Sage 200 Suite

Contents

Introduction to Sage 200 - A powerful integrated approach to business software

At Sage, we've been supporting businesses like yours with world class business software for more than 25 years. Our long term commitment to investing in technologies and applications helps you to stay ahead in a rapidly changing world.

We know that businesses are increasingly looking for software that operates throughout their organisation and we have responded with integrated software solutions designed to help you automate and integrate key processes right across the business.

Sage 200 Suite

Sage 200 is made up of powerful modules, designed to work together to help your business run more smoothly. With the Sage 200 Suite, you have the ability to seamlessly coordinate your business processes - from accounting to customer services, manufacturing to sales management, and project management to distribution.

In summary Sage 200 enables:

effective end-to-end process management. The Sage 200 suite includes the applications needed to manage information and processes in every part of your business. It supports you in managing the whole process of customer acquisition, from the initial marketing campaign and lead generation, through the quotation process to successfully winning the order, order fulfilment and flowing on to providing outstanding customer service in the future.

By integrating your business processes, Sage 200 allows staff to view the same data. Time previously spent re-entering data is saved and accuracy is improved, while customer requirements can be identified and fulfilled quickly and profitably.

All Sage 200 suite applications can be quickly deployed and mapped to specific business requirements, ensuring that you are up and running quickly with software that's right for your business. As well as having options to configure applications, in many cases the software can be customised fully by a Sage Business Partner.

Sage 200 supports operations specific to particular industries, notably Construction, Manufacturing, Retail, Wholesale and Distribution. Beyond that, our alliances with third-party software developers gives you access to an exceptionally wide range of software and hardware options that can be integrated with your Sage software.

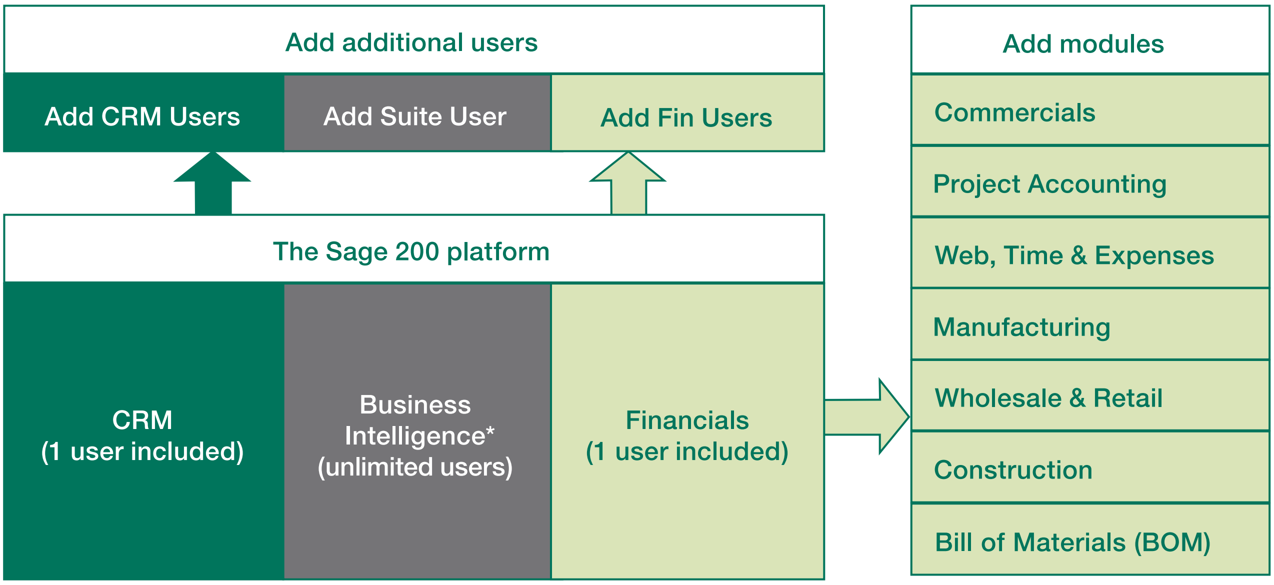
The Sage 200 Suite provides users with **market leading reporting capabilities** ranging from an easy to use interface and an extensive range of inbuilt reports, through to the Sage 200 **Business Intelligence** module. Users can easily create additional reports to meet specific requirements. Complementing this, the Suite includes **workspaces** which 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 provided enables users to configure user defined workspaces to meet individual requirements. Workspaces can pull together information across the entire Suite, as well as providing designers with the capability to report on data from external data sources via the Sage 200 desktop.

