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Sage 200 v4.10

What's New At a Glance

Introducing the Sage 200 Platform

The Sage 200 Platform forms the base layer onto which customers can build their Sage 200 solution, it includes: Sage 200 CRM single user, Sage 200 Financials single user and the Sage 200 Integration Manager. The Platform allows a strong financial and commercial system to integrate with a market leading CRM system, providing efficiency and consistency across the business in areas such as customer service, marketing and sales.

Sage 200 CRM Overview

Sage 200 CRM is an internet-based CRM solution, designed to bring the real benefits of Customer Relationship Management (CRM) to your organisation. It's designed to be easy to use and deploy, affordable and packed with useful features. With Sage 200 CRM, you can quickly analyse, manage and synchronise sales, marketing and customer service activities across all points of contact.

Sage 200 WTE Overview

The Sage 200 Web Time & Expenses (WTE) module allows Sage 200 Project Accounting users to enter and track 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.

Feature	Screen shot	Explanation	Benefits
Enhanced pipeline management:			
Create quotations for prospective or existing customers	Screenshot 1	Quotations for potential or existing customers can be raised within the CRM opportunity area. A Quotation is raised via the CRM interface but stored in Sage 200 Accounts. Once the quote is completed it is visible to both CRM and Sage 200 Accounts users. The CRM user can easily see the quote total in the opportunity to allow for quick and accurate pipeline forecasting. Quotes can use a stock list, free text items, comment lines, and/or additional charges to add an item to a quote.	The tight integration between the opportunity and the quotation allows greater visibility and control over the pipeline. The sales person using CRM can produce high quality quotes using the Sage 200 Accounts information. Once the quote has been created the sales person can use the CRM forecasting features in combination with the available Sage 200 Accounts information to quickly and confidently predict their future sales pipeline

Amendment of quotations	Screenshot 5	Existing quotations can be amended within CRM. The CRM Opportunity quote total will be updated with the changes made. Furthermore quotations can be deleted from within the CRM opportunity area with the quote total being updated to remove the value of the deleted quote.	The pipeline remains accurate to reflect changes made to quotations as they develop through the sale process.
Print quotations	Screenshot 8	Quotations can be viewed and printed within a CRM opportunity. When the quotation is printed, a CRM communication will be added to the Opportunity and Company with the printed document attached. This document will also be attached to the customer in Sage 200 Accounts.	An accurate communications history can be maintained allowing visibility throughout the business.
Enhanced Opportunity Quotations View	Screenshot 4	A Sage 200 CRM view displays quotations raised against a CRM opportunity.	All pipeline opportunities can be seen aiding in the forecasting process
Enhanced CRM creation and linking of Sage 200 Accounts Customer records	Screenshot 9 Screenshot 10 Screenshot 11	The CRM administrator can manage which users have the ability of using a CRM Company record to create a new Sage 200 Account Customer record or link to an existing one. The CRM user can search the list of existing customers conveniently to prevent duplication of data. Once the CRM record is linked to the Sage 200 Accounts record the CRM user can view highly useful information about the financial status, quotes, and orders.	The ability to create Sage 200 Accounts Customer information using CRM data removes duplication of effort and data. The CRM users have an accurate, informative view of their customers allowing them to provide better customer service.
Enhanced Convert Quotation to Sales Order	Screenshot 13	At the point that the customer accepts the quotation, Convert Quotation to Sales Order will complete the sales cycle by updating the order to sage 200 accounts. The value of this order is updated against the opportunity and the quotation and orders totals updated accordingly.	The sales cycle is managed from start to end with the correct information being updated to the relevant areas. Furthermore the sales order is now visible and can be distributed through the business workflow ensuring customer requirements are met.
Enhanced Sales Order Entry	Screenshot 14	Should a quotation not be required this process can be bypassed and a sales order can be raised from within the CRM opportunity or company area. The order details are updated to Sage 200 accounts and the order total within the CRM opportunity area is adjusted.	This system fits with a fast moving sales environment when a quotation may not be required.
Enhanced Opportunity Sales Orders View		A Sage 200 CRM view displays sales orders raised against a CRM opportunity.	The progress of an opportunity through the sales process can be viewed and monitored.

Enhanced SOP profitability	Screenshot 6	When entering or amending a Quotation or Sales Order there is an option to view the Order Profit. The user can therefore see the Margin associated with a Quotation or Sales Order.	Profit margins are maintained as users entering quotations or orders have accurate margin information to hand.
View Order Despatch Status	Screenshot 17	A CRM user can view which order items have been dispatched to the customer.	Customer facing staff can quickly answer enquiries about order status.
SOP Invoice enquiries	Screenshot 18	Transactional details associated with a sales order for example, invoice or payment information can be viewed via a customised enquiry with the CRM module.	Customer facing staff can easily retrieve information relevant to a specific order.
Back to back order enquiries	Screenshot 19	When a purchase order is raised to fulfill a specific sales order the links between these orders can be viewed via an enquiry screen.	Accurate customer delivery information can be provided based around supplier lead times.
Product Purchased History	Screenshot 20	A CRM user can view the historical products the customer has purchased.	Customer facing staff can discuss with the customer their past purchases in order to make new sales or provide support.
Customer Price Enquiry	Screenshot 21	Information on customer specific pricing can be viewed from within the CRM module.	Accurate discounted prices relevant to a specific customer can be viewed at the touch of a button. For example, a customer who receives 10% discount for purchasing over 'x' amount would be catered for.
Enhanced Sales Ledger Customer Transaction Enquiry	Screenshot 22	The sales ledger customer enquiry screen can be viewed from within the CRM module.	Critical customer information such as credit limit, outstanding balance and transactional information is easily accessible to customer facing personnel. This eliminates credit control enquiries from the field.
New Modules:			
Sage 200 Web Time and Expenses	Screenshot 23 Screenshot 24	The module provides remote Timesheet and Expense entry functionality allowing the user to synchronise employee, payroll, financial, timesheet and expense data	Enables field based personnel to submit timesheet and expenses remotely eliminating costly visits to the office for administrative tasks.

