

# Sage Line 100 - 200 upgrade datasheet

## Sage 200 features and benefits

For many years, Line 100 was the market-leading accounts and trading solution in its class. However, Line 100 is based on DOS technology which is increasingly unsupported on modern day hardware and software operating systems. Newer, market leading technologies are now available. These technologies 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 Line 100**

Description	Explanation	Benefit
<b>Sage 200 Mobile</b>	Sage 200 data is accessible to view and search via a Blackberry © 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.
<b>Sage Payment Solutions Integration</b>	Sage 200 is integrated with Sage Payment Solutions, 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.
<b>Workspace Designer</b>	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, 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.
<b>Line 100 data conversion</b>	A data checking and migration tool quickly transfers your Line 100 data into Sage 200.	You can carry your data forward with confidence.
<b>Built on the .Net framework</b>	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.
<b>SQL Server Database</b>	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®).
<b>List based User Interface</b>	Information in a ledger is presented in the form of a continuous list which can be sorted (ascending/ descending) according to the column headings, for example, a list of customers in Sales Ledger. You can now configure which columns appear on their lists as well as applying and saving filters to produce lists for particular activities (debt chasing etc). By selecting multiple rows from the list, you can perform a range of appropriate actions by right-clicking or selecting an option from the toolbar.	You have flexibility in how to work within either Sage 200 Financials or Commercials. Using the function based approach, you can perform the same task on a number of records. For example, raising sales order. The 'list-based' approach works in a range of ways, for example, starting with the chosen records of a customer, supplier or stock item and then performing a range of actions on them. Adoption of a list-based approach streamlines a number of business functions.

