

**Sage 200**



# Sage 200

Open up to more



CentrePoint Software | 122 Minories, London, EC3N 1NT | Tel: 020 7831 3050

Web: [www.CentrePointSoftware.co.uk](http://www.CentrePointSoftware.co.uk) | Email: [info@CentrePointSoftware.co.uk](mailto:info@CentrePointSoftware.co.uk)

---

# Sage 200

## A solution for your growing business



Sage 200 software helps you manage your finances, customers and business insight in one solution. It's designed to help you share data easily, work smarter and ensure your whole business works together efficiently as well as delivering real cost benefits to your business.

The flexibility of Sage 200 means it's ideal for companies with a turnover of £1 million to £50 million or typically 10 to 200 employees, across all business sectors and delivers scope to grow. For those businesses with particularly complex processes, or those which are cross-departmental Sage 200 is an ideal solution.

It delivers a three-tiered nominal accounting structure linking to specific jobs or projects, stock traceability across multiple locations and the ability to submit timesheets and expenses in the office or on the road. It also gives you the ability to track costs and manage data via Business Intelligence and offers Customer Relationship Management for marketing and sales.

The Manufacturing module is ideal for businesses in this industry, enabling you to track supply chain activities in detail from end to end; deliver products on time and on budget, and manage cash flow throughout the entire process.

The new interactive dashboards for sales, purchases, sales orders and financials, gives you an even greater view of the health of your business. Sage 200 workspaces allow you to see key, actionable data all in single screen, as well as offering the ability to integrate other systems such as Google maps, charts or web pages. Excel Reporting for Sage 200 and Business Intelligence make it quick and easy to analyse your data.

There are a huge range of choices available to allow businesses with specific needs to pick and choose the modules relevant to their business.

Easy to install and adapt, Sage 200 offers the choice and flexibility to fit the needs of your business as it changes and grows.

# Sage 200

All businesses are different and change over time. Choose upfront or monthly payments. Choose the modules you need to manage your business. Choose the options that are right for you.

Sage 200 is modular, so you choose the elements you need when you need them and add others as your business develops.

And with a choice of online or installed on premise software, there's even more flexibility about how you use, roll out and pay for your software.

## Accurate, timely insight that helps you drive success

Save time and support key decisions by getting straight to the business critical data you need, from sales, to orders, invoices, productivity, budgets, profits and much more in one single system.

Sage 200 present facts and figures in a meaningful way. Excel Reporting and our Business Intelligence module provide powerful trend analysis and intuitive reporting.

## Access data anytime from anywhere

Sage 200 offers the option to access data when away from the office or out on the road. Authorised users can access key information through an internet connection, enabling you to use a wide variety of mobile devices as well as standard PCs, laptops and tablets.

## Software that fits your business

Pay for what you use, not what you don't. Choose different modules depending on what your business needs – financials, commercials, project accounting, customer relationship management, bill of materials and manufacturing.

Add or remove modules and scale the number of users up or down to match the needs of your business.

## Detailed reporting

Produce detailed reports by region, sales representative, industry type, customer rating account manager, partner and much more. Easily forecast and budget for customers, suppliers and projects.

## Advanced multi-currency options

Manage all your foreign currency trading with ease, including exchange rate changes and their impact on business finances across all ledgers and cash book.

Move money from one bank account to another, and between currencies to maximise interest earned and minimise overdraft charges.

## Fixed Assets

We've introduced a Fixed Assets register to allow you to effectively record assets and manage depreciation with either straight line or reducing balance methods.

## Bank reconciliation

Save time and eliminate rekeying by reconciling bank statements alongside your banking software. Reconcile statements with payment and receipt details, record discrepancies, transactions and charges all in one place.

---

# Financials

## Managing your financial position

Ensure you know the financial position of your company at any point in time. Analyse historical trends and data to give you the accurate information you need to make critical business decisions.

---

### Accurate and up to the minute finances

Be precise with your business finances. Track budgets, drill down into data and deal with all your VAT submissions.

### Interactive Dashboards

Brand new interactive dashboards for sales, purchases, sales orders and financials, gives you an even greater view of the health of your business.

