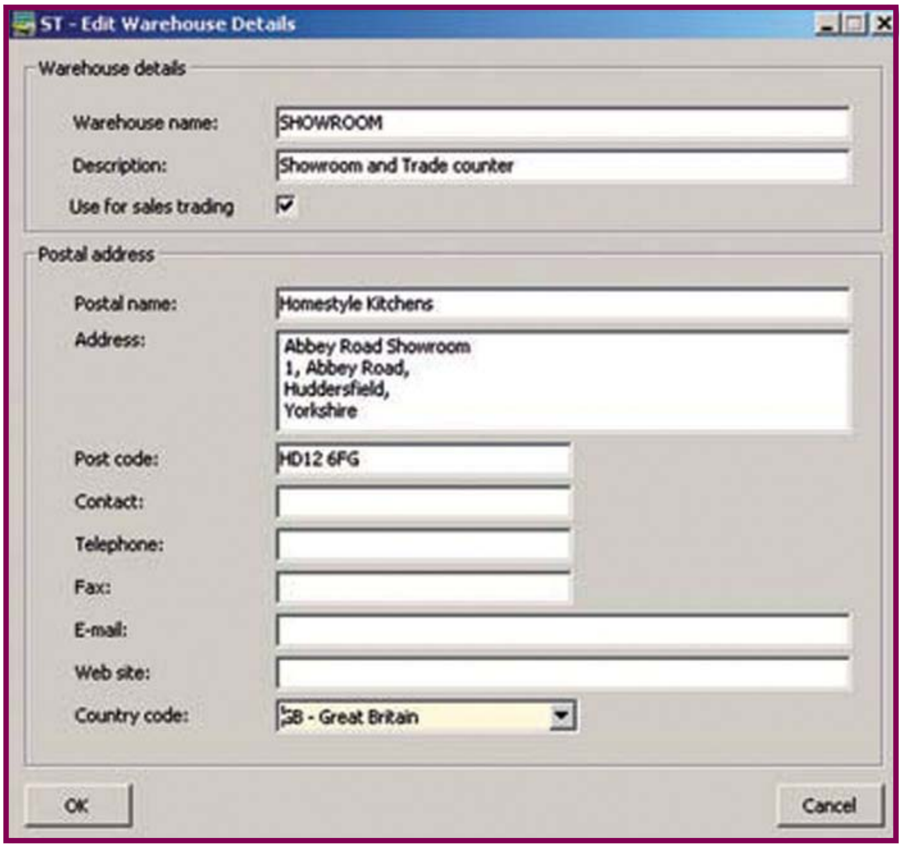
Sage 200 Stock Control allows you to organise and closely manage your product lines. You can manage different stock locations independently, in terms of replenishment, sales, reporting and stock takes. Custom search categories and wildcard searches will assist you in managing large numbers of product lines. Serial and batch controlled items can be managed, and you can buy and sell in different units of measure.

Description	Explanation	Benefit
Full, independent stock location management	If your business operates one or more locations (for example, warehouses divided into bays), Sage 200 Commercials can help you manage these effectively. Each location can be operated independently in terms of replenishment, sales, reporting and stock takes.	All warehouses can always have essential items in stock. This can save time and money as a complete order could be fulfilled from a single warehouse.
Stock take routine to include negative and traceable items	Sage 200 Commercials has the option to record the 'real' stock level for items with a negative level on the system. Further options specify whether items with outstanding purchase order receipts can have a value recorded.	Allows businesses that have fast moving stock who use the stock level routine to realign their stock levels quickly and accurately, giving a more complete view of the stock held in their business.
Supplier price lists	Sage 200 Commercials allows a list and last price to be recorded against a stock item linked to a supplier. Users can also specify (per item) whether the list or last price is used at the point of purchase ordering.	Accurate stock pricing can be achieved when raising orders, by minimising mistakes on entry of cost prices. Users also have the flexibility to maintain the default stock price manually or via an import.
Landed costs	Landed Costs represent the 'true' cost of buying an item. For example a business importing goods from abroad would have to pay the suppliers cost for the item as well as any import charges or duty. Product groups or stock items can be flagged up as using Landed Costs. The method to be used, either a fixed amount or a percentage of the stock item cost can be specified for each.	Accurate costing can be achieved to represent the actual cost of importing goods, including the supplier costs and any import duties.
Product Groups are definable as 'Traceable'	Each Product Group has traceability enabled or disabled. Within an enabled group, serial and/or batch numbers may be used for each individual product if desired.	It is simple to manage traceable items, particularly if only a limited number of items are traceable. For example, within the huge range of products sold by a DIY supplier, only wallpaper needs to be batch controlled.
A stock item may have a serial number associated with it	Each item can have a serial number.	Track high value items (or other items requiring a unique ID) through the sales process, and purchasing process if necessary. For example, mobile phone SIM cards are sold, each with a unique ID.
A stock item may have a batch number associated with it	A stock item can have a batch number associated with it.	Track items which need to be purchased, stored and sold in batches.
Supplier serial numbers can be entered when goods are received, or new serial numbers can be self-generated	Serial numbers may be created by the original manufacturer of the item and used by the distributor - or the distributor's own serial numbers are generated and used. Sage 200 Commercials can handle both scenarios.	Flexibility. Fits in with the company's way of using serial numbers. For example, computers are bought in from a manufacturer, then customised with industry-specific software and hardware. The company needs each to have a new serial number indicating their own configuration.