Description	Explanation	Benefit
<b>Desktop views</b>	The Sage 200 Financials and Commercials packages utilise an interactive 'desktop' that incorporates a number of amendable 'views'. A view presents the information relevant to you on screen, without the need to run reports or enquiries. The view also provides a number of processing options on the information presented.	Sage 200 Financials and Commercials can be tailored to the exact needs of each user, prioritising the information and processes of each user and automatically placing it at their fingertips, maximising efficiency. For example, The Sage 200 Financials or Commercials desktop of a particular user could include views showing stock item below re-order level, and sales orders due for despatch. The user can then interact with the view selecting orders and despatching them.
<b>Sage Report Designer</b>	The Sage Report Designer (as currently used by Sage 50) has been incorporated into the Sage 200 Suite (with the exception of Construction module), this unified reporting layer allows much enhanced report design.	The Sage report designer is an intuitive, easy to use, much more flexible tool so it is easier to meet your reporting needs. The Sage report designer brings a host of benefits including: <ul style="list-style-type: none"> <li>· Simplified reporting scheme</li> <li>· Simplified use of analysis codes for reporting</li> <li>· Improved look and feel and usability</li> <li>· Report editing in preview mode</li> </ul>
<b>Ability to send information directly to Microsoft Excel</b>	Microsoft Excel is heavily used in businesses as a means to analyse information. Sage 200 Financials and Commercials allows the user to send information from a list view or form directly to a spreadsheet.	Exporting information such as budgets from the Nominal Ledger in Sage 200 Financials and Commercials into Microsoft Excel is now quicker and easier. This Information can be modified and manipulated in Excel and reimported into Sage 200 Financials and Commercials.
<b>Advanced reporting and analysis as standard</b>	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
<b>Support for Open Period Accounting with up to 20 periods</b>	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 Line 100, you may wish to continue using 12 or 13 periods with only the current period open. However you have the option of adopting a more flexible model by utilising analysis, with up to 20 periods open in each financial year.
<b>Transactional analysis</b>	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 analysis code for each edition and therefore quickly gain the reports they require.
<b>Foreign currency trading</b>	Realised loss or gains are automatically posted on allocation and a full audit history of all currency loss or gains is available via a drill-down or report.	Sage 200 Financials will 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 and provide a full history.
<b>Foreign currency trading Nominal Ledger</b>	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.	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
<b>Foreign currency trading utilising period or spot exchange rates</b>	Sage 200 Financials allows you to specify the exchange rate for a given date range, as well as allowing the usage of a spot exchange rate. Where a currency uses both spot and period exchange rates the default can be set against a customer or supplier.	Flexibility to fit your business.
<b>Retro P&amp;L, aged balance and other financial information available on standard reports</b>	Separate reports for prior periods are replaced with date selection criteria on standard reports.	Quickly access current or historical data.
<b>Nominal Ledger drill-down</b>	You can view the Nominal Ledger in the form of a Profit and Loss and Balance Sheet, drilling down to view nominal accounts and all related transactions.	From a top-level view of your overall numbers, drill down to the detail in a few clicks. The Nominal enquiries can also use a hierarchal structure, giving combined views for all cost centres and departments. For example, from an overall Overheads figure, drill down to see where the major expenses are being incurred.
<b>Easy Nominal Code creation</b>	The Nominal coding structure in Sage 200 Financials can be created code by code or by using an automated creation routine to create a range of nominal codes, cost centres and departments.	Quickly set up new Nominal accounts.
<b>Trading periods</b>	The Sales and Purchase Ledger can utilise trading periods which can match the accounting period structure or have your own date range structure.	Greater analysis. The Sales and Purchase Ledgers can be configured to match the accounting period structure or to support a different structure for example daily, weekly, fortnightly, monthly or a mixture. For example, in a retail environment, sales could be analysed on a weekly basis, while the Nominal Ledger retains the monthly structure required for The P&L and Balance Sheet Reports.
<b>Colour-coded alerts during data entry</b>	During data entry, colour-coded alerts supplemented with explanatory text warn you if there is any potential problem. Amber warnings allow you to continue if you wish, while red warnings denote a more serious problem that requires action.	Allows rapid data entry, alerting you where there is a potential problem without interrupting workflow unnecessarily. For example, the amount entered on a sales invoice will take a customer over their credit limit. A warning alerts you to this fact; if you are authorised to override credit limits the warning will be amber, otherwise the warning will be red and the sales invoice cannot be saved without authorisation.
<b>Extended analysis codes</b>	Each customer and supplier can be categorised using up to 20 analysis codes taken from an unlimited list of system analysis codes.	Detailed analysis can be produced using the 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, detailed reports can be produced in the Sales Ledger using a number of analysis codes, for example region, sales representative, industry type, customer rating, account manager, partner etc.
<b>Multiple trader contacts</b>	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 from Sage 200 Financials offering greater flexibility, improved contact visibility and more informed staff.
<b>Credit reference information</b>	Information about a customer's or supplier's credit rating, account terms payment times and important dates can now be stored directly against their record, along with the option to perform an on-line credit check.	Full visibility of important credit information in one place allows you to efficiently and effectively monitor, identify and report on your customer or supplier status.
<b>Opening balances set up only once</b>	Opening balances are entered once at set-up, along with any unrepresented cheques - removing the need to adjust opening balances retrospectively. Further unrepresented cheques can be entered later via standard transaction routines.	In line with good accounting practice.
<b>Grouped transactions in Cash Book</b>	Improvements to 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.
<b>Ability to change the nominal code on free text invoices</b>	You can change the nominal code and enter a transaction analysis code on free text invoices.	Allows you greater flexibility and improves your budget analysis.
<b>Multiple selections on the bank reconciliation form</b>	A multiple selection tick box has been added next to each line on the bank reconciliation form.	You can clearly identify items that have been ticked and are therefore marked for reconciliation – reducing errors.