### Flexible accounting periods

Gain greater control over your accounting periods, with up to 20 accounting periods, which can be open, closed and re-opened as needed. You can also control the length of period and set up period structures in advance for future years.

### Flexible nominal code structure

Enjoy the benefit of in depth analysis and reporting. Set up departments and cost centres as well as Profit & Loss and Balance sheet reporting with the option to group accounts for reporting purposes. Make adjustments to previous year journals and roll changes forward to ensure your accounts are accurate and up to date.

### Batch data upload

Enter a batch of journals and place transactions on hold for authorisation before committing them to the Nominal Ledger.

### VAT flexibility

Choose VAT inclusive or exclusive prices. Online VAT submissions are built in, ensuring you comply with Her Majesty's Revenue and Customers (HMRC) regulations.

### Save time with automated statements, standing orders and direct debits

Set up processes to send statements directly to customers. Get a view of all outstanding customer payments and invoices to help you maintain cashflow. Easily and clearly view and track all standing orders and direct debits.

### Store unlimited customer and supplier contact details

Make sure the right information goes to the right contact by storing customer and supplier details including phone numbers, addresses and websites.

# Business Intelligence

## Gain greater control over your business

Plan strategically for growth and change with tools that help you identify key trends and patterns. Spot opportunities for innovation and identify improvements in productivity and growth in every area of your company.

### Effectively analyse critical business information

Use powerful analytical tools to inform your decision - making and share business data widely across your organisation.

### Easily build your own reports

Change report fields in seconds to give you key information such as Profit & Loss by cost centre and department; sales by customer by month; stock valuation for the last three months; trend in overdue orders; stock movements by product group, and much more.

Bring your business data to life using charts and graphs.

### Improved insight

Gain better visibility of your information with tools that allow you to drill down to additional information. The dashboards are also accessible online, so you can get remote access to any of your statistics.

### Effectively manage your customer relationships

Sage 200 Customer Relationship Management (CRM) provides you with a complete view of your customer, enabling you to manage the lifecycle from first point of contact through to maintaining a valuable relationship.

### Benefit from greater Business Intelligence

Sage 200 Business Intelligence can help you to identify customer and product trends and understand any variations. You can measure performance against different benchmarks and analyse data and connections between different parts of your business.

- View key performance indicators
- Plan for business growth at minimal risk
- Highlight additional revenue opportunities
- Discover areas where you can improve productivity
- Respond to changing business conditions

---

# Workspaces

## Sage 200 workspaces bring key information together on one screen.

---

Workspaces provide different people across your organisation relevant information quickly and easily and are customisable, so you can configure them to suit different job roles and responsibilities.

Workspaces are very simple to navigate. You can quickly and easily drill down from top level to more detailed information. For example, you can select a customer account on a workspace and from there see the transactions that customer has made.

### To customise their workspace, users can:

- Add and remove data fields
- Quickly filter and sort information using advanced filters that can be saved and shared with other users
- Save time as forms can be automatically populated with details of the item selected on the workspace
- Print workspaces data and related reports
- Change the layout and content of the workspaces using the Workspace Designer, so it fits to the way you work
- Access data remotely from external sources alongside your Sage 200 data on one screen
- Integrate with other applications, such as Google maps, webpages or stock catalogues, so everything can be accessed on a single screen.

---

# Commercials

## Managing your supply chain

Sage 200 is designed to help you manage every element of your supply chain with a sophisticated stock management system that's fully linked to your financial data.

---

Sage 200 Purchase Order Processing fully integrates with Stock Control, Purchase Ledger and Sales Order Processing, so you'll know that goods are available to your customer as soon as you receive them. You can respond quickly and efficiently to customer demands and be agile about products and pricing to maintain loyalty and satisfaction.

### See the full story of an order

Sage 200 supports complex supply and delivery models. Select different delivery addresses per order line; specify different delivery addresses to one supplier and see price negotiation data - invaluable information that helps orders run smoothly.

### Source goods worldwide

Source goods worldwide, purchasing in up to 100 different currencies. View individual costs and overall order costs associated with importing goods on a purchase order.

