sage

200

Financials and Commercials

Line 50 Upgrade Guide

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200
Financials and
Commercials
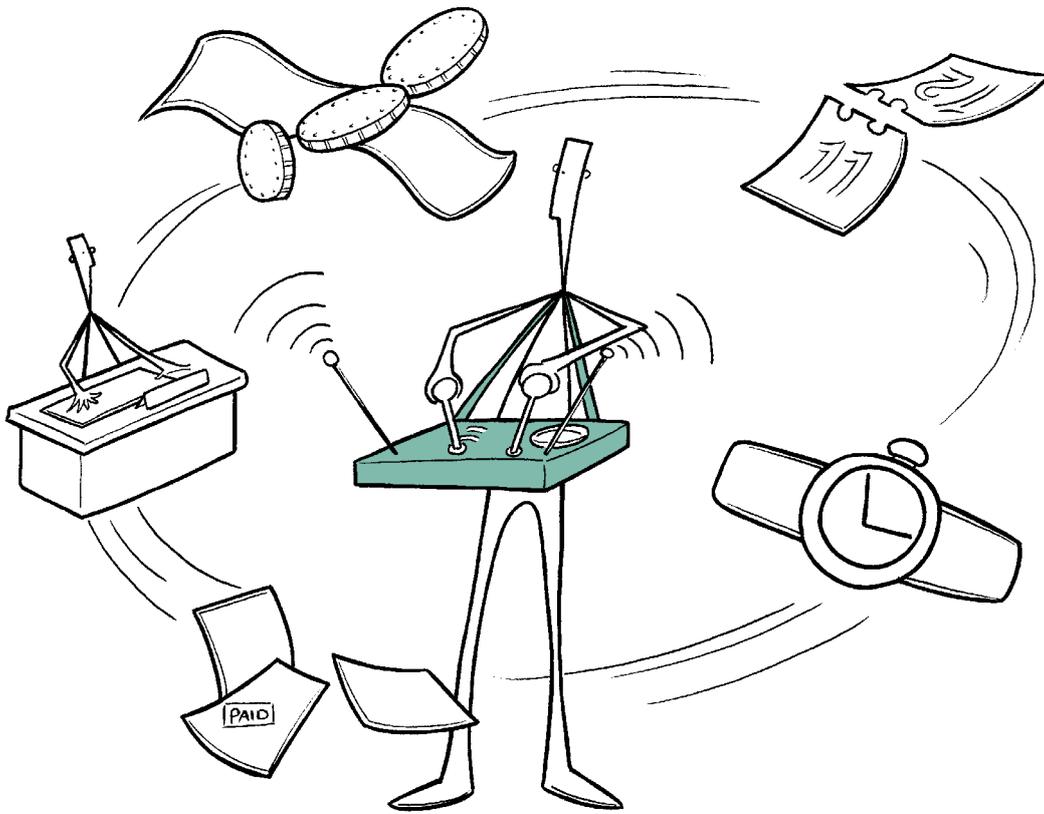
Contents

About this Guide.

This guide highlights the feature enhancements and benefits of the Sage 200 Financials and Sage 200 Commercials packages in comparison to Sage Line 50. If you feel that the size of your business, its processes or industry requirements may have outgrown your current software your business partner will be able to work with you to understand how Sage 200 Commercials and Financials could meet the changing needs of your business.

Outgrowing Sage Line 50

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

Newer technologies are now available that have allowed us to apply our knowledge of financial and trading requirements to create the next generation accounts and trading software, ready to meet customers' challenges for the next 20 years.

Additionally, businesses are looking to deploy software across their departments to interconnect data and processes to enable greater efficiencies.

The new Sage 200 Suite embodies this approach, incorporating a next generation accounts and trading application within a wider suite of business management software. This integrates information from finance, distribution, manufacturing, marketing, service operations and more.

Made up of a number of powerful modules the Sage 200 Suite offers a broad range of applications and software from which you can pick and choose. Each application is designed to operate independently to fulfill your immediate needs, whilst giving you the option to continue to add complementary software within the suite, if and when required.

"The Sage package is easy to implement, easy to use and has the potential to develop with the business as it grows. And my staff like it too."

Chris Fenn, Financial Director, Fusion People

Introducing the Sage 200
Financials and Commercials Packages

The Sage 200 Financials and Commercials applications operate as powerful standalone accounts and trading packages whilst also forming part of the newly launched Sage 200 Suite. Evolving from their previous incarnations as Sage MMS, built on the .NET platform and using the latest Windows technology, Sage 200 Financials and Commercials offer unrivalled usability and impressive scalability. A broad range of complementary software is also available from third party developers that extends the system to your exact needs.

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

Talk to your business partner about how and when moving to Sage 200 Financials and Commercials will be right for you or contact us directly on 0845 111 9988 to find out more.
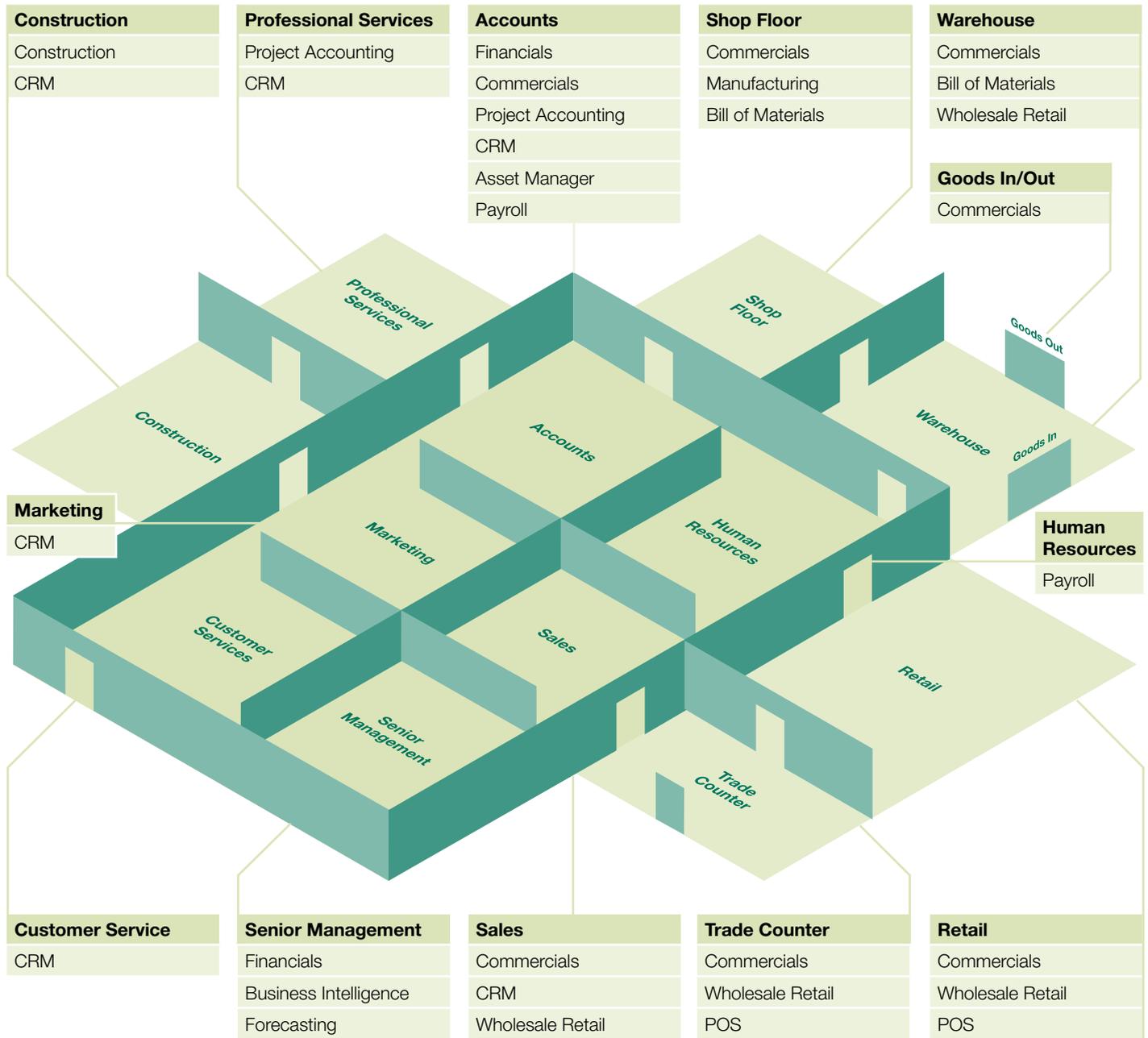
Sage 200 Financials and Commercials Overview