Description	Explanation	Benefit
Traceable items can be specified on a picking list or defined during the 'pick and pack' process	It may be more appropriate to specify the items to be sold at the Sales Order Entry stage, or (especially if there are many items in the same warehouse) to simply record which ones are picked. Items specified on the picking list can be amended at despatch if necessary - e.g. if the specified item is found to be broken.	Flexibility to adopt the best process in each instance. For example, Warehouse staff may need to pick a customised computer with a specific configuration, or, pick the monitor box on the top of the pile.
Traceable items can have 'sell-by' and 'use by' dates associated with them	Traceable items can have 'sell by' and 'use by' dates associated with them.	Effective management of perishable goods.
Facility to assign default 'use by' dates	With Sage 200 you are able to assign a use by date to each traceable stock item. This date can be specified in days, weeks, months or years.	Default use by dates saves the user time as the system automatically applies a use by date when traceable stock items are booked in.
Traceable items can have an alternative reference	A second field allows an alternative reference number to be entered for each traceable stock item.	Increased flexibility. For example, original computer manufacturer serial number can be recorded along with the self-generated serial number should a warranty issue arise with the original manufacturer.
Traceable numbers can be entered on receipt or at a later date	Serial or Batch numbers do not have to be entered at the point that goods are received.	Flexibility to adopt the best process in each instance.
Traceable item analysis attributes	You can store up to fifteen additional pieces of user defined information with each batch or serial numbered stock item.	Gives you the ability to instantly access important information that relates to the product. For example, you may record QA Standards or Inspector references for a stock item.
Serial numbers can be autogenerated	With Sage 200 you have the option to automatically generate the next number in the sequence for traceable items. Your stock record will hold a number of new settings including the next sequence number, the format of the number which includes date, order number, padding, prefix and separator options.	Fits your existing serial and batch numbering schemes. Improved accuracy and reduced time taken to enter new serial and batch numbers. For example, 100 SIM cards with consecutive numeric ID numbers are purchased and put into stock. Rather than key all ID numbers individually, the serial numbers are autogenerated.
Serial numbers do not have to be unique	Generally, serial numbers will be unique (particularly if self-generated). However this may not be the case if multiple suppliers are used for serial numbered items.	Flexibility to fit in with supplier serial number schemes.
Facility to archive traceable items.	Traceable items can be archived.	Reduces the amount of irrelevant information presented on queries and reports, improving systems performance.
'Real World' stock take process	Most businesses don't shut a warehouse to do a stock-take - they'll only count the most valuable items, or schedule stock-takes for particular products. Sage 200 Commercials supports these methods.	Sage Commercials works the way you work. For example, You decide to count only items worth more than £50 that are due for a count.
Default fufilment methods	Customer orders can be fulfilled using a number of methods including from your own stock, from a supplier via stock and from a supplier direct to the customer. These settings can be overruled at the point of sales order entry.	Flexibility to match your supply model and to handle exceptions. For example, You choose not to stock a high value item, instead shipping direct from your suppliers to your customers.
Stock item search categories	Each stock item has specific fields that can be populated with keywords, used when searching for particular products.	You don't need to know stock codes to find items. Quickly find items based on product characteristics appropriate to your product lines; speed up order entry and improve customer service by quickly being able to offer a selection of products to meet customers' requirements. e.g. find all blue shirts in size 16.

Description	Explanation	Benefit
Ability to make stock items inactive	You can set a flag to make a stock item inactive, so that it can't be ordered but remains on the system with full history. If the stock item is only temporarily inactive the flag can be removed.	You won't lose the history of a stock item that is no longer used, but staff won't be able to order it (and it won't appear in drop-down lists when selecting products for an order, speeding up order entry).
Unlimited suppliers per item	The system stores additional information such as price last paid, lead time, invoiced YTD and when supplied.	Greater flexibility, assisting you to purchase from multiple suppliers. Ideal when you always need to secure the best prices on high-volume, low-value commodity items that are readily available from multiple sources.
Unlimited alternative stock items	Unlimited alternatives to each stock item can be listed, with a preferred alternative specified.	Allows you to quickly specify a range of alternatives if a product is out of stock.
Unlimited buying prices per item	The system keeps accurate record of all buying prices for all individual stock items.	Supports margin-based selling (ie cost-plus). For example, I have 100 of this product in stock - I paid £40 for 50 of them, 20 cost £45 and 30 cost £42.
Drill down on allocation/ on order totals to Sales/ Purchase Orders	Easily view which customers have been allocated a particular product.	Allows you to prioritise orders more effectively. For example, An order comes in from a very important customer for a product that's already allocated to other customers. You can quickly see who it's allocated to, and decide who should get the product.
Default comment lines for picking lists and despatch notes	Stock items can have specific picking and handling instructions stored against the stock record. Comments can be edited or replaced at order entry.	The rights goods are despatched at the right time in the right packaging for example, a particular item needs to be packaged and handled in a certain way, the information is entered against the stock item and automatically passed down to the warehouse.
Monthly trading/ profitability enquiry	You can view the activity for each product by month in terms of sales and purchase volumes and prices.	Greater control and understanding of product activity.
Short and Extended stock descriptions and choice of description used for orders/Invoices	With Sage 200 you have a 1 x 60-character and an optional unlimited text box. You are able to choose to use long or short descriptions as appropriate.	Fuller and more detailed product descriptions can be used for websites, invoices and other documents. More presentable, appropriate and informative documentation. For example, use a concise product description on an invoice but a full product description on the website. Some products may need a longer product description (e.g. computer systems with different configurations).
Three analysis codes per stock transaction	Three customisable fields can be populated for each stock transaction.	More comprehensive information about each stock movement can be recorded and reported on. For example, if a stock item moves to manufacturing, who requested it? Or if promotional items are booked out to be used at a particular exhibition, this can be recorded (in such a case, the transaction wouldn't go via SOP so wouldn't be recorded elsewhere).
Ability to prevent sales from named warehouse/ stock location	A particular stock location can be flagged so that sales cannot be made from it.	Prevent sales of a product that should not be sold. You may have a warehouse or stock location that is bonded, quarantined, undertaking a stock take or that contains damaged goods - Commercials will allow you to prevent sales from that warehouse.
Specify areas for internally issued goods	Stock can be issued internally to individual areas of a business (as opposed to the departments defined in the Nominal Ledger).	Track internal usage of supplies; increase efficiency, accountability and budget control. For example, see how much stationery is used by a particular team within a department.

