Sage 200 Suite

An Introduction to Sage 200

sage
Business Partner

Sage 200 Business Partner of the Year 2006, 2007, 2008

Accredited

TSG
TECHNOLOGY SERVICES GROUP

The complete IT service from one professional local supplier

TSG TECHNOLOGY SERVICES GROUP

TSG has the expertise and resources to handle your entire IT system

- We provide you with a system that is designed to meet your business needs
- We help you to manage the full cost of your IT system
- We provide the ongoing services to keep your business systems running
- We support over 12000 customers across the UK
- We have local offices close to you and over 13 across the UK
- We have over 300 IT professionals dedicated to our customers
- We are number 1 for Sage 200, Pegasus and Microsoft Dynamics NAV software

Business software

- Accounts and ERP
- Payroll
- Reporting and business intelligence
- CRM
- Microsoft Office
- Project management
- Industry specific software
- Back-up and anti-virus
- SharePoint Collaboration
- Bespoke applications

Networks

- Design
- Cabling
- Installation
- Wireless
- Storage
- Security
- Remote management
- Data back-up
- Firewalls

Hardware

- PCs
- Laptops
- Servers
- Printers
- Storage and back-up
- Mobile devices

Internet services

- Email
- Security including anti-virus, anti-spam, anti-spyware
- Virtual private networks (VPN)
- Domain and web hosting
- E-business
- Online data back-up
- Disaster recovery
- Broadband Internet access
- Leased lines

Maintenance and support

- Desktop PC support
- Server support
- Business software support
- On site proactive support
- Remote support
- Part or full helpdesk outsourcing
- 24 hour monitoring & diagnostics
- Equipment repair
- Warranty management

Other services

- Security audits & policy creation
- Business continuity/disaster recovery planning
- Training
- Consultancy
- Bespoke software development
- Systems integration
- Project management
- Office moves
- License management

Contents

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Introduction to Sage 200

Sage have been supporting businesses like yours for over 27 years, providing software and services to over 5.4 million customers. And its because of this experience that we can literally help with any aspect of running a business.

This brochure is designed to introduce you to the Sage 200 Suite, the Sage 200 Platform that sits at the core of the Suite and the how that Platform can be extended and tailored to your individual business requirements.

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.

This suite approach has been developed to ensure that your people and departments can work at maximum efficiency by streamlining your processes, reporting quickly and with ease - giving you one view of your business and it's customers.

Construction
- Construction
- CRM

Professional Services
- Project Accounting
- CRM

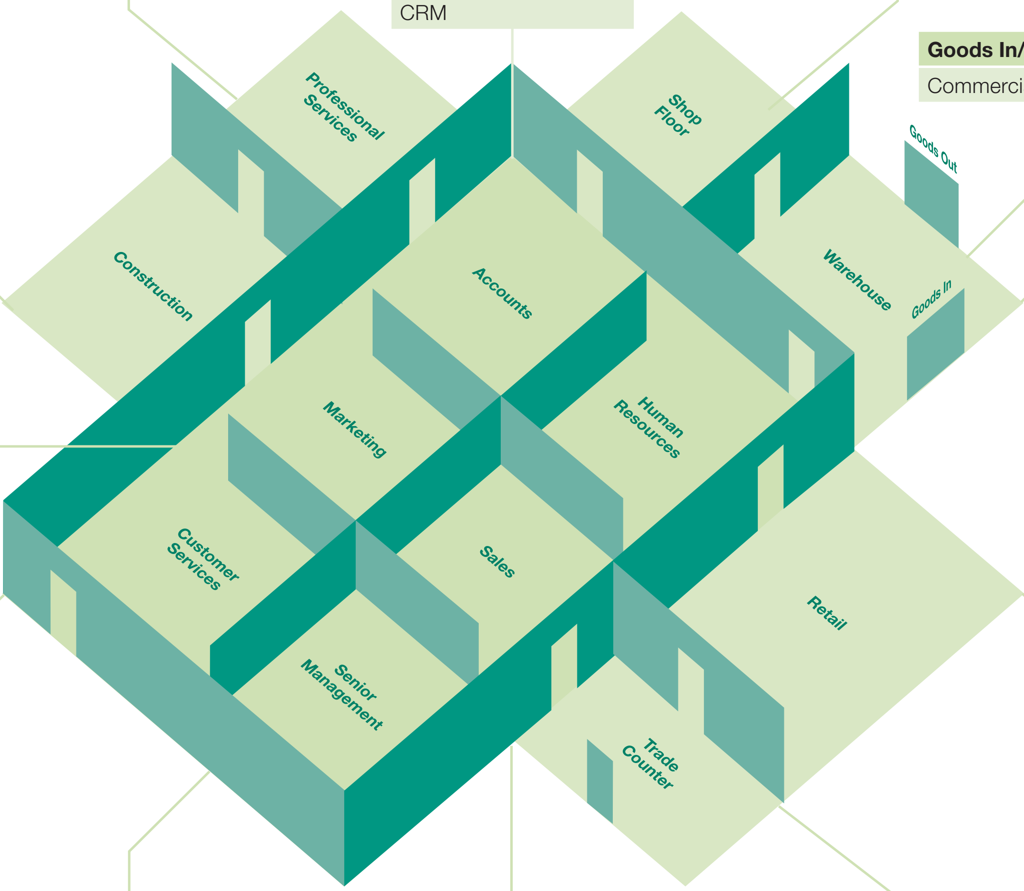
Accounts
- Financials
- Commercials
- Project Accounting
- CRM

