



# Sage 200 Suite

*What's new*



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# Sage 200 2009 – What's New

**Sage 200 2009 focuses on strengthening the existing Suite proposition – we have listened closely to feedback from both customers and our Business Partners, utilising wish lists and focus groups across the Suite. The 2009 release focuses on improving usability for our customers and improving customer experience by implementing the top wish list items, prioritised based on business impact and number of customers affected. This release is aimed at improving customer satisfaction, usability and making life easier for Sage 200 customers.**

With this in mind we have implemented the following top new features:

- Workspaces
- Sage Payment Solutions
- Deposit Handling
- Web quotes and orders
- Project accounting enhancements - implementing the top customer wish list items
- Multi-currency expenses
- Multi-level estimating

The table below details the new features included in the Sage 200 2009 release, per module.

NB: For those customers integrating with Sage Construction we are releasing a compatible version of Sage 200 Construction in the months following the release of Sage 200 2009, to ensure continued integration

Description	Explanation	Benefit
<b>Sage 200 Financials and Commercials enhancements:</b>		
<b>Sage Payment Solutions Integration</b> [*See Fig 1]	Sage 200 is now integrated with Sage Payment Solutions, allowing you to record credit card payments against transactions. All credit card details are held outside of Sage 200, therefore posing no security risk around storing these details.	You can now quickly and easily record credit card transactions against orders and invoices, from within Sage 200. This eliminates the need to do two separate transactions in separate applications, improving efficiency and reducing the margin for human error.
<b>Workspace Designer</b> [*See Fig 2]	A new concept of user workspaces has been introduced. Ten standard 'out of the box' workspaces are available along with a workspace designer tool that allows for configuration or creation of new workspaces.	Workspaces have been designed to give you business critical information 'at a glance' on your desktop. Their design makes it quicker and easier to access related information. The designer tool enables you to configure user defined workspaces to meet specific requirements, allowing each individual user to have a customised workspace.
<b>Deposit Handling</b>	In previous versions when a payment was recorded against an order, this payment was not accounted for until the invoice was produced and posted to the sales ledger. You now have the choice whether to account for the VAT on this payment and treat it as a deposit for VAT purposes, at the point of entering the payment against the order.	Ensures compliance with the VAT regulations around deposit handling. Also reduces credit control error as the payment is apparent on the customers account when the payment is received.
<b>Units of Measure Enhancements</b>	In previous versions some combinations of conversion units caused imbalances in stock and also problems when trying to complete sales and purchase orders. This area of the software has been re-designed to ensure that customer requirements are met and that units are defined correctly, upon setup	Allows you to configure Sage 200 to buy and sell stock in your required units, whilst offering guidelines on setting up units to get the best results for your business.
<b>Create Purchase order from Sales Order</b>	A single or multiple purchase orders can now be generated directly from the sales order entry screen.	This functionality eliminates the need to use the 'generate orders' feature for those who wish to generate individual purchase orders for individual sales orders. Saves you time as they no longer have to access a different menu to generate purchase orders.