Description	Explanation	Benefit
Sales order flag	Sage 200 allows you to set a flag against stock items to determine whether they should be excluded from the Sales Ordering process.	The Sales order flag reduces the number of inappropriate stock items visible to sales people, preventing possible errors and speeding up the selection of valid sales order items.
Allows label production	Each stock item record now holds a flag to specify whether a label is required.	The system will automatically determine whether labels for stock items or batches are needed, and if so will generate them on receipt of the goods.
Ability to rename the ‘Unspecified’ bin	This ‘Unspecified’ default bin can be renamed to match your customer requirements.	Matching customer requirements helps businesses run more efficiently.



Locations: Sage 200 allows stock to be held at multiple locations, whether it be in the UK or across the world. By unchecking the ‘Use for Sales Trading’ option, users can set up quarantine or holding areas that will not appear when selecting a location to sell from in Sales Order Processing.

Price Book

Sage 200 Price Book allows you to easily manage prices and discounts across your customer base. Supporting two types of pricing schemes - discount-based and price-band based, it allows you to create 'communities' of customers to attach to either kind of scheme – or combinations of the two.

Description	Explanation	Benefit
Supports simple and complex pricing schemes	Sage 200 Commercials helps you easily manage prices and discounts across your customer base. Sage Commercials supports discountbased and price-band based price schemes. You can create 'communities' of customers to attach to either. Price schemes can therefore be as simple, or complex as your business requires.	You can create a complex pricing or discount scheme, then apply it to multiple customers without having to recreate it each time. By categorising your customers in this way you can easily make sense of the pricing that should apply to each. For example, you may have a pricing scheme based on discounts or on standard product price bands - Sage 200 Commercials will support both.
Unlimited prices per item	You can create unlimited price bands for each stock item, and rename these bands as you wish.	With unlimited price bands, Sage 200 Commercials supports more detailed pricing schemes; and with custom labels it's easier to understand and maintain prices.
Unlimited quantity breaks for discounts	Unlimited quantity discount breaks can be defined.	Greater flexibility, particularly for businesses supplying a wide range of large and small customers.
Prices for different stock units of measure	Set a specific price for each unit of measure (e.g. bottle, case and crate). This can be based on a multiple of the base price, or a special price for that quantity.	You can be flexible enough to easily sell products in quantities that suit your different customers. For example, a wine merchant could offer £5 for individual bottle, £55 per 12-bottle case, £100 for 24-bottle crate.
Prices in foreign currency	A given price band can be set up with a particular currency. You can then attach customer price groups to that price band.	Easily manage prices in more than one currency.
Price book validation	A validation routine checks that no price/discount combinations result in negative prices or margins below required levels.	You can be sure that your pricing schemes are sensible.
Ability to specify a price band on the customer record.	The ability to link a price band and a default discount group to a customer.	This speeds up the creation of new customers, as all information can be entered in the customer record.
Ability to delete a price book band in the Price Book module.	Unused price bands can now be deleted.	Improved housekeeping and reduced possibility for error.

Sales Order Processing

Sage 200 Sales Order Processing module gives you control of the entire procedure, from raising quotations to capturing the order and ensuring stock availability, to despatching goods and creating the invoices. Documentation is produced efficiently as part of this workflow as and when required, including picking lists, order acknowledgments, delivery notes and invoices. Sage 200 Commercials has been designed to ensure that orders are entered quickly and accurately, and that customer queries can be dealt with promptly and with confidence.

Description	Explanation	Benefit
Deposit Handling	Previously when a payment was recorded against an order, this payment was not accounted for until the invoice was produced and posted to the sales ledger. In Sage 200 you have the choice whether to account for the VAT on this payment and treat it as a deposit for VAT purposes, at the point of entering the payment against the order.	Ensures compliance with the VAT regulations around deposit handling. Also reduces credit control error as the payment is apparent on the customers account when the payment is received.
Create Purchase order from Sales Order	A single or multiple purchase orders can be generated directly from the sales order entry screen.	This functionality eliminates the need to use the ‘generate orders’ feature for users who wish to generate individual purchase orders for individual sales orders. Saves the user time as they no longer have to access a different menu to generate purchase orders.
Choice of full or rapid order entry	Rapid order entry assumes that standard pricing and delivery addresses are used. Orders can be entered with just a few keystrokes. Full order entry facilitates complete flexibility - change discounts, add non-stock items, free text items etc. Switch from one to the other as necessary.	Rapid order entry is ideal for quick entry of straightforward orders - resulting in quicker service and happier customers. If something out of the ordinary is needed, a click of a button takes them to Full Order Entry mode. For example, using Rapid Order Entry, an operator realises that a different delivery address will be needed for a customer order. No problem - a click of a button takes them to Full Order Entry mode where they can do this.
Trade Counter processing	This order entry mode supports the sales model where goods are taken away by the customer on the spot; this could be on account or a cash transaction could take place. With a single routine Sage 200 Commercials creates an order, allocates and despatches stock, generates and prints an invoice.	Fast processing of orders at the counter - quicker service, happier customers. For example, a builder’s merchant mainly supplies account customers by delivery, but has a trade counter where the public can buy items or account customers can quickly take away products with an invoice.
Mix order entry types within a business	One part of the business could use Trade Counter, another Full Order Entry, and another Rapid Order Entry.	Rather than one size fits all, different operators or departments can use an order entry system that suits them.
Full link for ‘Back to Back’ orders	When you enter a sales order for an item not normally carried in stock, a purchase order can be automatically raised to the item’s supplier. However you have the flexibility to choose whether to use any on-hand stock first. The back to back order settings also allow you to choose whether back to back orders are kept as separate Purchase Orders or are grouped together on one Purchase Order.	Flexibility to match your purchasing model and handle exceptions. For example, you choose not to stock a high value item, instead shipping direct from your supplier to your customers. However, a customer has recently returned one of these items, so you choose to ship this returned unit when you next receive an order.
Cost of Sales Postings	Sage 200 Commercials can (if required) automatically post the costs associated with selling an item.	Sage 200 Commercials will automatically make postings to the relevant Nominal Codes when an item is sold as part of the ordering process therefore removing the need to post Journal Entries at period end. For example, for a retail company, this may mean the cost of purchasing goods, net of carriage and purchasing discounts, less the movement in the value of the stock. For a manufacturing company, it may mean the cost of producing the goods sold.