Shop Floor
- Commercials
- Manufacturing
- Bill of Materials

Warehouse
- Commercials
- Bill of Materials
- Wholesale Retail

Goods In/Out
- Commercials

Marketing
- CRM



Customer Service
- CRM

Senior Management
- Financials
- Business analysis and forecasting
- Sage 200 Business Intelligence

Sales
- Commercials
- CRM
- Wholesale and Retail

Trade Counter
- Commercials
- Wholesale and Retail
- POS

Retail
- Commercials
- Wholesale and Retail
- POS

Notes
CRM - Customer Relationship Management
POS - Point of Sale

- The Sage 200 Suite is perfect for businesses who want to pick and choose specialist software that fits their business processes and integrates to share relevant information across departments and sites.

- Build the software that suits your business. You choose the software that will provide each of your departments with the specialist tools that are easily customised to best fit the way they work.

- Give your people customisable screens of their specific workflow and key performance indicators offering them focus and the information they need to react quickly and influence their people.

- Provide your people with one view of the customer, save man power across departments by working from one database that gives everybody one up to date and accurate view of the customer.

In summary Sage 200 enables:

Effective process management end-to-end - The Sage 200 suite includes the applications needed to manage information and processes in every part of your business. For example, 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 – through to order fulfilment and flowing on to providing outstanding customer service in the future.

Sharing data for a unified view of the customer - The Sage 200 suite helps your people access a more concise, accurate and complete view of your customers and their every interaction with your organisation, for example, sales and marketing, order dispatch, project management or credit control. 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.

Fast return on investment with rapid, easy deployment and customisation - 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 to suit particular business processes.

Flexibility and choice to match your business - We understand that every business has its own requirements in terms of the functionality and level of integration they need. The Sage 200 suite provides your business with a solid and dependable software platform. All components of the Sage 200 suite are designed to work together, minimising interoperability issues. In addition, your business benefits from simplified ownership and a single point of contact and accountability.

Supporting industry specific operations - Sage 200 supports operations specific to particular industries, notably Construction, Manufacturing, Retail, Wholesale and Distribution. Beyond that, our alliances with over 900 third-party software developers give you access to an exceptionally wide range of software and hardware options that can be integrated with your Sage software.

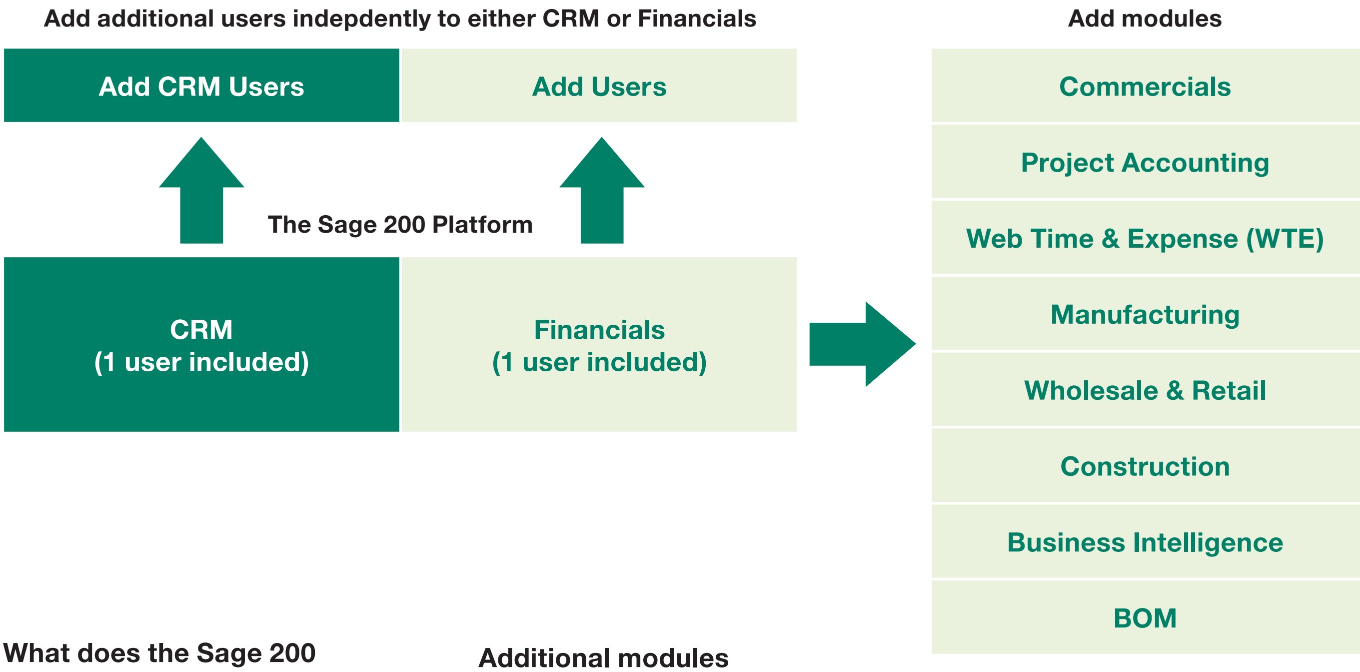
Information Management - Information Management is all about making information within the Suite more available to users in their day to day roles - Sage 200 embraces this is a number of ways, including workspaces and reporting. The Sage 200 Suite provides users with market leading reporting capabilities; 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. Complimenting 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 and 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 emphasis of the Sage 200 Suite is on integrated business process management. The Sage 200 Platform sits at the heart of the Suite, providing the solid, dependable foundation that your can build upon, taking the most appropriate software from the Sage 200 Suite to meet your business requirements.