### Make sure business doesn't stop without you

Apply authorisation limits and alerts to keep orders moving while you're busy. If you're out of the office, authorise orders remotely via a secure web user. Reject unexpected or incorrect deliveries, highlighting any discrepancies with invoices and allow for costs that are already committed.

### Compile order lists based on purchase orders

If you prefer to create your Purchase Orders manually, Sage 200 can help you save time by compiling lists of what you should order, based on shortfall, and what you need for back-to-back orders. You can then decide who to buy from.

### Keep a running total

It's easy to spot errors as you go, as Sage 200 calculates a running total when you're matching invoice line items to orders.

### Record disputes

Flag up any invoices "under dispute" and they won't be updated to the Purchase Ledger until the dispute is resolved.

### Manage your stock

When you enter a sales order for an item that's not normally held in stock, Sage 200 automatically raises a purchase order to the item's supplier. Or you may choose to use stock that's on-hand first, making sure you efficiently manage and control your stock.

Deliver items to a number of delivery addresses, including your premises, customers and suppliers.

---

# Commercials

## Managing your stock

With Sage 200 you get a complete inventory and warehouse management solution to help you optimise stock levels, keep costs down and deliver what your customers want.

---

### **Easily control your stock**

Quickly and easily access your stock record details, including supplier details, stock levels at each location and pricing information. Pinpoint where your products come from, where they are now, when they were sold and at what price.

Control stock items by serial or batch number, include criteria like 'sell-by' and 'use-by' dates, as well as specifying your own information for each item. Monitor stock movements and traceability.

Work with different quantities, for example buying tiles by the pallet, storing them by the box and selling by the square metre.

Set up unlimited categories for reporting purposes or to help you locate your products during the sales order entry process.

### **Effectively manage your suppliers**

Get the best deals from suppliers by recording details of price history, lead time, part reference and purchase history, for each stock item. Useful if you need to source an item from another stockist.

### **Manage your business effectively across multiple locations**

If your business works across more than one location, you can manage each location independently for things like replenishment, sales, reporting and stock takes. Realign stock levels quickly and accurately, and gain a complete view of the stock held in your business. And account for extra costs such as customs duties.

### **Track your stock**

Keep track of your stock by flagging up any inactive stock items. They can't be ordered but stay on the system so you can review their full history. And improve efficiency and maintain budget control by keeping track of internal stock movements.

Count the most valuable items or particular products in stock and quickly find stock items by name or reference number when you're dealing directly with customers over the phone.

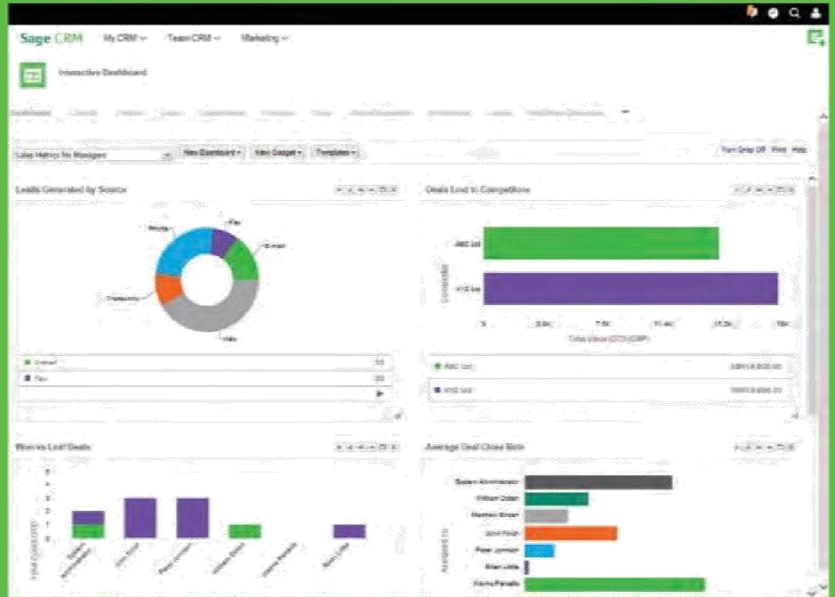
### **Improve efficiency, cut costs and improve customer service**

Reduce time taken from order to shipment by choosing to ship direct to your customer from a supplier. Reduce order time for your most important customers by allocating stock to orders as soon as they are received. This gives you the freedom to prioritise your most important customers and keep them happy.



