

# Business Software for Retailers



sage

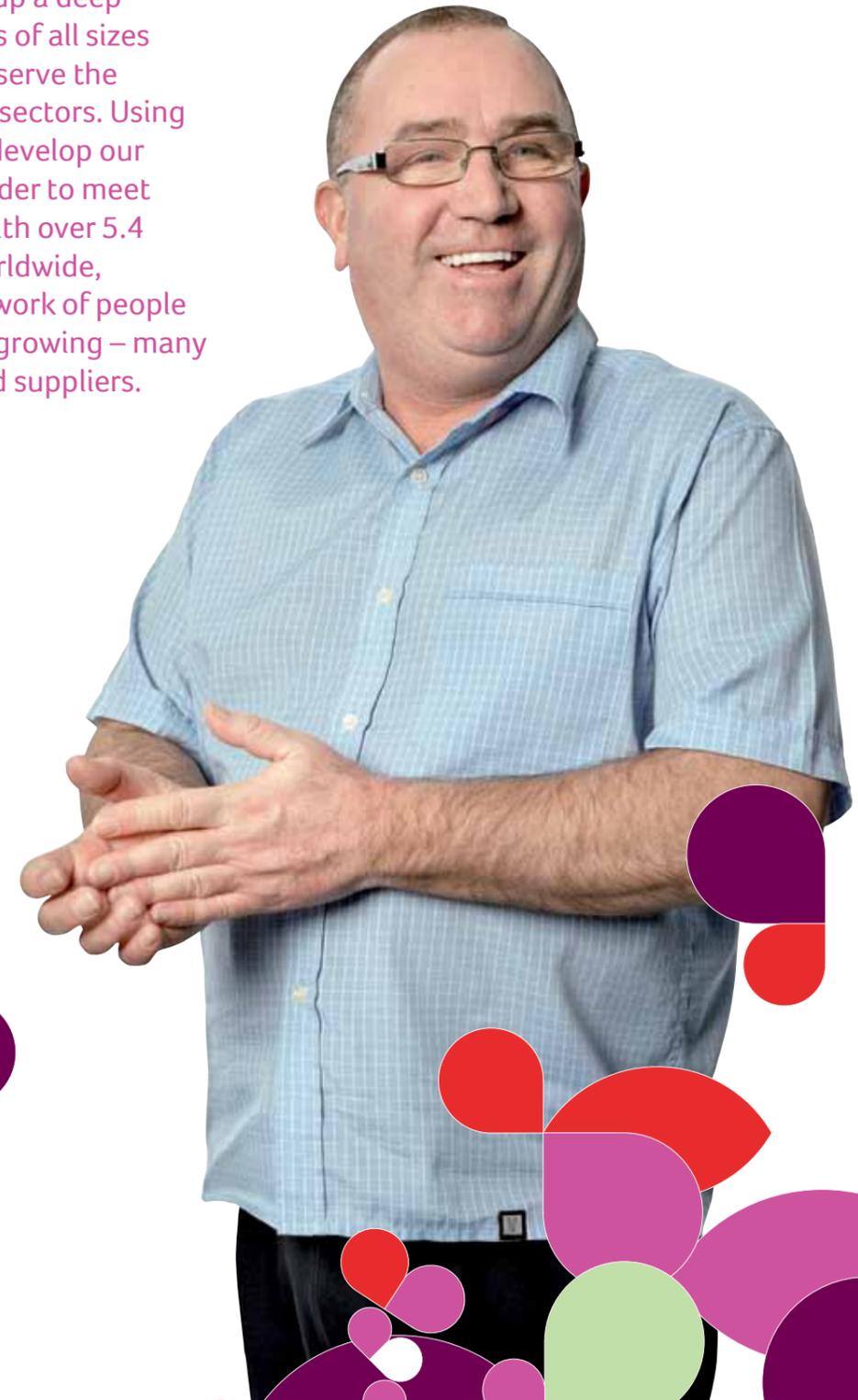
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## Sage working for retailers and traders

At Sage, we've been supporting businesses like yours with world-class business software for well over a quarter of a century.

