What's new guide

Sage 200 Suite v2011

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Sage 200 Suite 2011 is scheduled to launch in summer 2011. This latest version of the Suite builds on our market led strategy and takes us further on our journey towards our vision of Sage 200 for a connected world. We have listened closely to feedback, utilising wish lists and focus groups, as well as adding new features which support those trends in the lower mid-market which are relevant to our customers, highlights of the release include:

- New improved Web, Time & Expenses
- New Migration Utility
- New Business Intelligence for Project Accounting
- New improved Sage 200 mobile – now includes iPhone
- CRM v7.1 Integration

The 2011 release builds on the key themes of:

Accessibility – Market trends tell us that customers want accessibility of information and immediacy of response – our customers want the ability to make smarter faster decisions. This release takes further steps to providing customers with the choice of how they access their data wherever they are on using whatever device they choose to use.

Information Management – Our phased approach to the information management strategy continues by the delivery of business intelligence for Project Accounting, giving business intelligence an even broader reach within the Suite.

Improved Usability – We want systems that are easy for our customers to use and require little or no training, so we have really focussed on improving usability within this release, particularly for Web, Time and Expenses (WTE) and the new migration tool. So far we have conducted over 30 usability tests with end users, partners and internal candidates who had never used the system before. These hands-on tests helped us spot design flaws early on and makes us confident that users will find it easy to use.

Sage 200 Suite v2011 features and benefits

Sage 200 Suite enhancements				
ITS ref	**Feature**	**Explanation**	**Benefits**	**Location in software**
	New migration tool	The new data migration tool takes standard data from Sage 50 2011 to Sage 200. The tool allows the data to be checked and verified before commencing the migration.	A much more flexible, user friendly and efficient migration tool that allows Business Partners to: • Specify whether product groups are for traceable items • Assign Sage 50 departments to cost centres or departments • Migrate part processed sales orders • Migrate data far quicker than ever before	N\A
	New in-product surveys	The new in-product survey will provide a platform for users to be able to provide feedback directly to the product team. This will enable Sage to analyse feedback, identify issues and provide feedback directly to Business Partners.	Direct user feedback will enable Sage to: • Quickly identify user issues and learn how they feel about the product • Discuss feedback with Business Partners • Provide a consistent platform to gather in-depth information about Sage 200 and ultimately further improve the proposition	N\A
	Improved Sage 200 Mobile	We have extended the current mobile offering to enable you to view and search via iPhone. This is available with both the 2010 and 2011 releases. We currently support the Blackberry 9000 series, 8900 and 8520. We'll confirm details of the iPhones we will support closer to the release date. The search functionality via data feeds allows you to drill and explore data with the ability to search customers, customer transactions, Sales Order Processing (SOP), stock items and suppliers.	You can view data using workspaces for Mobile providing a richer presentation and enhanced user experience. While you'll get out of the box views, Business Partners can also create views to meet individual requirements, offering a tailorable solution. Out of the box views include: • Sales Revenue Position • Cash Position • Project Position • My Sales Summary Allows you to access data whilst on the move, giving you the power to make decisions when you're out and about. The data currently available is aimed at the Financial Director, Managing Director as well as sales and Project Manager roles.	Set up within System Admin tool. Mobile client installed on Blackberry/iPhone device.

Sage 200 CRM enhancements				
Now more than ever, companies need to maximise workplace effectiveness, drive staff productivity and put the customer at the heart of their business processes to stay ahead of the competition. Sage 200 CRM v7.1 delivers the tools companies need to communicate more effectively, collaborate better internally and compete in today's marketplace.				
ITS ref	**Feature**	**Explanation**	**Benefits**	**Location in software**
	Sage200 E-marketing for Sage CRM	Allows customers to create E-marketing Campaigns via a dedicated E-marketing area. E-marketing also provides an overview or detailed analysis of the E-marketing Activity Results.	Sage 200 E-marketing for CRM: • Enables users to execute high-quality, targeted email marketing campaigns and create drip marketing campaigns quickly and easily. • Automatically delivers email communications to the right people at the right time for maximum impact. • Enables marketers to calculate accurate ROI and deliver hot leads to the sales team. • Simple 3-step wizard enables users to create new e-marketing campaigns with ease and a choice of over 90 templates.	CRM marketing
	Sage 200 CRM Communications Management	Enables seamless syncing of Appointments, Tasks and Contacts between Sage 200 CRM and the MS Exchange Server. Also delivers support for Exchange in the Cloud, Small Business Server and Outlook Web Mail.	Sage 200 CRM communications management • Provides a more robust, reliable and stable synchronisation platform. • Enables users to access up-to-date appointments, tasks and contacts on their smartphone, laptop or desktop PC for maximum ease-of use and productivity. • System administrators benefit from a single point of entry to manage existing Exchange users and add new users.	N\A
	Marketing Module Enhancements	Several enhancements to the marketing area including the ability to edit person / company details directly and convert leads to opportunities from the outbound call list. Customisable workflow for campaigns, the ability to clone campaigns and more tightly integrated groups to Campaigns. Customers can also attach entity documents to emails and mass emails.	Sage 200 CRM's total campaign management functionality drives marketing-wide collaboration by enabling marketing users to share best practice within teams and re-create campaigns quickly and easily, saving valuable time.	CRM marketing

