Sage 200 v2010 – Business Partner What's New Guide

Introducing Sage 200 2010

Sage 200 v2010 is scheduled to launch in June 2010. This latest version of the Sage 200 Suite further strengthens our customer and market-led development. We have listened closely to feedback from customers and Business Partners, utilising wish lists and focus groups across the Suite, as well as adding new features which support those trends in the lower mid-market which are relevant to our customers. The Sage 200 v2010 release has three key themes:

Accessibility – Gartner identified hyper speed and hyper connectivity as key emerging trends in the lower mid-market. Hyper speed is about the improved integration and accessibility of information within a business, providing improved internal capability with one view of the customer, enabling smarter and faster decisions. Hyper connectivity is more focused on accessing data from outside of the business, it is immediacy and agility of response, connectivity across borders and technologies and being able to access key information that is relevant to your customers role no matter where they are. Accessibility enables customers to connect to Sage 200 data outside of the desktop by whichever method they desire. Sage 200 v2010 delivers new features such as Sage 200 Mobile and e-mail authorisation for purchase orders, which are the first steps on the journey towards a more flexible, accessible Sage 200 Suite.

Information Management – The v2010 release brings phase 2 of our ongoing Information Management strategy - making information within the Suite more available to users in their day-to-day roles. Phase 2 of this strategy sees the introduction of the new Sage Report Designer, further additional workspaces in the desktop and the new Sage 200 Mobile solution which utilises out of the box workspaces that are rendered on a BlackBerry © smartphone.

Customer Satisfaction – We continue to listen to our customers and Business Partners feedback. In the v2010 release we've implemented many top wish list requests (equating to almost 400 contacts within the wish list), including a number which close some common Sage 50 gaps. The Sage 200 v2010 launch helps to improve usability and customer satisfaction with enhanced project accounting performance, project filtering, improved installation routines, CRM integration enhancements and the implementation of top wish list items.

ITS ref	Feature	Explanation	Benefits	Location in software
Sage 200 Suite Enhancements:				
	New Sage Report Designer	The Sage Report Designer (as currently used by Sage 50) will be incorporated into the Sage 200 Suite (with the exception of Construction module). There is now a unified reporting layer which allows much enhanced report design. The majority of reports will be migrated across to the new report designer however we will still provide the old report designer to run alongside the new one to enable amended/ bespoke reports to be upgraded if they cannot automatically be migrated.	The new report designer and underlying reporting layer result in an easier to use and more intuitive offering. Ensures consistency as customers moving from Sage 50 now experience a smoother upgrade experience as they can use the same report designer which should be familiar to them. The new report designer brings a host of benefits including: • Simplified reporting scheme • Simplified use of analysis codes for reporting • Improved look and feel and usability • Report editing in preview mode • Drill-down reports	All modules except Sage 200 Construction
	Sage 200 Mobile	Sage 200 data is now accessible to view and search via a Mobile device (BlackBerry 9000 series as well as 8900 and 8520).The Search functionality via data feeds allows users to drill and explore data with the ability to search their ccustomers, customer transactions, SOP, stock items and suppliers. View functionality is via workspaces for Mobile giving a richer presentation and enhanced user experience. Customers are not restricted to just those views which are out of the box; in addition Business Partners can create views to meet individual customer requirements. Out of the box users have views for Sales Revenue Position, Cash Position, Project Position and My Sales summary.	Allows users of Sage 200 access to data whilst on the move, giving them the power to make decisions when not in the office. The data currently available is aimed at the Financial Director, Managing Director, Sales Person and Project Manager roles.	Setup within System Admin tool. Mobile client installed on BlackBerry smartphone.
2710	**Analysis Code Alignment**	Analysis codes within Sage 200 have been streamlined across the modules – each area can now have up to 20 analysis codes so reporting is improved and simplified and the analytics of BI are enhanced.	All analysis codes in Sage 200 are now formulated in the same manner and held against the individual module records. This means the reporting on these codes will be far easier allowing the customer to get the information out of the system they require.	SOP, POP, Sales and Purchase Ledger accounts, Stock Transaction History and BOM.
	Direct E-mail of Documents from	Within the spooler list we have added a new email button which	Saves valuable time and improves efficiency so users of	Spooler