Opportunity: Setup of cafe
Company: Sandy Beach Cafe
Person: Terry Bank

Summary | Notes | Communications | Documents | Tracking | Account | ...

For
Company: Sandy Beach Cafe | Person: Terry Bank

Details
Description: Setup of cafe
Details: opening new cafe
Wave Activity: -None selected-

Source: Phone
Opened: 21/06/2007 18:50
Territory: Sales Worldwide

Type: | Customer Ref: | Closed:

Status
Stage: Lead | Status: In Progress | Forecast: £ 1,500.00 | Certainty%: 0
Assigned To: System Administrator | Team: Sales UK | Priority: | Close By: 30/06/2007 13:00

Opportunity Total
Opportunity Currency: | Total Quote Value: £ 1,099.20 | Total Order Value: £ 0.00

Actions:
Current State: Lead
• Qualify
• Proposal Submitted
• Reassign

Screenshot 1. Opportunity Summary.

- Total Quote and Order Values – updated when quotes and order are created or updated.
- Forecast Value – the user can update the sales forecast value using the readily available quote and order information

sage CRM | My CRM for: William Dolan

Recent | Dashboard | Calendar | Leads | Outbound Call Lists | **Opportunities** | Forecasts | Preferences | ...

Statistics for All Stages
No. Oppos: 14 | Forecast: £ 59,500.00 | Weighted Fcst: £ 30,600.00
Average Value: £ 4,250.00 | Average Certainty: 18.57% | Weighted Average: £ 789.29

Lead (4) | Qualified (5) | Proposal Submitted (2) | Negotiating (2) | Deal Lost (1)

16 Opportunities, Page 1 of 2

Status	Description	Company Name	Person	Opened	Stage	Priority	Territory
	Cabinet Range	Abbey Retail Ltd	Andrew Lowe	12/04/2007 10:05 AM	Negotiating	Normal	Sales Scotland
	Kitchen Project Management	Abbey Retail Ltd	Andrew Lowe	13/02/2007 9:25 AM	Negotiating		Sales Scotland
	Interested in Blenders	Abbey Retail Ltd	Andrew Lowe	15/05/2007 4:05 PM	Proposal Submitted		Sales Scotland
	Interested in Kitchens	ARTICHOKE KITCHEN & CABINET	Markus Newton	15/05/2007 3:10 PM	Demo		Sales North West
	Blenders / Mixers	Better Kitchens	Brian Lynch	24/01/2007 9:40 AM	Proposal Submitted		Sales South
	Dishwasher	Better Kitchens	Brian Lynch	14/01/2007 10:00 AM	Qualified		Sales South
	Hinges	Country Kitchens	Will Laird	05/03/2007 9:55 AM	Qualified		Sales Midlands
	Potential New Kitchen £10,000	Country Kitchens	Will Laird	18/04/2007 2:30 PM	Lead		Sales Midlands
	Potential New Kitchen	Dixonway Kitchens Ltd	Jan Dudley	18/04/2007 12:05 PM	Lead		Sales South
	Dishwasher	Festival Homes Ltd	Maureen Duffy	12/04/2007 10:05 AM	Lead		Sales South

Screenshot 2. My CRM Opportunity pipeline.

- View your current sales pipeline based on opportunities.

2 Forecasts, Page 1 of 1

Year ^	Quarter	Commit	Likely	Best Case
2007	2	11,250.00	22,800.00	26,800.00
2007	3	11,650.00	19,150.00	31,450.00

Year: --All--
 Quarter: --All--
 Filter
 New Forecast
 Help

Screenshot 3. Create Forecasts by Quarter based on Opportunity Forecast Values

Opportunity: Setup of Cafe
 Company: Sandy Beach Cafe
 Person: Geogre Bass

Quotation No.: 0000000030 Customer Order No.: Quotation Date: 14/06/2007

Address

Invoice Address	Delivery Address
CASH SALE ACCOUNT	CASH SALE ACCOUNT

Line Items

Item	Description	Quantity	Unit Price	Disc %	Tax Rate	Net
ACS/ESPRESSO	Espresso Machine	2.00	299.60	0.00%	17.50	599.20
	Consultancy to install	1.00	500.00	0.00%	17.50	500.00

Totals

Goods: 1099.20	Net Value: 1088.21
Quotation Discount: 10.99	Tax Value: 185.67
Early Settlement Discount: 2.50% if paid within 14 days	Gross Value: 1273.88

Continue
 Amend Quotation
 Convert Quotation To Order
 Print Quotation
 Delete Quotation
 Refresh

Screenshot 4. Quote Details viewed from CRM.

- Buttons allow the user to amend, convert to order, print, or delete a quote.