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<b>Audit trail file created by each posting routine</b>	Rather than automatically printing or sending audit trails to the spooler on completion of a posting routine, Sage 200 Financials adds audit trail records to a file that can be printed or archived.	Flexibility to archive audit files electronically or print them. Reduces the size of the spooler file, cuts down on housekeeping and ensures that a clear audit trail is maintained automatically.
<b>Additional bank reference fields for IBAN numbers and Swift codes</b>	Fields to hold IBAN numbers and Swift codes have been added to the Purchase Ledger account details screen. The IBAN number is recorded on the bank details screen and the new fields included on the relevant import files.	Allows you to hold a record of these details for your suppliers and for your own bank accounts and add to report layouts where necessary.
<b>Store Incomplete Bank Reconciliation</b>	A bank reconciliation can be saved part way through and retrieved at a later time.	You can save a draft of the bank reconciliation and return to continue later so you can carry out another task and return when convenient. It also reduces security risks as the screen/programme can be closed, knowing that you can pick it up later at the same stage.
<b>On Line VAT Return Submission</b>	HMRC legislation changes dictate that from the 1st April 2010, all companies with a turnover of more than £100,000 will have to submit their VAT returns electronically. This feature provides a link to the HMRC gateway, allowing you to electronically submit and pay your VAT return online.  <b>NB:</b> The release date of v2010 means you may need to submit initial returns manually via the HMRC government gateway.	Ensures that you comply with legislation changes and makes it quicker and easier for you to submit and pay your VAT return.

## Sage 200 Commercial - features and benefits

The Sage 200 Commercial 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.

Description	Explanation	Benefit
<b>Landed costs</b>	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.
<b>Stock Control</b>		
<b>Supplier price lists</b>	Sage 200 Commercial 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.
<b>More realistic stocktake process (e.g. cyclical stock takes)</b>	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 also allows for traceable items to be included in a stock take.	More realistic and flexible stock taking facility, ensures as little disruption to the business as possible during stock take.
<b>Default fulfilment methods</b>	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.
<b>Stock item search categories</b>	In Line 100 you can only search by stock code. With Sage 200 Commercial, each stock item has specific fields that can be populated with keywords, used when searching for particular products.	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. For example, you could find all blue shirts in size 16.
<b>Serial numbers can be autogenerated</b>	Sage 200 Commercial gives you 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.

Description	Explanation	Benefit
<b>Traceable item analysis attributes</b>	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.
<b>Serial numbers do not have to be unique</b>	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. For example, supplier X serial number for product a is the same as supplier Y serial number for product a or b.
<b>Traceable items can have an alternative reference which can be autogenerated</b>	A new field allows an alternative reference number to be entered for each traceable stock item.	Increased flexibility.
<b>Facility to archive traceable items</b>	Traceable items can be archived.	Reduces the amount of irrelevant information presented on queries and reports, improving systems performance.
<b>Stock take routine option to include negative items and count by bin location</b>	Sage 200 Commercial 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.
<b>Unlimited buying prices per item</b>	In Line 100 5 buying prices can be recorded - with Sage 200 Commercial this is now unlimited. Therefore keeping accurate records of all buying prices for all individual stock items.	Supports margin-based selling (i.e. 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.
<b>Unlimited suppliers per item</b>	Line 100 only allows 5 suppliers to be specified per item; this is now unlimited. Sage 200 Financials and Commercial stores additional information such as price last paid and when supplied.	Greater flexibility, assisting you to purchase from multiple suppliers. Ideal when you always need to secure the best prices on highvolume, low-value commodity items that are readily available from multiple sources.
<b>Unlimited alternative stock items</b>	In Line 100 2 alternatives can be specified - with Sage 200 Commercial there are unlimited stock items	Allows you to quickly specify a range of alternatives if a product is out of stock.
<b>Default comment lines for picking lists and despatch notes</b>	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.
<b>Short and Extended stock descriptions and choice of description used for orders/Invoices</b>	In Line 100 you have a 1 x 60-character field, 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 e.g. use a concise product description on an invoice but a full product description on the website. More presentable, appropriate and informative documentation.
<b>Sales Order Flag</b>	Sage 200 Commercial 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.
<b>Allows label production</b>	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.
<b>Full warehouse information including address and re-order level</b>	Sage 200 supports multiple warehouses where full details can be recorded. For example independent reorder levels for individual warehouses can store full address details.	All warehouses can always have essential items in stock. Could save time and money as a complete order could be fulfilled from a single warehouse.
<b>Information can be moved from the 'live' Stock History file to an 'Archive' database and easily viewed</b>	Fully completed transactions can be archived from Stock History, as well as Sales Orders and Purchase Orders. You can view archived information and drill down and around the information held within that archive.	Improves performance by reducing the amount of 'live' data being used by the program. Detailed historical information is still readily available although not taking up space in 'Live' database.
<b>Ability to rename the 'Unspecified' bin</b>	This 'Unspecified' default bin can be renamed to match customer requirements.	Matching customer requirements helps businesses run more efficiently.
<b>Serial numbers do not have to be unique</b>	Generally, serial numbers will be unique (particularly if self-generated). However this may not be the case if multiple suppliers are used for batch numbered items.	Flexibility to fit in with supplier serial number schemes. For example, supplier X serial number for product a is the same as supplier Y serial number for product a or b.
<b>Traceable items can have 'sell-by' and 'use by' dates associated with them</b>	Traceable items can have 'sell-by' and 'use by' dates associated with them - goods past their sell-by date are flagged by a colour-coded warning.	Effective management of perishable goods.