The Sage 200 Platform

The Sage 200 Platform is the base layer which is supplied to every customer who adopts Sage 200. The Sage 200 Platform tightly integrates a strong financial and commercial system with a market leading CRM system, providing efficiency and consistency across the business. This coupling of financial and customer information enables business processes to be automated end-to-end, with essential data flowing throughout your organisation.

What does the Sage 200 Platform contain?

As demonstrated in the diagram below, the Sage 200 Platform is the starting point for the Sage 200 Suite, onto which you can add extra users and modules as required, to match your own business processes. The Sage 200 Platform can also be extended at a later date, catering for future growth and the changing requirements of a medium sized business.



* Currently only available for Sage 200 Financials and Commercials.

Sage 200 Financials - Features and Benefits

Sage 200 Nominal Ledger

The Nominal Ledger provides you with a wealth of reporting and business management information. Its multi-level structure allows cost centre and departmental breakdown, giving you total flexibility to track budgets and produce profit and loss reports by product, sales region or even individual departments. It simplifies managing your VAT, whilst providing comprehensive analysis of VAT details.

Cash Book

With the ability to configure all Standing Orders and Direct Debits, the Cash Book controls all of your bank, investment and cash accounts, and offers multi-currency processing and advanced bank reconciliation, including links to online banking services.

Sales and Purchase Ledger

Sage 200 offers total control for managing your customers and suppliers, no matter what currency they trade in. These ledgers allow you to enter data quickly, by specifying defaults that suit your processes. You can attach all relevant documents to a customer or supplier record, as well as details of individual trading terms. If you have large volumes of transactions, invoice processing can be batch controlled.

Feature	Explanation
Nominal Ledger	
Flexible account structure	Account Number, Cost Centre and Departmental analysis.
Set and track budgets	Annual and monthly budgets can be assigned and budget profiles created to calculate monthly budgets by percentage.
Journal templates	Create templates to easily apportion fixed amounts or percentages across Nominal Ledger accounts - for example, to spread electricity bills across cost centres.
Graphical analysis and presentation of Nominal data	Bar charts and line graphs can be used to show balances and budgets for current and previous years.
Drill down facility	Drill down through Profit & Loss, Balance Sheet accounts and summarised Nominal Codes/Cost Centres and Departments, in order to view the details behind them.
Flexible Profit and Loss and Balance Sheet layout design, and unlimited transaction history	You can have multiple Profit and Loss and Balance Sheet layouts, as well as the ability to import categories used in financial reports.
Transactional analysis	In addition to cost centre and department, additional analysis marks can be added to a transaction. The nominal codes can be grouped for reporting purposes.
Consolidation	Merge nominal ledger data from two or more separate companies for financial reporting.
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 modules in foreign currencies.
E-Banking facility and bank reconciliation	Allows supplier payments to be made through your banking software. When you receive a bank statement, use this routine to reconcile it with the details of payments and receipts stored in the Cash Book account records. The e-reconciliation facility allows bank reconciliation with your banking software (for compatible banks) on the same screen.
Automate Direct Debits, Standing Orders and Inter account transfers	Arrangements can be made to automate transactions on a monthly, quarterly or user defined basis. Move money from one bank account to another.
Graphical analysis and presentation of bank data. Attach a file to a bank account	As an example, bar charts show the comparison between the current and previous year's bank account balances. In addition, it is possible to attach files to the bank account, which subsequently make it possible for the details contained within the files to be represented and analysed graphically on screen.