SOP - Amend Quotation

Quotation Details | Delivery & Invoicing

Account selection

Postal Name: Sand Shop

Address: 12 Beach Street

Post Code: RG5 3HH

By default supply from: [dropdown]

Quotation details

Quotation no: 0000000030

Quotation status: Live

Document date: 14/06/2007

Date requested: 14/06/2007

Date promised: 14/06/2007

Customer order no: [text]

Item	Description	Quantity	Unit Price	Disc. %	Tax Rate	Net
ACS/ESPRESSO	Espresso Machine	2.00000	299.60000		0.00 Std Rate	599.20
	Consultancy to install	1.00000	500.00000		0.00 Std Rate	500.00

Add Items... Edit Item... Delete Item Move Up Move Down

Exchange rate

Rate: 1.000000 Currency: Pounds Sterling

Subtotals

Goods: £ 1099.20

Charges: £ 0.00

Ord disc: £ 10.99

Totals

Net: £ 1088.21

Tax: £ 185.67

Gross: £ 1273.88

Save Quotation Profit Close

Screenshot 5. Amend Quote Screen opened from CRM

SOP - Sales Order Profit Analysis for 0000000031

Total profit for order

Estimated profit value: £ 699.20000

Estimated profit %: 174.80000

(profit values do not take order or settlement discounts into account and are calculated on net values)

Stock item order lines

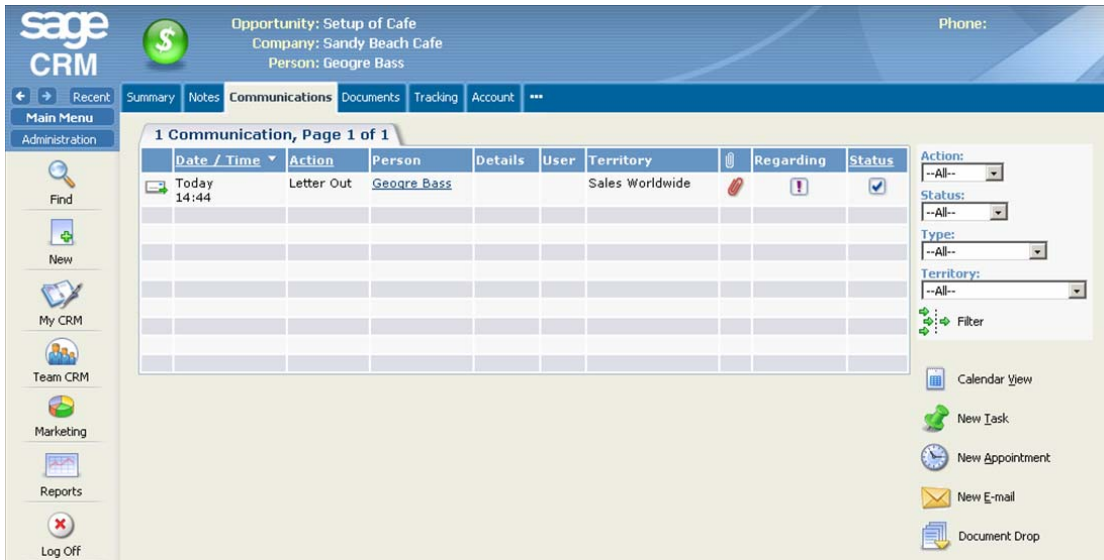
Item Code	Description	Line Quantity	Estimated Profit Value	Estimated Profit %
ACS/ESPRESSO	Espresso Machine	2.00000	449.20000	299.46667
Totals			449.20000	

Other order lines

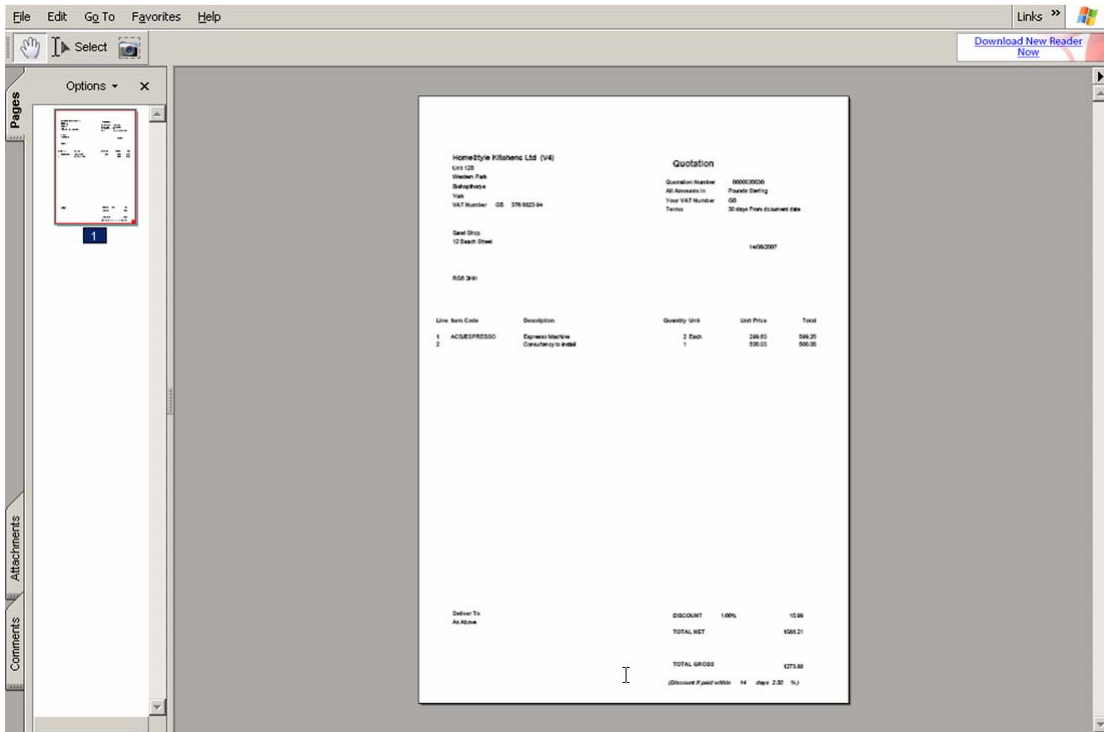
Item Code	Description	Quantity	Estimated Profit Value	Estimated Profit %
	Consultancy to install	1.00000	250.00000	100.00000
Totals			250.00000	