Description	Explanation	Benefit
Flexibility in stock allocation	With Sage 200, you are able to set up rules to allocate stock in a variety of ways. You can assign stock by order number, ensuring those who placed their order first will receive their goods first. You can allocate stock by order priority, guaranteeing your most valued customers will receive your stock first. Or you can allocate stock by the delivery date that you stated to the customer. Alternatively you can allocate your stock on the basis of use by date, sell by date, first in first out, by the quantity of the order or by taking stock from bins in a pre-determined order.	Allows you more control and flexibility in stock allocation. You are able to specify how your stock is allocated in line with your current processes. If you are producing a line of perishable products with a short shelf life, you can ensure you set allocation by the use by date ensuring those products that are about to expire are sent to your customers first. If you are attempting to fulfill an order quickly you may allocate the stock produced from a bin near the loading bay.
Order Profitability	With Sage 200 Commercials you can record an original ‘estimated’ profit for a stock item; the actual profit is then updated either at the point of despatch or when invoiced.	Ensures your profit analysis is accurate.
Profit Levels	Profit levels can be shown for the full value of an order (as well as for individual line items), at order entry. This is useful to see whether the overall profitability of an order meets requirements even if individual line items do not.	Give sales people margin guidelines to allow them to win sales while protecting your profit.
Automatic or manual stock allocation	Sage 200 Commercials affords great flexibility in allocating stock to orders. Allocations can be made manually, or by a choice of automatic methods - order number (first come - first served), by prioritising certain customers or scheduling against due delivery dates.	Ensure that important customers are automatically given priority. For example, an order comes in from a very important customer for a product that’s already allocated to other customers. You can quickly see who it’s allocated to, and decide who should get the product.
Show discount calculation during order entry	If authorised, staff can see which discounts have been applied to arrive at a particular price on an order - useful if complex pricing schemes are used.	Quickly and confidently answer when a customer queries a price.
Sale return cost management	You can specify whether an operator is able to enter an estimated cost price on orders and returns.	A cost can be associated with a stock item being returned from a customer, therefore maintaining accurate profit analysis.
Easily monitor status for order line items	At an order header level, you can toggle between seeing the price details for all line items, or order status (e.g. Allocated, Despatched, Invoiced) for all line items - without even having to drill down.	Quickly see the status of sales order items to give better customer service and save time.
Ability to enter and store negative invoice lines	Negative free text items are allowed on a Sales Order to represent any part exchanges agreed as part of the order. The system provides the safeguard of checking that the order has a positive balance before saving.	By allowing part exchanges as part of the sales order routine, it removes the need to raise a credit note after the customer has placed their order. Which in turn saves time, ensures more accurate information is held and customer service is improved.
‘Price and Availability’ queries dealt with quickly	With the Customer Pricing Summary enquiry screen, you can deal with speculative pricing and availability queries for a particular stock item without creating a quotation or sales order. This includes calculating any applicable discounts, being able to view stock balances across locations, plus being able to view any live sales and purchase orders for that stock item.	Quickly answer customer price/availability queries without entering a quotation or sales order.
Extended support for repeat order	You can filter repeat orders so that only due orders are shown.	Speed up processing of orders from your regular customers.
View stock availability at order entry	With Sage 200 Commercials stock balances can be viewed across all locations without leaving the order entry screen.	A user can give accurate information to a customer about availability without leaving the Sales Order Entry screen.
View alternative stock items during order entry	Sage 200 Commercials can quickly suggest alternatives if a product is out of stock.	Offer a speedy and helpful service to your customers.