Description	Explanation	Benefit
<b>Record notes against a stock item</b>	Notes can be stored against a specific stock item, with a record of who created the note, when it was created and whether the note is active.	Notes that are relevant to a stock item can now be stored directly against that stock item.
<b>Retrospective Stock Valuation</b>	This feature allows the stock valuation report to be run retrospectively, including late entries.	Makes the reconciliation between the stock control module and the nominal ledger easier as you can run a stock valuation report for a date in the past and reconcile stock to the nominal ledger. This means that processing at month ends can continue in the knowledge that the reports can be printed out later.
<b>Price Book</b>		
<b>Extends concepts found in Line 100, gathering into a single area.</b>	Introduces a more comprehensive, more manageable model for managing prices and discounts across your customer base. Sage 200 Commercial supports two types of pricing schemes - discount based and price-band based, and allows you to create 'communities' of customers to attach to either.	Supports a wide range of complex business models. For example, you may have a pricing scheme based on discounts or on standard product price bands - Sage 200 Commercial will support both.
<b>Unlimited prices per item</b>	Line 100 supports 5 price bands per stock item (perhaps used for foreign currency pricing in some instances); Sage 200 Commercial offers unlimited price bands. Also, these bands can now be re-named.	With more price bands, Sage 200 Commercial supports more detailed pricing schemes; and with custom labels it's easier to understand and maintain prices. For example, you could have one price band for Retail, one for Platinum customers, one for Web sales.
<b>Customer price and discount groups</b>	You can create customer price groups or 'communities' to attach to individual price schemes.	You can create a complex pricing or discount scheme, e.g. 'Platinum', 'Gold' and 'Silver' customer groups with standard pricing schedules 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.
<b>Prices in foreign currency</b>	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. You may supply the same products to the UK and countries in the EU. Products could be set up with dual pricing and customers are then specified as Euro or Sterling customers.
<b>Prices for different stock units of measure</b>	You can set a specific price for each unit of measure (e.g. bottle, case and crate) rather than adjust discounts to do this.	Be flexible enough to easily sell products in quantities that suit different customers. For example, a wine merchant could offer £5 for individual bottle, £55 per 12-bottle case, £100 for 24-bottle crate.
<b>Unlimited quantity breaks for discounts</b>	Line 100 has 10 volume breaks, in Sage 200 Commercial this is unlimited.	Greater flexibility, particularly for businesses supplying a wide range of large and small customers.
<b>Price book validation including profit check</b>	You can instantly see the margin on an individual product sale (if authorised).	Give sales people margin guidelines to allow them to win sales while protecting your profit.
<b>Ability to specify a price band on the customer record</b>	The ability to link a price band and default discount group to a customer.	This speeds up the creation of new customers, as all information can be entered in the customer record.
<b>Ability to delete a price book band in the Price Book module</b>	Unused price bands can now be deleted.	Improved housekeeping and reduced possibility for error.
<b>Sales Order Processing</b>		
<b>Deposit Handling</b>	In Line 100 when a payment is recorded against an order, this payment is 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.
<b>Choice of full or rapid order entry</b>	Rapid order entry assumes that standard pricing and delivery addresses are used. Orders can be entered with as few as three clicks. Full order entry mode allows for full 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 quicker service, happier customers. If something out of the ordinary is needed, a click of a button takes them to Full Order Entry mode. For example, while entering an order using Rapid Order Entry, an operator realises that a different delivery address will be needed. No problem - a click of a button takes you to Full Order Entry mode where you can do this.