# Commercials

## Managing your sales orders



From raising a quotation or order to checking stock, delivering goods and raising invoices, Sage 200 gives you complete control of your entire sales order process.

Automatically produce all the documents you need including delivery notes, invoices, picking lists and acknowledgements as part of the sales process.

### Rapid order entry

For standard pricing and delivery addresses, enter your orders in just a few keystrokes and get the goods on their way.

### Flexible ordering options

If you need to record more information, switch to full order entry so you can change discounts and add non-stock items. With trade counter order entry, you can create an order, allocate and dispatch stock and print an invoice all in one process.

### Match your stock to your customers' needs

Search for stock items to match your customers' needs during the sales order entry process. Tailor invoice layouts to individual customers or suppliers.

### Work with stock and sales

Handle pricing and credit control efficiently with sales order processing linked to your stock, price book and sales ledger. When orders are processed, all the relevant information is updated including stock records, customer balances, VAT return and management reports.

### Manage multiple currencies and exchange rates

When customers place orders in their own currency, you control the exchange rates and apply them at order entry or invoice stage, so you manage the risk of exchange rate fluctuations.

### Support simple or complex pricing

Easily apply discounts, promotions or price-band schemes to multiple customers (even with multiple currencies). With unlimited price bands for each stock item it's easy to understand and maintain prices by units of measure (e.g. bottle, case and crate) adapted to your business. Sage 200 can also validate your pricing schemes, making sure you maintain sensible margins.

### Manage discounts and margins

Give authorised staff the tools to negotiate on prices. See any changes to cost pricing and view the profit on any item or trace discounts over time.

### Maintain profit

Analyse products down to customer or supplier levels, viewing profitability month by month.

---

# Project Accounting

## Managing your projects

Sage 200 helps you control your costs and maximise your profits by understanding the detail of each and every project you manage. Improve customer satisfaction with accurate bills delivered by capturing and allocating projects costs, overheads and revenues. And collect timesheets and expenses information online from anywhere, saving time and ensuring accurate payments

By helping you understand the income and expenditure of each project, Sage 200 supports your decision making, giving you the information you need to improve profitability.

### Gain a single view of your projects

Make the most of your time, by tracking multiple projects based on time and materials, fixed price contracts or a combination of both.

Share information with other areas of your business to save time and reduce administration costs.

### Work the way your business does

- Give project managers control by allowing them to raise and authorise purchase orders
- Set up project structures that suit the way your business works with unlimited parent and sub projects
- Name and configure fields to match your business needs
- Get the right information to the right people with workspaces designed for different users
- Integrate project accounting with accounts, sales and purchase order processing, and payroll

### Effectively manage your resources

If your projects involve charging for people's time, Sage 200 can easily capture the information you need.

- Capture timesheet information and expenses via batch entry or remotely online
- Make sure timesheets and expenses are accurate before they are entered by creating authorisation processes
- Pay and work with contractors in the same way as suppliers if needed
- Analyse expenditure by employee or contractor, and by type of work and/or project

### Drive accurate and flexible billing

- Flexible billing schedules that can differ by project and by customer, showing when a customer should be invoiced and for how much
- Simple to use templates that simplify billing management
- Manual or automatic bill production to save time and effort
- A detailed breakdown of all project costs, so project managers can check for accuracy, reducing the risk of complaints and encouraging prompt payment

### Work in Progress

Businesses who manage projects or charge on a time basis need to be able to see the true profitability of a project such as design agencies or construction companies.

Work In Progress (WIP) allows you to post costs to the associated nominal codes and show costs as finalised alongside revenues posted to the P&L; providing you with more control over your project costs.