Close

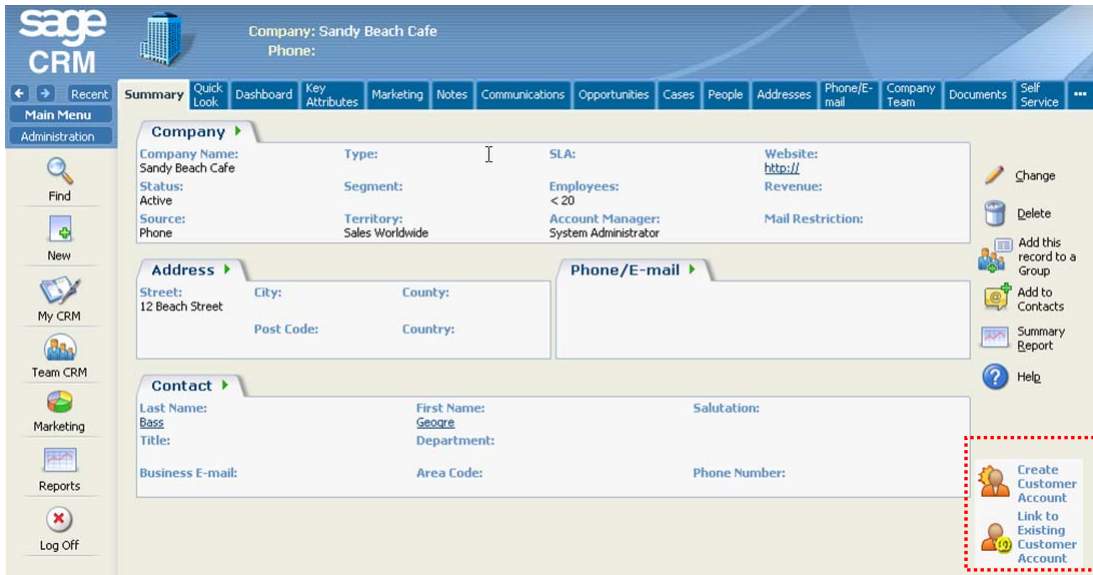
Screenshot 6. View profitability of a quote.



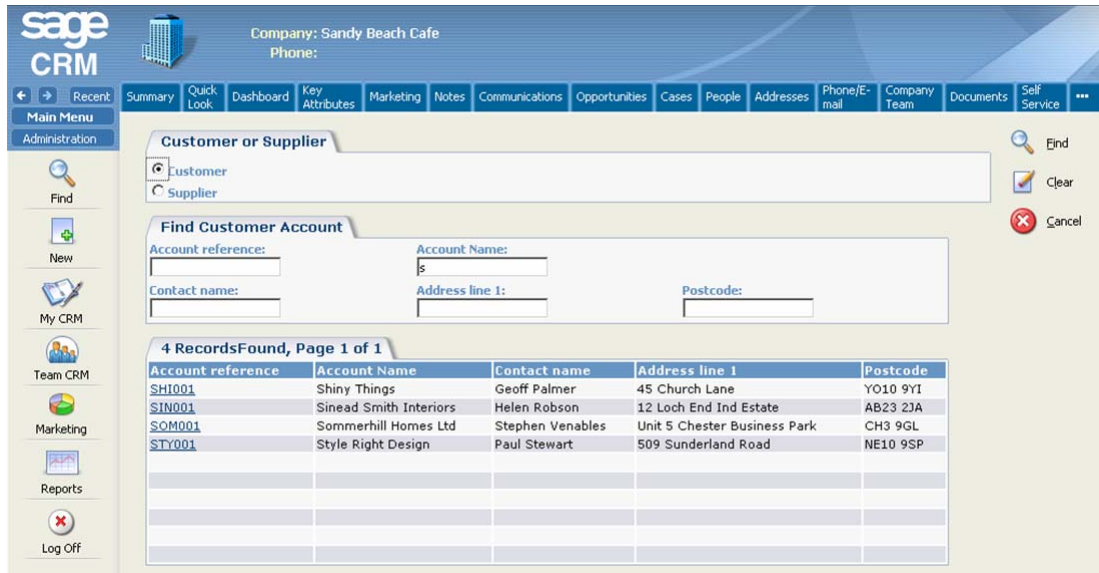
Screenshot 7. Communication created by printing the quote