Feature	Explanation
Purchase Ledger	
Enter unlimited analysis codes and define terms of business for each supplier account	Produce detailed analysis of your suppliers using the unlimited analysis codes. The codes created can be linked to the Sales or Purchase Ledger. The terms of business, such as number of days for payments, discount and credit limit, can be recorded.
Account and transaction 'drill down' facility, and graphically analyse and present supplier data	View the status and details of any invoice or purchase order from withiin the supplier record or transaction enquiry. This flexible option supports drill down to individual line detail including receipt and invoice status as well as providing the option to reprint a document such as an invoice. Analyse supplier transaction details including nominal payment and tax analysis or turnover and aged balances.
Trading periods, unlimited transaction history and authorisation	The Purchase Ledger can utilise trading periods for extra balance and transactional analysis, which can match the open period accounting structure, or have its own date ranged structure. Purchase invoices, if above a user defined level, can be flagged prior to payment, enabling greater cost control.
Currency management	The Purchase Ledger will maintain turnover details of an account in both the base currency and the operating currency of the supplier, using spot or period rates or a combination, as well as recording a full transactional revaluation history.
Send payments to a factor house. Automate payments and e-Banking facility	Send payments to a company that collects supplier debts on their behalf. Invoices overdue can be identified for payment and those, that if paid in advance, will qualify for settlement discount. Payments can then be made electronically or cheques and/or remittance advices printed.
Credit reference information and multiple trader contacts	Supplier credit rating, account terms and payment terms can be stored directly against the supplier record. The credit control options let you record key credit control dates and credit check online. Unlimited number of contacts, roles, telephone numbers and other contact numbers can be held for suppliers.
Currency management and batch data entry. Unlimited transaction history	The Sales Ledger will maintain turnover details of an account in both the base currency and the operating currency of the customer. You can amend, add to, or delete entries of batches of transactions, before finally committing them to the Sales Ledger.
Unlimited analysis codes and definable trading periods	Produce detailed analysis of your customers using the unlimited analysis codes that can be linked to the Sales or Purchase Ledger. The Sales Ledger can utilise trading periods for extra balance and transactional analysis, which can match the open period accounting structure or have its own date ranged structure.
Define terms of business for each customers account, record multiple trader contacts, email them direct from customer records and attach a file (e.g. an email or document) to a customer's account.	The number of days for settlement of payments, discount and credit limit can be defined. The word processed documents or contracts can be attached to the customer record. You can also control if/where the statements are sent.
Create individual price lists for your customers. Account and transaction drill around facility. Graphically analyse and present customer data	View the status and details of any invoice or sales order from within the customer record or transaction enquiry. This flexible option supports drill down to individual line detail including allocation, dispatch and invoice status as well as providing the option to reprint a document such as an invoice or dispatch note. Within the bar charts, you will have a visual analysis of turnover, aged balances etc. You can, for example, create charts to display customer information and enable further analysis and manipulation.
Integrated credit management feature	Includes debtors' letters, statement production, provisions for doubtful and bad debts and the ability to place customer accounts on hold. The credit control options also record key credit control dates, provide the ability to credit check online and automatically calculate your customers average time to pay.

Sage 200 CRM - Features and Benefits

Sage 200 CRM is an easy to use, web-based CRM solution with out-of-the-box yet customisable business process automation.

Through its powerful workflow engine, Sage 200 CRM drives business process automation, making organisations more effective and efficient. As a result of tight integration with a strong financial and commercial system, it drives deep business process automation right across the organisation, from back office to front office. Sage 200 CRM provides the tools to enable a business to manage the complete customer lifecycle, from first point of contact through to maintaining and building a valuable relationship with the customer.

Sage 200 CRM – Sales Force Automation

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

Sage 200 CRM – Marketing Automation

Sage 200 CRM provides powerful tools for marketing teams to plan, execute and audit highly targeted marketing campaigns. Sage 200 CRM users have the ability to assign and analyse marketing activities efficiently and easily. Integration with the Sage 200 accounting and stock modules gives the ability to create campaigns based on the financial profile, order information and purchase history of customers. With Sage 200 CRM, every phase of every marketing campaign can be tracked, to provide meaningful analysis and campaign measurement.

Sage 200 CRM – Customer Service Automation

This intuitive interface allows you to easily view information about your customers and resolve their issues effortlessly by employing the escalation features of Sage 200 CRM Customer Service.