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<b>Trade Counter processing</b>	Supports a 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. Quickly 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.
<b>Mix order entry types within a business</b>	One part of the business could use Trade Counter, another Full Order Entry, another Rapid Order Entry.	Rather than one size fits all, different operators or departments can use an order entry system that suits them. For example, the warehouse has an outlet which uses the Trade Counter module while telesales in the office upstairs use a mix of Rapid and Full Order Entry.
<b>Full link for 'Back to Back' orders</b>	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.
<b>Create Purchase order from Sales Order</b>	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 if you wish to generate individual purchase orders for individual sales orders. Saves you time as you no longer have to access a different menu to generate purchase orders.
<b>Choice of "first come - first served" or controlled stock allocation</b>	In Line 100, stock is allocated either on a 'First Come, First Served' basis, or manually. Sage 200 Commercial affords greater control, for example by prioritising certain customers or scheduling against deliveries.	Ensure that important customers are automatically given priority. Without manual intervention, an order from a customer you need to keep happy is allocated stock over a cash customer.
<b>Stock allocation sequencing</b>	Your stock items can be allocated to Sales Orders in a chosen priority, either by: *Use by date *Sell by date *First in first out for traceable items *Bin order with the user defined *Largest or smallest quantity first	Provides greater control and flexibility in stock allocation. You are able to specify how your stock is allocated to which customers 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.
<b>Order Profitability</b>	With Sage 200 Commercial 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.
<b>Stock availability is easily visible at order entry</b>	Stock balances are visible for all warehouses at order entry.	You can give accurate information to customer about availability without leaving the Sales Order Entry screen. For example, a customer asks for 2 of an item, but the system tells you that there is insufficient stock in the default warehouse. Clicking a button shows that there is 1 available in the default warehouse but a further 30 in another warehouse. You can place an order to ship from the other warehouse.
<b>View entire order on single screen</b>	In Line 100 order details are spread over more than one screen. Sage 200 Commercial brings everything onto one screen.	Quick and efficient customer service all information easily to hand. A customer has a number of queries about a particular order. You can answer them quickly, without keeping the customer hanging on.
<b>Record payments with orders</b>	Easily take a deposit for an order and if required record credit card payments using Sage Payment Solutions. (record whether full payment or deposit is received when an order is created). In Line 100 this has to be done manually.	Easily take deposits for high-value items and manage the subsequent payment of balances. Our credit card processing functionality allows you to process the order and receive credit card payment in one place.
<b>Ability to enter and store negative invoice lines</b>	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.
<b>Cash account orders</b>	In Line 100, all orders are pre-set as account orders. These are already created in Sage 200 Commercial.	Easily manage a mix of cash and account customers.
<b>Payment method for each order stored</b>	Allowable payment methods can be predefined, and recorded at order entry.	Assists in reconciling actual receipts with expected receipts.
<b>Customer Pricing Enquiry</b>	Additional enquiry screen in SOP that shows the price of a particular item, with applicable discounts, for a particular customer. Stock item balances can also be accessed from this screen.	Deal with 'price & availability' enquiries without using the Sales Order Entry or Quotation screens.