	spooler	allows you to email documents or reports to customers or suppliers without the need to preview first. The email address is pre-populated and therefore ready to send.	S200 can be faster and more effective.	
ITS ref	**Feature**	**Explanation**	**Benefits**	**Location in software**
Sage 200 Financials and Commercials enhancements:				
	Charting within workspaces	We've created new charting functionality and added it to six existing workspaces: • Credit Control • Payment Control • Sales Document • Purchase Document • Projects • Nominal Transactions We've also created two new workspaces: • Live Sales Order Status • Allocated Stock	The new charting functionality allows users to see a dynamic graphical representation of key data so they can quickly interpret their data at a glance. In addition to the out-of-the-box charts, a Chart content part is also available that can be used within workspace design so BPs can add charts to their own workspaces.	Specific workspaces as listed.
	Content part row and column splitters within workspaces	The column splitter allows the user to freeze columns within a content part so the user can scroll through the data whilst chosen columns stay visible. The row splitter allows the user to pick out individual pieces of data and show them in a split panel.	Improved usability and flexibility as the user can focus on specific pieces of data without having to scroll backwards and forwards comparing data.	All lists in all workspaces
922, 165622144, 10668 14523	**Purchase Order Authorisation Enhancements**	Improvements have been made to the purchase order authorisation area of Sage 200 with the ability to allow customers to authorise by roles, with the ability to set and apply different levels for those people who require their orders to be authorised. We've also introduced the ability to set out of office replacements for authorisers and keep a log of authorisation change. In addition we've also introduced two new workspaces.	A total overhaul of this area means the customer now has full control over their authorisation processes, making the order process more secure, with clear and concise rules allowing for a flexible approach to meet customer's requirements in this area. The out of office functionality helps to keep the workflow going when a person is not present to authorise orders and the introduction of new workspaces make the visibility of orders within the authorisation process far simpler and easier to use.	Throughout Purchase Order Processing
	Remote Authorisation Alerts	Allows a user to receive e-mail alerts to notify them that they have orders requiring authorisation, which can be authorised via a secure website.	Ensures that the purchase order authorisation workflow is not held up by staff being outside of Sage 200 or even the office. Enhances the user's experience and improves usability in this area of the software by providing Mobile purchase order	Purchase Order Authorisation – POP utilities, system set up and maintain authorisation rules.

			authorisation.	
	EC Sales Lists – Legislation Changes	HMRC legislation changes to the submission of the EC Sales List report took effect on the 1st January 2010. These changes involve a change to the frequency of the submission of the report from quarterly to monthly, showing more detail for each invoice instead of a summarised total and changes to the XML file format. Changes were implemented in v2009 service packs and have now been incorporated into this core release.	Ensures that our customers can easily comply with the new legislation changes with minimum impact to their business.	Sales Ledger – Reports, Account Analysis, EC Sales List
852	**On Line VAT Return Submission**	HMRC legislation changes dictate that from the 1st April 2010, all companies with a turnover of more than £100,000 will have to submit their VAT returns electronically. This feature will provide a link to the HMRC gateway, allowing users to electronically submit and pay their VAT return online.	Ensures that our customers comply with legislation changes and makes it quicker and easier for them to submit and pay their VAT return. NB: The rescheduled release date means customers may need to submit initial returns manually via the HMRC government gateway.	Nominal Ledger and set up in System Administration
18147	**Receive Text & Service items With Stock**	If a purchase order contains a mixture of text or service lines and stock item lines, they currently have to receive these items separately through the good received process. A change has been made to ensure that the user can process good received for all types of item in one screen.	Make it far easier and quicker for a user to process goods received in one place. This also gives a consistent approach across both sales and purchase order processing.	Purchase Order Processing, Goods Received and Purchase Order Processing Settings
1947	**Exchange Rate at Invoice Print**	When entering a sales order for a foreign currency customer on Sage 200, an exchange rate is entered. There is currently no way of changing this rate when printing an invoice; this change will allow the user to make changes to the rate should it have fluctuated between the order and invoice dates.	This feature will save the user time as the rate can be changed prior to printing the invoice instead of having to go into the amend order screen as well.	Sales Order Processing – Document Printing, Print Invoices
1120710554, 4781	**Additional Charge Only Invoice & Credit Notes**	Currently when an order is entered that contains an additional charge item only and no item lines it cannot be processed through to an invoice. Changes to this feature ensure that it is now possible to raise an order and an invoice for an additional charge item only.	A user can now enter an order for an additional charge on its own, meaning that errors of omitting these charges on an original order or refunding an additional charge on a return and subsequent credit note can now be carried out.	Sales Order Processing – Enter New Order or Enter New Sales Return
14868,2598, 15319	**Stock Take Enhancements**	Recent improvements to the stock take routine added more flexibility and added	Allows users to split the stock take count by bin location – particularly useful for larger	Throughout the Stock Module