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

Feature	Explanation	Benefit
Sales Force Automation		
Calendar management and bi-directional Outlook integration	Sage 200 CRM provides sales users with a complete diary solution. Reminders and notification alerts are available to all sales team members. It is possible to run email, calendars and contacts through Microsoft Outlook. Tasks and appointments are automatically updated in both systems.	Increases efficiency, punctuality and convenience. Fosters organisational transparency within the business and enhances the quality and retention of information.
Key opportunities and leads, account and activity management	Users can track leads from first contact to final sales closure. The leads can be escalated and reassigned easily. Follow-up activities can be automated and field-level security is a simple and straightforward process.	Ensures that time and resources are invested into the deals that are most likely to close. Guarantees that leads are handled by the employees most qualified to assist the client.
Sales Forecasting and Graphical Reporting	Graphical forecasting and reporting features allow filtering of data, as per the user's criteria, with accurate and timely forecasts, which are accessible by sales representatives and managers.	Gives sales teams and management access to data for immediate analysis and decision making.
Client awareness and web quotes and orders. Sales process automation	It is possible to enter a quote or an order remotely using the CRM interface. Vital customer information is up-to-date, complete and easily retrievable. Time is organised and administrative tasks are reduced to a minimum.	Provides a better view of your customers, enabling greater flexibility and automates the sales process.
Territory and pipeline management. Escalation and notification alerts	Assignment rules automatically route leads to the relevant sales representatives based on territories. The ability to create new teams and reassign ownership is also possible. Ability to view marketing campaigns, response rates and associated sales revenue by territory. The pipeline can be analysed and gives the sales reps and managers the ability to see and report on leads, opportunities and proposals at a glance. Critical opportunities and forecast information is delivered in periodical messages.	Delivers insight into sales effectiveness and performance by territory. Ensures business opportunities are always retained and worked on. Sales professionals are provided with tools to increase productivity and efficiency.
Anytime anywhere workforce. Document sharing and workflow	The sales team have the ability to work offline or mobile wherever they are. Literature fulfilment can be automated and simplified and the inbuilt workflow can be followed out of the box or customised to reflect your business process.	Automates the sales process. Decreases administrative and other non-revenue generating activities. The system administrator has the ability to create profiles for offline users which optimises the download and synchronisation of data.
Integration with accounting modules	Sage 200 CRM is integrated with Sage 200 accounting software. Sales staff have access to accurate pricing for quotes, orders, fulfilment data and complex pricing rules and discounts. Financial and non-financial information is accessible in one central location for a 360 degree view of the customer.	Gives sales staff a true 360 degree view of the customer across front and back office systems for better account management.
Sage 200 CRM Marketing Automation		
Campaign and email management	Sage 200 CRM empowers users to view activities, objectives, leads and follow-up actions and to drill down to every element of every marketing campaign. Provides mass email functionality and has the ability to create email templates, send HTML and attachments.	Expedites campaign analysis. Enables employees to review the exact email message received by a specific user or prospect.
Segmentation and groups. List building and management	Customer data and prospect lists can be segmented based on desired criteria and exported to Excel. Multiple criteria may be selected to assemble lists. Responses to campaigns can trigger a sub-list for the next wave of the campaign, with successful responses moved to sales and non-responses kept on a reminder list.	Targeted messages can be delivered to select groups. Records marketing lists for future reference and provides the option to reuse successful campaign lists. Offers the tools to create detailed profiles of customers and prospects over the course of the relationship.

Feature	Explanation	Benefit
Marketing Automation (continued from previous page)		
Lead management	Leads can be qualified as per selected criteria, followed-up and tracked at each stage of 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	It is possible to allocate and schedule target lists, calls and follow-up calls at times convenient for prospects and customers. The outcome of the calls, such as length and results, are saved for cross departmental future reference.	Provides telemarketers with the tools necessary for effective and efficient telemarketing campaigns.
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.
Campaign evaluation tools	Analyse marketing campaigns by lead source, or evaluate other important campaign details.	Enables management to determine marketing ROI.
Integration with accounting modules	Sage 200 CRM is integrated with Sage 200 accounting and stock modules. Marketing staff have the necessary information to create lists based on financial profiles.	Enables marketing staff to execute highly targeted campaigns based on customers' financial histories.
Customer Service Automation		
Cases and knowledge base	Cases are defined as incidents or requests for technical assistance. The escalation process built into the program guarantees that cases are attended to in a timely manner to maximise customer satisfaction. Sage 200 CRM provides users with technical notes and solutions to known issues (the Knowledge Base). These are stored centrally, for ease of access.	Maximise customer satisfaction and drive customer loyalty. Provides easy and immediate access to a central bank of information.
Customers' profiles and communications history	The company/person entities within Sage 200 CRM contain a wealth of information related to each customer. Customers' communication histories are accessible and easy to use.	Enables customer care organisations to work to meet their requirements faster. Improves efficiency and reduces administrative time and effort.
Reports	Several predefined reports in different formats, such as PDF or CSV are available to users.	Allows easy analysis of case details.

Sage 200 Business Intelligence - Features and Benefits

Sage 200 Business Intelligence (BI) ensures you receive the maximum benefit from your business systems, by enabling the extraction of real intelligence from data accumulated every day in the normal course of operations. Sage 200 BI helps you to pinpoint exceptions, such as areas of high and low performance, identify inefficient processes and highlight exciting opportunities for innovation and business growth.