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<b>Web-based help files</b>	The help files have been revamped and are now available through a new web-based interface.	The new format provides more functionality and flexibility than the format supplied in previous releases.
<b>Sage 200 Project Accounting Enhancements:</b>		
<b>Multi-currency Expenses</b>	Expenses can now be entered in currencies other than the base currency, through the core Project Accounting module and also within WTE.	Businesses can account for expenses in the currency which they are incurred, eliminating the need to convert back to base currency prior to entry.
<b>New WTE Reports</b>	New reports have been added to WTE to allow you to print out timesheet and expense entries.	Vastly improves the usability of this module, as you can now print out timesheets and expenses remotely and post them into the office, eliminating the need to go back into the office to ensure that they are submitted.
<b>One-sided adjustments to projects</b>	Customers have a requirement to be able to adjust an item on a project without impacting another project – i.e. a one-sided entry.	Saves time and complex work-arounds, as you can now account for mis-postings or omissions quickly and easily.
<b>Copy Project items</b>	When setting up project items, a number of tabs have to be completed. This can be a timely exercise; however it is now possible to copy the options chosen for one project item to another.	Significantly reduces the amount of time taken when setting up new project items.
<b>Adjustments to Posted Timesheets</b>	Previously, authorised and posted timesheets could not be adjusted; therefore it was very difficult to make amendments to reduce the amount of hours charged to a job/project. Negative timesheets can be entered to account for any mistakes made.	Saves time and reduces margin for error, as incorrect timesheets can be immediately corrected.
<b>Nominal Receipts as Revenue</b>	Nominal Receipts attached to a project were previously charged to the project as a negative cost, as assumptions were made that this type of transaction would be used to correct incorrect cost postings. You now have control over whether these transactions are posted as revenue or negative costs.	Reduces the margin for error and ensures accurate project accounting reports can be easily reconciled to the nominal ledger.
<b>Disable Payroll Sync Option</b>	A 'synchronise with Payroll' message box used to appear every time a user accessed the enter timesheet screen, some customers found this undesirable.	You have an option to enable or disable this synchronisation message, handing control over to you when Payroll sync is performed.
<b>Remove a Sub-project from a Project</b>	If a sub-project is included in a project in error, it was not possible in previous versions to remove this sub-project from the main project.	A 'delete' option has been added to the amend project screen, significantly reducing the amount of time and effort required to correct errors made.
<b>Copy billing Templates</b>	A new option to copy a previously created billing template has been added.	If a new template is to be created that is similar to an existing one, a copy can be made and then subsequently adjusted. This saves you having to create it from scratch.
<b>Sage 200 CRM enhancements:</b>		
<b>Web quotes and orders</b>	It is now possible to enter a quote or an order remotely using the CRM interface, without screen popping the commercials order forms within Sage 200.	Provides greater flexibility within the CRM module, allowing orders to be entered remotely and synchronised to the sales order processing module.
<b>CRM address enhancements in financial modules</b>	New address lines, sectioned contact details and a salutation field have been added to the existing fields within the core financial modules.	Financial data is now aligned to the CRM module to ensure consistency in data entry and reporting across the suite. This also ensures that the modules can be synchronised without loss of data.
<b>Prospect Orders</b>	Quotes can now be entered remotely for new customers who do not yet have a credit account in the Sage 200 sales ledger.	Aligns the CRM order and quote functionality with the processes in the sales order processing modules, to ensure consistency across the suite. Prospect quotes can also be produced for potential foreign customer accounts, broadening the scope of this feature.
<b>Real Time Data Views</b>	More real time financial and commercial module information is surfaced through the CRM interface.	Allows CRM users to view financial and commercial information through the CRM interface. You can therefore access this information remotely, saving the need for you to be in the office or have access to the back office system.
<b>Improved installation, upgrade and integration</b>	Improvements have been made to the installation procedure. The AIS link previously used to synchronise the CRM system to the back office accounts system has been removed to enable a smoother integration between the two products.	Saves time during installation and upgrades. The new tighter integration provides a seamless connection between the modules.