■ Made up of powerful modules, designed to work together to help your business run more smoothly and efficiently.

■ Sage 200 Financials contains the core ledgers to manage your accounting processes.

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

■ Offers detailed reporting and analysis, to give you the information you need to make more informed business decisions.

■ Provides you with unparalleled control over your distribution and supply chain.

■ Flexes to match the way your business actually works.

■ Quick to install and easy to use - you are up and running in days, with minimum disruption.

■ Reliable, backed by over 25 years of Sage software development.

■ Network-ready, supporting multiple users simultaneously.

■ Built upon industry standard SQL relational database technology.

■ Designed to utilise the latest version of the .NET architecture and integrate with your Windows operating system.

■ Key information is available in the desktop, using Sage 200 views - with details just a click away.

Sage 200 Suite Overview

- A comprehensive management system for every aspect of your business, integrating information from finance, distribution, manufacturing and service operations.

- Sage 200 Suite is made up of a number of applications and modules including the Sage 200 Financials and Commercials packages.

- Sage 200 offers you the ability to manage your process from start to finish. For example, acquiring a new customer through to order fulfilment and customer service.

- The flexibility of being able to install standalone applications within the suite at different times means you can upgrade different areas of your business separately – minimising disruption.

- Each module can be fully customised by a Sage Business Partner to suit your processes.

- Sage 200 supports operations specific to specialist industries – particularly Construction, Manufacturing, Retail and Wholesale/Distribution.

- All applications within the suite can be quickly deployed and mapped to specific business requirements, ensuring that you are up and running quickly.
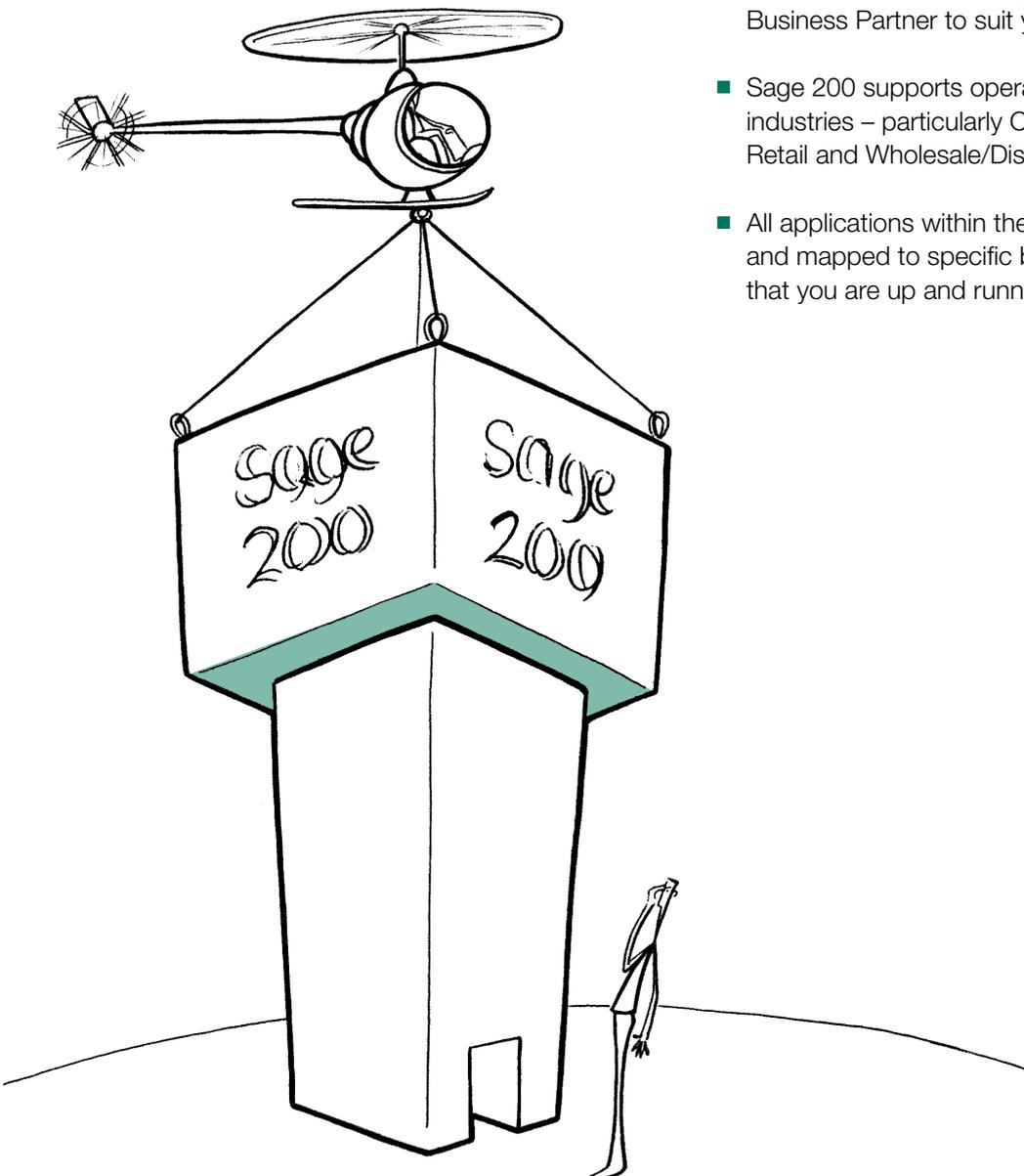
The Sage 200 suite provides you with integrated software for every part of your business, from accounting to customer service, from the shop floor to sales and professional services to retail.

