



Sage 200c Standard & Professional pre-release 'What's New'

Partner briefing July 2017

Sage 200c Standard & Professional 'What's New' – pre-release

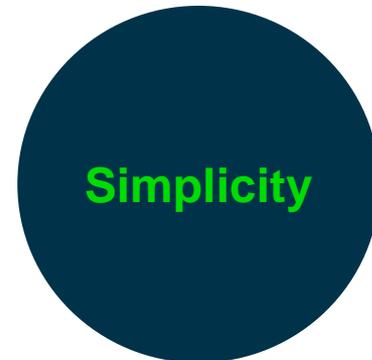
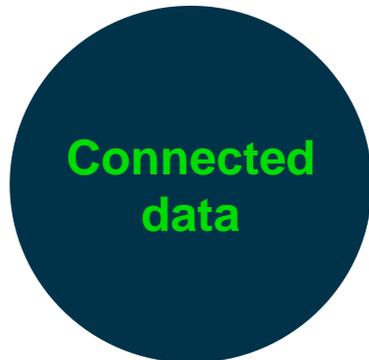


Sage 200 is a global franchise with a clear vision and strategy across fourteen countries worldwide. With a single focus on product modernisation, delivered by harnessing the power of the desktop whilst liberating key data via connected web and mobile services, the strategy allows us to deliver continuous improvement through regular releases that ensure we are continually adding value to the customer base.

200c launches August 2017 in UK and Ireland.

First in a series of releases, Sage 200c launch includes Standard and Professional. In alignment with Sage naming convention, 200 Extra will be renamed to Sage 200c Professional. 200c introduces new connected services, the first being Sage Bank Feeds. Subsequent releases will introduce Microsoft integration services.

200c has three key themes:



Sage 200c Standard & Professional Highlights



Sage 200c is built on direct customer feedback - customers tell us that simplifying business processes is key, and that improving the user experience to help them become more productive on a daily basis is what really matters to them.

200c launch highlights include:

- **Sage Bank Feeds**
 - Secure, rich, high quality and timely bank data flows directly in to Sage 200c
- **Purchase Requisitions**
 - Quick and easy web requisition entry, authorisation and order generation
- **Invoicing**
 - Fast, effective invoice entry making the day to day easier - ideal for service industries or those with no despatch process
- **Click Once Installer**
 - Improve the whole install and upgrade process with the introduction of 'Click Once' technology
- **Top requested ideas from customers**
 - Hide Sales/Purchase accounts; rapid purchase invoice entry; additional SOP status; Nominal Analysis and Error Corrections – all based on direct customer feedback

Sage 200c Features and Benefits



Feature		Explanation	Benefit	Location
Bank Feeds	<p>Bank balances and transaction details will be available in near/real time once the customer has authorised their bank to do so</p> <p>Direct bank feeds from top high street banks flow straight into Sage 200 creating transactions within the bank feeds form</p> <p>Users can check and authorise transactions</p>	Direct bank feeds from your bank to Sage 200 to enable automated bank reconciliation	<p>Secure, accurate and timely bank data flows seamlessly into Sage 200</p> <p>Efficient processing of banking data removing the need to manually re-key data</p> <p>Reduce human error by automating activity from your bank in to Sage 200</p> <p>Improved user experience</p> <p>Greater control over your data</p>	Financials
Export to Excel	<p>Over 80% of customers take Sage 200 data into Excel and find the process cumbersome</p> <p>Export to Excel allows customers to send data to Excel in a single click with:</p> <ul style="list-style-type: none"> Header and footer information removed prior to display in excel Auto-filtering on all columns with headers enabled prior to display report in excel <p>Adopting the latest version of Sage Report Designer which is compatible with .NET 4</p>	Sage 200 export to Excel allows customers to report on data and perform more detailed analysis using the familiar format with Excel	<p>Single click export</p> <p>Improved productivity</p> <p>Removing the need to manually, manipulate data</p>	Reporting
Excel Reporting for Sage 200 – financial pack and nominal analysis	<p>Removes the conditionality around selected reports which are only available in Sage 200 Services</p> <p>Financial pack reports and Nominal transactions report – both now available out of the box.</p> <p>We have made changes to automatically enable the stock pack when a customer buys Services Extra</p>	Excel reporting for Sage 200 is existing functionality which works with O365. <i>Note this is only available to customers on Sage 200 Services Extra</i>	<p>Better reporting out of box</p> <p>Enables customers to see the value of the full Excel</p> <p>Reporting which is available within Sage 200 Services Extra</p>	Financials

