Sage 50 - 200 upgrade datasheet

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 and grow with you.

The following tables highlight the key features of the overall Suite and looks at functionality that comes as standard within the Suite in Sage 200 Financials, CRM and Business Intelligence as well as additional functionality which is available with Commercials. These tables represent enhancements to functionality between Sage 200, above and beyond Sage 50.

Description	Explanation	Benefit
Sage 200 Mobile	Sage 200 data is accessible to view and search via a Blackberry © and iPhone ® smartphone. The Search functionality via data feeds allows you to drill and explore data with the ability to search customers, customer transactions, SOP, stock items and suppliers. View functionality is via workspaces for Mobile giving a richer presentation and enhanced user experience. You are not restricted to the out of the box views; in addition Business Partners can create views to meet your individual requirements. The following views are supplied out of the box: Sales Revenue Position, Cash Position, Project Position and My Sales summary.	Allows you to access data whilst on the move, giving you the power to make decisions when not in the office. The data currently available out of the box is aimed at the Financial Director, Managing Director, Sales Person and Project Manager roles.
Sage Payment Solutions Integration	Sage 200 is 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	Numerous '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, you 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 is 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.

Description	Explanation	Benefit
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. E.g. s 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	The majority of the Suite 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.
Excel™ Integration		
Advanced reporting and analysis as standard	Sage 200 is supplied with comprehensive reporting and analysis capabilities including over 250 ready made reports and layouts, an intuitive report design tool to create and customise reports, enhanced Excel integration and a sophisticated business intelligence tool all as standard	You get immediate benefit as Sage 200 enables both static and dynamic reporting and analysis so you can select the type of reporting which is most relevant to the job in hand. For example, Key Performance Indicators, Profit and Loss, Balance Report, Sales by Product.

Sage 200 Financials - features and benefits

Managing the day to day running of your business, Sage 200 Financials 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.

Description	Explanation	Benefit
Nominal Ledger		
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. E.g. 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.

Description	Explanation	Benefit
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.
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. Financial reports can be produced for individual or a group configurations.
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	Enter a batch of journals and if required 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		
Triangulated goods on the EC Sales List (ESL)	A check box 'Triangulated' exists in 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
User defined analysis codes	Each customer can be categorised using up to 20 analysis codes.	Detailed analysis can be produced using the user defined analysis codes 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 accounting period structure or have your own date range structure.	Flexibility. The Sales Ledger can be configured to match the accounting period 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.

Description	Explanation	Benefit
Cash Book		
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 different 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	The Cash Book group transactions function, allows you 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.
Purchase Ledger		
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 or e-mailed directly to supplier or factor house	Assists in cash flow management and speeds up payment processing.
User defined analysis codes	Each of your suppliers can be categorised using up to 20 analysis codes.	Detailed analysis can be produced using the user defined 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 accounting period structure or have your own date range structure.	Flexibility. The Purchase Ledger can be configured to match the accounting period 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.

Description	Explanation	Benefit
Stock Control		
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.
Multi-user stock take routine to include negative and traceable items and counting by bin location	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 stock levels quickly and accurately, giving a more complete view of the stock held in your business.
Supplier price lists	Sage 200 Commercials allows a list and last price to be recorded against a stock item linked to a supplier. You 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. You 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. For example, within the huge range of products sold by a DIY supplier, wallpaper and paint need to be batch controlled, whereas other items may not.
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, for example food items, wallpaper, paint etc.
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 can be generated and used. Sage 200 Commercials can handle both scenarios.	Flexibility. Fits in with the your 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.
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 you valuable 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.

Description	Explanation	Benefit
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.
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 down to customer or supplier level.
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).
Up to 20 analysis codes per stock transaction	Up to 20 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).

Description	Explanation	Benefit
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.
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.
Price Book		
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.
Sales Order Processing		
Deposit Handling	In Sage 200 you have the choice whether to account for the VAT on a deposit at the point of entering the payment against the order or at point of invoice	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 those who wish to generate individual purchase orders for individual sales orders. Saves valuable time as you 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.

Description	Explanation	Benefit
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.
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.

Description	Explanation	Benefit
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.	Enables you to 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.
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.
20 analysis codes per order line and order header	Each order line can be accompanied by up to 20 custom analysis codes, with a further 20 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'.
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	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.

Description	Explanation	Benefit
Purchase Order Processing		
Enhanced purchase order authorisation and remote alerts	You can apply various levels of authorisation limits and also authorise orders remotely via a secure website whilst out of the office.	Gives you full control over your authorisation processes, making the order process more secure, with clear and concise rules allowing for a flexible approach to meet your requirements in this area. In addition, out of office functionality helps to keep the workflow going when a person is not present to authorise orders and workspaces make the visibility of orders within the authorisation process far simpler and easier to use.
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 you 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 costings, 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 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.
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.

Description	Explanation	Benefit
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.
Up to 20 analysis codes per order line and order header	Each purchase order line can be accompanied by up to 20 custom analysis codes; a further 20 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

The Sage 200 platform is at the centre of the Suite, integrating a strong financial system, a market leading CRM system and the analytical tools of our Business Intelligence system, it provides the solid dependable foundation that you can build upon, choosing the most appropriate software to meet your specific business requirements.