Feature	Explanation	Benefit
Dynamic charts	Dynamic charts can be created using any chart type within Microsoft Excel based on the data in a report, to show a graphical view of the data.	Add charts to reports to give a graphical representation of the data - ideal for presentations and reporting.
Drill to detail	Allows you to show the underlying values that make up the totals.	Provides you with the ability to analyse to a transactional level, to allow further detailed analysis of customer data.
Reporting and analytics. Flexible layout options to produce formal reports	Sage 200 BI brings business data into the familiar Microsoft Excel environment, allowing quick analysis of company data from many different angles. Furthermore, because the data is now in Microsoft Excel, users can make full use of existing functionality and add their own calculations or bring data in from other sources. Ability to lay out all forms of reports exactly as required within Microsoft Excel.	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. Using Sage 200 BI within Microsoft Excel also minimises training needs. Produce professional and aesthetic reports and dashboards quickly and easily.
Predefined reports out-of-the-box and report sets	Predefined reports allow the user to analyse and understand financial information within their Sage 200 solution, for example, using the Profit & Loss report to identify worst paying customers and average sales month on month. A static report pack can be created and quickly deployed to a distribution list via email.	Predefined reports save you time. Automates the creation of multiple reports when creating report packs and saves you time when you are running reports by eliminating the need to reselect the same report parameters each time.
Sort, filter and subtotal functionality and the ability to change the report parameters	Allows the user to define additional calculations based on existing data within a report. Enables multi-dimensional analysis.	Provides additional flexibility. Allows you to quickly flick between data by changing the report to get a different view of your data.
Ability to programmatically control reports	A Sage 200 BI report is comprised of Excel functions that have been created to retrieve data from the Sage 200 BI cube. These functions can also be used within an Excel workbook or within VBA code (Visual Basic for Applications - Microsoft Excel's macro language) to add additional functionality to a report. For example, a user may want to add a workbook title that includes the current selected item for a specified dimension.	The Sage 200 BI Excel functions provide the opportunity to extend the reports within Excel and also to create integrated analytical applications in Microsoft Excel.
Microsoft SQL Server Analysis Services	Sage 200 BI uses SQL Server Analysis Services, which is a market leading OLAP technology.	Sage 200 BI is built using market leading Microsoft technology.
Report wizard	The report wizard allows the user to change the report layout to meet their business requirements. For example, if customers were shown on the rows of the report, but the user wants to see products, the wizard will allow this change to be made easily.	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.

Additional Modules

Extend the platform to match your specific requirements by choosing from a range of additional modules including:

Sage 200 Commercials
Sage 200 Project Accounting
Sage 200 Web, Time & Expenses
Sage 200 Manufacturing
Sage 200 Construct
Sage 200 Wholesale & Retail
Sage 200 Point of Sale (POS)
Sage 200 Bill of Materials (BOM)

For more information on these additional modules call **1890 88 20 60** or visit www.sage.ie

Note: Sage 200 Point of Sale (POS) can be added to the Sage 200 Wholesale & Retail module.

Value Added Support

The Sage Product Advice Team

For help in selecting exactly the right Sage software for your business, simply telephone one of our experienced Product Advisors on **1890 88 20 60** and choose option 4, or e-mail sales@sage.ie.

A Network of Support

Once organisations reach a certain size and complexity, their software must map tightly onto their processes. With Sage, you have the reassurance of knowing that our unrivalled customer service organisation and well established network of carefully selected Business Partners and Developers will ensure that your Sage 200 Suite meets your needs.

Sage Business Partners have the in-depth industry knowledge and outstanding technical expertise to work with you and your teams before, during and after implementation. They can extend and modify your software, as well as link it to other market-leading applications.

With a planned development roadmap, choosing Sage will ensure your business receives the full support it needs for success – not just today, but into the future.

Microsoft® SQL Options

Sage 200 requires an approved third party database management system to operate - currently Microsoft SQL Server. In addition, we offer highly recommended Microsoft Software Assurance, enabling you to adopt updated versions of Microsoft SQL as they become available and certified for Sage 200.

For more information, please contact your Sage Business Partner:

To find out more about the Sage 200 Suite, the full range of Sage 200 modules, or to discuss how and when moving to Sage 200 will be right for you, talk to your Business Partner or contact us directly on 1890 88 20 60.

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