		functionality. In this release we allow for stock taking by bin location and counts across different warehouses at the same time further extending this functionality.	organisations or businesses where stock is held across multiple bin or shelf locations. Multi user stock count significantly reduces the time taken for stock taking as businesses can now count in more than one warehouse at the same time.	
698	**Retrospective Stock Valuation**	It is currently not possible to run a stock valuation report for a day in the past in order to reconcile with the nominal ledger at a set period. This new feature will allow the report to be run retrospectively, including late entries.	This will make the reconciliation between the stock control module and the nominal ledger easier and mean that processing at month ends can continue in the knowledge that the reports can be printed out later. Fills a gap for those customers who have upgraded from Sage 50 Accounts.	Stock – Reports
1497	**Store Incomplete Bank Reconciliation**	In Sage 50 it is possible to begin a bank reconciliation and save it prior to finishing the process. This functionality has now been incorporated into Sage 200.	Takes the pressure off a user reconciling the bank reconciliation as they can now save it and return to continue later. Also reduces security risk as the screen/programme can be closed, knowing that they can pick it up later at the same stage. Also improves the upgrade path for Sage 50 customers.	Cash Book – Period end Routines, Bank Reconciliation
682	**User Defined Despatch Date**	When recording a despatch in the current system the date is hard coded and defaults to the system date. This change will allow users to change this date should the despatch not be going today.	Delivers flexibility for the user who may chose to record the despatch and load up a lorry, however not physically despatch the goods for a day or two.	Sales Order Processing, Goods Despatched
1152	**Revalue Bank Account With Zero Balance**	In previous versions, when the foreign currency or base currency bank balance is zero it is not possible to calculate the effective exchange rate. Customers can now revalue a bank account when either one of these balances is zero.	Accounting conventions require bank balances for non base currency bank accounts to be expressed in the Balance Sheet at a fixed stated exchange rate. Introducing revaluation for zero balance accounts allows customers to correctly account for their bank balances on the nominal ledger.	Cash Book
11189,1075, 1733	**SL & PL Imports to Update Cash Book**	Currently when receipts or payments are imported into Sage 200, only the sales or purchase ledger is updated with the transactions. This feature will update the cash book module with the receipts and payments as well.	By doing this we can save the customers and Business Partners time when importing as they will have the option to have each transaction update the modules it would normally update if entered manually in the system. Currently the user would have to import the transactions and then enter a separate transaction for the cash book module.	Sales & Purchase Ledger - Utilities, Import, Import Transactions

16922	**Additional bank reference fields for IBAN numbers and Swift codes**	Fields to hold IBAN numbers and Swift codes have been added to the Purchase Ledger account details screen. The IBAN number is recorded on the bank details screen and the new fields included on the relevant import files.	Allows customers to hold a record of these details for their suppliers and for their own bank accounts and add to report layouts where necessary.	Purchase Ledger Account Details, Bank Details screen
	Allow amendment of invoice address prior to reprinting	If an invoice is printed and the address on the invoice is incorrect, currently a user would have to change the account address and re-print the invoice.	New functionality has been added to allow the invoice address to be changed for an invoice. This will not change the permanent address held on the customer account.	Sales Order Processing Invoice Print
ITS ref	**Feature**	**Explanation**	**Benefits**	**Location in software**
Sage 200 CRM enhancements:				
	Hide Account Entity	The CRM integration introduced in Sage 200 2009 was aimed at customers who have one CRM company linking to many back office accounts. The introduction of this functionality caused confusion amongst the majority of our customers who link one company in CRM with one account in the back office. We have taken the decision to hide the account entity by default in order to meet the demands of the majority of our customers.	Smooth end to end processing from the CRM interface through to the back office in Sage 200.	N\A
N\A	**New Look User Interface (UI)**,	Sage 200 CRM comes with a choice of UIs, enabling the user to personalise the look and feel to their own preference.	Makes it easier to use and offers greater choice of interface designs, delivering greater personalisation options and helping drive user adoption across the organisation	Across Sage 200 CRM
N\A	**Interactive Dashboard**.	Users can now manage all their activity from a tailored workspace that combines the information they use every day. This includes their calendar, their tasks, their lists as well as displaying web and RSS feeds, Pre-installed dashboards by role for Sales, Marketing, Customer Service and Management are available out-of-the-box providing relevant content for each department on their desktop when they logon	The interactive dashboard delivers a rich and personalised user experience. The interactive dashboard delivers an intuitive and convenient way to view and action items from a single screen, reducing the need to switch between screens for maximum productivity	
N\A	**Active Directory Import**	Allows IT administrators to import a batch of users from your Windows® network into Sage CRM quickly and easily. Sage CRM can connect to an Active Directory server that lists	Speeds up deployment time and delivers increased IT productivity as well as a reduction in administrative overhead, as logons are standardised across the network	