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<b>Multiple ERP databases linking to one CRM database</b>	Previously, it was only possible to link one ERP database to one CRM database. Under the new integration, multiple ERP customers and suppliers from different databases can link to one CRM account.	Provides you with a centralised view of contact and trading information with a single customer or supplier in CRM, whilst keeping the individual records for different legal entities separate in the ERP databases. This enables different types of users within an organisation to view data in the format required to meet the demands of your role.
<b>Launching of 3rd party forms through the CRM interface</b>	Any form within ERP can now be launched through the CRM interface.	Enables you to utilise development work carried out in ERP, within the CRM user interface, providing a more streamlined and integrated solution.
<b>New System Administrator:</b>		
<b>Replacement of the old system administration tool</b>	The old Sage 200 system administration tool has been replaced with a new application designed to control information on users, roles, menus etc.	Similar in functionality to the existing tool ensures that the learning curve for you is not too steep. Taking the form of a snap-in to the Microsoft Management Console, the new tool provides a familiar environment to system administrators. New added features enhance its usability.
<b>New password policy</b>	Criteria such as lifetime, length and complexity can be applied to user passwords.	Provides greater levels of security.
<b>Roles</b>	Roles can be created and act in a similar way to groups; however a user can belong to more than one role.	A way of grouping similar roles together and determining how your desktop will look.
<b>Add-on Manager</b>	The new system administrator now offers the administrator a location in which to manage system add-ons.	Add-ons packaged in this way can be checked for compatibility with new versions, meaning upgrades should be less time consuming and costly for the customer. Also they can easily be enabled and disabled within the system.
<b>Sage 200 Wholesale &amp; Retail Enhancements:</b>		
<b>Move items in merchandise hierarchy</b>	Drag and drop functionality has been introduced to enable items in the merchandise hierarchy to be moved from one department to another. Also the structure is more fluid, as all items do not have to have entries at all levels. An audit trail is included to reflect changes made.	Enables the quick correction of errors, utilising common Windows functionality. You no longer have to ensure that all levels within a hierarchy are populated, should they not be required. For auditing purposes a record of all changes made is maintained.
<b>Move items in company hierarchy</b>	As with the merchandise hierarchy, items within the company hierarchy can be moved within the hierarchy using drag and drop functionality. An audit trail is included to reflect changes made.	Enables the quick correction of errors and means that changes in the company structure can be easily reflected in the system. The audit trail ensures a complete auditable log of changes made.
<b>Transfer between all stores and warehouses</b>	Stock can now freely be transferred between warehouses and stores and visa versa, or between stores.	You can now quickly and easily transfer goods between all locations within a business. This ensures that stock levels are more accurate and up to date and also eases the common retail scenario where stock is transferred from another shop for a customer requesting an item that is out of stock in your local store.
<b>Include the same dimension more than once in styles</b>	When setting up product groups for retail items requiring variants, it is now possible to duplicate a dimension type within a style.	It is now less complex to configure product groups and dimensions to meet your needs, as a dimension can be utilised more than once within the product group set up. For example; you may want to use Size twice when setting up a product group, once for a set for waist size and again for leg length on trousers.
<b>Sage PayPort Enhancements:</b>		
<b>Single Polling</b>	You can choose to continue to use the timer within PayPort to update transactions from the till, or alternatively chose to manually poll the transactions.	Gives you the choice of automatic, timed polling or the ability to poll transactions as and when necessary. More control is given to you allowing you to decide when polling takes place, therefore having less impact on the day to day transaction processing.
<b>Error log output</b>	An error log output is spooled to an output file. Two reports are produced, one detailing errors and one showing activity.	Allows you to quickly and easily review errors that have occurred during polling and monitor activity that has taken place during that day.