Description	Explanation	Benefit
User privileges	Set up users with their own variable rights to change prices, override credit hold, view profit etc, as appropriate.	Empower sales people to have appropriate responsibility and therefore speed up the sales process. For example, an order being placed would take a customer over their credit limit. The team leader can enter the order where a junior member of staff could not.
Six analysis codes per order line and order header	Each order line can be accompanied by up to 6 custom analysis codes, with a further 6 for the order header. These can be used for reporting.	Sales can be analysed to a superb level of detail, to suit the individual business.
Unlimited additional charges per order	Unlimited charges for delivery, carriage etc can be set up.	Greater flexibility. For example, you have additional charges for carriage, weekend despatch, installation/demonstration etc.
Comment Lines	Items on a sales order can have instructions entered at the point of raising the order. These instructions can be passed down from the Stock Item.	Default comments can be passed down relating to a stock item from the stock file, however, the user can amend or enter a new instruction while creating the order.
Deal with customer queries about existing orders swiftly	List all orders, filtering by order number, invoice number or customer if required, and drill down to view the original order.	Deal with customer queries quickly and efficiently.
Record payments with orders and take payments from credit cards	Easily take a deposit for an order (record whether full payment or deposit is received when an order is created).	Easily take deposits for high-value items and manage the subsequent payment of balances. For example, an account customer sends a cheque with their order for £75, but the cheque doesn't cover the order which is actually for £100. A quick call to the customer and they agree to put the balance on account. Sage 200 Commercials automatically creates an invoice that shows £75 paid and £25 still owing.
Payment Method for each order stored	Allowable payment methods can be pre-defined, and recorded at order entry.	Assists in reconciling expected vs actual receipts.
Reduce data entry	Many fields can be set with default values.	Reduce the number of keystrokes and accelerate order entry. For example, defaults can be set for customer delivery address, nominal code to post to for customer and cash sales, and warehouse to supply from.
Part despatch	Sage 200 Commercials allows part despatch without editing the order.	Flexibility to ship product as it suits you.
Cancelled order lines file	Keep a full history of cancelled items for analysis.	Analyse cancelled items for patterns. For example, Have customers been claiming volume discounts then cancelling? Is a sales person cancelling orders the day after month end? Is a particular product always getting cancelled, because it's always out of stock?
Prospect quotation	With Sage 200 Commercials you can store quotations for prospective customers without a sales account on the system. On conversion of the order Sage 200 Commercials will prompt for a new account to be created or for the order to be linked to an existing account.	Ensures that your sales ledger only records actual customers rather than prospective customers, keeping your financial system 'clean'.
Introduction of multiple invoice layouts	Sage 200 Commercials allows a default layout and a customerspecific invoice layout to be created. Customer-specific invoice layouts are stored against each customer account, so the correct layout is used whenever an invoice is printed for that customer. An override feature allows the default customer layouts to be overridden if a set of copy invoices with uniform format are required for internal filing.	These improvements ensure customer facing documentation is improved and processing time is reduced. By allowing multiple layouts in one print run, it removes the need to rename layouts and run multiple print runs, based around different customer ranges.
Ability to provide the EC Sales List in XML format	As of June 2006 all submissions for EC Sales must be made via the electronic submissions upload link provided on the HM Revenue and Customs website. Sage 200 Commercials can provide this information in the format required.	Ensures that your company's procedures are compliant with legislative requirements.

Purchase Order Processing

Sage 200 Commercials manages the entire Purchase Order Processing procedure, from creating a purchase order to checking goods received against purchase order and supplier invoice. Automated processes help you to manage your supply chain with confidence and efficiency - ensuring that the correct goods are always received and paid for.

Description	Explanation	Benefit
Effective supply chain management	Easily manage all your purchase orders, quickly finding individual orders and drilling down to view the details.	Save time when dealing with order queries.
Ability to allocate stock to Sales Orders at the point of goods received	At the point of booking stock in from a Purchase Order, Sage 200 will allow the user to view and allocate stock to outstanding Sales Orders that are awaiting the items, without having to enter sales order processing and allocate the stock manually.	Improves efficiency and improved customer service as stock can be allocated as soon as it's booked in. For example, If you have an urgent order for an important customer you are able to allocate that stock as soon as it arrives at your warehouse.
Full link for 'Back to Back' orders	Each Purchase Order line knows which Sales Order line it is for. With this full link between SO's and PO's, you can see the effect of the non-availability of a product on a particular PO, or the effect on a PO of the cancellation of a SO line.	Ensures that you can quickly identify which customers will be affected by non-availability of a product (and demonstrate good customer service by informing them quickly).
Standard cost variance processing	If you use standard costs, there may be a variance between the actual purchase price and the standard cost. This would traditionally need reports, journals and calculations to clear. Sage 200 Commercials keeps a running variance for each stock item, with a process to clear these down to an appropriate nominal code.	Minimises work required to clear variances. For example, You buy for £10 but your standard cost is £11. You sell the item based on the £11, leaving £1 'floating about'. Sage 200 Commercials keeps track of this and clears down to a nominal code you call Stock Value Adjustments.
GRN (Goods Received Note) processing	Sage 200 Commercials supports 2-way invoice matching (i.e. match order to invoice) and 3-way matching (match order, invoice and goods received note).	You get full control when matching up the order, the invoice and the delivery - including where there are multiple order and delivery note numbers. For example, you order 10 items; these are invoiced on two separate invoices and arrive in three deliveries of 6, 2 and 2 respectively.
Matching invoices to orders	Sage 200 Commercials will calculate a running total when matching invoice line items to orders - making it easier to spot errors as you go.	Save time and make the matching of orders and invoices less error-prone.
Disputed invoices	You can record a purchase invoice but flag it up as disputed. It won't go through to the Purchase Ledger until the dispute has been resolved - either by accepting it 'as is' or matching it to further deliveries or a credit note. You can also generate reports on disputed items.	Rather than having 'problem' invoices sat on a desk and not entered at all, or entered into the system 'as is' and applied to the ledgers directly, they'll be separately identified in the system - making it easier to identify their status. For example, you order 10 items for a total of £1000, but the invoice shows 9 for a total of £1000. You want the goods urgently so you ask the supplier to forward on the missing item, and accept the invoice against the goods actually received.
Delivery address per order line	Specify different addresses for line items on the same PO.	Save time and paperwork by creating single orders for a supplier - even when the goods are needed at different warehouses. For example, you have three warehouses, and want to replenish stock at all three from the same supplier. Rather than create three POs, you can put the entire order on one.
Choice of delivery addresses	Orders raised with your suppliers can be delivered to a number of delivery addresses including your own different premises, customers, suppliers, subcontractors and ad hoc addresses. As part of the goods received routine the system will record an inward and outward stock movement automatically.	Sage 200 Commercials supports complex supply and delivery models.

