# Sage 200 2009 - What's New At a Glance

## Introducing Sage 200 2009

Sage 200 2009 is the next major release of the Sage 200 Suite, and is scheduled for launch at the end of January 2009. Since the launch of the Sage 200 Suite in 2007 we've spent development time building the Suite and incorporating additional modules. Now, the 2009 version focuses on strengthening the existing Suite proposition.

The 2009 release improves usability and customer experience by implementing the top wish list items, prioritised based upon business impact and number of customers affected. This release is aimed at improving customer satisfaction, usability and making life easier for Sage 200 customers. Hand held sites, which will run for an unprecedented 3 months, went live the first week in November 2008.

The key themes for our first major annual release of the Sage 200 Suite include:

- Introducing Sage Payment Solutions
- Improving Project Accounting
- Improved integration between Sage 200 and Sage 200 CRM
- Usability
- Information Management - making information within the Suite more available to users in their day to day roles

| Feature | Explanation | Benefits |
|---|---|---|
| **Sage 200 Financials and Commercials enhancements:** | | |
| ***Sage Payment Solutions Integration** *[*See Fig 1]* | Sage 200 is now integrated with Sage Payment Services, allowing the user 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. | Users 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. |
| **Workspace Designer** *[*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 the user business critical information 'at a glance' on their desktop. Their design makes it quicker and easier to access related information. The designer tool enables advanced users to configure user defined workspaces to meet the customer's requirements, allowing each individual user to have a customised workspace to meet their individual requirements. |
| ***Deposit** | In previous versions when a payment was recorded | Ensures compliance with the VAT regulations around |

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| **Handling** *[*See Fig 3]* | against an order, this payment was not accounted for until the invoice was produced and posted to the sales ledger. The user now has 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. | deposit handling. Also reduces credit control error as the payment is apparent on the customers account when the payment is received. |
| **Units of Measure Enhancements** | **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 users to configure Sage 200 to buy and sell stock in their required units, whilst offering guidelines on setting up units to get the best results for their business. |
| **Create Purchase order from Sales Order** | 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 users who wish to generate individual purchase orders for individual sales orders. Saves the user time as they no longer have to access a different menu to generate purchase orders. |
| **Web-based help files** | 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. |
| **Sage 200 Project Accounting Enhancements:** | | |
| **Multi-currency Expenses** | 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. |
| **New WTE Reports** | Previously when time or expenses were entered via WTE, no reports were available. New reports have been added to WTE to allow the user to print out timesheet and expense entries. | Vastly improves the usability of this module, as the user 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. |
| **One-sided adjustments to projects** | On the previous cost adjustment screen, a project and project item had to be selected. This meant that to add costs to one project they had to be removed from another. 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 users can now account for mis-postings or omissions quickly and easily. |
| **Copy Project items** | 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. |
| **Adjustments to Posted Timesheets** | 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 | Saves time and reduces margin for error, as incorrect timesheets can be immediately corrected. |

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| | account for any mistakes made. | |
| **Nominal Receipts as Revenue** | 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. The user now has 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. |
| **Disable Payroll Sync Option** | A 'synchronise with Payroll' message box used to appear every time a user accessed the enter timesheet screen. This was undesirable for some customers. | The user has an option to enable or disable this synchronisation message, handing control over to them on when Payroll sync is performed. |
| **Remove a Sub-project from a Project** | 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. |
| **Copy billing Templates** | 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 the user having to create it from scratch. |
| **Sage 200 CRM enhancements:** | | |
| **Web quotes and orders** | It is now possible to enter a quote or an order remotely using the CRM interface, without screen popping the back office commercials order forms. | Provides greater flexibility within the CRM module, allowing orders to be entered remotely and synchronised to the sales order processing module. |
| **CRM address enhancements in financial modules** | 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. |
| **Prospect Orders** | 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. |
| **Real Time Data Views** | 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. Users can therefore access this information remotely, saving the need for them to be in the office or have access to the back office system. |
| **Improved installation, upgrade and integration** | 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 | Saves time and money during installation and upgrades. The new tighter integration provides a seamless connection between the modules. |

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| | between the two products. | |
| **Multiple ERP databases linking to one CRM database** | 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 the user 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 their role. |
| **Launching of 3rd party forms through the CRM interface** | Any form within ERP can now be launched through the CRM interface. | Enables the user to utilise development work carried out in ERP, within the CRM user interface, providing a more streamlined and integrated solution for the customer. |
| **New System Administrator:** | | |
| **Replacement of the old system administration tool** | 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 users 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. |
| **New password policy** | Criteria such as lifetime, length and complexity can be applied to user passwords. | Provides greater levels of security. |
| **Roles** | 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 the user desktop will look. |
| **Add-on Manager** | 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. |
| **Sage 200 Wholesale & Retail Enhancements:** | | |
| **Move items in merchandise hierarchy** | Previously items in the merchandise hierarchy could not be moved to another department, they would have to be deleted and re-entered. Drag and drop functionality has been introduced to enable this. 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. A user no longer has 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. |