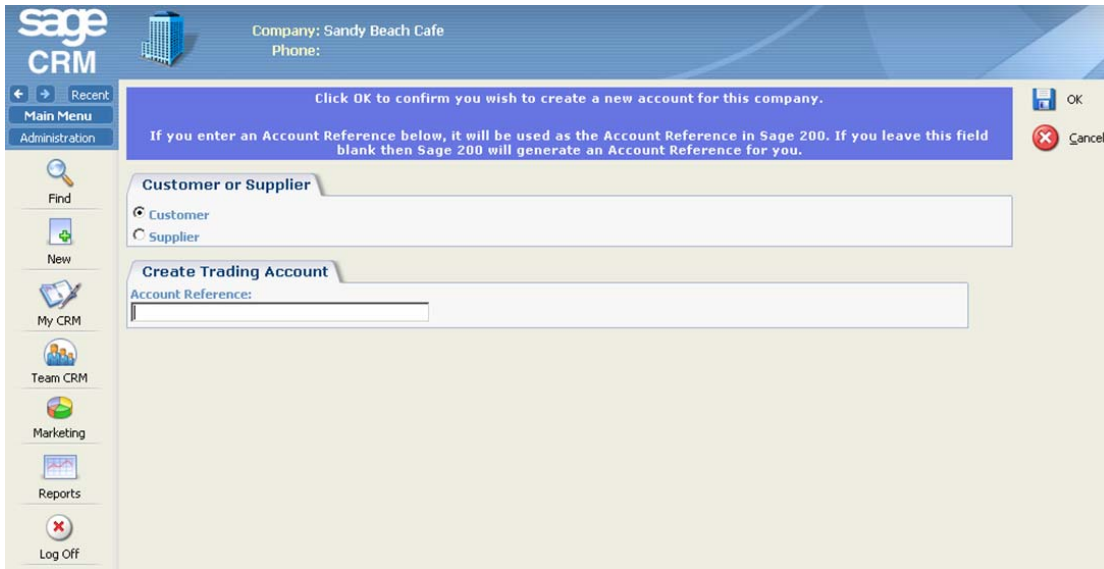
Screenshot 8. View/Print the quote linked to the communication.



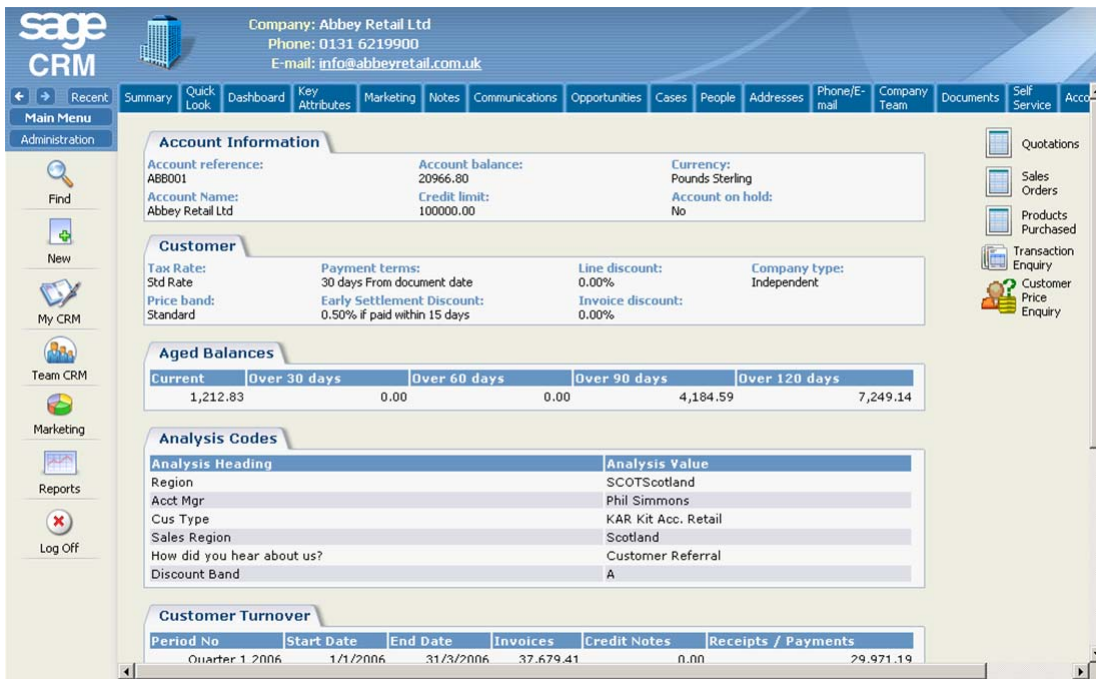
Screenshot 9. Create or link a Customer Account to a CRM Company.



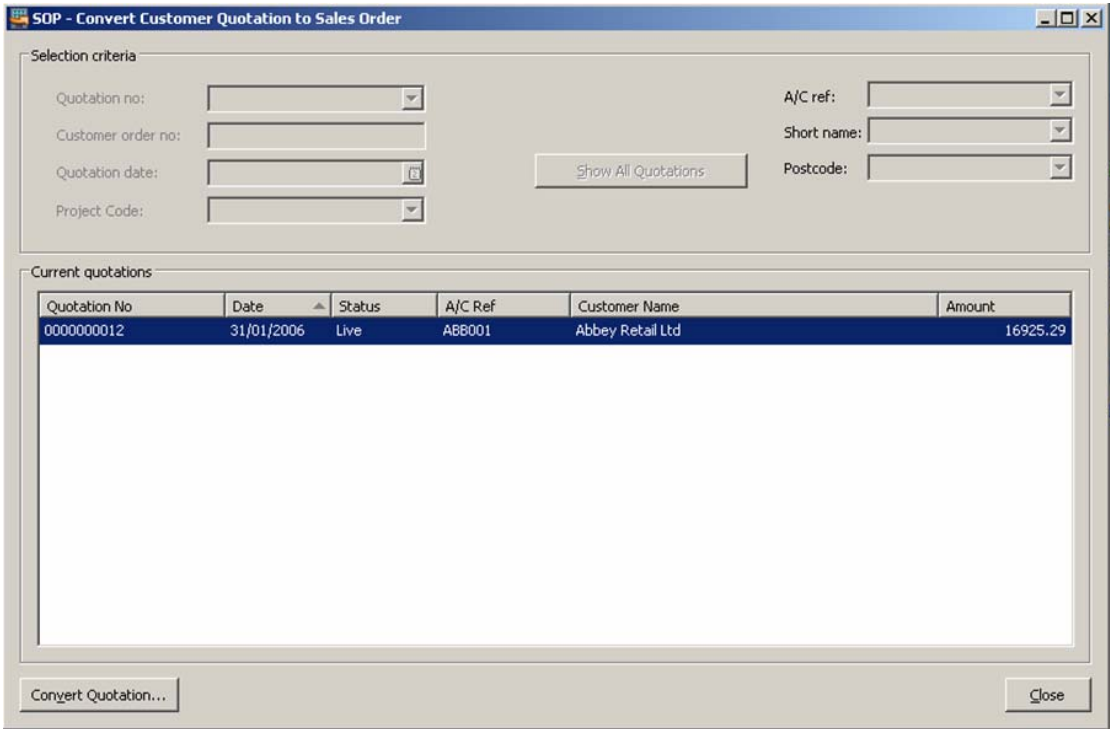
Screenshot 10. Search for a customer account with an account reference, an account name, a contact name, address line 1 or a postcode.