Description	Explanation	Benefit
<b>20 analysis codes per order line</b>	Each order line can be accompanied by up to 20 custom analysis codes.	Sales can be analysed to a superb level of detail, to suit the individual business. For example, a sales line item could be identified not only by sales person but also by lead source and coupon code.
<b>Despatch process allows part despatch without editing order</b>	In Line100, it's not that straightforward to part despatch. Sage 200 allows part despatch quickly and easily	Flexibility to ship product as it suits you.
<b>Improved process for consolidating invoices</b>	Sage 200 Commercials consolidates separate orders onto a single invoice.	Give your customers the flexibility to place multiple orders yet only have to process a single invoice.
<b>View alternative stock items during order entry</b>	Sage 200 Commercials can quickly suggest alternatives if a product is out of stock.	Offer a speedy and helpful service to your customers.
<b>Cancelled order lines file</b>	In Line 100, if an order line is cancelled that information is lost. Sage 200 Commercials keeps a full history of cancelled items.	Analyse cancelled items for patterns. 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?
<b>Unlimited additional charges per order</b>	In Line 100 only two additional charges - e.g. delivery, carriage etc. are supported. This is now unlimited in Sage 200 Commercials.	Greater flexibility.
<b>Comment Lines</b>	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, you can amend or enter a new instruction while creating the order. A particular customer wants an item delivering on Friday between the hours of 10 and 11. These instructions are entered onto the order, the item is picked, packed, despatched and invoiced at the right time.
<b>Sale return cost management</b>	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.
<b>Control of tax codes</b>	Certain organisations in the UK are tax exempt. The tax code on a customer record can be optionally set to always override the stock item tax code on a sales order line.	This option ensures that the system automatically inserts the correct default tax code on sales order lines that would be VATable for most businesses, without manual intervention, therefore saving time.
<b>Introduction of multiple invoice and credit note layouts</b>	Sage 200 allows a default layout and customer-specific invoices or credit note layouts 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 mean that customers can be better served, 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.
<b>Drill down from order to invoice (and reprint)</b>	A Sales Order may have several related invoices; you can drill down from a Sales Order to a specific invoice, then print it if required.	Easily reprint invoices when customers require it.
<b>Edit stock description during order entry</b>	The stock description appearing on the invoice can be edited if necessary.	Description could be tailored for a particular customer - demonstrating a more customer-centric approach. Products have different names in different countries (e.g. bonnet vs hood) and some words have negative connotations in other cultures. Sage 200 Commercials allows you to accommodate such considerations without setting up multiple stock items.
<b>Profit levels can be shown for the full value of an order, if you are authorised to see this information</b>	Profit levels can be shown for the full value of an order, not just for each order line. Profit can be viewed on saved orders, not just at order entry. It can also be reported on.	You can see the full picture of the profitability of an order. A special price on item could be given, knowing that the other items buoy up the overall profitability.
<b>View status or price details of order lines</b>	Toggle between a view showing the price details for each order line, and a view showing details of allocated, despatched and invoiced quantities.	All information easily at hand e.g. A customer query on the status of an order can be quickly dealt with.
<b>Show discount calculation during order entry</b>	Sage 200 Commercials will show how a price has been arrived at – useful if complex pricing schemes are used.	Quickly and confidently answer when a customer queries a price.
<b>User privileges</b>	Users can be set up 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.