		and controls network logons. Those users within the directory are then not only filtered and imported easily into Sage CRM but also have security, and profile rights automatically assigned to them.	ensuring ease-of-logon for users	
ITS ref	**Feature**	**Explanation**	**Benefits**	**Location in software**
Sage 200 Project Accounting Enhancements:				
	Project Accounting Performance Improvements	Some customers with large numbers of nested projects experienced time delays and lack of memory messages when performing certain tasks within the project accounting module.	Improves usability and performance within Project Accounting.	Project Accounting
114, 483	**Project Accounting Filtering**	When entering timesheets or expenses into Sage 200 the user currently sees all projects held on the system. This new feature allows resources and projects to be linked so that timesheets and expenses can only be entered for projects linked to the resource. It also allows the linking of resources to control who can enter timesheets and expenses for themselves and other resources.	This will save the user time when searching on a drop down list for the project against which they wish to record timesheets or expenses as they will only see projects on which they are working. It will also reduce the margin for error of items getting allocated against the wrong projects.	Project Accounting – All timesheet and expense entry screens
67, 474	**Project Accounting Reporting Enhancements**	We've added the ability to create new reports within this module, based on some of the existing enquiries. There are also 6 new out of the box reports: • Cost Transaction Report • Revenue Transaction Report • Nominal Transaction Report • Cost Analysis Report (by Group or by Structure) • Revenue Analysis Report (by Group or by Structure) • Profitability Transaction Report (by Group or by Structure)	Eliminates the dependency on application fabricated data (AFD), therefore making the reports amendable. Improved usability and supporting the information management strategy – the new reports allow the user quicker and easier access to data within the project accounting module.	Project Accounting - Reports
279	**Project Accounting Workspaces**	We've introduced 4 new workspaces into Project Accounting: • Projects - at-a-glance overview of the status of a project • Project Actual Costs By Period (Actual Costs This Year By Period) • Project Actual Net Profit By Period (Actual Profitability This Year By Period) • Project Profitability	These new workspaces improve usability with quick, easy navigation to project accounting data: • The projects workspace allows the user to see what makes up the total cost within the cost header in terms of the costs and revenues accrued to it and the level of completeness of the project itself and its sub-elements. • The Project Actual Costs By	Workspaces Navigation Bar