	Interactive Dashboard Enhancements	Enhancing the existing dashboards, which were introduced with v7 – improvements include: • Flexible Dashboard Layout • Multi-link Gadgets • Company Summary Dashboard • Quick Start / Welcome page Dashboard • Extend LinkedIn Gadget for other social networking sites	Provides increased flexibility with the ability to move and resize gadgets, allowing users to create bespoke dashboards. The dashboard has been enhanced to include the ability to dynamically link multiple gadgets on a single screen, maximising user productivity.	CRM dashboards
	New Report Charts	Incorporating FusionCharts technology to create eye catching charts.	Users can create highly graphical report charts quickly and easily with Sage 200 CRM v7.1. Provides at-a-glance business insight, report charts and graphics are now more visually impactful, making it easier for management and users to see comparisons, patterns, and trends in their data.	CRM reporting
	Enhancements to relationship entity within CRM	Feedback from customers indicated that the account entity made the operation of CRM too complex for many customers who did not require support for one-to-many type relationships. As a consequence we chose to hide the account entity as part of the 2010 release. However we recognise some customers do have a requirement to view these company relationships. Therefore in 2011 we have utilised the relationships functionality to allow customers to link associated companies together to view notes, communications, opportunities, cases, people, addresses, quotes, orders and docs for individual companies or companies within a group.	Enables support of one-to-many relationships for customers who require it and supports consolidated enquiries for one-to-many relationships.	CRM

Sage 200 Financials and Commercials enhancements				
ITS ref	**Feature**	**Explanation**	**Benefits**	**Location in software**
1825	**Triangulated goods on the EC Sales List (ESL)**.	Currently reporting on the EC Sales List does not distinguish triangulated goods. A new checkbox 'Triangulated' has been added to the Sales Ledger and Sales Order entry forms. This is disabled until a customer is selected with a country code belonging to the EU and which is different from the base company's country code. By flagging the box, EU Triangulation will be applied to the transaction. In addition un-posted sales ledger transaction batches have also been extended to include the indicator.	Enables support for reporting triangulated goods on the EC Sales List. Building upon the manual functionality available in Sage 50, ensuring that Sage 50 functionality is not only maintained but improved for those customers upgrading from Sage 50.	Sales ledger and sale order processing

Sage 200 Project Accounting enhancements				
ITS ref	**Feature**	**Explanation**	**Benefits**	**Location in software**
322, 361, 1482	**Archiving within project accounting**	We have introduced a new criterion on the Reports and Enquiries for Cost transactions 'Exclude fully billed transactions'. This excludes transactions from the list if the 'outstanding to bill' is 0. Please note this criterion is not available on Profitability enquiries and reports. In addition customers can now flag a whole project as archived so it is excluded from reports and enquiries. We have also introduced reports to allow customers to view archived project information.	Enables greater control of projects and their transactions. Improves user experience by excluding irrelevant information. Addresses the most frequent wish list request for Project Accounting.	Project accounting
114, 435, 493, 528, 691, 836 and 2628	**Replacement Web, Time and Expenses (WTE)**	The WTE module has been completely re-written and will now be available by default to all customers who purchase the project accounting module. The new improved WTE provides remote access via a browser to a single dashboard that provides a complete overview of the user's timesheets and expense status. Users can now view, enter and print timesheets and expenses remotely and authorisers can authorise remotely. Reliance on the Application Integration Server (AIS) has been removed, providing improved connectivity and a more robust	This new module has a simple user interface ensuring a great user experience for those infrequent or non-typical Sage 200 users. It also allows users and authorisers to print, submit or authorise timesheets and expenses regardless of location. Authorisers can access a dashboard which provides an overview of all of the items that require their attention, improving usability and accessibility. It provides a more robust interface between WTE and project accounting and improves the consistency of setup in WTE and project accounting. The improved integration enables users to filter by projects or	Project accounting

		solution. Improved integration between WTE and Sage 200 means that updates such as resource filtering in project accounting will be surfaced in WTE. NB: We'll confirm details of the browsers we will support closer to the release date.	resource, so they only view information that's relevant to them.	