Description	Explanation	Benefit
Order generation with price negotiation	Create purchase orders manually if you wish; alternatively, the system can compile lists of what you should order based on shortfall (by warehouse, if necessary) and what's required for back-to-back orders. Then choose who to buy from and what to pay (the system defaults to the last buy price). If you wish, Sage 200 Commercials will then create a set of reports to base your negotiations on; once you're satisfied that you've got the best deal it will create and collate a series of purchase orders for you.	Saves time, organises workflow, cuts down on paperwork, improves efficiency. For example, You can get Sage 200 Commercials to calculate what product is needed to replenish stock at your three warehouses. It presents you with the prices you last paid from a selection of suppliers for those items, and you ring those suppliers to negotiate from there.
Order line history	You can view receipt and invoice entries, for full traceability of orders.	See the complete 'story' of an order line - invaluable when troubleshooting an order. For example, you've received 5 items but were invoiced 4; you can see when they were received, whether they were on one or more orders etc - and therefore have all facts to hand when you call the supplier to query.
Six analysis codes per order line and order header	Each purchase order line can be accompanied by up to 6 custom analysis codes; a further 6 are available on the order header. These can be used for reporting.	Purchases can be analysed to a superb level of detail, to suit the individual business.
Unlimited additional charges	Unlimited charges for delivery, carriage etc can be set up in advance and selected for a PO. Alternatively, ad hoc additional charges can be created at the time of order entry.	Greater flexibility.
Incomplete orders	You can write off incomplete orders.	In the real world, you don't always get exactly what you ordered - for all sorts of reasons. Sage 200 Commercials reflects this. For example, you order some goods from a supplier who send all but two items which are out of stock. They remain out of stock and are subsequently discontinued. You write the order off.
Cancelled order lines file	Sage 200 Commercials can keep a full history of cancelled items for analysis.	Analyse cancelled items for patterns. For example, Is a particular product from a particular supplier always getting cancelled, because it's always out of stock? If so, should you look at a different supplier as first choice?

Sage 200 CRM – Features and Benefits

At the heart of the Sage 200 Suite sits the Sage 200 Platform . This Platform forms the base layer onto which you can build your Sage 200 solution, it includes: Sage 200 CRM (1 user) and Sage 200 Financials (1 user). This means that when you upgrade to the Sage 200 Suite you automatically receive the Sage 200 CRM module free of charge.

Tightly integrating a strong financial and commercial system with a market leading CRM system brings you a wealth of benefits, far beyond the capabilities of your current Sage 50 system. The Sage 200 Platform allows a complete view of the customer end to end, enabling you to track their customers throughout their entire lifecycle. For example, managing the whole process of customer acquisition – from the initial marketing campaign and lead generation, through the quotation process to successfully winning the order – through to order fulfilment and flowing on to providing outstanding customer service in the future.

Sage 200 CRM – Sales Force Automation

Sage 200 CRM empowers organisations to sell effectively. Easy-to-use, Sage 200 CRM provides sales users with instant access to calendars, accounts, reports, pipelines, contacts and call lists, empowering sales people to sell.

All sales information is stored, tracked and reported providing you with meaningful and up-to-date information on the performance of the sales team. Graphics provide at-a-glance information to sales reps and sales managers on how they are doing at any point in time. Integration with the Sage 200 accounting and stock modules, gives sales staff access to both financial and non-financial customer data, for a complete 360 degree view of the customer across front and back office departments.

A. Perry & Co (Hinges) Ltd:

"Since upgrading to Sage 200 we can now take telephone orders in real time making for a slicker and quicker sales process"

Peter Wright, Accountant,
A. Perry & Co (Hinges) Ltd

With Sage 200 CRM Sales Force Automation, real-time sales opportunity analysis is provided instantly. Sage 200 CRM provides a snapshot of all opportunities within the sales pipeline, allowing sales teams to effectively analyse and manage deals at every stage. The sales process is automated, streamlining your business and enabling better business management.

Description	Explanation	Benefit
Calendar Management	Sage 200 CRM provides sales users with a complete diary solution with daily, weekly and monthly views. In addition, onscreen reminders and notification alerts are available to all sales team members.	Increases efficiency, punctuality and convenience.
Complete Bi-directional Outlook Integration	It is possible to run email, calendars and contacts through Microsoft Outlook and all interactions can be automatically synchronised with Sage 200 CRM, meaning that contacts, tasks and appointments are automatically updated in both systems.	Fosters organisational transparency within the business and enhances the quality and retention of information available to the user.
Management of Key Opportunities and Leads	Using Sage 200 CRM sales users can track leads from first contact to final sales closure.	Ensures that time and resources are invested into the deals that are most likely to close. Enables the sales team to easily identify and recruit new customers and resell or up-sell to existing accounts.
Sales Forecasting and Reporting	Point and Click reporting and graphs are provided by Sage 200 CRM along with accurate and timely forecasts which are accessible by sales representatives and managers alike.	Enables easy sales forecasting and reporting. Gives sales teams and management access to data for immediate analysis and decision-making. Delivers on-demand reports for business insight.