			Period and Project Actual Net Profit By Period workspaces are for those users who wish to view quantities by period e.g. (actual/potential) costs, (actual/potential) revenues etc. • Project Profitability enables a quick view of sales invoices that have been raised for a project but which are still outstanding.	
ITS ref	**Feature**	**Explanation**	**Benefits**	**Location in software**
Sage 200 Bill of Materials 2010 (Replacement Module):				
In this release the existing Sage 200 BOM module has been re-written. The re-write of the Sage 200 BOM module is a strategic initiative to bring Sage 50 Manufacturing BOM, Sage 200 Manufacturing BOM and Sage 200 BOM (previously MMS BOM) into a single code base. This means from the release of Sage 200 v2010 the existing Sage 200 BOM module will no longer ship as part of the Sage 200 Suite, and will be replaced with the re-engineered Sage 200 BOM module. This initiative will continue throughout the coming years with the Sage 200 Manufacturing module being re-written in stages.				
2226	**User access**	A view only enquiry option has been added.	Separate view only options allow more secure access to BOMs.	
2028, 2520, 2963	**Enhanced version control**	Additional settings allow BOMs to be amended without forcing version updates. This feature also provides manager override options.	Provides greater flexibility and easy to use versioning.	
	Resources enhancements	Multiple resources per operation - no longer restricted to one machine and operator per operation. **not available in Works Orders in v2010*	Increased flexibility enabling users to mirror actual working practises.	
		Default cost rates from resource registers. BOM costing can now be configured to use these rates rather than re-setting rates per resource and operation.	Time saving for users and provides greater flexibility.	
		Fixed, "per batch" operation times.	Increased flexibility enabling users to mirror actual working practises.	
		Users can restrict the process to only BOMs that have changed since they were last costed, or BOMs changed since a specified date. Users can cost any Bill of Material version that doesn't have the status of Retired. New option to re-cost one, a group, or all BOMs with a single action.	These changes have been implemented in response to customer feedback, greatly increasing flexibility within BOM costing	

213, 1086, 2946	**Extended BOM Costing**	"Miscellaneous" stock items are included or excluded based upon a parameter setting. The results of all costing runs are recorded in the BOM costing history together with the date of the costing for subsequent enquiry. Costing of sub-assembly BOMs checks the Built / Bought flag on the stock record to determine whether to re-cost the sub-assemblies or to take the cost from the sub-assembly stock record. An option to force re-costing is available. Cost roll-up can show sub-assembly operation costs as individual cost headings or summed as 'Materials' at the top level. A default setting can be overridden at run time for exceptional items.		
		Unlimited cost headings grouped by type. Extends available cost breakdown from Materials, Labour, Overheads and Subcontract. The type code allows cost headings to be grouped for reporting purposes. E.g. Type 'Labour Group' could now include Direct labour, Subcontract labour, Temporary staff	Improved usability, cost analysis and breakdown.	
		Explore costs by resource / operation / phase. Cost enquiries can now drill-down, group and show costs by operation, by machine, by labour group or by setup time, run time and teardown time.	Flexible reporting gives users additional information to drive initiatives e.g. Cost and setup time reduction programmes.	
		Cost finished goods, sub-assemblies and components on different quantity basis. New options to specify the quantity of the finished item to be used for costing. New options to specify the quantity to be used when costing assemblies to derive a unit cost to be used when calculating the	Improved cost analysis and breakdown, by more accurately modelling your manufacturing processes. E.g. Finished goods are built in batches of 10, but a sub-assembly is common to many products and is built in batches of 50.	

		cost of assemblies used in the cost roll-up.		
		Allocate, pick and amend pick options have been added to the backflush routines.	Improved control within the factory.	
		Backflushed production now enables a multi-level backflush with full support for traceable and serial numbered items.	Removes previous restrictions.	
	Enhanced backflush	Backflush one or more BOMs. Also works with BOM Groups (see below)	Easier and faster processing at end of shift to record all items completed.	
		Create consolidated picklist, (existing allocated BOMs must be selected). This will show the total quantities of each component required for the allocation. The list of finished items linked to the allocation will be shown.	Additional documentation is now available to help manage the warehouse and shop floor activities.	
		Create individual picklist per BOM. Users can specify that the picking list is printed by finished item. This will produce a picking list for each finished item linked to the allocation.	Whilst warehouse picking is against the entire requirement, the shop floor may require a separate document per finished product being built.	
	BOM Groups	Users can now link together several BOMs into a group that can be processed together. A "BOM Group" is not related to the actual manufacture of a product (as a sub-assembly or phantom is), but offers a shortcut to entering several separate BOMs (and optionally quantities) on the various dialogs in the Bill of Materials module. Unlimited number of BOM Groups may be defined. Each group can have an unlimited number of BOMs associated with it. Retired BOMs cannot be associated with a group. It is not possible to retire a BOM that is associated with a group. It is not possible to delete a BOM that is associated with a group.	Time saving and ease of use. BOM Groups simplify processing for multiple products. For example, Trial Kitting, Re-costing, BOM Build (backflush), Mass replace / delete.	
	Remove component	Enhanced function to find a component and remove from	Simplify BOM maintenance.	