Construction	Professional Services	Accounts	Shop Floor	Warehouse
Construction	Project Accounting	Financials	Commercials	Commercials
CRM	CRM	Commercials	Manufacturing	Bill of Materials
		Project Accounting	Bill of Materials	Wholesale Retail
		CRM		
		Asset Manager		
		Payroll		

Goods In/Out

Commercials

Marketing

CRM

Human Resources

Payroll

Customer Service	Senior Management	Sales	Trade Counter	Retail
CRM	Financials	Commercials	Commercials	Commercials
	Business Intelligence	CRM	Wholesale Retail	Wholesale Retail
	Forecasting	Wholesale Retail	POS	POS

Notes

CRM - Customer Relationship Management
POS - Point of Sale

System Wide

The tables below highlight the key features of Sage 200 Financials and Commercials, that represent enhancements to functionality found in Sage Line 50.

| Description	Explanation	Benefit	Example
Sage Line 50 data conversion.	A data checking and migration tool will quickly transfer your Sage Line 50 data into Sage 200 Financials and Commercials.	You can carry your data forward with confidence.	
Built on the .Net framework. – .Net2.	The Sage 200 Financials and Commercials applications have been built using the latest development languages and technologies.	Adoption of the .NET technology future proofs Sage 200 Financials and Commercials facilitates exploitation of web services and reduces development time.	
SQL Server Database.	Data entered into Sage 200 Financials or Commercials are stored in a 'best of breed' relational database.	Sage 200 Financials and Commercials are 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®).	
List based User Interface.	Information in a ledger is presented in the form of a continuous list which can be sorted (ascending/descending) according to the column headings. Users 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.). Users can select multiple rows in a list, then perform a range of appropriate actions by right-clicking or selecting an option from the toolbar.	Customers now have the flexibility to work in two ways within either Sage 200 Financials or Commercials packages. Using the existing 'function-based' approach, they can perform the same task on a number of records. For example, raising sales orders or transaction enquiries. The new 'list-based' approach works the other way, starting with a record, for example a customer, supplier or stock item and then performing a range of actions on it. Adoption of a list-based approach streamlines a number of business functions.	
Multiple users	Support for higher user counts (typically up to 50 users although there is no 'hard' limit - it depends on system usage).	Supports growth in a business where additional users are required.	
Security	Advanced security options allowing tailored menus per user. Access to certain other functions is also controlled by user permissions, for example Sales Order Entry options, Accounting Period and Multi-Currency set-up. In the latter two, full auditability allows you to see who has done what, and when.	Access to each area of the system is precisely controlled.	A junior purchasing staff member only has access to supplier enquiry screens plus certain Purchase Order processing screens. The Nominal Ledger, with sensitive data, is off limits.
Desktop views.	Both 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, without the need to run reports or enquiries. The view also provides a number of processing options on the information provided.	Either Sage 200 Financials or Commercials can be tailored to the exact needs of each user, putting necessary information and processes at their fingertips, maximising their efficiency.	The Sage 200 Financials or Commercials desktops of a particular user could include views showing stock below re-order level, and sales orders due for despatch. In the list of orders due for despatch. The user can then interact with the view selecting orders and despatching them.

Description	Explanation	Benefit	Example
Advanced Multi-currency	Sage 200 Financials and Commercials contains advanced multi-currency features. This allows you to specify the exchange rate for a given date range, as well as allowing the usage of a spot exchange rate.	Where an increasing proportion of your trade is with foreign-currency suppliers and customers, Sage 200 Financials and Commercials offer advanced capabilities.	Maintain currency-specific product pricing and discounts; allow a customer to pay in more than one currency (for example, a French customer might generally pay you in Euros but might occasionally want to pay you in $US or pounds sterling).
Amendability	Both Sage 200 Financials and Commercials can be amended to remove and add screens, fields and custom controls.	Sage 200 Financials and Commercials can be customised to specific business requirements - fields, labels, tabs, buttons and other form objects can be added, changed and removed.	Coupon codes need to be recorded against sales orders, and the address details of customers need to be captured quickly and accurately. Using the Sage 200 Financials and Commercials software development kit (SDK), the Sage Business Partner adds a coupon code field to the sales order entry and enquiry screen, and develops a live link on the post code field with third party address management software.
Alerts	Intelligent, colour-coded alerts appear in the relevant field when a user's action could cause a problem. Amber alerts are advisory and allow the user to continue, while red alerts do not allow the user to proceed. In either case an explanation of the problem appears when the cursor is placed over the alert.	Help prevent input errors without interrupting workflow.	An invoice amount being entered will take a customer over their credit limit. The invoice amount is highlighted in amber and advisory text appears when the cursor is hovered over it. This particular user is allowed to override credit limits so can carry on if they wish.
Integrated logon (optional).	The Sage 200 Financials and Commercials applications have the ability to use an integrated logon with the Microsoft Windows Operating System. If this option is enabled and the Sage 200 Financials and Commercials username is the same as your Windows login name, when running Sage 200 Financials and Commercials the product will launch without the need to login.	If enabled, users no longer need to type their usernames and passwords to login to Sage 200 Financials and Commercials. This increases launch performance and removes the need to remember several usernames and passwords.	
Archiving	When information is archived in Sage 200 Financials and Commercials it can be easily accessed and viewed in the same way as current information.	Information can be archived off to speed up the 'live' system but the same enquiry screens are used to access live and archived information - saving time when searching for specific information.	

Microsoft Excel® Integration

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

Description	Explanation	Benefit	Example
Ability to send information directly to Microsoft Excel®.	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 Microsoft Excel and re-imported into either Sage 200 Financials and Commercials.	
Information from Sage 200 Financials and Commercials can be accessed directly from within Microsoft Excel.	From within Microsoft Excel, a range of data fields in Sage 200 Financials and Commercials can be selected from a list using the standard function button.	Microsoft Excel is the tool of choice for customers wishing to analyse financial and other data. This is now considerably simpler to do with Sage 200 Financials and Commercials.	A Profit and Loss or sales report can be created in Microsoft Excel, that can be updated with the latest information at the click of a button.
Sample reports provided 'out of the box'.	The Microsoft Excel integration means that new reports can be built from scratch to suit the customer's exact requirements, however a number of prewritten reports are included with the product.	Customer can get immediate benefit from this feature.	Key Performance Indicators, Profit and Loss, Balance Report, Sales by Product.
Microsoft Excel reports can be accessed from within Sage 200 Financials and Commercials.	From either Sage 200 Financials or Commercials menu, the pre-written Microsoft Excel reports can be accessed directly. Microsoft Excel is started with the appropriate report open. Subsequently-written reports can also be added to the menu for direct access.	Quick access to functionality.	