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.

The Sage 200 Platform allows a complete view of the customer end to end, enabling you to track your customers throughout their entire lifecycle. For example, from customer acquisition to order completion and customer retention.



What does the Sage 200 Platform contain?

As demonstrated in the diagram 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.

Additional modules

Extend the Platform to match your specific requirements, choose from a range of additional modules including:

- Sage200 Commercials
- Sage200 Business Intelligence
- Sage200 Project Accounting
- Sage200 Web, Time & Expenses
- Sage200 Manufacturing
- Sage200 Construct
- Sage200 Wholesale & Retail
- Sage200 Point of Sale (POS)
- Sage200 Bill of Materials

Sage 200 Financials – Features and Benefits

Nominal Ledger

Sage 200 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.

- **Process transactions quickly and efficiently -** Create templates for recording repetitive transactions like payroll values. The prepayments option allows you to cater for items that have been paid in advance, such as insurance. Accruals can be configured and automated to cater for anything you pay in arrears, such as electricity bills. You can also place transactions on hold with the batch postings facility.
- **Budgetary control to monitor performance -** Track your actual performance against your budgets by recording this year and up to 5 previous years of annual or monthly budgets. You can also calculate monthly budgets by percentage or by import. Furthermore, you can export information and analyse it in other applications.
- **Rapid deployment -** You can import transactions and budgets that are held in other applications quickly and easily. Multiple cost centres and department codes can be quickly created using existing information, eliminating the need to re-key information.
- **VAT Returns made simple -** The screen actually replicates a printed VAT Return. Analyse the figures produced using the drill down facility.
- **Effective consolidation -** Nominal Ledger data from separate companies can be merged for financial reporting. This includes companies operating in different currencies and nominal structures, as the software converts values to the base currency of the parent company.

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.
Create memorandum accounts	Memorandum accounts are not included in the totals for financial statements, but are still reported on.
Journal Templates	Create templates to easily apportion fixed amounts or percentages across Nominal Ledger accounts - for example, to spread electricity bills across cost centres.
Define up to 20 accounting periods	The comprehensive period accounting structure offers flexibility with tight controls, allowing for open or closed period accounting.
Attach a file to a Nominal account	(E.g. a spreadsheet or graph).
Graphical analysis and presentation of Nominal data	(E.g. bar charts and line graphs can be used to show balance and budget for current and previous years).
Drill Down Facility	Drill down through Profit & Loss, Balance Sheet accounts and summarised Nominal Codes/Cost Centres and departments.
Batch journal entry	Place transactions ‘on hold’ for authorisation or amendment, before finally committing them to the Nominal Ledger.
Easy-to-use VAT Return procedure	
Automate Pre-payment and Accruals	
Flexible Profit and Loss and Balance Sheet layout design	You can have multiple Profit and Loss and Balance Sheet layouts, as well as the ability to import categories used in financial reports.
Unlimited transaction history	

Nominal Ledger	
Group Analysis	Group Nominal accounts for reporting purposes.
Consolidation	Merge Nominal Ledger data from two or more separate companies for financial reporting.
Transactional analysis	In addition to Cost Centre and Department, assign a transaction to a customisable.

Cash Book

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

- **Automate Direct Debits and Standing Orders -** Arrangements can be made to automate transactions on a monthly, quarterly or user-defined basis.
- **Save time and money with Bank Reconciliation -** Reconcile bank statements with details of payments and receipts entered. Discrepancies can be recorded, along with other transactions like bank and interest charges.
- **Foreign Bank Accounts & Electronic Banking -** Caters for your different banking requirements, such as inter-account transfers and foreign currency. Electronic banking allows for transactional information requests to be downloaded from the bank and reconciled when required, giving flexibility that puts you completely in control.

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 up to 100 foreign currencies.
E-Banking facility	Allows supplier payments to be made through your banking software.
Bank Reconciliation	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. E-Reconciliation facility allows bank reconciliation with your banking software on the same screen. Use the tick box next to each line to quickly and clearly identify and mark items which have been or are to be reconciled before saving the routine.
Automate Direct Debits and Standing Orders	Arrangements can be made to automate transactions on a monthly, quarterly or user defined basis.
E-Mail direct from a bank record and launch the bank's website	
Attach a file to a bank account	(E.g. word processing documents and spreadsheets).
Graphical analysis and presentation of bank data	(E.g. bar charts compare the current year's bank account balances to last year's).
Inter Account Transfers	Move money from one bank account to another. Transfers can be made between banks of the same currency or different currencies.
Authorisation	Purchase invoices if above a user defined level can be flagged prior to payments, enabling greater cost control.
Grouped transactions	Cash Book group transactions function allows drill down from the paying-in slip to the individual postings.