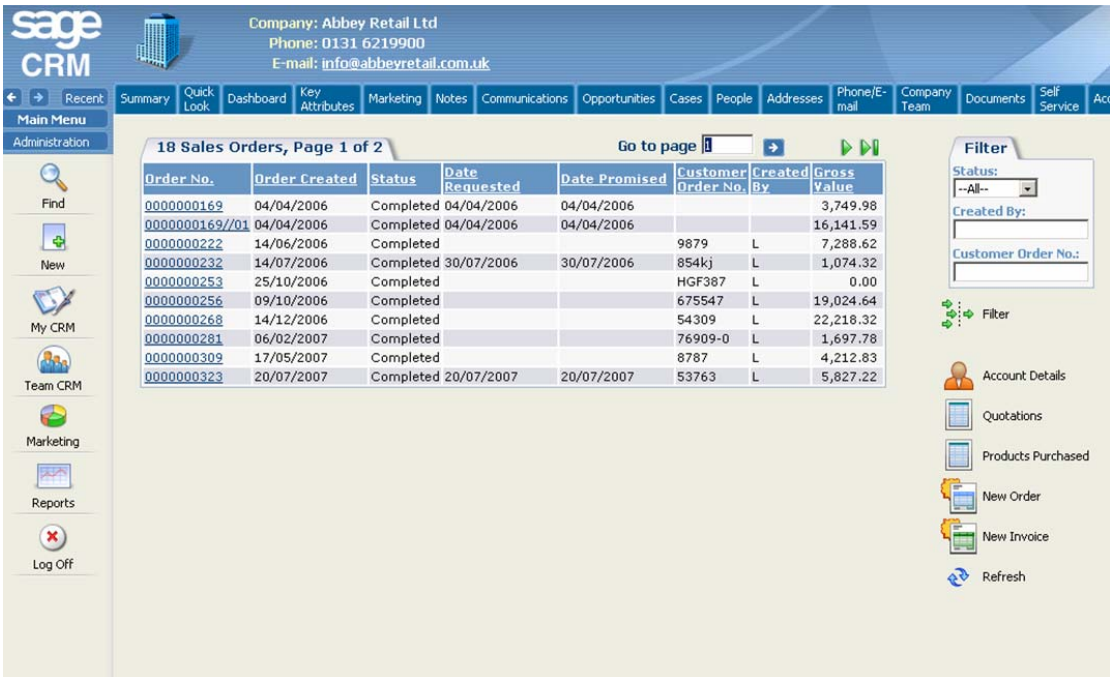
Screenshot 11. Create a new trading account from CRM



Screenshot 12. Account Details - a CRM View of a linked Customer Account



Screenshot 13. Convert Quote to Order – launched from CRM



Screenshot 14. View Orders for a CRM Company

Company: Abbey Retail Ltd
Phone: 0131 6219900
E-mail: info@abbeyretail.com.uk

Order No.: 000000169 Customer Order No.: Order Date: 04/04/2006

Address

Invoice Address	Delivery Address
Abbey Retail Ltd 16 Church Lane Lochside Edinburgh Midlothian EH12 1WE	Abbey Retail Ltd 16 Church Lane Lochside Edinburgh Midlothian EH12 1WE

Line Items

Item	Description	Allocated	Despatched	Invoiced	POP Order	Complete
CA/BASE/SNG/BEECH	Beech Base Single Cabinet H58cm	0.00000	9.00000	9.00000		Yes
CA/WALL/H70/BEECH	Beech Wall Cabinet H70cm	0.00000	11.00000	11.00000		Yes
	Thank-you for your order. Complete satisfaction guaranteed.	0.00000	0.00000	0.00000		Yes

Totals

Goods: 3223.71	Net Value: 3191.47
Order Discount: 32.24	Tax Value: 558.51
Early Settlement Discount: 0.00% if paid within 0 days	Gross Value: 3749.98

Screenshot 15. View Order Details with Order Status Columns

Company: Abbey Retail Ltd
Phone: 0131 6219900
E-mail: info@abbeyretail.com.uk

Order No.: 000000169 Customer Order No.: Order Date: 04/04/2006

Address

Invoice Address	Delivery Address
Abbey Retail Ltd 16 Church Lane Lochside Edinburgh Midlothian EH12 1WE	Abbey Retail Ltd 16 Church Lane Lochside Edinburgh Midlothian EH12 1WE