# CRM

## Managing your customers

Sage 200 offers a Customer Relationship Management (CRM) module that can help you to manage your customer relationships, and offer the highest quality of service and support.

Because Sage 200 works together with your accounting and stock processes, you get an informed view of the customer, helping you deliver joined-up customer service throughout the whole of your business.

### Build strong customer relationships

Maintain one view of information about your customers, including financial, commercial and communications information. Giving everyone in your business the same view of the customer, helping all of your teams provide consistent and effective customer service.

### Manage customer services

With a unified customer view, Sage 200 can help you quickly respond to customer enquiries and track communications.

If there's a question or issue that isn't followed up, the system can automatically notify a customer services manager.

### Maintain customer service performance

Sage 200 helps you measure customer service levels with detailed reports which can show call volumes, case resolution times, communications and follow up statistics.

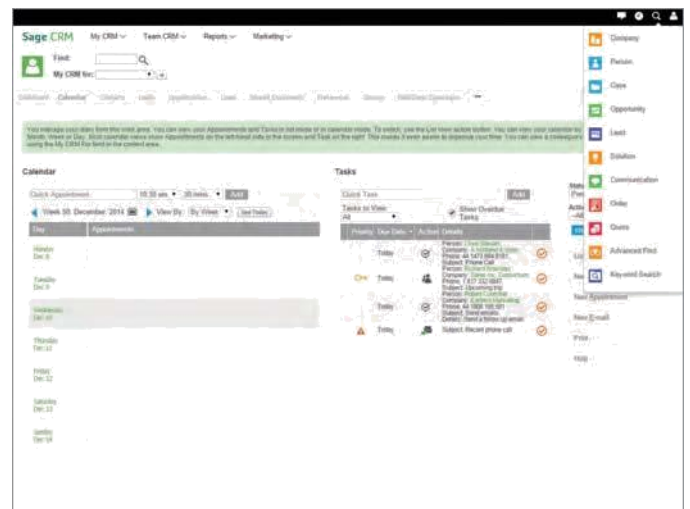
You can show your customers how you are performing against service level agreements with easy to understand graphical and visual reports

### An informed view of the customer

Sage 200 brings together financial and commercial information together with customers' data, so everyone in your business gets a complete picture of the service you offer.

### Find the answers quickly

Within Sage 200 you can build a central knowledge bank containing answers to known issues or questions, so your customer services team can quickly find the information the customer needs.



### An informed view of the customer

Business Accelerators for Sales deliver powerful insight to optimise sales performance including:

- Management Dashboards that display a range of KPIs, charts, reports and leaderboards for better insight and trend analysis.
- Preconfigured alerts and notifications help ensure management are getting realtime updates on their business KPIs as they happen.
- Sales workflows that can be optimised to suit your unique business needs.

# CRM

## Managing your sales and marketing

No matter how, when or where your customers, partners and prospects interact with your business, Sage 200 helps you manage these important relationships easily and intuitively.

Sage 200 gives your sales and marketing teams access to complete customer information so they can do their job effectively.

It provides up to date performance and pipeline data to help you to accurately identify and target new customers, and better take care of those you already have.

Sage 200 provides powerful tools for marketing teams to plan, execute and audit highly targeted marketing campaigns.

### Optimise your marketing activity

With Sage 200 you can get the right message to the right people at the right time, and plan, execute and measure targeted campaigns.

Manage all your customer details including transaction history, multiple contact details and phone numbers.

Track the success of your campaigns with pin-point accuracy, and generate accurate return on investment information.

### New Mobile CRM apps for sales

New mobile CRM apps provide access to important information for sales representatives out on the road - even when out of coverage. Access customer data, tasks and appointments, customise the app to your own preferences and push information back into Sage 200 when you're back online.

### Integration with MailChimp

The latest version of CRM introduces a new integration with MailChimp - one of the top email marketing solutions for SMEs on the market - in addition to Swiftpage integration

Use customer insights to help you retain customers, cross sell and up-sell by making the most of the powerful, flexible customer and prospect profiling tools.

Easily create e-marketing campaigns with a range of templates to get you started.