Sales and Purchase Ledger

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

- **Quickly locate and interrogate transaction data -** All details are within easy reach whether they are related to the financial or commercial ledgers. For example drill down to view the details of an invoice, order or to analyse a transaction under query as well as any transactional notes that may have been recorded.
- **Designed for rapid data entry -** Both ledgers can be configured with numerous defaults to speed up the data entry process and ensure compliance with agreed terms of business. For example, VAT can be applied automatically at the standard rate but can be changed; and in the Purchase Ledger a 'For Authorisation' flag can be set automatically on invoice transactions over a certain value. When entering transactions such as invoices, colour-coded warnings assist in preventing errors while not interrupting your workflow. In addition transactions can be batched up and applied to the ledgers at 'off-peak' times to optimise system speed.
- **Process Foreign Currency transactions -** You can trade in up to 100 foreign currencies, setting up each supplier or customer account with an operating currency. Balance and turnover will be maintained in base and foreign currency within the ledgers. Payments and Receipts can be made though the Cash Book or Sales/Purchase Ledgers and exchange rate fluctuations are dealt with by calculating 'gains' and 'losses' and posting them to specific nominal accounts.
- **Credit Control -** The Sales Ledger provides the best tools to manage your debtors, including retrospective aged debtor reports, customer statements and customisable debt chasing letters - with the flexibility to analyse absolute or overdue debt against customisable ageing periods. Furthermore the credit control options stored against a customer record can automatically calculate average time to pay, key credit control dates and has the ability to on-line credit check.
- **Automate Payments -** The Purchase Ledger allows you to quickly identify all invoices overdue for payment and those that, if paid, will qualify for settlement discount.
- **Automatic error correction -** Should you post a transaction incorrectly; Sage 200 can automate the necessary accounting processes to reverse it, updating the audit trail in the process.
- **Customer analysis -** Customers can be segmented (prospect, trade customers etc.) so that sales information and buying trends can be easily viewed and analysed. In addition you can analysis sales figures by specific trading periods, for example daily and weekly.

Purchase Ledger	
Define terms of business for each supplier account	(E.g. agreed number of days for settlement of payments, settlement discount and credit limit).
Unlimited analysis codes	Produce detailed analysis of your suppliers using the unlimited analysis codes. The codes created can be linked to the Sales or Purchase Ledger (or both) and a list of valid values provided ensures accuracy of the data captured.
Trading periods	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. In busy periods for example, it may be more applicable to analyse purchases weekly rather than by monthly.
e-Mail direct from supplier records and launch your supplier's websites	
Graphically analyse and present supplier data	(E.g. bar charts show turnover and aged balances).
Transaction 'drill down' facility	Analyse supplier transaction details including nominal payment and tax analysis as well as any transactions under query, for example details of invoice items, payments made and notes recorded.

Purchase Ledger	
Account and transactional drill around facility	View the status and details of any invoice or purchase order from with 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 re-print a document such as an invoice or GRN.
Unlimited transaction history	
Authorisation	Purchase invoices if above a user defined level can be flagged prior to payments, enabling greater cost control.
Batch data entry	Full batch control allowing the amendment, addition to or deletion of batched transactions, before committing them to the Purchase Ledger.
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	Send payments to a company that collects supplier debts on their behalf.
Automate payments	Quickly identify all invoices overdue for payment and those that if paid, will qualify for settlement discount. Payments can then be made electronically or cheques and/or remittance advice printed.
Flexible Cheque and Remittance Advice Design	
E-Banking facility to post supplier payments directly through your banking software.	
Multiple trader contacts	Unlimited number of contacts, roles telephone numbers and other contact numbers can be held for supplier.
Credit reference information	Supplier credit rating, account terms, payment terms can be stored directly against the supplier record. Furthermore, the credit control options which are stored against a supplier let you record key credit control dates and credit check on-line.

Sales Ledger	
Currency management	The Sales Ledger will maintain turnover details of an account in both the base currency and the operating currency of the customer - using spot rates, period rates or a combination as well as recording a full transactional revaluation history.
Define terms of business for each customer account	(E.g. agreed number of days for settlement of payments, settlement discount and credit limit).
Create individual price lists for your customers	
Unlimited analysis codes	Produce detailed analysis of your customers using the unlimited analysis codes. The codes created can be linked to the Sales or Purchase Ledger (or both) and a list of values provided, ensures accuracy of the data captured.
Trading periods	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. In busy periods for example, it may be more applicable to analyse sales weekly rather than monthly.
E-Mail direct from customer records and launch your customers' websites	
Multiple trader contacts	Unlimited number of contacts, roles telephone numbers and other contact numbers can be held for customers.
Attach a file to a customer's account	(E.g. word processing documents, images and spreadsheets).
Head Office Facility	Controls if/where statements are sent.
Graphically analyse and present customer data	(E.g. bar charts show turnover and aged balances).