Line Items

Item	Description	Quantity	Unit Price	Disc %	Tax Rate	Net
CA/BASE/SNG/BEECH	Beech Base Single Cabinet H58cm	9.00	163.20	10%	17.50	1,321.92
CA/WALL/H70/BEECH	Beech Wall Cabinet H70cm	11.00	192.10	10%	17.50	1,901.79
	Thank-you for your order. Complete satisfaction guaranteed.	0.00	0.00	0%	17.50	0.00

Totals

Goods: 3223.71	Net Value: 3191.47
Order Discount: 32.24	Tax Value: 558.51
Early Settlement Discount: 0.00% if paid within 0 days	Gross Value: 3749.98

Screenshot 16. Order Details with Quantities and Pricing information

Company: Abbey Retail Ltd
Phone: 0131 6219900
E-mail: info@abbeyretail.com.uk

Summary Quick Look Dashboard Key Attributes Marketing Notes Communications Opportunities Cases People Addresses Phone/E-mail Company Team Documents Self Service Account

Line Items

Item	Despatch No	Despatch Date	Despatched by	Qty Despatched
CA/BASE/SNG/BEECH	000000232	24/5/2006	L	5.00000
CA/BASE/SNG/BEECH	000000250	10/6/2006	L	4.00000
CA/WALL/H70/BEECH	000000232	24/5/2006	L	6.00000
CA/WALL/H70/BEECH	000000250	10/6/2006	L	5.00000

Continue
Amend Order
View Order Status
View Invoices for Order
View Back to Back Orders
Refresh

Screenshot 17. View Order Line items despatched information

Company: Abbey Retail Ltd
Phone: 0131 6219900
E-mail: info@abbeyretail.com.uk

Summary Quick Look Dashboard Key Attributes Marketing Notes Communications Opportunities Cases People Addresses Phone/E-mail Company Team Documents Self Service Account

1 Records Found, Page 1 of 1

Invoice No.	Invoice Date	Gross Value	Status	Order No.
000000193	23/09/2006	1,074.32	Completed	000000232

Continue
View Quantities and Prices
View Despatch Details
View Back to Back Orders
Refresh

Screenshot 18. View an order's associated invoices

Company: Abbey Retail Ltd
Phone: 0131 6219900
E-mail: info@abbeyretail.com.uk

2 Records Found, Page 1 of 1

Purchase Order No.	Item Code	Quantity	Requested Del. Date	Requested Del. Qty.	Supplier Name
0000000240	COOK/CERM/HOB	3.00		0.00	Smithfield Electrics plc
0000000240	COOK/EXTRACTOR/HOOD	3.00		0.00	Smithfield Electrics plc

Continue
View Quantities and Prices
View Despatch Details
View Invoices for Orders
Refresh

Screenshot 19. View an Order's associated purchased orders (back to back orders)