Sage 200c Features and Benefits



Feature		Explanation	Benefit	Location
Invoicing	<p>Following customer feedback (invoicing being # 1 wish), we have introduced a standalone invoicing module</p> <p>Invoicing introduces a new, easy and quick way for you to create invoices to send to your customers</p> <p>Great for creating invoices and credit notes with no despatch process. Ideal for service industries, those without despatch process or with no lead time between order and invoice despatch</p>	<p>A new Invoicing module to simplify the process of raising and processing invoices</p> <p>Raise, Print and Post invoices</p> <p>Auto update of Stock and transactions at point of post</p>	<p>Fast, effective invoice entry making the day to day processing easier</p> <p>Reduce human error by removing need to re-key information</p> <p>Ideal for service industries or those with no despatch process</p> <p>Rapid data entry</p> <p>Reducing the cost of entry with invoicing available out of the box as part of the Sage 200c platform</p> <p>Greater usability</p>	Financials & Commercials
Purchase Requisitions	<p>Following customer feedback the new purchase requisitions feature provides an easy way to enter requisitions for either stock or free text items regardless of whether you know the supplier or stock code, authorise them, and generate orders</p> <p>Authorisation rules let you control who can authorise the requisitions</p> <p>You can enter and authorise requisitions when you're on the move using the remote user. This means that you only need a remote user licence, and don't need access to the full desktop app</p>	<p>Web based requisition system for raising purchase requests</p> <p>Web based authorisation for processing requests</p> <p>Web based conversion for converting requests to purchase orders</p> <p>Everything offered through a remote user licence</p> <p>Authorisation route based on rules</p>	<p>Quick and easy web requisition entry, authorisation and generate orders</p> <p>Reduce human error by removing need to re-key information</p> <p>Access anywhere, anytime</p> <p>Giving you control with authorisation rules</p> <p>Full visibility and audit of requests through to Purchase orders</p> <p>Reducing the cost of entry as reduces the need for add-ons</p> <p>Reducing administrative burden</p>	Remote user Purchase Orders
Hide Sales and Purchase accounts	<p>Following customer feedback hiding of Sales & Purchase ledger accounts that are no longer used will allow customers to more effectively report and analyse their data without including trader accounts that they no longer transact with</p>	<p>Flag Sales & Purchase ledger accounts so you can hide them from view and selection lookups</p>	<p>Increase speed and efficiency by enabling greater speed of data entry</p> <p>Removing the need to manually remove accounts from list and reports</p> <p>Reduce human error by hiding redundant accounts</p> <p>Greater usability and more friendly reporting</p>	Financials