Sales Ledger	
Transaction 'drill down' facility	Analyse customer transaction details including nominal, payment and tax analysis as well as any transaction under query (e.g. details of invoice items, payments made and any usernotes recorded).
Account and transactional drill around facility	View the status and details of any invoice or sales order from with 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 re-print a document such as an invoice or dispatch note.
Unlimited transaction history	
Integrated credit management features	Includes debtors letters, statement production, provisions for doubtful and bad debts, and the ability to place customer accounts on hold.
Batch data entry	Amend, add to or delete entries of batches of transactions, before finally committing them to the Sales Ledger.
Credit reference information	Customer credit rating, account terms, payment terms can be stored directly against the customer record. Furthermore the credit control options also record key credit control dates, provide the ability to on-line credit check 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. It can be easily deployed delivering freedom of choice and rapid Return on Investment (ROI). *Award winning, it is feature-rich and offers a broad range of functionality.

Sage 200 CRM equips organisations with the tools they need to find new customers, close sales faster and build lasting, more profitable relationships across all channels. It provides a decisive competitive advantage by delivering a comprehensive, easy-to-use system to successfully manage these relationships.

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

Sage 200 CRM empowers organisations to sell effectively. Easy-to-use, Sage 200 CRM provides sales users with instant access to calendars, accounts, reports, pipelines, contacts and call lists, empowering sales people to sell.

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.

With Sage 200 CRM Sales Force Automation, real-time sales opportunity analysis is provided instantly. Sage 200 CRM provides a snapshot of all opportunities within the sales pipeline, allowing sales teams to effectively analyse and manage deals at every stage. The sales process is automated, streamlining your business and enabling better business management.

*Sage CRM has won many awards worldwide - recent UK awards include: 2007 CRM Excellence Award From Customer Inter@ction Solutions Magazine, Best On Premise CRM Software in the Siftmedia Business Awards, 2007, Best On Premise CRM in the Business Software Satisfaction Awards, 2007.

Description	Explanation	Benefit
Calendar Management	Sage 200 CRM provides sales users with a complete diary solution with daily, weekly and monthly views. In addition, onscreen reminders and notification alerts are available to all sales team members.	Increases efficiency, punctuality and convenience.
Complete Bi-directional Outlook Integration	It is possible to run email, calendars and contacts through Microsoft Outlook and all interactions can be automatically synchronised with Sage 200 CRM, meaning that contacts, tasks and appointments are automatically updated in both systems.	Fosters organisational transparency within the business and enhances the quality and retention of information available to the user.
Management of Key Opportunities and Leads	Using Sage 200 CRM sales users can track leads from first contact to final sales closure.	Ensures that time and resources are invested into the deals that are most likely to close. Enables the sales team to easily identify and recruit new customers and resell or up-sell to existing accounts.
Sales Forecasting and Reporting	Point and Click reporting and graphs are provided by Sage 200 CRM along with accurate and timely forecasts which are accessible by sales representatives and managers alike.	Enables easy sales forecasting and reporting. Gives sales teams and management access to data for immediate analysis and decision-making. Delivers on-demand reports for business insight.
Account and Activity Management	With Sage 200 CRM leads can be escalated and reassigned easily, follow-up activities can be automated and field-level security is a simple and straight-forward process.	Guarantees that leads are handled by the employees most qualified to assist the client and only relevant parties are privy to information.

Description	Explanation	Benefit
Client Awareness	The most up-to-date and complete customer information is instantly and easily retrievable within Sage 200 CRM.	Helps organisations to have a better view of their customer and deliver superior customer service.
Graphical Reporting	Graphical forecasting and reporting features allow filtering of data per the user's criteria. It is also possible to use system default reports or easily create new reports with the aid of a reporting wizard.	Provides detailed data as required by businesses as well as graphical interpretations on the state of the business at any moment in time. Allows businesses to strategically plan and gain insights on future performance.
Web Quotes and Orders	Within Sage 200 CRM it is possible to enter a quote or an order remotely using the CRM interface.	Provides greater flexibility within Sage 200 CRM module, allowing orders to be entered remotely and synchronised to the sales order processing module.
Territory Management	With Sage 200 CRM, assignment rules automatically route leads to the relevant sales representatives based on territories. It is possible to create new teams and re-assign ownership of teams as well as view marketing campaigns, response rates and associated sales revenue by territory.	Delivers insight into sales effectiveness and performance by territory.
Escalation and Notification Alerts	Sage 200 CRM delivers periodic messages to sales managers summarising critical opportunity and forecast information for their direct reports.	Ensures business opportunities are always retained and worked on.
Sales Process Automation	Vital customer and prospect information can be retrieved quickly and easily, time is organised and administrative tasks are reduced to a minimum.	Automates the sales process to enable users to concentrate on their primary purpose which is selling.
Workflow	The in-built workflow can be followed out-of-the box or customised to reflect your business process.	Automates the sales process so that all sales users follow the same steps, ensuring no opportunities fall through the cracks. The sales process can be structured to suit your internal business process for maximum effectiveness.
Pipeline Management	Sage 200 CRM permits sales reps and managers to effectively analyse and manage the sales pipeline, with the ability to see and report on leads, opportunities and proposals at a glance.	Sales professionals are provided with tools to increase productivity and efficiency. Pipeline management is easier to do and at-a-glance status is available.
Document Sharing	Literature fulfilment can be automated and simplified.	Decreases administrative and other non-revenue generating activities which all impact on business performance and personal productivity.
My CRM and Team CRM	Individual and team views of activities are available.	Gives both individuals and management a single view of business activities as and when required.
Anytime Anywhere workforce	Sage 200 CRM provides the sales team with the ability to work offline or mobile wherever they are around the world.	Sage 200 CRM provides the system administrator with the ability to create profiles for offline users which optimises the download and synchronisation of data. This ensures that the sales person downloads data that is only relevant to them.
Integration with accounting modules	Sage 200 CRM is integrated with the Sage 200 accounting and stock modules. Sales staff have access to accounting functionality such as accurate pricing for quotes and orders, fulfilment data, and complex pricing rules and discounts normally held in the back office system only. Financial and non-financial information is accessible in the one place for a 360 degree view of the customer.	Allows sales teams to effectively manage, forecast and report on all phases of the sales cycle; gives sales staff a true 360 degree view of the customer across front and back office systems for better account management. The real time data views allows you to view financial and commercial information through the CRM interface. You can therefore access this information remotely, saving the need for them to be in the office or have access to the back office system.