Description	Explanation	Benefit
Account and Activity Management	With Sage 200 CRM leads can be escalated and reassigned easily, follow-up activities can be automated and field-level security is a simple and straight-forward process.	Guarantees that leads are handled by the employees most qualified to assist the client and only relevant parties are privy to information.
Client Awareness	The most up-to-date and complete customer information is instantly and easily retrievable within Sage 200 CRM.	Helps organisations to have a better view of their customer and deliver superior customer service.
Graphical Reporting	Graphical forecasting and reporting features allow filtering of data per the user's criteria. It is also possible to use system default reports or easily create new reports with the aid of a reporting wizard.	Provides detailed data as required by businesses as well as graphical interpretations on the state of the business at any moment in time. Allows businesses to strategically plan and gain insights on future performance.
Web Quotes and Orders	Within Sage 200 CRM it is possible to enter a quote or an order remotely using the CRM interface.	Provides greater flexibility within Sage 200 CRM module, allowing orders to be entered remotely and synchronised to the sales order processing module.
Territory Management	With Sage 200 CRM, assignment rules automatically route leads to the relevant sales representatives based on territories. It is possible to create new teams and re-assign ownership of teams as well as view marketing campaigns, response rates and associated sales revenue by territory.	Delivers insight into sales effectiveness and performance by territory.
Escalation and Notification Alerts	Sage 200 CRM delivers periodic messages to sales managers summarising critical opportunity and forecast information for their direct reports.	Ensures business opportunities are always retained and worked on.
Sales Process Automation	Vital customer and prospect information can be retrieved quickly and easily, time is organised and administrative tasks are reduced to a minimum.	Automates the sales process to enable users to concentrate on their primary purpose which is selling.
Workflow	The in-built workflow can be followed out-of-the box or customised to reflect your business process.	Automates the sales process so that all sales users follow the same steps, ensuring no opportunities fall through the cracks. The sales process can be structured to suit your internal business process for maximum effectiveness.
Pipeline Management	Sage 200 CRM permits sales reps and managers to effectively analyse and manage the sales pipeline, with the ability to see and report on leads, opportunities and proposals at a glance.	Sales professionals are provided with tools to increase productivity and efficiency. Pipeline management is easier to do and at-a-glance status is available.
Document Sharing	Literature fulfilment can be automated and simplified.	Decreases administrative and other non-revenue generating activities which all impact on business performance and personal productivity.
My CRM and Team CRM	Individual and team views of activities are available.	Gives both individuals and management a single view of business activities as and when required.
Anytime Anywhere workforce	Sage 200 CRM provides the sales team with the ability to work offline or mobile wherever they are around the world.	Sage 200 CRM provides the system administrator with the ability to create profiles for offline users which optimises the download and synchronisation of data. This ensures that the sales person downloads data that is only relevant to them.
Integration with accounting modules	Sage 200 CRM is integrated with the Sage 200 accounting and stock modules. Sales staff have access to accounting functionality such as accurate pricing for quotes and orders, fulfilment data, and complex pricing rules and discounts normally held in the back office system only. Financial and non-financial information is accessible in the one place for a 360 degree view of the customer.	Allows sales teams to effectively manage, forecast and report on all phases of the sales cycle; gives sales staff a true 360 degree view of the customer across front and back office systems for better account management. The real time data views allows you to view financial and commercial information through the CRM interface. You can therefore access this information remotely, saving the need for them to be in the office or have access to the back office system.

Sage 200 CRM – Marketing Automation

Sage 200 CRM provides powerful tools for marketing teams to plan, execute and audit highly targeted marketing campaigns. Easy-to-use, Sage 200 CRM provides marketing users with the tools to target the right customer at the right time, eliminating guesswork and optimising marketing resources. With Sage 200 CRM, users have the ability to assign and analyse marketing activities efficiently and easily.

Integration with the Sage 200 accounting and stock modules, gives marketing staff the ability to create campaigns based on the financial profile, order information and purchase history of customers, and enables marketing managers to generate accurate ROI calculations for better marketing measurement.

A. Perry & Co (Hinges) Ltd:

"In the next 3-5 years we hope to add 50-60% to our turnover by fully utilising the Sage 200 CRM software to aid the marketing of our business"

Peter Wright, Accountant,
A. Perry & Co (Hinges) Ltd

With Sage 200 CRM, every phase of every marketing campaign can be tracked to provide meaningful analysis and campaign measurement. Powerful and flexible profiling of customers and prospects based on criteria selected by the marketing team as well as direct integration to mass email, makes Sage 200 CRM for Marketing an invaluable tool for organisations and marketers.

Description	Explanation	Benefit
Campaign Management	Sage 200 CRM Marketing empowers users to view activities, objectives, leads and follow-ups, to drill down to specific activities including communications, opportunities, responses, budget, costs and prospects; managing and tracking every element of every marketing campaign.	Expedites campaign analysis, makes it easier and more automated to roll out marketing campaigns and creates good business practice going forward. Puts marketing resources to their best use as it delivers detailed information and eliminates guesswork.
Segmentation and Groups	Customer data and prospect lists can be segmented based on desired criteria such as interest or demographics via user-friendly tools. Marketing lists can be exported to Microsoft Excel if required.	Targeted messages can be delivered to select groups or target audiences.
Outbound Call Management	With Sage 200 CRM it is possible to allocate and schedule target lists, calls and follow-up calls at times convenient for prospects and customers.	Integrates easily into any marketing campaign and shares call details for transparency and easy access across the company.
Email Management	Sage 200 CRM Marketing provides the functionality to mass email efficiently with the ability to create email templates, send HTML and attachments as well as store communications per campaign.	Enables employees to review the exact email message received by a specific user or prospect. Sage 200 CRM provides enhanced formatting options for emails including a multi-lingual spell checker.
Campaign Reporting	Track the success of individual or ongoing campaigns in real-time, at any stage in the campaign from the initial lead to the close and match sales revenues to specific campaigns.	Provides immediate cost versus sales analysis data and the ability to analyse marketing campaigns per lead source with user-friendly tools and reports.
Lead Management	With Sage 200 CRM Marketing, leads can be qualified per selected criteria for follow-up and tracked at each stage in the process.	Ensures leads are visible to all team members, prioritised by management, have the appropriate team member assigned to them and are maximised at all times.
Outbound Call Management	Sage 200 CRM schedules calls for telemarketers and triggers follow-ups dependent on the outcome of the calls while the details of the call, such as length and results, are saved for cross departmental future reference.	Provides telemarketers with the tools necessary for effective and efficient telemarketing campaigns.