Over this time, we've built up a deep understanding of the needs of all sizes and types of business who serve the retail, wholesale and trade sectors. Using this insight we constantly develop our products and services in order to meet customer requirements. With over 5.4 million Sage customers worldwide, 730,000 in the UK, the network of people relying on Sage systems is growing – many include your customers and suppliers.



# Helping overcome your business issues

Sage software is available in three suites, Sage 50, Sage 200 and Sage 1000. These suites include the applications needed to manage the processes and information in every part of your business; from buying stock, booking it in, marketing and selling it, and reporting on your business performance. Sage helps you gain greater control over these processes whilst addressing the following business issues:

- **Time saving** – automated routines and touch-screen terminals with automated transaction updates and product look-ups
- **Cost saving** – addressing your business issues quickly and helping reduce inefficiencies, to deliver rapid ROI
- **Security** – by controlling everything from prices, credit authorisation, merchandising, reordering, etc. providing you with the assurance that your business is protected whenever you're away on business or holiday

- **Price pressures** – helping cut operational costs across your business and driving sales and stock rotation so you can increase the value of each sale and stay ahead of the competition
- **Reporting** – providing management with insight into the decision-making needed to run an efficient operation

Sage's goal is to streamline processes between traders, suppliers and customers, helping businesses run at optimum profitability. Our suites of software are designed to put you in total control of your business systems, whatever you sell

## A network of support

All of our customers are supported through a combination of our own unrivalled customer service and our close relationships with Business Partners and Developers. This ensures that you have the right support before, during and after implementation.

# What our customers say...

**Gavin Sutton**  
Finance Manager  
Morris Pasties

"Sage 50 Point of Sale integrates fully with our accounting systems and gives us control over both pricing and stock levels. We can also readily change the system to suit our business and it will grow with our needs"

"We keep the pastry and butcher businesses separate, use Sage 50 in each and then consolidate the accounts for internal management purposes"

**Morris Pasties has five family owned shops and a growing number of franchise outlets, the business generates seven-figure revenue and directly employs close to 50 staff.**

**Steve Proudman**  
IT Manager  
Racoon International

"Sage 200 Point of Sale has greatly simplified our accounts process as payment is authorised at the point of order and not five or ten minutes after the order was taken"

"Sage 200 Point of Sale has not only streamlined the service we offer our customers but it has improved our own internal management process too"

**Racoon International supplies hair extensions, hair care accessories and training services to more than 2,000 salons throughout the UK and to a wide range of clients throughout Europe, Asia and the US.**

**Michael Black**  
Finance Director  
Bristol Flying School

"Our customers want to be in the air as soon as possible. Time on the ground is time wasted! Now customers simply swipe their card through the touch-screen terminal every time they have a lesson or flight"

"It enables us to recognise patterns in what's selling best, with clear visibility of which packages are our biggest revenue earners. This in turn, means we can plan our instructor staffing levels and appropriately schedule expensive resources such as our fleet of aircraft, parts and fuel"

**Bristol Flying School was founded in 1987 and is now a leading player in the commercial training field. Today, it attracts students from all over the world, employs 31 staff and has a turnover of around £2.5 million.**

# Integrated operations for a competitive advantage

Whilst efficient resource planning is pivotal to a successful trader, being able to quickly analyse facts and spot developing issues can make all the difference to your profitability. Whether tracking costs across departments or defining items that make the most profit, having integrated software enables you to link your buying, finance, distribution and customer facing operations. This can help you gain that elusive competitive edge in the competitive retail and trading business arena.

By implementing a complete suite of software, your business will benefit from simplified ownership and a single point of contact and accountability. The components of the software suite are designed to work together.

Whatever the pressures and challenges you face, the suite will help you manage your finances, people, customers, stakeholders, suppliers, stock and operations more effectively. You'll make optimum use of limited or expensive resources and be well positioned to plan your future success.

In short, whether you choose Sage 50, Sage 200 or Sage 1000, a Sage suite puts you firmly in control.