Sage 200 CRM – Marketing Automation

Sage 200 CRM provides powerful tools for marketing teams to plan, execute and audit highly targeted marketing campaigns. Easy-to-use, Sage 200 CRM provides marketing users with the tools to target the right customer at the right time, eliminating guesswork and optimising marketing resources. With 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 marketing staff the ability to create campaigns based on the financial profile, order information and purchase history of customers, and enables marketing managers to generate accurate ROI calculations for better marketing measurement.

With Sage 200 CRM, every phase of every marketing campaign can be tracked to provide meaningful analysis and campaign measurement. Powerful and flexible profiling of customers and prospects based on criteria selected by the marketing team as well as direct integration to mass email, makes Sage 200 CRM for Marketing an invaluable tool for organisations and marketers.

Description	Explanation	Benefit
Campaign Management	Sage 200 CRM Marketing empowers users to view activities, objectives, leads and follow-ups, to drill down to specific activities including communications, opportunities, responses, budget, costs and prospects; managing and tracking every element of every marketing campaign.	Expedites campaign analysis, makes it easier and more automated to roll out marketing campaigns and creates good business practice going forward. Puts marketing resources to their best use as it delivers detailed information and eliminates guesswork.
Segmentation and Groups	Customer data and prospect lists can be segmented based on desired criteria such as interest or demographics via user-friendly tools. Marketing lists can be exported to Microsoft Excel if required.	Targeted messages can be delivered to select groups or target audiences.
Outbound Call Management	With Sage 200 CRM it is possible to allocate and schedule target lists, calls and follow-up calls at times convenient for prospects and customers.	Integrates easily into any marketing campaign and shares call details for transparency and easy access across the company.
Email Management	Sage 200 CRM Marketing provides the functionality to mass email efficiently with the ability to create email templates, send HTML and attachments as well as store communications per campaign.	Enables employees to review the exact email message received by a specific user or prospect. Sage 200 CRM provides enhanced formatting options for emails including a multi-lingual spell checker.
Campaign Reporting	Track the success of individual or ongoing campaigns in real-time, at any stage in the campaign from the initial lead to the close and match sales revenues to specific campaigns.	Provides immediate cost versus sales analysis data and the ability to analyse marketing campaigns per lead source with user-friendly tools and reports.
Lead Management	With Sage 200 CRM Marketing, leads can be qualified per selected criteria for follow-up and tracked at each stage in the process.	Ensures leads are visible to all team members, prioritised by management, have the appropriate team member assigned to them and are maximised at all times.
Outbound Call Management	Sage 200 CRM schedules calls for telemarketers and triggers follow-ups dependent on the outcome of the calls while the details of the call, such as length and results, are saved for cross departmental future reference.	Provides telemarketers with the tools necessary for effective and efficient telemarketing campaigns.
List Building and Management	Multiple criteria may be selected to assemble lists. It is also possible to merge documents with target lists for mass mailings. Responses to campaigns can trigger sub-lists for the next wave of the campaign, with successful responses moved to sales and non-responses kept on a reminder list (or removed if required).	Records marketing lists for future reference and provides the option to re-use successful campaign lists or import mail house lists. Offers the tools to create detailed profiles of customers and prospects over the course of the relationship. This information can be stored, reported and segmented for future campaigns.
Campaign Evaluation Tools	Analyse marketing campaigns by lead source or evaluate other important campaign details by using sophisticated, user-friendly tools and reports. Sage 200 CRM not only tracks response rates, it also permits the matching of sales revenues to specific campaigns.	Enables the status of campaigns to be viewed at any time to evaluate ongoing return on investment. Provides immediate cost versus sales analysis data. Enables management to determine marketing ROI.