Sage 200 CRM provides you with a 360 degree view of your customer, enabling you to manage the complete customer lifecycle from first point of contact through to maintaining and building a valuable relationship with your customer.

Description	Explanation	Benefit
Sales Force Automation		
Calendar Management	Sage 200 CRM provides sales staff 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.
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.
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 you to have a better view of your customer and deliver superior customer service.

Description	Explanation	Benefit
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 sales staff 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 staff 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.
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.
Marketing Automation		
Sage Emarketing for Sage 200 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.	· 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.
Campaign Management	Sage 200 CRM Marketing empowers you 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.

Description	Explanation	Benefit
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 customer 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.
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.
Customer Service Automation		
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 you 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 you to find information quickly and easily, which ultimately results in improved customer care.

Description	Explanation	Benefit
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 staff 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. 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.
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.

Sage 200 Business Intelligence - features and benefits

Sage 200 Business Intelligence allows quick access to your data, with multi dimensional analysis allowing data to be viewed easily from different angles. You immediately achieve greater control with increased visibility of your business and powerful analytic tools at your fingertips. It can help you achieve that competitive advantage by helping you to pinpoint exception areas such as high and low performance, identify inefficient processes and highlight exciting opportunities for innovation and business growth.

Feature	Benefits
Reporting and analytics within the comfort of Microsoft Excel	Sage 200 BI brings business data into the familiar Microsoft Excel environment allowing quick analysis of company data from many different angles. This means the features of Excel, such as ease of managing and manipulating data, calculations and macros can all be used to enhance the reports created using Sage 200 BI.
Pre-defined reports out-of-the-box	Sage 200 BI is supplied with time saving, pre defined reports allowing you to analyse and understand financials, commercials and projects information within your Sage 200 solution. For example Profit & Loss by cost centre and department, Sales by Customer by Month, Stock Valuation last 3 months, Trend In Overdue orders and Stock Movements by Product Group - and many more.
Make faster, more informed and confident strategic decisions	Sage 200 BI provides quick and easy access to information that has not typically been available through Sage 200. The report fields can be easily changed in seconds to allow quick and easy reporting and analysis.
Save essential time on reporting	Sage 200 BI provides a superior alternative to complex spreadsheet reporting with reports easy to create, from easy to access data that is automatically refreshed. Sage 200 BI gives one version of the truth and reduces the need for complex time consuming spreadsheets which require manual intervention and manipulation - it enables quick, easy analysis, allowing you to identify trends and anomalies
Easy and fast deployment	As part of the Sage 200 Platform, Sage 200 BI is a fast and easy tool which can be deployed across the business in a few hours with minimal disruption to your business.
Uses reliable Microsoft SQL Server Analysis Services	Sage 200 BI uses SQL Server Analysis Services which is a market leading OLAP technology. Therefore Sage 200 BI is built using market leading Microsoft technology.
Report Wizard	Sage 200 BI comes with a report wizard as standard. The report wizard is a powerful editing tool which provides flexibility and ease of use by enabling you to extract the information you require and display it the way you want.
Drill down and drill to detail	Drill down allows you to easily go from a summary report to detailed analysis on specific items in the report. You can drill down through increasing levels of detail or to the transaction data for further, detailed analysis. Drill to detail allows you to show the underlying values that make up the totals that are shown in a report.
Change the report parameters	Enables multi-dimensional analysis, by allowing you to quickly flick between data by changing the report to get a different view of your data and a better insight of your business.
Sort, Filter and subtotal functionality	This functionality allows the data to be manipulated making it easy to view and analyse. These additional features provide additional flexibility allowing you to create the reports you require to suit your business needs.
Conditional Formatting	Provides a very quick and easy method of spotting exceptions within a report by highlighting anomalies within your data, thus saving you valuable time.

Feature	Benefits
Flexible layout options to produce formal reports	Produce professional and aesthetic reports and dashboards quickly and easily – ideal for use in presentations. You can layout all forms of reports exactly as required within Microsoft Excel. You can also build dashboard reports with multiple linked queries and charts.
Dynamic Charts	Easily add charts to reports to give a graphical representation of the data - ideal for presentations and reporting.
Ad-hoc analysis via Report Layout Panel	Provides full flexibility to create reports, which can be configured and designed specifically for your requirements.
Report Sets	Automate the creation of multiple reports to create report packs and save time on reporting.
Link reports	Allows you to create a dashboard of a number of reports that can all be linked and updated together by enabling synchronisation between reports within a workbook.
Named Sets	Save time and improve reporting by creating sets specific to the business. For example, create a set for the last 6 months to quickly be able to show data for each of the previous 6 months.
Calculated Members	Extend reports by creating additional calculations as required. You can define additional calculations based on existing data within a report.
Pre-defined data cubes	Sage 200 BI comes with powerful pre-defined data cubes enabling every view of your data. Sage 200 BI has 5 financial data cubes, 8 commercial data cubes and 3 Project Accounting data cubes enabling quick access to all your financial, commercials and project data.

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