# Software that grows with your business

If you thought Sage was only for small businesses, think again. We have different software designed to meet the changing needs of businesses of different sizes and complexity. This may range from small, single outlet companies, to large multiple site businesses employing hundreds of staff.

We offer three suites of software that have the functionality to allow you to coordinate your whole business, from core activities on which your business is based, such as customer transactions; to back-office processes such as accounting and forecasting; to marketing support such as campaign and pipeline management.

The result: everything your organisation does is firmly focused on delivering the excellent service that keeps customers coming back to you rather than turning to the competition. Internally, you will start to see the benefits as processes flow into one another, staff work together more effectively, and managers have instant access to company-wide information.

Use the table below as a rough guide and skip to the section that relates the closest to your business. Businesses can't strictly be simplified into these 3 groups, so also take the time to review information within the other section nearest to the one that represents you the most.

	Smaller Businesses	Medium Sized Businesses	Larger Businesses
<b>Business Coverage</b>	Local	Regional/National	National/International
<b>Number of sites</b>	Small single site	Larger single site and multiple branches	Larger single site and multiple branches
<b>Recommended Suite</b>	<b>Sage 50</b>	<b>Sage 200</b>	<b>Sage 1000</b>

# Sage Point of Sale (POS)

**Whether you are serving the trade or the public, Sage can provide you with access to the latest touch-screen point of sale and chip & PIN devices from leading suppliers, with each till linking seamlessly to either Sage 50 Accounts, Sage 200 Commercial or Sage 1000.**

Sage Point of Sale is designed specifically for businesses operating within a trade or retail environment and handling customer transactions.

Sage Point of Sale supports your business whether you operate a single point of sale or many points of sale across multiple locations and is fully compatible with industry leading hardware including Epson, IBM and J2. Whether your businesses transacts from a single PC or via a network of retail terminals, Sage Point of Sale is fully scalable to meet your needs.

## Improving customer service

Sage Point of Sale is an electronic point-of-sale system that's packed with functionality and easy to use. It plays an active part in increasing customer satisfaction by performing quick, accurate and secure transactions. There's no need to keep your customers waiting: they can pay by cash, cheque, on account, voucher, etc. in part or full payment, and use a mix of payment methods or currencies to settle a transaction.

The software handles electronic funds transfer; prints cheques; provides clear, itemised receipts; and manages exchanges and refunds. It supports gift card loyalty schemes and can also capture customers' postcodes. Items can be quickly corrected, removed and edited within a transaction. All transactions can be printed and stored in case of subsequent queries.

## Works the way your business does

Sage Point of Sale easily adapts to the way you operate your day-to-day business. It can be customised to reflect your unique processes and adopts the terminology and look and feel you require..

## Configurable display

The operator touch-screen can be tailored to make the system easier to use, reducing staff training overheads and minimising operator errors. So you can colour code similar functions eg. Voids and corrections could be red; category and product buttons can be grouped and arranged for maximum efficiency.

## Customisation by sector

The screen can be customised to reflect the characteristics of a multitude of specific retail types, making it work the way you need to operate. So a point of sale at a visitor attraction can prompt for and record a Gift Aid donation. Alternatively, a point of sale at a paint shop offering a colour match service can prompt the operator for the details of the tint used in the paint mix process.

## Trade counter capability

In-built trade counter capability means customer-specific pricing, such as trade or public pricing, can be applied, eliminating the need for dedicated terminals. The information is shared from the Sales Ledger and pricing matrices in the back office software. This enables, for example, a timber merchant selling to trade and public to conduct all payment transactions on all points of sale.

## Promotional support

To promote sales you can apply discounts at product level and transaction level, as you wish. This supports promotions and multi-buys such as 3 for 2, and buy 1 get 1 free; thereby delivering flexibility and customer service, whilst reducing operator intervention by automating the process. Full details are recorded on the receipt, reinforcing the value for money message.

## Multiple payment methods

Sage Point of Sale offers flexibility to the customer by supporting a mix of payment methods that may be used to settle a transaction. Customers can pay with a mixture of vouchers and cash, credit card, etc. All credit/debit card payments can be processed via integration with major card clearing systems for fast and secure processing.