Description	Explanation	Benefit
List Building and Management	Multiple criteria may be selected to assemble lists. It is also possible to merge documents with target lists for mass mailings. Responses to campaigns can trigger sub-lists for the next wave of the campaign, with successful responses moved to sales and non-responses kept on a reminder list (or removed if required).	Records marketing lists for future reference and provides the option to re-use successful campaign lists or import mail house lists. Offers the tools to create detailed profiles of customers and prospects over the course of the relationship. This information can be stored, reported and segmented for future campaigns.
Campaign Evaluation Tools	Analyse marketing campaigns by lead source or evaluate other important campaign details by using sophisticated, user-friendly tools and reports. Sage 200 CRM not only tracks response rates, it also permits the matching of sales revenues to specific campaigns.	Enables the status of campaigns to be viewed at any time to evaluate ongoing return on investment. Provides immediate cost versus sales analysis data. Enables management to determine marketing ROI.
Integration with accounting modules	Sage 200 CRM is integrated with the Sage 200 accounting and stock modules. Marketing staff have access to financial information on customers, giving them the ability to create marketing lists based on financial profiles and target customers with good credit ratings and purchase histories. Return on marketing investment can be measured more accurately thanks to back office integration.	Enables marketing staff to execute highly targeted campaigns based on customers' financial history and enables pin-point measurement of marketing ROI. The real time data views allows you to view financial and commercial information through the CRM interface. You can therefore access this information remotely, saving the need for them to be in the office or have access to the back office system.

Sage 200 CRM – Customer Service Automation

Sage 200 CRM Customer Service is designed to help you effectively manage and resolve issues efficiently by providing you with an easy to use user-interface and powerful feature set. This intuitive interface allows you to easily view information about your customers and resolve their issues effortlessly by employing the escalation features of Sage 200 CRM customer service.

Integration with the Sage 200 accounting and stock modules, gives customer service staff access to back and front office customer data for a complete 360 degree view of every customer, making every customer interaction more informative and effective.

> Fin Machine Company:
>
> "Departmental managers can identify any discrepancies, make informed decisions and take early, pre-emptive action rather than fire-fighting once problems arise. Having this ability plays a major part in our profitability."
>
> Craig Billingham, Financial Director, The Fin Machine Company

Providing quality customer care and maintaining satisfied customers is a challenge for every business. Sage 200 CRM allows you to take care of your new and existing customers. By defining business processes, tracking cases and solutions becomes more automated and streamlined, enabling you to focus more time on growing your business while delivering best practice customer service.

Description	Explanation	Benefit
Cases	Sage 200 CRM defines Cases as customer incidents or requests for technical assistance. Cases include Service Level Agreements. Failure to abide by the time frame allocated to a case will result in the trigger of an escalation process, such as informing the Support Manager that there is a case past its cut-off date.	Ensures that cases are attended to in a timely manner to maximise customer satisfaction and drive customer loyalty.
Knowledge Base	Articles about cases are called Solutions in Sage 200 CRM. This is a powerful resource providing users with technical notes and solutions to known issues or questions which can be stored centrally in the Knowledge Base.	Provides easy and immediate access to a central bank of information and keeps accurate records of contacts with customers via Case Tracking and Communication logs.
Search	With Sage 200 CRM, customer service representatives can search for known existing solutions to new cases in the Knowledge Base using powerful Sage 200 CRM find technology.	Reduces resolution time as it enables users to find information quickly and easily, which ultimately results in improved customer care.
Customer Information	The company/person entities within Sage 200 CRM contain a wealth of information related to each customer.	Profiles customers and their needs - this enables customer care organisations to work to meet their requirements faster based on the historical profile of the customer.
Workflow	The ability to define customer care processes and escalation points is controlled and managed by a feature in Sage 200 CRM Customer Service called Workflow.	Adhering to workflow processes results in escalation and automatic notification to a Customer Care manager if the Case remains inactive for longer than the predefined period of time. This is a powerful automatic reminder.
Customer Communications	Sage 200 CRM Customer Service enables customer care users to view communications, contacts, leads, opportunities or cases for each customer in the database.	Improves efficiency and information organisation and reduces administrative time.
Reports	Several predefined reports are available to users. Sage 200 CRM reports can be printed to PDF or exported to CSV as well as being delivered on screen.	Allows easy analysis of case details. Graphs may be added to make the report even more presentable and easier to examine. Reporting with Sage 200 CRM is powerful, yet simple and easy to do.

Description	Explanation	Benefit
Integration with accounting modules	Sage 200 CRM is integrated with the Sage 200 accounting and stock modules. Customer service staff have access to back and front office customer data for a complete 360 degree view of every customer. Greater linkage between revenues and SLA's ensure that customers get the appropriate level of service.	Empowers your organisation with critical information to build and support long-term customer satisfaction and loyalty. Maximises every customer interaction and experience. The real time data views allows you to view financial and commercial information through the CRM interface. You can therefore access this information remotely, saving the need for them to be in the office or have access to the back office system.

Customisation and Integration

Customisable to meet specific business requirements

We know that no two businesses are alike, but no matter what your needs are you'll find that Sage 200 Financials and Commercials can be customised by your Sage Business Partner to suit the most exacting of requirements.

Sage 200 Financials and Commercials forms can be customised to include set default field values, tab order, form and field level security, disabling buttons or hiding information based on user permissions.

Customisation is held separately from the 'core' Sage 200 Financials and Commercials applications so you can take full advantage of upgrades and updates to Sage 200 Financials and Commercials. Changes can also easily be made to the customisation in line with the changing requirements of your business.

This approach to interaction with the 'core' product also makes it straightforward for Sage Business Partners to fully integrate their own applications with Sage 200 Financials and Commercials - creating a complete solution for your business.

For more information, please contact your Sage Business Partner:

To find out more about the full range of Sage 200 modules or to discuss how and when moving to Sage 200 will be right for you, talk to your Business Partner or contact us directly for a health check on 0845 111 9988.

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