Sage 200c Features and Benefits



Feature		Explanation	Benefit	Location
SOP Status	<p>Following customer feedback, we have added the ability to extend the status of sales order will allow users to report the exact state of the sales order to cover Allocations, Dispatches and Invoiced status</p> <p>Allows customers to quickly track the status of a sales order.</p>	<p>Extension to SOP status to view Allocated, Despatched and Invoice status</p> <p>Additional columns highlighting each stage of the SO cycle</p>	<p>Gain greater control over your Sales book with greater in sight of the Sales order status</p> <p>More in depth reporting available at each stage of the sales order process</p> <p>Clear visibility of orders and any blockers in the sales cycle</p> <p>Greater usability and improved product quality</p>	SOP
Rapid Purchase Invoice	<p>Following customer feedback, we have introduced the ability to enter purchase invoices for multiple lines and trading accounts in a grid format rather than having to enter individually</p>	<p>Ability to rapidly input Purchase Invoices</p> <p>Function keys to speed up data entry</p> <p>Data checking against existing transactions to avoid duplication</p>	<p>Improved productivity and greater usability, saving valuable time on data entry tasks</p> <p>Reduces human error by copying previously entered data</p> <p>Reduce duplication of data by checking transactions before saving</p>	Purchasing
Nominal Analysis	<p>Following customer feedback, we have added the ability to store analysis codes on each nominal record, this allows greater depth of analysis and reporting vastly improving the reporting capabilities of Sage 200 in the core area of the product</p> <p>20 analysis codes have been introduced for nominal accounts to provide parity with all other analysis codes within Sage 200</p>	<p>Nominal records extended to include 20 analysis codes</p>	<p>Improved reporting and enquiries for nominal ledger</p> <p>Greater depth of analysis</p> <p>Allows customers to capture more data against individual nominal records</p>	Nominal
Error Corrections	<p>Continuing the work already delivered for corrections in v2015 and v2016</p> <p>Customers now have the ability to amend Trader invoices & credit notes Trader payments & receipts</p>	<p>Ability to correct trader transactions for both customers and suppliers</p> <p>Correct transactions in both base and foreign currency</p> <p>Reverse transaction in foreign currency</p> <p>Change critical and none critical data on your trader accounts</p>	<p>Providing greater control over your data</p> <p>Simplifying transactions processing to save time</p> <p>Maintain accurate data to improve quality of reporting</p>	Sales & Purchase

Sage 200c Features and Benefits



Feature		Explanation	Benefit	Location
Improved UI – Remote user	Following customer feedback, we've updated the user interface for the remote user so it's now quick and easy to navigate to reports and workspaces	Refresh of the remote user interface	Greater usability with improved product quality and ease of use Quick and easy navigation	Remote user
Click Once installer	Once installed on the server all client pcs will be prompted to update when they connect to the server to run Sage 200 so installing upgrades becomes faster and easier	Introduction of MS Click Once technology to improve the install and upgrade process for Sage 200	Speed of upgrade and install across customer site Reduce cost of upgrade as speedier process Greater usability means adoption new features and technology faster and at a lower cost	General
Freezing Assembly Version	We have frozen the assembly versions meaning third party development work will continue to link to the latest versions, thus mitigating the risk of "breaking" add on integration	Freeze assembly version to make third party development easier to upgrade	Faster adoption of upgrades Lower cost of adoption as no need for new versions of third party development Greater user experience	General
Second Reference on Transaction Enquiry	Previously the second reference could not be viewed on the transaction enquiry screen Following customer feedback the second reference has been added as a default column	Sales and Purchase ledger transaction enquiry extended to include 2 nd reference	Greater usability with improved product quality and ease of use More detailed enquiry screen leading to better quality data and improved user efficiencies	Financials
Aged Debtors & Creditors – Portrait Reports	Customers who migrate from Sage 50 are used to Portrait reports Following customer feedback from you, the portrait versions of these reports are now available 'out the box' rather than as an extra downloaded report	Portrait style aged debtors and creditors reports	Greater usability Improved reporting	Financials

Sage 200c Features and Benefits



Feature		Explanation	Benefit	Location
HMRC – new online gateway	<p>HMRC have confirmed that in Feb 2018 the Electronic Data Interchange (EDI) channel will be decommissioned and the existing services will be migrated to new services by that date</p> <p>EDI is to be dropped and all electronic returns must be made via a new end point</p> <p>The new service is available from 1st August 2017</p> <p>Work to ensure customers can continue to make online submissions via Sage 200 using the replacement service for HMRC Gateway</p> <p>NB: Customers on older versions can submit online by manually entering the data into the new gateway</p>	Integration to the new HMRC EDI gateway	<p>Time advantage gained by removing the need to re-key</p> <p>Reduces the risk of human error</p>	Financials
CRM: Adopt latest version of CRM	<p>Integration with Sage CRM CRM 2017 R2</p> <p>Adoption of CRM connector version 4.1</p>	<p>Adopt the latest version of Sage CRM on premise</p> <p><i>NOTE: Only applicable to Sage 200c Professional</i></p>	All the latest functionality from the latest release of CRM	CRM



For more pre-release information about 200c Professional and Standard please contact your Account Manager.