Sage 200 Financials

Managing the day to day running of your business, this fully integrated package has been developed to provide you with unrivalled business control and management reporting, utilising information held in the Nominal Ledger, Cash Book, Sales and Purchase Ledgers.
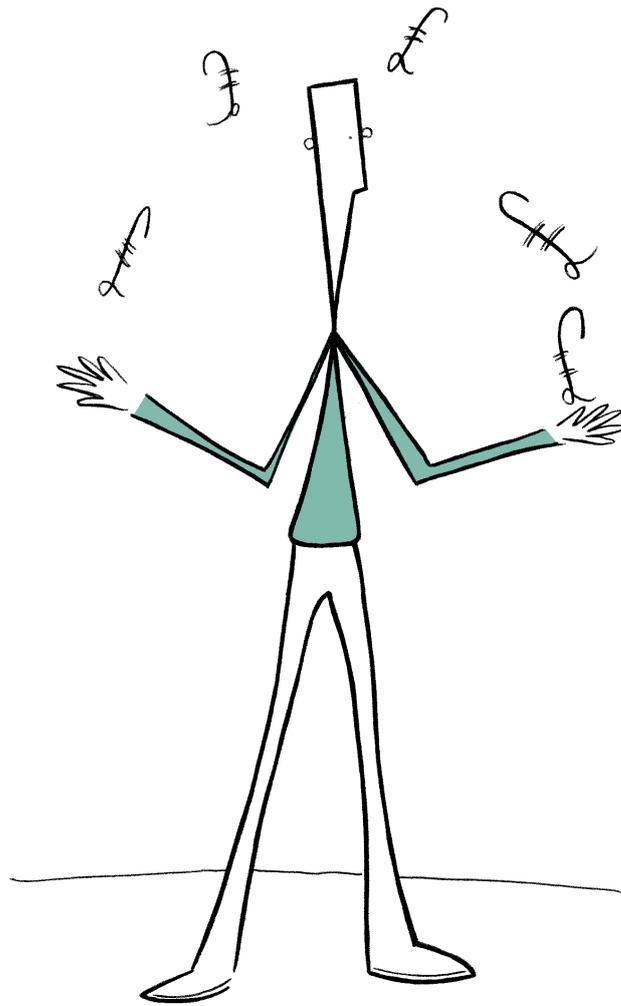
"Sage 200 Financials has provided us with the flexibility and control that we needed and has enabled us to make better use of our resources. As a result of highly flexible reporting structures and vastly improved information access, our decision making processes have improved substantially too."

Pamela Dowds, Senior Finance Officer, Theatre Royal

Nominal Ledger

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

Description	Explanation	Benefit	Example
Support for Open Period Accounting with up to 20 periods	Periods can be open, closed and re-opened as required; the following years period structure can also be set up in advance. Tight controls can be provided through a user access table and full auditability.	As a business currently using Sage Line 50, you may wish to continue using 12 open periods; alternatively you have the option of adopting a more flexible model by utilising analysis, with up to 20 periods in each financial year.	
Management analysis	A flexible nominal code structure including departments and cost centres. The coding structure can be created code by code or by using an automated creation routine to create a range of nominal codes, cost centres and departments.	Allows a greater depth of analysis for all management reports and enquiries. The enquiries can also use a hierarchical structure, giving combined views for all cost centres and departments.	In a kitchen company, ready-made items are sold as well as bespoke items. There's only one sales department, but P&L's for the two different types of sales need to be tracked and enquired upon. If a new item is introduced the coding required for the new item can be created quickly and easily.
Flexible profit and loss and balance sheet reporting	Compare actual against budgets or prior year/prior period, utilising cost centre and departmental breakdown.	See the performance of individual areas of your business.	In the example of a kitchen supplier, are bespoke kitchen operations cost-effective?
Budget control	Track and control budgets. Annual budgets can be assigned and custom budget profiles created so you can calculate monthly budgets by percentage.	Quickly create monthly budget profiles based on expected quiet and busy trading months.	You load the sales budget for each quarter end with a big 'push' at year end.
Currency handling	For each Nominal Ledger transaction, the value in base currency (for example sterling) is stored along with the currency and exchange rate of the originating document – for example a sales invoice raised in Euros. Sage 200 Financials allows you to store foreign currency exchange rates as spot rates, period rates or a combination of both.	Management reports reflect the value of transactions in base currency and in the exchange rate applicable at the time of posting. Revaluations are therefore more accurate.	
Transactional analysis	Transactions raised from Sage 200 Financials can be associated with an analysis code.	You can report across Nominal Codes, Cost Centres and Departments for example to track a particular job or project.	A newspaper company produces fortnightly free newspapers and would like to track the profit/costs associated with each run. Rather than creating a separate cost centre and department for each fortnightly edition, they can use a transactional edition analysis code for each transaction and therefore quickly gain the reports they require.
Group accounts	Create custom group accounts to summarise the balance of many nominal accounts. These group accounts can be reported upon.	Retain a great degree of 'granularity' by maintaining multiple nominal accounts for similar business activities, but easily view balances across these accounts for a quick, clear view.	You have different nominal codes for business expenses for different departments, but group them together for reporting purposes.
Pre-payments and accruals	Automated routines allow these to be posted at any time, not just at month end.	You can get an accurate picture of your finances at any point in the month - not just at month end.	

Description	Explanation	Benefit	Example
Consolidation	Merge Nominal Ledger data from two or more separate companies for financial reporting, in different currencies if required.	If subsidiary companies operate in a different base currency to the head office, business-wide accounts can still be consolidated.	
Batch journal entry	Place transactions on hold for authorisation before finally committing them to the Nominal Ledger.	Higher degree of control.	
Graphical representation of nominal data	Bar charts and line graphs can be used to show balance and budget for current and up to 5 previous years.	Quickly see how actuals compare with budgets.	