Empower your sales teams and increase conversion

Help your sales team achieve their targets with tools to create, track and monitor leads and pipeline.

With automated workflow and pipeline management tools, make sure opportunities are quickly progressed.

### Anytime, anywhere access

Sage 200 can help you get easy access to business information however you want, whether you're in the office, at home, travelling or simply on the go.

### With the latest integration you can:

- Add a group of Sage 200 CRM records (company, person, lead) as subscribers in a MailChimp list
- Create a new MailChimp campaign, selecting the list to send it to
- View a list of sent MailChimp campaigns in Sage 200 CRM with the results of the campaign (opened, clicked, bounced, or unsubscribed)
- Create groups based on the different responses, and update the mail preferences for subscribers who unsubscribed

---

# Manufacturing

## Managing your manufacturing and production processes

Sage 200 Bill of Materials and Manufacturing modules offer the flexibility to choose what's right for your business, whether you have light or more complex manufacturing requirements.

---

Bill of Materials is ideal for businesses involved in light manufacturing assembly, it can help break down complex processes and can split your business up into distinct areas with the ability to report by area.

Sage 200 Manufacturing also enables you to track supply chain activities in detail from end to end.

Sage 200 helps you monitor events on the shop floor to ensure it runs efficiently, maintaining maximum productivity and increasing customer satisfaction and profitability.

Deliver products on time and on budget, while managing cash flow throughout the entire manufacturing and delivery process.

### **Improve business efficiency**

Sage 200 Manufacturing helps you save time and resources, with tools to standardise and streamline production scheduling so you can coordinate your distribution channels.

Sage 200 also supports assembly, repackaging of bulk items, resource planning, and scheduling work and materials.

### **Reduce costs and delivery times**

Sage 200 helps you improve productivity by monitoring production processes and tracking components through the whole manufacturing cycle. Reduce lead times and errors by automating processes.

The built in market leading scheduling solution helps you assess potential production issues and produce flexible schedules that make sure you get the job done as efficiently as possible. Accurate resource planning helps you identify potential areas for savings and reduce the cost of production. Standardise and streamline production schedules to work more efficiently.

### **Share manufacturing data across your organisation**

Sage 200 gives people across the whole of your business access to accurate, timely information. So people in the project and accounting departments know exactly what those on the shop floor are doing and vice-versa, improving collaboration and understanding.

### **Keep up to date with the latest regulatory requirements**

Monitor quality standards in line with regulations such as ISO and trace serial numbers and batches back to suppliers and key components.

# Overview of Sage 200 range

Module	Functionality	Sage 200 On premise	Sage 200 Online
Financials	The essential financials package to manage your cashflow with the 4 key ledgers	✓	✓
Commercials	Stock, POP and SOP, price lists, price book and managing your supply chain	✓	✓
Business Intelligence	Powerful trend analysis and intuitive reporting. Simple to create your own reports and dashboards	✓	
Workspaces	For data mining and reporting. Use simple dashboards and customisable views to find the information you need, specific to your role	✓	✓
Customer Relationship Management	For sales and marketing automation, pipeline management and marketing campaigns	✓	
Project Accounting	For managing projects and customer/supplier relationships. View profitability and easily view costs v budgets at a glance	✓	✓
Web Timesheets and Expenses (access online)	Enter, print and authorise timesheets and expenses online. Links with Sage Payroll	✓	✓
Bill of Materials	For simple manufacturing processes	✓	✓
Manufacturing	For complex manufacturing processes – full Manufacturing Resource Planning solution	✓	
Excel Reporting	Better reporting and more detailed analysis	✓	✓
Sage 200 Services Standard	A whole host of benefits, giving you access to advice and insight to help grow your business	✓	
Sage 200 Services Extra	With two free web users and Excel Reporting included	✓	

If you're interested in finding out more, or would like a one-to-one demonstration, please contact us on:

.....

☎: 020 7831 3050

✉: [info@CentrePointSoftware.co.uk](mailto:info@CentrePointSoftware.co.uk)

.....

CentrePoint Software  
122 Minories  
London  
EC3N 1NT