Description	Explanation	Benefit
<b>Prospect quotation</b>	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 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'.
<b>Order line history showing allocation, despatch and invoice entries</b>	In Line 100, you may know that items have been sent but you can't quickly see when. Sage 200 Commercials allows you to drill down on an order line to see when the items were allocated, despatched and invoiced quickly.	Quickly get all the facts about an order - particularly important when answering customer enquiries. A customer rings up asking about a particular order - they've received some items but not all. Drilling down on the order lines reveals that the remaining 5 items were sent out this morning.
<b>Sales Order Information can easily be viewed in the archive database</b>	Users can view archived information, being able to drill down and around the information held within that archive.	Detailed historical information is still readily available although not taking up space in 'Live' database.
<b>Extended support for repeat orders</b>	Filter repeat orders so that only due orders are shown.	Speed up processing of orders from your regular customers.
<b>Purchase Order Processing</b>		
<b>Enhanced purchase order authorisation and remote alerts</b>	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.
<b>View entire order on single screen</b>	An entire order - including all line items - is now available on a single screen.	If you're querying a supplier about an order, or entering an order, the process is speeded up and made easier because all information is to hand.
<b>Order generation with price negotiation</b>	Sage 200 Commercials can compile lists of what you should order based on shortfall (by warehouse, if necessary) and what's required for back-to-back orders. You can then choose who to buy from and what to pay (the system defaults to the last buy price). 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 and improves efficiency. For example, Sage 200 Commercials calculates 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.
<b>Full link for 'Back to Back' orders</b>	Sage 200 Commercials has a full link between SO's and PO's, so 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).
<b>Standard cost variance processing</b>	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.
<b>Choice of delivery addresses</b>	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.
<b>Delivery address per order line</b>	In Line 100, you would need to create multiple POs or add notes in the comments fields to have items delivered to different addresses; Sage 200 Commercials allows you to 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.
<b>Write off incomplete orders</b>	In Line 100, you can't close an order if it's not completed (e.g. if an item never actually turns up). Sage 200 Commercials allows you to write the order off.	Accurate, realistic and up to date reporting.
<b>GRN (Goods Received Note) processing</b>	Line 100 supports 2-way invoice matching (i.e. match order to invoice). However, some businesses use a 3-way matching process (order, invoice and delivery) and Sage 200 Commercials supports this.	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. Sage 200 Commercials allows you to fully track this process.

Description	Explanation	Benefit
<b>Disputed invoices</b>	If there's a mis-match between an order and an invoice in Line 100, you can accept the invoice or not enter it at all. With Sage 200 Commercials you can record the 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, they'll be in the Sage 200 Commercials system - making it easier to identify their status.
<b>Improved process for matching invoices to orders</b>	Sage 200 Commercials calculates a running total when matching invoice line items to orders - rather than a total at the end.	Save time and make the matching of orders and invoices less error-prone. For example, you place an order with a supplier for many line items; there's a mismatch when the invoice arrives and Sage 200 Commercials allows you to quickly establish which line item is wrong.
<b>20 Analysis codes per order line</b>	Each Purchase Order line can be accompanied by up to 20 custom analysis codes.	Purchases can be analysed to a superb level of detail, to suit the individual business e.g. specify which department an order line is destined for, whose budget it should come from, if it's for internal use, for a particular promotion, etc.
<b>Unlimited additional charges per order</b>	In Line 100 only two additional charges - e.g. delivery, carriage etc. are supported. This is now unlimited.	Greater flexibility.
<b>Cancelled order lines file</b>	In Line 100, if an order line is cancelled that information is lost. Sage 200 Commercials keeps a full history of cancelled items.	Analyse cancelled items for patterns. 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?
<b>Ability to allocate stock to Sales Orders at the point of goods received</b>	At the point of booking stock in from a Purchase Order, Sage 200 Commercials allows 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. 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.
<b>Order line history showing receipt and invoice entries</b>	Sage 200 Commercials gives you full traceability of orders.	See the complete 'story' of an order line - invaluable when troubleshooting an order.
<b>Purchase Order Information can easily be viewed in the archive database</b>	You can view archived information and drill down and around the information held within that archive.	Detailed historical information is still readily available although not taking up space in 'Live' database.