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| **Move items in company hierarchy** | 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. |
| **Transfer between all stores and warehouses** | Stock can now freely be transferred between warehouses and stores. In previous versions it was possible to transfer stock from a warehouse to a store, however not in the other direction or between stores. | A user 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 their local store. |
| **Include the same dimension more than once in styles** | 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 the needs of the user, as a dimension can be utilised more than once within the product group set up. For example; a user 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. |
| **Sage PayPort Enhancements:** | | |
| **Single Polling** | A user 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 the user the choice of automatic, timed polling or the ability to poll transactions as and when necessary. More control is given to the user allowing them to decide when polling takes place, therefore having less impact on the day to day transaction processing. |
| **Error log output** | An error log output is spooled to an output file. Two reports are produced, one detailing errors and one showing activity. | Allows users to quickly and easily review errors that have occurred during polling and monitor activity that has taken place during that day. |
| **Sage 200 Manufacturing Enhancements:** | | |
| **Multi Item Estimates** | 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.<br>Provides users with the ability to automatically generate several blank estimates for a customer suffixing the estimate number. E.g. EST0001/1, EST0001/2, EST0001/3. | Simplifies the estimating process where quotes for multiple items are required for the same prospect or customer. Users no longer have to process separate estimates for each item resulting in significant time saving and ease of use.<br>This improved functionality ensures consistency with Sage 50 Manufacturing. |

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| | The quotation print provides the facility to combine items from multiple estimates.<br>Enables users to raise an invoice in Works Orders that covers several works orders. | |
| **Estimates - change Margin % on Stage and Quantity Breaks.** | Currently Estimating calculates the “Margin %” based on the “Markup %” and the “Total Selling Price”. This new functionality enables users to enter and amend the “Margin %” forcing the “Markup %” and “Total Selling Price” to be re-calculated based on the figure entered. | This provides the user with added flexibility in Estimate pricing. |
| **Estimates – auto add stage templates** | Provides users 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. |
| **Estimates – based on selling price** | Build estimate by selling price rather than cost and mark-up. | Added flexibility in pricing. |
| **MRP Tag view** | The MRP tag view is now collapsed by default | Improved usability, and consistency with Sage 50 Manufacturing**.** |
| **MRP Aggregation (Bucket optimisation)** | 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. |
| **MRP - Due Dates for netting off Sales against Forecasts** | 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 netts 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. |
| **MRP - Treatment of** | When a demand exists and MRP identifies that a purchase order has a due date that is prior to the MRP | Reduces the risk of costly over-ordering and over-stocking. |

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| **Overdue Purchase Orders** | run date, the order is recommended for cancellation and a new purchase order is recommended. This can potentially lead to over-ordering / over-stocking.<br>An alert has now been added to notify the user that the original order is late. This gives the user 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. | |
| **MRP - Replenishment Horizon By Product** | 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.<br>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 |
| **Substitute traceable components** | When building an assembly, the system supports traceability by advising which traceable components should be used and recording this against the finished items.<br>There is currently no mechanism to reflect changes to this data except for a workaround to edit the Traceable Identification numbers associated with a traceable item.<br>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 users to manage securely, the controlled and validated changes to serial number and batch details recorded against manufactured products |
| **Enhanced Traceability tools** | Traceability enquiry and reporting is currently a single level function requiring the user to perform multiple searches to trace batches from source, through production to despatch.<br>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. |
| **Hard linking Sales Order to Works Order.** | 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 | Provides added flexibility for customers who require specific linked Works Order and Sales Orders.<br>Some examples where this kind of functionality is required are: |

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| | Sales Order may be re-tagged to a different Sales Order. For some users 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. | - Aerospace and other industries where the customer supplies free issue materials which may only be used to satisfy a specific Sales Order,<br>- companies where a single product code is used, but each order is customised (for example by colour),<br>- where users are not comfortable with MRP and dynamic tagging and perceive linked orders to be easier to track on the shop floor. |
| **Enable Works Order component issues from multiple warehouses** | 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.<br>This has function has been extended to allow selection of the same product from other valid warehouses. | Improved stock management and flexibility. |

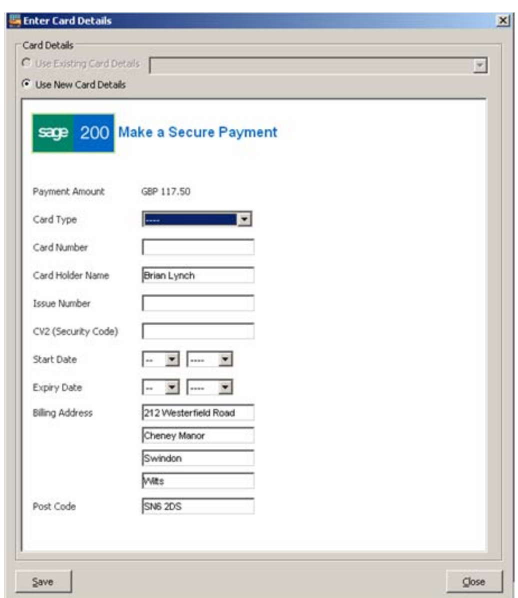
***Sage Payment Solutions**

Sage Payment Solutions provides secure on-line payment handling facilities allowing users 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'