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<b>Sage 200 Manufacturing Enhancements:</b>		
<b>Multi Item Estimates</b>	Sage 200 Manufacturing 2009 now provides facilities which allow multiple item estimates. Each item now effectively has its own estimate record, with the benefit of retaining all existing features like quantity breaks, stages etc. This provides maximum flexibility to manage which items are accepted, to be amended or invoiced. Provides you with the ability to automatically generate several blank estimates for a customer suffixing the estimate number. E.g. EST0001/1, EST0001/2, EST0001/3. The quotation print provides the facility to combine items from multiple estimates. Enables you to raise an invoice in Works Orders that covers several works orders.	Simplifies the estimating process where quotes for multiple items are required for the same prospect or customer. You no longer have to process separate estimates for each item resulting in significant time saving and ease of use.
<b>Estimates - change Margin % on Stage and Quantity Breaks.</b>	Currently Estimating calculates the "Margin %" based on the "Markup %" and the "Total Selling Price". This new functionality enables you to enter and amend the "Margin %" forcing the "Markup %" and "Total Selling Price" to be re-calculated based on the figure entered.	This provides you with added flexibility in Estimate pricing.
<b>Estimates – auto add stage templates</b>	Provides you with the ability to flag a stage template so that it is automatically added to any estimate that is created.	Time saving during estimate creation.
<b>Estimates – based on selling price</b>	Build estimate by selling price rather than cost and mark-up.	Added flexibility in pricing.
<b>MRP Tag view</b>	The MRP tag view is now collapsed by default.	Improved usability, and consistency with Sage 50 Manufacturing.
<b>MRP Aggregation (Bucket optimisation)</b>	Currently an initial bucket is created due to demand with subsequent buckets auto created at each multiple of aggregation days. This may lead to empty buckets where there are no demands and subsequent demand being pulled forward to the start of the bucket. When aggregation days is set to a significant number, this can result in excessive stock holding and orders being placed well before they are required. The new algorithm only creates time buckets where there is a demand avoiding the pull forward effect.	Optimises procurement and reduces stock holding.
<b>MRP - Due Dates for netting off Sales against Forecasts</b>	Currently, Sales Orders are netted off against Sales Forecasts on an oldest first basis. Whilst MPS identifies excluded items, it sums together what all Sales Forecast and Sales Orders with a Due Date between Time Fence #1 and Time Fence #2. This revised algorithm now nets off Sales Forecasts and Sales Orders on a weekly basis. This new method will be parameterised (so that the existing method can still be used) and is switched on by default.	Sales Forecasts and Sales Orders are now netted off in weekly demand time slots providing a more accurate view of demands.
<b>MRP - Treatment of Overdue Purchase Orders</b>	When a demand exists and MRP identifies that a purchase order has a due date that is prior to the MRP run date, the order is recommended for cancellation and a new purchase order is recommended. This can potentially lead to over-ordering / over-stocking. An alert has now been added to notify you that the original order is late. This gives you the opportunity to retain the order which, on the next MRP run, will enable the due date to be extended where a delivery is still outstanding.	Reduces the risk of costly over-ordering and over-stocking.
<b>MRP - Replenishment Horizon By Product</b>	The replenishment horizon is a global planning setting that can be altered on the MRP run-time dialog. The global setting is a compromise when components have widely differing lead times. Replenishment horizon can now be set on the stock record. Where the horizon for a product is not set MRP will use the default setting as at present. MRP will now evaluate the demand and replenishment position for each item subject to the appropriate Replenishment Horizon.	Ensures that long lead time items are always ordered in good time without creating an unwieldy number of recommendations for items not yet due for ordering.

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<b>Substitute traceable components</b>	When building an assembly, the system supports traceability by advising which traceable components should be used and recording this against the finished items. This new option "Substitute Traceable Component" enables controlled amendment of the component traceability details where items have been used out of sequence, scrapped and replaced or to correct data entry errors.	Enables you to manage securely, the controlled and validated changes to serial number and batch details recorded against manufactured products.
<b>Enhanced Traceability tools</b>	Traceability enquiry and reporting is currently a single level function requiring you to perform multiple searches to trace batches from source, through production to despatch. A new multi-level tree view enquiry has been added.	Complements existing traceability enquiries by providing an expandable tree view with multiple search options and multi-level capability.
<b>Hard linking Sales Order to Works Order.</b>	MRP dynamically associates Sales Orders with Works Order using the tags mechanism. As MRP balances demands with replenishments, as due dates change, a Works Orders originally created to satisfy a specific Sales Order may be re-tagged to a different Sales Order. For some you this may be undesirable where a Works Order is created specifically to satisfy a Sales Order and only that Sales Order. The "Hard linking" feature provides the best of both worlds and may be used in conjunction with regular, dynamic MRP tagging, ensuring complete flexibility.	Provides added flexibility for customers who require specific linked Works Order and Sales Orders. Some examples where this kind of functionality is required are: - Aerospace and other industries where the customer supplies free issue materials which may only be used to satisfy a specific Sales Order, - companies where a single product code is used, but each order is customised (for example by colour), - where you are not comfortable with MRP and dynamic tagging and perceive linked orders to be easier to track on the shop floor.
<b>Enable Works Order component issues from multiple warehouses</b>	When an order (Sales Order or Works Order) is created, the warehouse code is automatically added to the header record. This then limits the stock available for allocation and issue to batches and bins within that warehouse. This has function has been extended to allow selection of the same product from other valid warehouses.	Improved stock management and flexibility.