Sales Ledger

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

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

Cash Book

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

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

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

Purchase Ledger

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

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

Sage 200 Commercials

The Sage 200 Commercials package includes all of the Sage 200 Financials modules, plus a set of modules to help you administer your day to day business operations including stock control, pricing, sales order processing and purchase order processing.
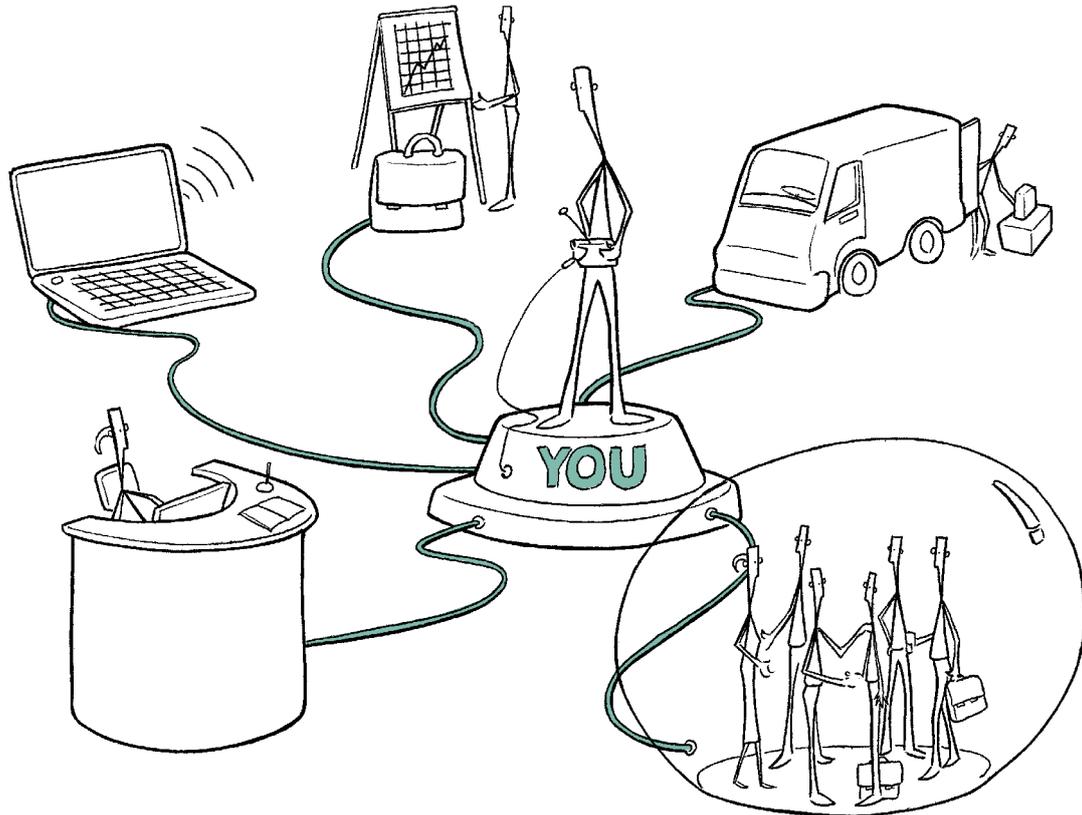
"It's an easy package for any individual to use, no matter what their financial experience, and this makes our job so much easier."

Graham Jenney, Financial Director, Budget Windows

Stock Control

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

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

Description	Explanation	Benefit	Example
Supplier serial numbers can be entered when goods are received, or new serial numbers can be self-generated	Serial numbers may be created by the original manufacturer of the item and used by the distributor - or the distributor's own serial numbers are generated and used. Sage 200 Commercials can handle both scenarios.	Flexibility. Fits in with the company's way of using serial numbers.	(a) SIM cards retain their original ID from manufacturer through distribution to end customer. (b) Computers are bought in from a manufacturer, then customised with industry-specific software and hardware. The company needs each to have a new serial number indicating their own configuration.
Traceable items can be specified on a picking list or defined during the 'pick and pack' process	It may be more appropriate to specify the items to be sold at the Sales Order Entry stage, or (especially if there are many items in the same warehouse) to simply record which ones are picked. Items specified on the picking list can be amended at despatch if necessary - e.g. if the specified item is found to be broken.	Flexibility to adopt the best process in each instance.	(a) Warehouse staff need to pick a customised computer with a specific configuration. (b) Warehouse staff pick the monitor box on the top of the pile.
Traceable items can have 'sell-by' and 'use by' dates associated with them.	Traceable items can have 'sell by' and 'use by' dates associated with them.	Effective management of perishable goods.	Food wholesaler sells dairy products with 'sell by' and 'use by' dates - so knows which products to sell first.
Facility to assign default 'use by' dates.	With Sage 200 you are able to assign a use by date to each traceable stock item. This date can be specified in days, weeks, months or years.	Default use by dates saves the user time as the system automatically applies a use by date when traceable stock items are booked in.	You may automatically assign a use by date of 2 months when a perishable item is booked into stock.
Traceable items can have an alternative reference	A second field allows an alternative reference number to be entered for each traceable stock item.	Increased flexibility.	Original computer manufacturer serial number can be recorded along with the self-generated serial number should a warranty issue arise with the original manufacturer.
Traceable numbers can be entered on receipt or at a later date.	Serial or Batch numbers do not have to be entered at the point that goods are received.	Flexibility to adopt the best process in each instance.	Quality checks or tests are carried out before the goods are numbered and made available for sale.
Traceable item analysis attributes.	You can store up to fifteen additional pieces of user defined information with each batch or serial numbered stock item.	Gives you the ability to instantly access important information that relates to the product.	You may record QA Standards or Inspector references for a stock item.
Serial numbers can be autogenerated	With Sage 200 you have the option to automatically generate the next number in the sequence for traceable items. Your stock record will hold a number of new settings including the next sequence number, the format of the number which includes date, order number, padding, prefix and separator options.	Fits your existing serial and batch numbering schemes. Improved accuracy and reduced time taken to enter new serial and batch numbers.	100 SIM cards with consecutive numeric ID numbers are purchased and put into stock. Rather than key all ID numbers individually, the first serial numbers are autogenerated.
Serial numbers do not have to be unique	Generally, serial numbers will be unique (particularly if self-generated). However this may not be the case if multiple suppliers are used for serial numbered items.	Flexibility to fit in with supplier serial number schemes.	Supplier's serial number for product a is the same as supplier's serial number for product a or b.
Facility to archive traceable items.	Traceable items can be archived.	Reduces the amount of irrelevant information presented on queries and reports, improving systems performance.	