Description	Explanation	Benefit
Integration with accounting modules	Sage 200 CRM is integrated with the Sage 200 accounting and stock modules. Marketing staff have access to financial information on customers, giving them the ability to create marketing lists based on financial profiles and target customers with good credit ratings and purchase histories. Return on marketing investment can be measured more accurately thanks to back office integration.	Enables marketing staff to execute highly targeted campaigns based on customers' financial history and enables pin-point measurement of marketing ROI. The real time data views allows you to view financial and commercial information through the CRM interface. You can therefore access this information remotely, saving the need for them to be in the office or have access to the back office system.

Sage 200 CRM – Customer Service Automation

Sage 200 CRM Customer Service is designed to help you effectively manage and resolve issues efficiently by providing you with an easy to use user-interface and powerful feature set. 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.

Integration with the Sage 200 accounting and stock modules, gives customer service staff access to back and front office customer data for a complete 360 degree view of every customer, making every customer interaction more informative and effective.

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 becomes more automated and streamlined, enabling you to focus more time on growing your business while delivering best practice customer service.

Description	Explanation	Benefit
Cases	Sage 200 CRM defines Cases as customer incidents or requests for technical assistance. Cases include Service Level Agreements. Failure to abide by the time frame allocated to a case will result in the trigger of an escalation process, such as informing the Support Manager that there is a case past its cut-off date.	Ensures that cases are attended to in a timely manner to maximise customer satisfaction and drive customer loyalty.
Knowledge Base	Articles about cases are called Solutions in Sage 200 CRM. This is a powerful resource providing users with technical notes and solutions to known issues or questions which can be stored centrally in the Knowledge Base.	Provides easy and immediate access to a central bank of information and keeps accurate records of contacts with customers via Case Tracking and Communication logs.
Search	With Sage 200 CRM, customer service representatives can search for known existing solutions to new cases in the Knowledge Base using powerful Sage 200 CRM find technology.	Reduces resolution time as it enables users to find information quickly and easily, which ultimately results in improved customer care.
Customer Information	The company/person entities within Sage 200 CRM contain a wealth of information related to each customer.	Profiles customers and their needs - this enables customer care organisations to work to meet their requirements faster based on the historical profile of the customer.
Workflow	The ability to define customer care processes and escalation points is controlled and managed by a feature in Sage 200 CRM Customer Service called Workflow.	Adhering to workflow processes results in escalation and automatic notification to a Customer Care manager if the Case remains inactive for longer than the predefined period of time. This is a powerful automatic reminder.
Customer Communications	Sage 200 CRM Customer Service enables customer care users to view communications, contacts, leads, opportunities or cases for each customer in the database.	Improves efficiency and information organisation and reduces administrative time.

Description	Explanation	Benefit
Reports	Several predefined reports are available to users. Sage 200 CRM reports can be printed to PDF or exported to CSV as well as being delivered on screen.	Allows easy analysis of case details. Graphs may be added to make the report even more presentable and easier to examine. Reporting with Sage 200 CRM is powerful, yet simple and easy to do.
Integration with accounting modules	Sage 200 CRM is integrated with the Sage 200 accounting and stock modules. Customer service staff have access to back and front office customer data for a complete 360 degree view of every customer. Greater linkage between revenues and SLA's ensure that customers get the appropriate level of service.	Empowers your organisation with critical information to build and support long-term customer satisfaction and loyalty. Maximises every customer interaction and experience. The real time data views allows you to view financial and commercial information through the CRM interface. You can therefore access this information remotely, saving the need for them to be in the office or have access to the back office system.

Overview of Sage 200 Additional Modules

Sage 200 Commercials

In addition to the Financials module, Sage 200 Commercials includes sales order processing, purchase order processing, stock control and price book. Integrating your accounting and trading modules means you can easily automate the delivery of customer orders with effective stock management, so you have the complete control required to manage the supply chain.

For more information download the Sage 200 Suite brochure and the sage 200 Commercials brochure at www.sage.co.uk/ sage200commercials.

Sage 200 Project Accounting

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 that be companies requiring a simple or a detailed costing and analysis structures. It provides in-depth analysis and reporting features, ensuring that projects remain on track and profit levels are maintained.

For more information download the Sage 200 Suite brochure and the sage 200 Commercials brochure at www.sage.co.uk/ sage200projectaccounting.

Sage 200 Web Time & Expenses (WTE)

The Sage 200 Web Time & Expenses (WTE) module allows Sage 200 Project Accounting users to enter and their timesheet and expense claims remotely using a web browser. The system can be configured in a number of ways, for example supporting users who enter their timesheets and expenses online (using an internet connection) or through a company intranet. One of the additional benefits of the Sage 200 WTE module is that the user does not require Sage 200 to be installed on their PC to allow the entry of timesheets and expenses.