## Operator security levels

Each operator can be allocated a unique ID and access levels, allowing them to operate within pre-defined parameters. This provides you with the peace of mind that the system has the necessary security and business control whilst enabling tracking and reporting per operator. Security levels means that junior staff can be restricted to certain transactions, leaving more sensitive transactions, such as refunds, to be authorised and actioned by supervisors.

## Customer flexibility

Sage Point of Sale fully supports layaways, to help staff provide seamless service during transactions e.g. where customers add items or change their minds. Where a point of sale is set so that staff cannot void transactions, they can lay the transaction away for later recall and void by the manager.

## Electronic auditing and trading

All customer transactions are recorded electronically, removing the need for paper journal rolls and providing a paperless history and audit of transactions. The software provides the ability to easily drill-down to investigate queries such as no-sale transactions and discounts. Sage Point of Sale will automatically recover transactions in the rare event of a power failure or other outage.

## Flexible product entry and searching

Flexible product entry means staff can type directly onto the keyboard, scan bar codes, press pre-set keys or touch the appropriate key on-screen, as you prefer. When looking for a product in the system, an operator can search by category, group, partial code, partial description and key words. We've made it as easy as possible for operators to locate products. For example, an operator in a stationers can locate a specific product such as coloured paper by entering the word 'blue' into the product search function.

## Chip and PIN compatibility

If a retailer does not have a chip and PIN acceptance device and the use of such a device could have prevented the fraud from occurring, the retailer may bear the cost of a fraudulent transaction. Sage Point of Sale is compatible with Chip and PIN devices to provide you with additional security for debit and credit card transactions. Using Chip and PIN also ensures the liability for any bad debts passes from you, to the card holder's bank.

## Supports PCI Security Standards

PCI is the Payment Card Industry. It sets security standards that are technical and operational requirements to protect cardholder data. The standards globally govern all merchants and organisations that store, process or transmit this data. There are requirements for software developers and manufacturers of applications and devices used in those transactions. Compliance with the PCI set of standards is mandatory for their respective stakeholders and is enforced by the major payment card brands.

## Reporting

Each point of sale can produce end of day/end of session reports providing a summary of takings, category sales, time analysis, operator activity and promotions applied. This assists with end of day reconciliation and provides detailed analysis of the day's takings. You can even run a Profit & Loss report on an individual point of sale, location, activity or product type.

## Secure, continuous operation

Integration with electronic funds transfer solutions delivers fast and secure processing of customer card payments. Password-protected user access and authorisation levels for different transactions support your own security procedures to help safeguard your business.

Continuous trading and auto-recovery are vital to your business. You must be able to trade in the unlikely event that the link to the back office is lost. After a power failure, your Sage Point of Sale will recover and display the transaction at the point of failure, once the power is restored.

## Integration

Sage Point of Sale is available in the Sage 50, Sage 200 and Sage 1000 suites.



# Retail and trading software for SMALL businesses

Sage 50 Accounts is a powerful business management system, designed to meet the needs of a wide range of smaller UK companies. The software has been refined over many years to take advantage of developments in technology, and to reflect the changing requirements of businesses. The software allows you to manage your business, accounts, customers, suppliers, cashflow and stock.

Sage 50 Accounts provides a choice of two packages that integrate with Sage Point of Sale. One is more sophisticated than the other, so you only pay for what you need but have the peace of mind that a seamless upgrade path is there when you need it. As a result, Sage 50 Accounts offers control over many areas of your business and is the UK's most successful accounting program.

**Sage 50 Accounts is highly usable and secure, with a choice of program to suit your different needs.**

- Simple and efficient to use, with a flexible installation process that allows you to tailor the set-up to suit your particular business requirements
- Securely and simply access your Sage 50 Accounts data from Microsoft Excel, so key members of your company can analyse and report on essential business information without using Sage 50 Accounts themselves
- Offers security and accountability features such as Event Logging, where user identity is logged against activities; and Crash Checking to help ensure you don't experience data corruption
- Helps to check for duplicate transactions and balance your books
- Contains a suite of VAT audit reports approved by Her Majesty's Revenue and Customs
- Helps you manage your stock, with product lists, records and Intrastat Returns
- A suite of features helping you to record and analyse credit dealings, maximise your cash flow and reduce the likelihood of bad debts.