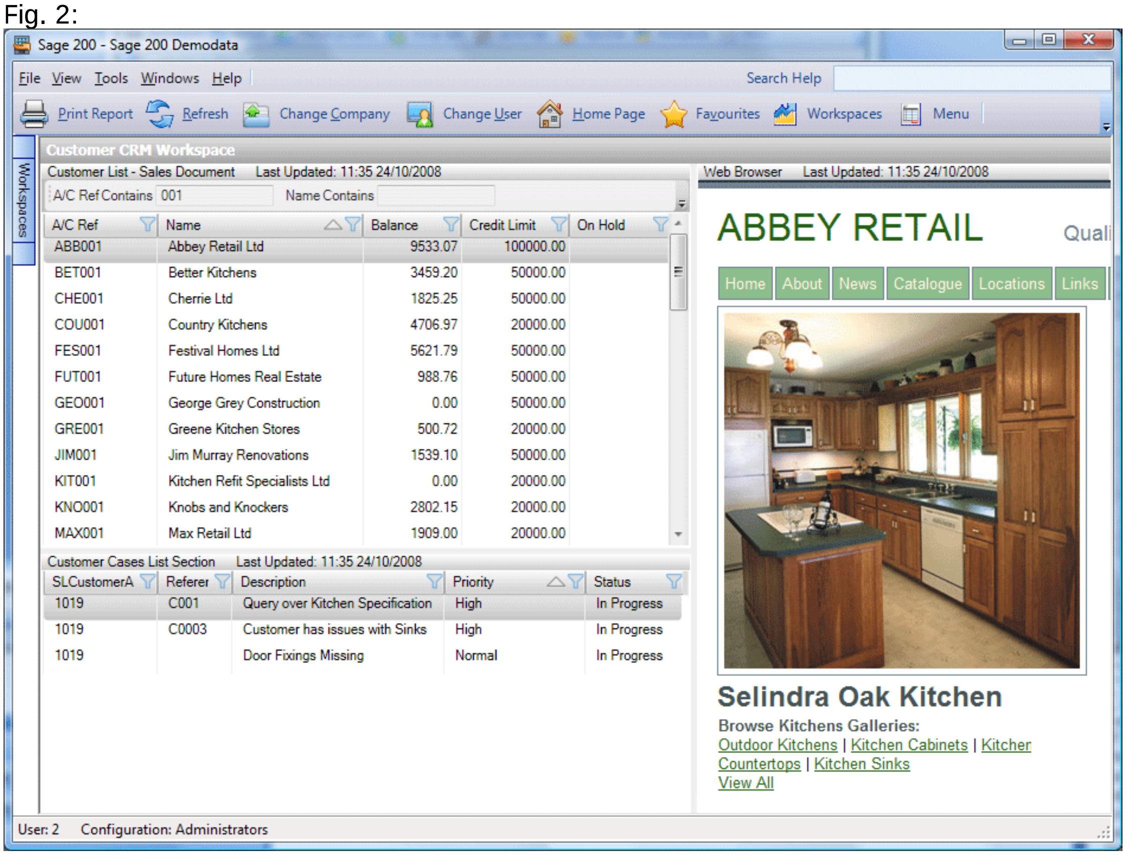
Sage 200 will store a reference to identify cards previously used by a customer. This reference can be used to make future payments using Sage Payment Services without the need to re-enter card details

***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 users with quick and easy access to the information they 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 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:




***Deposit handling**

Customers have the option to choose whether deposits received are accounted for on the VAT return at the point of receiving the money, or, at the point the goods are invoiced.

If the user chooses to account for the VAT at the point of receipt, an invoice is produced when saving the order showing the funds already received. If the user has chosen to account for the deposit in this way the payment already received is deducted from the total when the goods are invoiced (Fig. 3):

# COPY

**HomeStyle Kitchens Ltd (V4)**
Unit 12B
Western Park
Bishopthorpe
York YO23 6BS
**VAT Number** GB 376 6823 94

## Invoice

**For Order** 0000000378 **Dated** 02/01/2008
**All Amounts in** Pounds Sterling
**Terms** 30 days From document date
**Current Balance** 1569.62
**Your VAT Number** GB 119 1032 24

George Grey Construction
Unit 23 11 Crows Road
Waverton
Matlock
Derbyshire
DE4 6YH

0000000364

02/01/2008

GEO001

| Line | Item Code | Description | Quantity | Unit | VAT Code | Net |
|---|---|---|---|---|---|---|
| 1 | ACS/FILTER-COFFEE | Filter Coffee Maker | 2 | Each | 1 | 378.70 |
| 2 | | Payment received previously | 1 | | 1 | -170.21 |

-----------VAT Analysis-----------

| Code | % | Net | VAT |
|---|---|---|---|
| 1 | 17.50 Std Rate | 208.49 | 36.49 |

| | |
|---|---|
| **NET** | 208.49 |
| **VAT** | 36.49 |
| **GROSS** | 244.98 |
| **DUE WITHIN SETTLEMENT DAYS** | 244.98 |