Sage 200 Manufacturing

Manufacturing is one of largest revenue generating sectors in the British economy, employing over 3.5 million people. Many companies are not primarily manufacturers but could use elements of Sage Manufacturing to support assembly, repackaging of bulk items, resource planning, scheduling work and materials. The Sage 200 Suite is perfectly placed to provide an integrated system that controls the whole manufacturing process, from planning materials to monitoring realtime works orders. Sage 200 Manufacturing gives companies greater control over their manufacturing processes through effective scheduling of work, close tracking of resource utilisation and improved business analysis.

For more information download the Sage 200 Suite brochure and the sage 200 Commercials brochure at www.sage.co.uk/ sage200manufacturing.

Sage 200 Wholesale and Retail

Designed to enhance the Sage 200 Commercials module with retail, wholesale and trade counter functionality, Sage 200 Wholesale and Retail is invaluable for any business that operates within these environments. It offers a complete stores, retail and merchandising management system that enhances backoffice control and point of sales effectiveness. This enhanced module offers support for traceable items with batch and serial numbered items and improvements to warehouse to store stock transfers. In addition, Wholesale and Retail integrates with Sage POS, so that changes in stock file, prices and promotions need be applied only in one system. This saves time and increases accuracy by eliminating duplication of data entry and amendments. However this module can also be used without tills, which makes it ideal for company’s requiring extra stock and order functionality.

For more information download the Sage 200 Suite brochure and the sage 200 Commercials brochure at www.sage.co.uk/ sage200retail.

Sage Point of sale (POS)

Sage POS is an electronic point of sale (EPoS) system suitable for any business that needs to conduct quick, accurate and secure transactions with its customers. Sage POS software is specifically designed for businesses operating within a retail environment and handling customer-present transactions. Typical businesses already deploying Sage POS software include retailers, wholesalers, telesales operations, catering outlets, leisure centres and visitor attractions.

The software runs on the till and can be customised to reflect the unique processes of the business, adopting the terminology and the look-and-feel required, no matter how many bar codes and product variations. User friendly and fully customisable to suit business processes, the software can be installed on a single till or on multiple tills at various locations. It supports hardware from several Point of Sale manufacturers.

Sage 200 Construction

Sage 200 Construction provides business wide efficiency for companies operating in the construction sector. From helping to keep within contract budgets, to complying with complex and ever changing HMRC legislation, to reducing costs and managing cash flow, Sage 200 Construction is ideally suited to businesses with more complex contracting requirements.

All processes are supported – from receiving the initial enquiry to the final accounting, leaving you free to focus on building a profitable business.

Sage 200 Business Intelligence

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 provides a powerful analysis and reporting tool which transforms data into meaningful intelligence. Sage 200 BI can be used and understood by all users as there is no technical knowledge or prerequisites required to use the tool.

Sage 200 Bill of Materials (BOM)

Designed for businesses undertaking light assembly who do not have the requirements of the full feature rich Manufacturing module, Sage 200 BOM, follows the bill of materials process from beginning to end. It breaks down the manufacturing operation into easy to access areas, including materials, labour, machines, operations and reporting.

	Sage 200 Financials	Sage 200 Commercials	Sage 200 Project Accounting	Sage 200 CRM	Sage 200 Manufacturing	Sage 200 Bill of Materials	Sage 200 Wholesale and Retail	Sage 200 POS	Sage 200 Construction	Sage 200 Business Intelligence
Accounting and Payroll	✔		✔							✔
Supply chain and distribution		✔		✔		✔	✔			
Project management and billing	✔	✔	✔	✔						
Sales management		✔		✔						
Contact Management				✔						
Customer management, service and support				✔						
Marketing management				✔						
Retail and wholesale		✔					✔	✔		
Construction	✔	✔		✔					✔	
Manufacturing and production		✔			✔	✔				
Business forecasting, reporting and analysis	✔			✔						✔

Value added support

The Sage Business Advice Team

For help in selecting exactly the right Sage software for your business, phone one of our experienced Business Advisors. They will discuss your needs, provide you with detailed product information and, if appropriate, put you in touch with a local Sage Accredited Business Partner.

Sage Annual Licence Plan

The Sage Annual Licence Plan (SALP) ensures that your Sage 200 Suite product continues to support your business as it grows. You will benefit from legislative updates for Sage 200 software, access to business guides, special promotional offers and product upgrades.

Finance Options from Sage

At Sage, we recognise the upfront costs associated with purchasing and installing a new IT system can often be a barrier to acquiring the solution your business really needs. This is why we have created a variety of finance options, allowing you to spread the cost of payment, and enabling you to purchase the best possible solution for your business, with no compromises.

A network of support

Thanks to our unrivalled customer service and close relationships with Business Partners and Developers, we can provide the right business software for you – whatever the size and nature of your company. With over 5.5 million Sage customers worldwide - 700,000 in the UK - the network of people relying on Sage software is growing. You will find many of your customers and suppliers among them.

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 - allowing you to adopt updated versions of Microsoft SQL as they become available and certified for Sage 200.

The full IT service from one professional local supplier

TSG has the expertise and resources to support your entire IT system

- We provide you with local service
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- We provide a clear Service Level Agreement
- We provide you with experienced IT professionals
- We provide pro-active service
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- We also support your accounts software
- We provide impartial advice
- We provide cover for your IT team
- We can help you avoid unpleasant IT budget surprises

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