		BOMs. This operates on all BOMs or optionally a subset, which could be a BOM group. This function shows in which BOMs the component is to be found and allows the user to confirm the subset which is to be updated. The user will be presented with a list of BOMs which can't be updated. This list is presented prior to the Remove component has been performed. Exclusions reasons include: • BOM set to On-Hold • BOM checked-out to another user • BOM with versions having a status of obsolete/retired. It is optional whether a BOM 'On-Hold' is to be considered excluded.	Also removes the limitation in Sage 2009 Manufacturing where the Remove function was not available when operating with BOM Version Control enabled.	
	Replace component	Enhanced function to find a component and replace with another. This operates on all BOMs or optionally a subset, which could be a BOM group. This function shows in which BOMs the component is to be found and allows the user to confirm the subset which are to be updated with the replacement. The facility will show the user a list of BOMs which can't be updated. This list is presented prior to the Remove component has been performed. Exclusion reasons include: • BOM set to On-Hold • BOM checked-out to another user • BOM with versions having a status of obsolete/retired. • BOM with component lines having units of measure not supported by the replacement component. It is optional whether a BOM	Simplify BOM maintenance. Also removes the limitation in Sage 2009 Manufacturing where the Replace function was not available when operating with BOM Version Control enabled.	

		‘On-Hold’ is to be considered excluded.		
	Drawing register	Enhanced tracking of changes. Drawing register records having ‘retired’ status cannot be added to BOMs.	Improved usability. Enhanced audit trail of changes.	
2684, 2693	**Enhanced Trial Kitting**	Enhanced Trial Kitting for multiple BOMs, max build and shortages. Optionally specify that BOMs are to be re-costed as part of the process. Optionally include items currently on order from suppliers when assessing current available stock. Specify source warehouse(s) for components. Manage single batch constraints when assessing available stock in a single batch at the specified location(s). Display the results for each component indicating which components have a shortage. Choose whether to display only items with shortages. Results may also be printed. In the Sage 50 BOM or Sage 200 BOM only variants, optionally create a PO(s) for item(s) with shortages. Several operating modes are available:- Use only current available stocks of components in the specified location(s). Do not allow negative stock. Take account of the negative stock setting on a component record (i.e. never report a shortage for components that allow negative stock). Use only current assembled stock of sub-assemblies - report shortages regardless of the stock record setting for negative stock. Use only current assembled stock of sub-assemblies - allow negative stock if the setting on	Time saving and greater flexibility. Fully integrated with the BOM Build process. Optionally create MTS (Make to Stock) records, Works Orders, Purchase Orders and Sales Orders.	

		the stock record permits this. Ignore current assembled stock of sub-assemblies – base calculation on the stocks of components used on the sub-assembly. Use current assembled stock of sub-assemblies - if this is insufficient, evaluate the stocks of components used on the sub-assembly to attempt to fulfil any shortfall. Initial settings for the use of negative stock, the use sub assemblies, the inclusion of PO balances and the re-costing of BOMs are all taken from central parameters. On completion of the Trial Kit process, you can pass the list of finished items and quantities required to the BOM Build process for allocation and / or build or you can specify which new records and orders are to be created by the action buttons. These include:- New make for stock (MTS) record(s) or Works Orders for the item(s) in manufacturing; a new sales order record for the item(s) and quantity in SOP.		
Sage 200 Construction				
ITS ref	**Feature**	**Explanation**	**Benefits**	**Location in software**
	Workspaces for Construction	We have introduced six workspaces incorporating three different charts: Clients - shows Client details; including Project/Variations client has worked and their respective Purchase Documents and Revenue Transactions; along with a Risk Assessment Pie Chart. Suppliers & Subcontractors - shows supplier and subcontractors details; including all relevant Purchase Orders and the appropriate Purchase Invoices for each order.	All the benefits of workspaces – key information is brought together in single screens so users have all the information relevant to their day to day role at their fingertips. The new charting functionality brings an easy to understand view of the data so users can work smarter and with enhanced efficiency.	Sage 200 Construction Workspaces

		Subcontractors - shows Subcontractor details; including retentions and CIS status and any relevant Payments Construction Purchase Orders - shows purchase order headers and appropriate detail lines Top Ten Clients - shows top ten clients via a stacked column chart, along with their respective purchase documents and revenue transactions. Project Profitability Over Time - shows project profitability over time for each selected client via a scatter chart along with associated client details.		