Description	Explanation	Benefit	Example
'Real World' stock take process	Most businesses don't shut a warehouse to do a stock-take - they'll only count the most valuable items, or schedule stock-takes for particular products. Sage 200 Commercials supports these methods.	Sage Commercials works the way you work.	You decide to count only items worth more than £50 that are due for a count.
Default fufilment methods	Customer orders can be fulfilled using a number of methods including from your own stock, from a supplier via stock and from a supplier direct to the customer. These settings can be overruled at the point of sales order entry.	Flexibility to match your supply model and to handle exceptions.	You choose not to stock a high value item, instead shipping direct from your suppliers to your customers.
Stock item search categories	Each stock item has specific fields that can be populated with keywords, used when searching for particular products.	You don't need to know stock codes to find items. Quickly find items based on product characteristics appropriate to your product lines; speed up order entry and improve customer service by quickly being able to offer a selection of products to meet customers' requirements.	Find all blue shirts in size 16.
Ability to make stock items inactive	You can set a flag to make a stock item inactive, so that it can't be ordered but remains on the system with full history. If the stock item is only temporarily inactive the flag can be removed.	You won't lose the history of a stock item that is no longer used, but staff won't be able to order it (and it won't appear in drop-down lists when selecting products for an order, speeding up order entry).	Extreme example: If a problem has been found with a product, you would want to know details of every transaction without staff being able to continue selling it. The same could apply to a product that's simply been superceded.
Unlimited suppliers per item	The system stores additional information such as price last paid, lead time, invoiced YTD and when supplied.	Greater flexibility, assisting you to purchase from multiple suppliers.	Ideal when you always need to secure the best prices on high-volume, low-value commodity items that are readily available from multiple sources.
Unlimited alternative stock items	Unlimited alternatives to each stock item can be listed, with a preferred alternative specified.	Allows you to quickly specify a range of alternatives if a product is out of stock.	Batteries - many brands are available for each type, and for many consumers these are interchangeable.
Unlimited buying prices per item	The system keeps accurate record of all buying prices for all individual stock items.	Supports margin-based selling (ie cost-plus).	I have 100 of this product in stock - I paid £40 for 50 of them, 20 cost £45 and 30 cost £42.
Drill down on allocation/on order totals to Sales/ Purchase Orders	Easily view which customers have been allocated a particular product.	Allows you to prioritise orders more effectively.	An order comes in from a very important customer for a product that's already allocated to other customers. You can quickly see who it's allocated to, and decide who should get the product.
Default comment lines for picking lists and despatch notes	Stock items can have specific picking and handling instructions stored against the stock record. Comments can be edited or replaced at order entry.	The rights goods are despatched at the right time in the right packaging.	A particular item needs to be packaged and handled in a certain way, the information is entered against the stock item and automatically passed down to the warehouse.
Monthly trading/ profitability enquiry	You can view the activity for each product by month in terms of sales and purchase volumes and prices.	Greater control and understanding of product activity.	
Short and Extended stock descriptions and choice of description used for orders/Invoices.	With Sage 200 you have a 1 x 60-character and an optional unlimited text box. You are able to choose to use long or short descriptions as appropriate.	Fuller and more detailed product descriptions can be used for websites, invoices and other documents. More presentable, appropriate and informative documentation.	Use a concise product description on an invoice but a full product description on the website. Some products may need a longer product description (e.g. computer systems with different configurations).

Description	Explanation	Benefit	Example
Three analysis codes per stock transaction	Three customisable fields can be populated for each stock transaction.	More comprehensive information about each stock movement can be recorded and reported on.	If a stock item moves to manufacturing, who requested it? Or if promotional items are booked out to be used at a particular exhibition, this can be recorded (in such a case, the transaction wouldn't go via SOP so wouldn't be recorded elsewhere).
Ability to prevent sales from named warehouse / stock location	A particular stock location can be flagged so that sales cannot be made from it.	Prevent sales of a product that should not be sold.	You may have a warehouse or stock location that is bonded, quarantined, undertaking a stock take or that contains damaged goods - Commercials will allow you to prevent sales from that warehouse.
Specify areas for internally issued goods	Stock can be issued internally to individual areas of a business (as opposed to the departments defined in the Nominal Ledger).	Track internal usage of supplies; increase efficiency, accountability and budget control.	See how much stationery is used by a particular team within a department.
Sales order flag.	Sage 200 allows you to set a flag against stock items to determine whether they should be excluded from the Sales Ordering process.	The Sales order flag reduces the number of inappropriate stock items visible to sales people, preventing possible errors and speeding up the selection of valid sales order items.	A company that assembles stereo systems may not sell the speakers separately. Therefore, by disabling the sales order setting against the speakers they would not appear in the list of stock items for sale.
Allows label production.	Each stock item record now holds a flag to specify whether a label is required.	The system will automatically determine whether labels for stock items or batches are needed, and if so will generate them on receipt of the goods.	
Ability to rename the 'Unspecified' bin.	This 'Unspecified' default bin can be renamed to match your customer requirements.	Matching customer requirements helps businesses run more efficiently.	

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

Price Book

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

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

Sales Order Processing

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

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

Description	Explanation	Benefit	Example
Flexibility in stock allocation	With Sage 200, you are able to set up rules to allocate stock in a variety of ways. You can assign stock by order number, ensuring those who placed their order first will receive their goods first. You can allocate stock by order priority, guaranteeing your most valued customers will receive your stock first. Or you can allocate stock by the delivery date that you stated to the customer. Alternatively you can allocate your stock on the basis of use by date, sell by date, first in first out, by the quantity of the order or by taking stock from bins in a pre-determined order.	Allows you more control and flexibility in stock allocation. You are able to specify how your stock is allocated in line with your current processes.	If you are producing a line of perishable products with a short shelf life, you can ensure you set allocation by the use by date ensuring those products that are about to expire are sent to your customers first. If you are attempting to fulfill an order quickly you may allocate the stock produced from a bin near the loading bay.
Order Profitability	With Sage 200 Commercials you can record an original 'estimated' profit for a stock item; the actual profit is then updated either at the point of despatch or when invoiced.	Ensures your profit analysis is accurate.	
Profit Levels	Profit levels can be shown for the full value of an order (as well as for individual line items), at order entry. This is useful to see whether the overall profitability of an order meets requirements even if individual line items do not.	Give sales people margin guidelines to allow them to win sales while protecting your profit.	
Automatic or manual stock allocation	Sage 200 Commercials affords great flexibility in allocating stock to orders. Allocations can be made manually, or by a choice of automatic methods - order number (first come - first served), by prioritising certain customers or scheduling against due delivery dates.	Ensure that important customers are automatically given priority.	An order comes in from a very important customer for a product that's already allocated to other customers. You can quickly see who it's allocated to, and decide who should get the product.
Show discount calculation during order entry	If authorised, staff can see which discounts have been applied to arrive at a particular price on an order - useful if complex pricing schemes are used.	Quickly and confidently answer when a customer queries a price.	
Sale return cost management	You can specify whether an operator is able to enter an estimated cost price on orders and returns.	A cost can be associated with a stock item being returned from a customer, therefore maintaining accurate profit analysis.	
Easily monitor status for order line items	At an order header level, you can toggle between seeing the price details for all line items, or order status (e.g. Allocated, Despatched, Invoiced) for all line items - without even having to drill down.	Quickly see the status of sales order items to give better customer service and save time.	Your customer calls to query an order. You see that no line items have been despatched but 4 out of 5 have been allocated. You see that the remaining line item is waiting on a back-to-back PO. To investigate further, you drill down to see the status of that PO.
Ability to enter and store negative invoice lines	Negative free text items are allowed on a Sales Order to represent any part exchanges agreed as part of the order. The system provides the safeguard of checking that the order has a positive balance before saving.	By allowing part exchanges as part of the sales order routine, it removes the need to raise a credit note after the customer has placed their order. Which in turn saves time, ensures more accurate information is held and customer service is improved.	