Company: Abbey Retail Ltd
Phone: 0131 6219900
E-mail: info@abbeyretail.com.uk

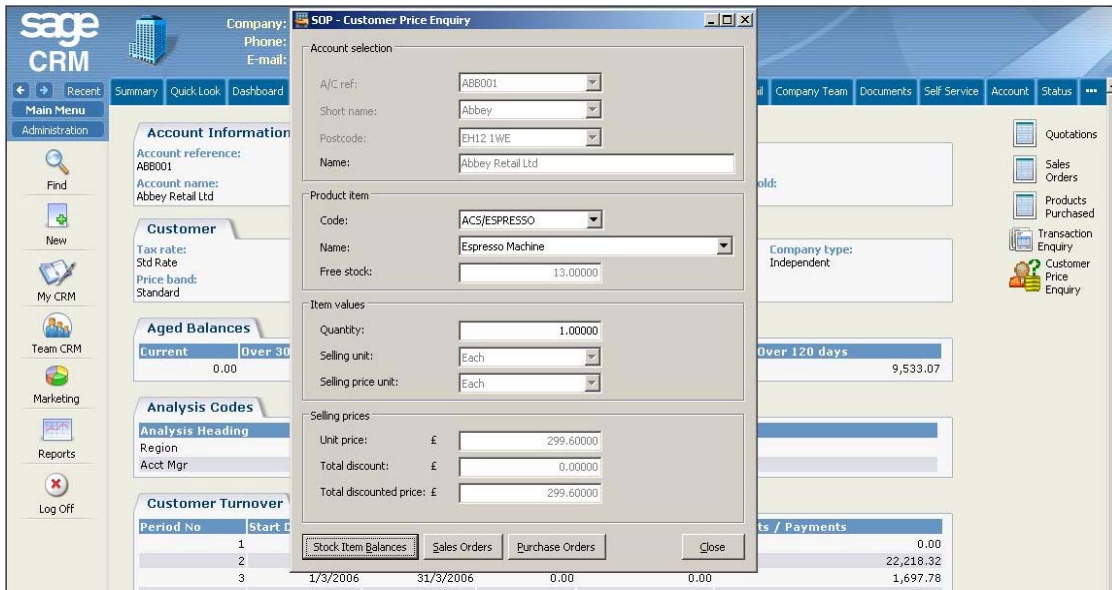
66 Products Purchased, Page 1 of 7

Go to page

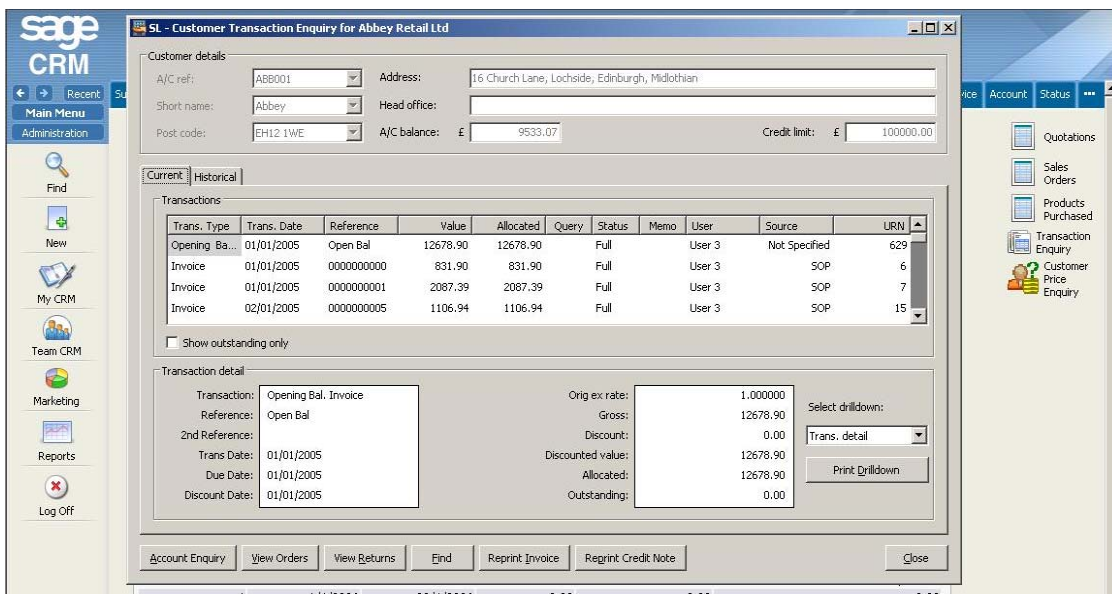
Item Code	Item Name	Quantity	Unit Issue Price	Value	Last Purchase	Current status
ACS/BLENDER	Professional Blender 5 Speed	10.00	256.50	2,565.00	05/01/2007	Active
ACS/BLENDER	Professional Blender 5 Speed	5.00	256.50	1,282.50	16/03/2007	Active
ACS/BLENDER	Professional Blender 5 Speed	2.00	256.50	513.00	25/01/2007	Active
ACS/BLENDER	Professional Blender 5 Speed	1.00	256.50	256.50	07/06/2007	Active
ACS/ESPRESSO	Espresso Machine	10.00	299.60	2,996.00	05/01/2007	Active
ACS/FILTER-COFFEE	Filter Coffee Maker	10.00	169.20	1,692.00	05/01/2007	Active
ACS/FILTER-COFFEE	Filter Coffee Maker	5.00	169.20	846.00	06/02/2007	Active
ACS/FILTER-COFFEE	Filter Coffee Maker	5.00	169.20	846.00	06/02/2007	Active
ACS/MEAT-SLICER	Commercial Meat Slicer	3.00	290.00	870.00	25/01/2007	Active
ACS/MEAT-SLICER	Commercial Meat Slicer	5.00	325.50	1,627.50	05/01/2007	Active

Filter
Item Code:
Item Name:
Filter
Account Details
Quotations
Sales Orders
Stock Item Lookup
Customer Price Enquiry

Screenshot 20. View a CRM Company's Products Purchased



Screenshot 21. Open a Customer Price Enquiry from a linked CRM Company.



Screenshot 22. Open a Customer Transaction Enquiry screen from a linked CRM Company

Screenshot 23

Easy to use timesheet entry screen

New Time Entry			
History	<none>		
Project	???	0000000008 - Kitchen Install Project for Festival Homes	
Activity	???	Fitting - Phase 2 - Kitchen Fitting - [108487]	
Charge Rate	BAS/Basic		
Cost Rate	Emp. Charge Rate A		
Pay Rate	No Rates Setup		
Date	21/05/2007	To	21/05/2007
Time	From 15 : 37	To 15 : 37	Total 00 : 00
Notes			
Submit & Stay		Submit & Back	

Screenshot 24

Expenses can be easily submitted by inputting a new expense entry:

TimeSheet for AIS, John

21 May 2007

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday															
21 May	22 May	23 May	24 May	25 May	26 May	27 May															
<table border="1"> <thead> <tr> <th>Project</th> <th>Activity</th> <th>Start / Finish</th> <th>Time</th> <th>Posted</th> </tr> </thead> <tbody> <tr> <td>0000000008 - Kitchen Install Project for Festival Homes</td> <td>Fitting - Phase 2 - Kitchen Fitting - [108487]</td> <td>10:35 - 15:35</td> <td>5:00</td> <td></td> </tr> <tr> <td>0000000008 - Kitchen Install Project for Festival Homes</td> <td>Plumbing - Phase 3 - Plumbing - [108499]</td> <td>15:36 - 17:36</td> <td>2:00</td> <td></td> </tr> </tbody> </table>		Project	Activity	Start / Finish	Time	Posted	0000000008 - Kitchen Install Project for Festival Homes	Fitting - Phase 2 - Kitchen Fitting - [108487]	10:35 - 15:35	5:00		0000000008 - Kitchen Install Project for Festival Homes	Plumbing - Phase 3 - Plumbing - [108499]	15:36 - 17:36	2:00						
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<table border="1"> <thead> <tr> <th>Project</th> <th>Expense</th> <th>Value</th> <th>Currency</th> <th>Posted</th> </tr> </thead> <tbody> <tr> <td>0000000008 - Kitchen Install Project for Festival Homes</td> <td>Travel/Car/Car hire</td> <td>600.00</td> <td>Sterling</td> <td></td> </tr> </tbody> </table>		Project	Expense	Value	Currency	Posted	0000000008 - Kitchen Install Project for Festival Homes	Travel/Car/Car hire	600.00	Sterling											
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