### \*Sage Payment Solutions

Sage Payment Solutions provides secure on-line payment handling facilities allowing you to accept card details, giving the freedom to liaise with the card issuer to obtain and transfer funds and will advise if funds are not available.

When a customer wants to pay for a previously entered invoice(s) the Sales receipt process will connect with Sage Payment Services (Fig 1) and:

- Obtain the card details and transfer the funds
- Record the receipt against the customer account
- Allow the immediate allocation of the receipt.

Fig 1:



When a customer wishes to pay for an order being placed:

- Select a payment method connected to Sage Payment Services
- Payment obtained immediately and recorded on the order - becomes a 'payment with order'

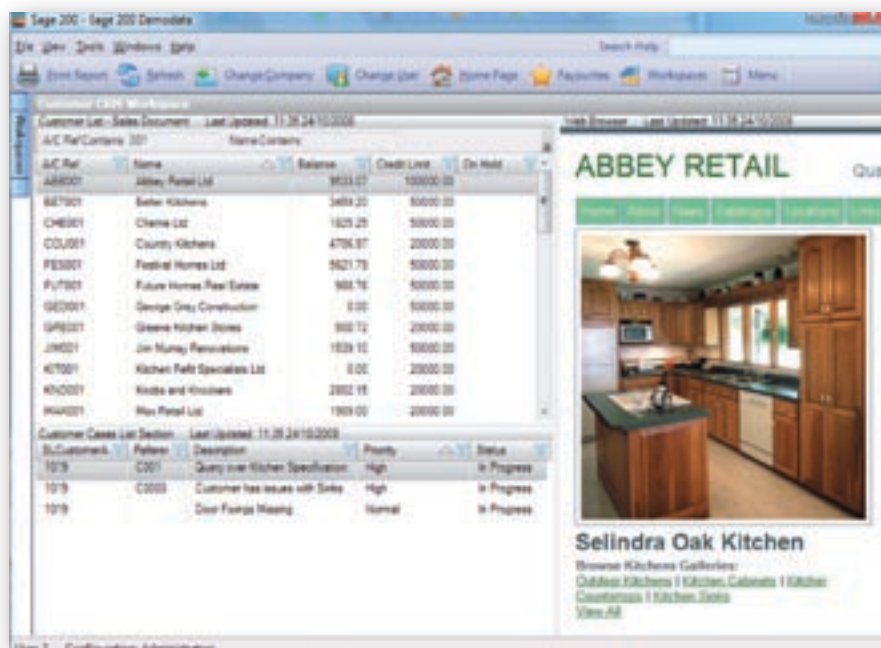
Sage 200 will store a reference to identify cards previously used by a customer. This reference can be used to make future payments using Sage Payment Services without the need to re-enter card details

### \*Workspace Designer:

Workspaces are part of the Sage 200 Information Management strategy and provide a method of surfacing business data directly on to the Sage 200 desktop. They provide you with quick and easy access to the information you want to know, presented in a way that delivers maximum value for minimum effort. Extensive support is provided for customisation and creation of Workspaces, to allow flexible and attractive desktops to be created including information from multiple sources.

In this respect workspaces are a breakthrough in usability, in that they can extract information from multiple sources (including sources external to Sage 200), such as Excel and web browsers. For example, the workspace below shows information from Sage 200 Financials, CRM and incorporates a web browser (Fig. 2):

Fig. 2:



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