Description	Explanation	Benefit	Example
'Price and Availability' queries dealt with quickly	With the Customer Pricing Summary enquiry screen, you can deal with speculative pricing and availability queries for a particular stock item without creating a quotation or sales order. This includes calculating any applicable discounts, being able to view stock balances across locations, plus being able to view any live sales and purchase orders for that stock item.	Quickly answer customer price/availability queries without entering a quotation or sales order.	
Extended support for repeat order	You can filter repeat orders so that only due orders are shown.	Speed up processing of orders from your regular customers.	
View stock availability at order entry	With Sage 200 Commercials stock balances can be viewed across all locations without leaving the order entry screen.	A user can give accurate information to a customer about availability without leaving the Sales Order Entry screen.	Customer asks for 2 of an item, but the system tells the operator 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. Operator places an order to ship from the other warehouse.
View alternative stock items during order entry	Sage 200 Commercials can quickly suggest alternatives if a product is out of stock.	Offer a speedy and helpful service to your customers.	Batteries - many brands are available for each type, and for many consumers these are interchangeable.
User privileges	Set up users with their own variable rights to change prices, override credit hold, view profit etc, as appropriate.	Empower sales people to have appropriate responsibility and therefore speed up the sales process.	An order being placed would take a customer over their credit limit. The team leader can enter the order where a junior member of staff could not.
Six analysis codes per order line and order header	Each order line can be accompanied by up to 6 custom analysis codes, with a further 6 for the order header. These can be used for reporting.	Sales can be analysed to a superb level of detail, to suit the individual business.	A sales line item could be identified not only by sales person but also by lead source and coupon code.
Unlimited additional charges per order	Unlimited charges for delivery, carriage etc can be set up.	Greater flexibility.	You have additional charges for carriage, weekend despatch, installation/demonstration etc.
Comment Lines	Items on a sales order can have instructions entered at the point of raising the order. These instructions can be passed down from the Stock Item.	Default comments can be passed down relating to a stock item from the stock file, however, the user can amend or enter a new instruction while creating the order.	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.
Deal with customer queries about existing orders swiftly	List all orders, filtering by order number, invoice number or customer if required, and drill down to view the original order.	Deal with customer queries quickly and efficiently.	
Record payments with orders	Easily take a deposit for an order (record whether full payment or deposit is received when an order is created).	Easily take deposits for high-value items and manage the subsequent payment of balances.	An account customer sends a cheque with their order for £75, but the cheque doesn't cover the order which is actually for £100. A quick call to the customer and they agree to put the balance on account. Sage 200 Commercials automatically creates an invoice that shows £75 paid and £25 still owing.

Description	Explanation	Benefit	Example
Payment Method for each order stored	Allowable payment methods can be pre-defined, and recorded at order entry.	Assists in reconciling expected vs actual receipts.	According to the system, the day's takings on the Trade Counter should be £1500 Switch, £75 Amex, £2000 cash. At cashing up this can be quickly reconciled against actual receipts.
Reduce data entry	Many fields can be set with default values.	Reduce the number of keystrokes and accelerate order entry.	Defaults can be set for customer delivery address, nominal code to post to for customer and cash sales, and warehouse to supply from.
Part despatch	Sage 200 Commercials allows part despatch without editing the order.	Flexibility to ship product as it suits you.	The whole quantity won't fit on your van - you'll need to send some today and the rest tomorrow.
Cancelled order lines file	Keep a full history of cancelled items for analysis.	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?
Prospect quotation	With Sage 200 Commercials you can store quotations for prospective customers without a sales account on the system. On conversion of the order Sage 200 Commercials will prompt for a new account to be created or for the order to be linked to an existing account.	Ensures that your sales ledger only records actual customers rather than prospective customers, keeping your financial system 'clean'.	A potential customer calls to check your prices and request a quotation, on successful conversion of the quote a customer account can be created.
Introduction of multiple invoice layouts	Sage 200 Commercials allows a default layout and a customer-specific invoice layout to be created. Customer-specific invoice layouts are stored against each customer account, so the correct layout is used whenever an invoice is printed for that customer. An override feature allows the default customer layouts to be overridden if a set of copy invoices with uniform format are required for internal filing.	These improvements ensure customer facing documentation is improved and processing time is reduced. By allowing multiple layouts in one print run, it removes the need to rename layouts and run multiple print runs, based around different customer ranges.	
Ability to provide the EC Sales List in XML format.	As of June 2006 all submissions for EC Sales must be made via the electronic submissions upload link provided on the HM Revenue and Customs website. Sage 200 Commercials can provide this information in the format required.	Ensures that your company's procedures are compliant with legislative requirements.	

Purchase Order Processing

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

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

Description	Explanation	Benefit	Example
Delivery address per order line	Specify different addresses for line items on the same PO.	Save time and paperwork by creating single orders for a supplier - even when the goods are needed at different warehouses.	You have three warehouses, and want to replenish stock at all three from the same supplier. Rather than create three POs, you can put the entire order on one.
Choice of delivery addresses	Orders raised with your suppliers can be delivered to a number of delivery addresses including your own different premises, customers, suppliers, subcontractors and ad hoc addresses. As part of the goods received routine the system will record an inward and outward stock movement automatically.	Sage 200 Commercials supports complex supply and delivery models.	A kitchen fitter may want the flat packs delivering to his home address for preparation before delivery to the customer.
Order generation with price negotiation	Create purchase orders manually if you wish; alternatively, the system can compile lists of what you should order based on shortfall (by warehouse, if necessary) and what's required for back-to-back orders. Then choose who to buy from and what to pay (the system defaults to the last buy price). If you wish, Sage 200 Commercials will then create a set of reports to base your negotiations on; once you're satisfied that you've got the best deal it will create and collate a series of purchase orders for you.	Saves time, organises workflow, cuts down on paperwork, improves efficiency.	You can get Sage 200 Commercials to calculate what product is needed to replenish stock at your three warehouses. It presents you with the prices you last paid from a selection of suppliers for those items, and you ring those suppliers to negotiate from there.
Order line history	You can view receipt and invoice entries, for full traceability of orders.	See the complete 'story' of an order line - invaluable when troubleshooting an order.	You've received 5 items but were invoiced 4; you can see when they were received, whether they were on one or more orders etc - and therefore have all facts to hand when you call the supplier to query.
Six analysis codes per order line and order header	Each purchase order line can be accompanied by up to 6 custom analysis codes; a further 6 are available on the order header. These can be used for reporting.	Purchases can be analysed to a superb level of detail, to suit the individual business.	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.
Unlimited additional charges	Unlimited charges for delivery, carriage etc can be set up in advance and selected for a PO. Alternatively, ad hoc additional charges can be created at the time of order entry.	Greater flexibility.	You can account for additional charges for carriage, weekend despatch, installation/demonstration etc.
Incomplete orders	You can write off incomplete orders.	In the real world, you don't always get exactly what you ordered - for all sorts of reasons. Sage 200 Commercials reflects this.	You order some goods from a supplier who send all but two items which are out of stock. They remain out of stock and are subsequently discontinued. You write the order off.
Cancelled order lines file	Sage 200 Commercials can keep a full history of cancelled items for analysis.	Analyse cancelled items for patterns.	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?