## 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
<b>Sales Force Automation</b>		
<b>Calendar Management</b>	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.
<b>Complete Bi-directional Outlook Integration</b>	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.
<b>Management of Key Opportunities and Leads</b>	Using Sage 200 CRM sales staff 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.

Description	Explanation	Benefit
<b>Sales Forecasting and Reporting</b>	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.
<b>Account and Activity Management</b>	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.
<b>Client Awareness</b>	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.
<b>Graphical Reporting</b>	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.
<b>Web Quotes and Orders</b>	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.
<b>Territory Management</b>	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.
<b>Escalation and Notification Alerts</b>	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.
<b>Sales Process Automation</b>	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.
<b>Workflow</b>	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.
<b>Pipeline Management</b>	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.
<b>Document Sharing</b>	Literature fulfilment can be automated and simplified.	Decreases administrative and other non-revenue generating activities which all impact on business performance and personal productivity.
<b>My CRM and Team CRM</b>	Individual and team views of activities are available.	Gives both individuals and management a single view of business activities as and when required.
<b>Integration with accounting modules</b>	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.
<b>Marketing Automation</b>		
<b>Campaign Management</b>	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.
<b>Segmentation and Groups</b>	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.

Description	Explanation	Benefit
<b>Outbound Call Management</b>	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.
<b>Email Management</b>	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.
<b>Campaign Reporting</b>	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.
<b>Lead Management</b>	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.
<b>Outbound Call Management</b>	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.
<b>List Building and Management</b>	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.
<b>Campaign Evaluation Tools</b>	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.
<b>Integration with accounting modules</b>	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.
<b>Customer Service Automation</b>		
<b>Cases</b>	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.
<b>Knowledge Base</b>	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.
<b>Search</b>	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.
<b>Customer Information</b>	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.
<b>Workflow</b>	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.
<b>Customer Communications</b>	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.

Description	Explanation	Benefit
<b>Reports</b>	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.
<b>Integration with accounting modules</b>	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
<b>Reporting and analytics within the comfort of Microsoft Excel</b>	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 formatting (layout and printing), calculations and macros can all be used to enhance the reports created using Sage 200 BI.
<b>Pre-defined reports out-of-the-box</b>	Sage 200 BI is supplied with time saving, pre defined reports allowing you to analyse and understand financials and commercial 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.
<b>Make faster, more informed and confident strategic decisions</b>	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.
<b>Save essential time on reporting</b>	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
<b>Easy and fast deployment</b>	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.
<b>Uses reliable Microsoft SQL Server Analysis Services</b>	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.
<b>Report Wizard</b>	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.
<b>Drill down and drill to detail</b>	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.
<b>Change the report parameters</b>	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.
<b>Sort, Filter and subtotal functionality</b>	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.
<b>Conditional Formatting</b>	Provides a very quick and easy method of spotting exceptions within a report by highlighting anomalies within your data, thus saving you valuable time.
<b>Flexible layout options to produce formal reports</b>	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.
<b>Dynamic Charts</b>	Easily add charts to reports to give a graphical representation of the data - ideal for presentations and reporting.
<b>Ad-hoc analysis via Report Layout Panel</b>	Provides full flexibility to create reports, which can be configured and designed specifically for your requirements.
<b>Report Sets</b>	Automate the creation of multiple reports to create report packs and save time on reporting.

Feature	Benefits
<b>Link reports</b>	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.
<b>Named Sets</b>	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.
<b>Calculated Members</b>	Extend reports by creating additional calculations as required. You can define additional calculations based on existing data within a report.
<b>Pre-defined data cubes</b>	Sage 200 BI comes with powerful pre-defined data cubes enabling every view of your data. Sage 200 BI has 5 financial data cubes and 8 commercial data cubes enabling quick access to all you financial and commercial data.

For more information call **0845 111 99 88**  
or visit [www.sage.co.uk/sage200suite](http://www.sage.co.uk/sage200suite)



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