Sage 200 Business Intelligence enhancements for Project Accounting				
With this release we have extended the Business Intelligence functionality to include the Project Accounting module, the existing financial and commercial data cubes have also been amended to include project data where applicable. Here we list the new cubes which are being introduced and what analysis they enable.				
Data Cube:	**Enables Analysis of:**	**By:**	**Out-of-box reports**	**Example scenario**
Project costs, revenues and profitability	Costs and revenue transactions linked with the various types of project item.	Project Project group Project item Transaction Type Resource Time Period	• Costs by project and group in last 6 months • Project revenue as percentage of total costs • Project costs by item and resource this Year • Gross profit by project this year and last • Most profitable projects (Net) • Billable status of project costs incurred this year • Project profitability analysis	Enable you to answer such questions as: • How do my project costs, compare year on year? How do they compare at project level (i.e. comparing kitchen projects with bathroom projects)? • Does the profitability of all my projects vary? Does the profitability vary if I use an additional information field (i.e. across regions) to analyse the costs? • How do the costs of certain group levels in my projects vary with the resources used? • How quickly do I receive the revenue for my projects? Does this vary if I analyse the results, using an additional information field (e.g. by project manager)? • Which are my most profitable projects this year?

Budgets v Actuals	Project budgets and the actual cost and revenue totals associated with them.	Time Period Project Project Groups or Items Resource	• Revenue budget v actuals by project • Cost budgets v actuals by project structure this year • Projects exceeding cost budget any period this year • Projects below revenue budget at the latest period • Cost budget v actuals for project items by project • Project budget analysis	Enable you to answer such questions as: • Which projects exceeded their cost budget at the end of last month? • How do actuals compare with current/previous budget, month by month, last year? • Which projects, at 90% complete or more, have not yet achieved 90% of their budgeted revenue? • What is the cumulative variance for all my projects, analysed using an additional information field e.g. region?
Resource Utilisation	Usage of different resources, whether individual persons or groups. Comparison of applicable cost and charge rates.	Time periods per project, Project groups or items Resource status	• Hours posted by project and accounting period • Resource cost and charge value this year • Chargeable hours by resource - this year and last • Project groups using most resources this year • Project resource analysis	Enable you to answer such questions as: • How many hours have I spent on particular activities (i.e. plumbing) this month? Which resources have I used most? • Does the use of resources (i.e. electricians), vary from project to project? • What is the average cost per hour for resources (e.g. labourers)? Does this vary if I analyse using an additional information field, for example by region? • What times of the year do I use certain resource groups the most? • Analysing hours by month, how often do I pay overtime?

Sage 200 Bill Of Materials (BOM) enhancements				
ITS ref	**Feature**	**Explanation**	**Benefits**	**Location in software**
	BOM costing analysis	A Cost Session is captured every time a Bill of Material is costed and the user is able to drill down on a session to see more detailed information. Costing Analysis allows customers to visualise their costing data graphically using charts. In addition, it allows costing data from BOM to be displayed alongside Planned and Actual costs from Works Orders if Works Order Processing is installed.	Enables quick and easy interpretation of data for costings in their own right or against planned and actual costs.	Sage 200 BOM
16143	**Reverse BOM Build**	It is now possible to reverse the BOM build process if a BOM is built in error. Please note, this is not intended to support salvage operations, it is for error correction purposes only.	Allows customers to dismantle BOMs which have been built in error.	Sage 200 BOM
	BOM workspace	A new workspace has been created to enable you to view data from the BOM record.	All the benefits of workspaces – key information is brought together in single screens so users have all the information relevant to their day to day role at their fingertips.	Sage 200 BOM

Sage 200 Manufacturing enhancements				
ITS ref	**Feature**	**Explanation**	**Benefits**	**Location in software**
	Integration of Preactor Graphical Planner v11.01	The changes to Preactor v11.01 are considerable including changes in functionality and User Interface.	Allows our customers to receive all the benefits of latest version of Preactor Graphical Planner v11.01 (updated from v8). The latest version includes new functionality and a revamped User Interface making it easier to use, navigate and create reports.	Sage 200 Manufacturing
	Update operations and resources	It is now possible to batch update Bill Of Material (BOM) operations, operation rates, labour resource details, machine resource details and tool resource details.	It is now easier to maintain and update BOM setup data, saving you time and improving efficiency.	Sage 200 Manufacturing