Introducing Sage Report Designer

The Report Designer used in Sage 200 Financials and Commercials will be familiar to anyone who has use Sage Line 50. We have added an inbuilt WYSIWYG Report Designer tool to help you to edit and automate your current reports.

Description	Explanation	Benefit	Example
Easy to use WYSIWYG Report Designer.	Edit any of the 250+ reports supplied with Sage 200 Financials and Commercials, or create new reports and documents from scratch.	Quickly design reports to give you precisely the information you need to make critical business decisions.	A full range of reports across all modules is supplied, along with a large number of standard letters, invoices, order acknowledgments and other documents.
Within a report, new values can be calculated using a series of expressions.	The Expression Engine is a straightforward yet powerful tool within the 200 Financials and Commercials Report Designer that can be used to build 'expressions' (rather like formulae). These expressions can be used to calculate values on a report.	Easy to create calculated fields on reports.	An invoice could have some text saying "you could save £x if you pay this within y days", where x is calculated from the early settlement discount and invoice total, and y is pulled from the sales ledger account.

Customisation and Integration

Customisable to meet specific business requirements

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

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

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

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

# Introducing Sage 200 Bill Of Materials

The Sage 200 Bill of Materials module offers accurate record keeping and functionality for any business with engineering or assembly operations. Working collectively with the Sage 200 Commercials application, Sage Bill of Materials allows you to control virtually all aspects of production, from the initial quote to the final invoice.

Description	Explanation	Benefit	Example
Precise Costing	Detailed costs can be built in for each unit or build run. Additionally, you can allocate a proportion of a fixed cost/operating overhead to a run, based on an average number of units per run.	If a component changes the rolled-up costs can be calculated automatically if desired. For components that do not use the standard costing method, the system will re-calculate the rolled-up cost of the finished goods upon allocation.	
Flexible Nominal Ledger analysis	Stock use can be summarised to a single line for each nominal account when posting to the Nominal Ledger, or split out to multiple lines by component.	Summarising nominal postings significantly reduces the volume of Nominal Ledger transactions, improving performance.	
Easily manage multiple Bills of Materials (BOM)	Multiple versions of a BOM can be stored and used, one of which is 'live' at a given time.	With powerful version control, only one person can edit or change a BOM at any one time and staff are aware that a BOM is being edited. Full change history is stored for each BOM. Old BOMs can be marked as 'Dead' or 'Obsolete'. Obsolete BOMs can be revived but not built from, and Dead BOMs can be permanently deleted if required.	
Multiple views of BOM structures	Four views of BOMs are available. The tree view allows drill-down through all levels and branches of the BOM.	The top level view shows only the first level of components below the finished item. The bottom level view shows only the end points of each of the BOM branches. Consolidated view shows rolled-up totals of all components used.	
Flexible build options	The system can be configured to always build subassemblies, or always use from stock, or allow choice in each case.	Picking lists can be produced at the time of allocation or separately.	
Customised BOMs and 'Specials'	Existing item quantities can be changed, individual items can be replaced and new items added.	A 'Partial Build' feature means that if for some reason you don't need to build all the items that raw materials have been allocated for, you can enter the quantity you have actually built. In addition, the system can cope with the situation where finished goods are built without allocating raw materials first, for expedited builds.	

Introducing Sage 200 Project Accounting

A New Addition to the Sage 200 Suite

Sage 200 Project Accounting is a highly configurable and flexible costing application. It is ideally suited to businesses that run projects or services and can be adjusted to suit the needs of each industry type. Whether you require a simple or extremely detailed costing and analysis structure Sage 200 Project Accounting will provide you with in-depth analysis and reporting features, ensuring that projects remain on track and profit levels are maintained.
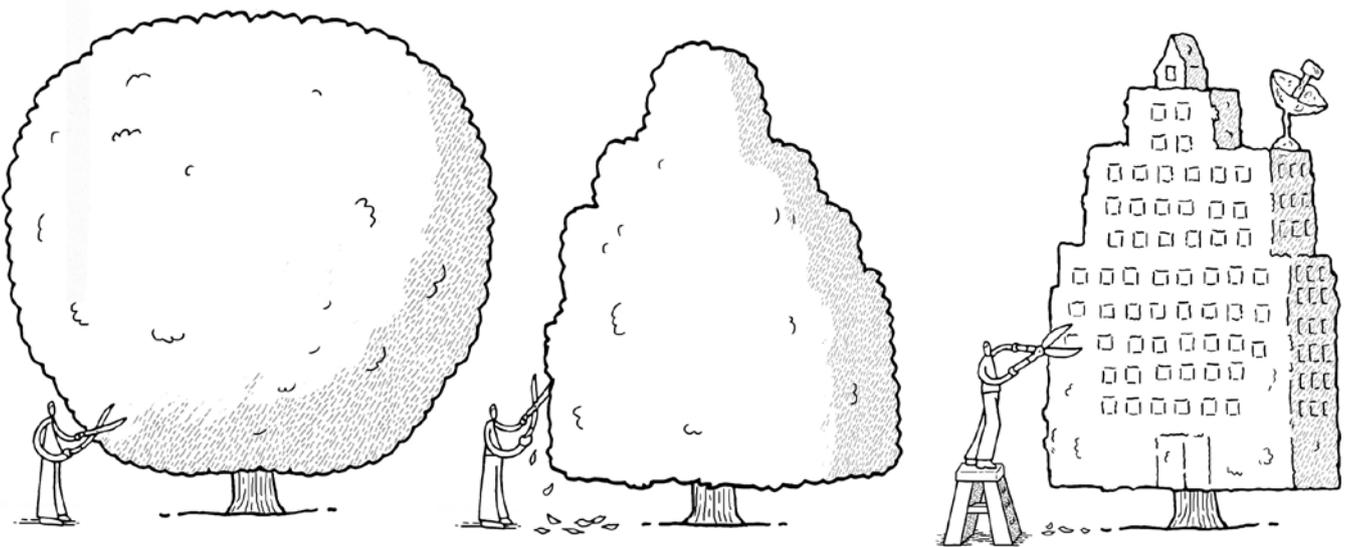
"We didn't really give much consideration to other software packages at the time of purchase, as I had already seen that Sage would give me all that I required. We have been with Sage for 18 years and they have always delivered in all the areas I anticipated they would."

Graham Jenney, Financial Director, Budget Windows

Want to know more?

To find out more about Project

Accounting, Bill of Materials

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 **0845 111 9988**.

Your Sage Business Partner:

System Requirements

The hardware requirements for Sage 200 will vary depending on the usage pattern on each workstation. Please see www.sage.co.uk or consult your Sage Business Partner for details.

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Sage (UK) Limited,
North Park,
Newcastle upon Tyne,
NE13 9AA

Tel 0845 111 9988
Fax 0845 245 0297
www.sage.co.uk