# Which Sage 50 Accounts product is right for your business?

**Each Sage 50 Accounts programme enables you to manage all areas of your business but there is specific functionality that differs between the packages.**

## Sage 50 Accounts Plus

As you grow your numbers of customers and your business becomes more complex, the additional features in Sage 50 Accounts Plus can help you manage more easily. Whether you need to manage project costs against budgets or improve your stock management, Sage 50 Accounts Plus helps you stay in complete control.

## Project costing

Vital to your overall business success the Project Costing feature is powerful and integrates fully with the supplier and customer management processes, offering you control of resources, costs and profits allocated to specific projects.

## Customer price lists

Multiple and individual customer price lists help you easily manage different discounts for your most valued customers.

## Stock management

You can automatically calculate whether you need to re-order stock items, so you should never run out of vital products or components.

## Dashboard view

Sage 50 Accounts Plus allows you to choose a Dashboard View providing an instant update of how every aspect of your business is performing. Plus, with drill down analysis throughout the program, you can see the detail you need at any time.

## One or two users

Sage 50 Accountant Plus provides the option of running one or two concurrent users of the system

## Sage 50 Accounts Professional

Sage 50 Accounts Professional provides all the capability of Sage 50 Accounts Plus, as well as a range of additional benefits allowing you full control over your entire customer and supplier processes, it gives you unrivalled scope to grow and develop your business.

## Cash sales

Helps you complete trade counter sales quickly and easily, with a configurable cash sales button that allows you to choose which documents should be printed. You can be sure that all the stock movements, invoice generation, invoice updates and sales receipts are properly handled.

## Foreign trader

The foreign currency operation means you can trade overseas in your customers' currencies. All foreign currency bank accounts feature a list of previous revaluations, and you can correct a previous revaluation straight from this list, revaluations on retrospective changes are automatically updated.

## Advanced stock management

Includes shortfall calculations, stock taking, automatic order generation and handling of documents such as goods received notes and delivery notes.

## Repeat orders

Enables you to set up the automatic production of regular bills and repeat orders, which is useful for selling on credit or monthly fees.

## Multiple users

With full multi-user capability for up to 10 concurrent users, Sage 50 Accounts Professional can be built into different departments' processes.



## Other products available as part of the Sage 50 Suite include:

### Sage 50 Payroll

Enjoy the peace of mind that comes from using the UK's market-leading payroll software for small to medium-sized businesses. Sage Payroll is accredited by HM Revenue and Customs, so you can make complex calculations with accuracy and confidence. You can also submit your payroll information online with Sage Payroll, which will become mandatory over the next few years.

### Sage 50 P11D

Expenses and benefits can be a tricky area if you're not 100% sure what you're doing. Sage P11D automatically calculates complex taxable benefits and expenses accurately and quickly, saving you time and ensuring you stay in line with HM Revenue and Customs regulations.

### Sage 50 ACT!

ACT! is the latest customer contact management software that will help you manage your sales, marketing and customer services efficiently, helping your business productivity and performance.

### Sage 50 Forecasting

This powerful tool helps manage your business and plan for future growth. It's designed to save time and reduce the errors associated with producing spreadsheet forecasts. This software enables you to develop flexible forecasts that can help you to achieve new business ideas, plan for expansion or achieve additional funding for new business ventures.

### Sage HR Advice Standard

This invaluable human resource advice service helps you get to grips with employment law and explains how it relates to your business. It will also keep you informed about upcoming legal changes and offers practical guidance on managing the people that you work with.

### Sage HR Advice Professional

All the benefits of Sage HR Advice Standard with the addition of a dedicated helpline to put you in touch with human resources and employment law professionals who can offer tailored, confidential advice for you and your business.

### Sage Health and Safety Advice

Complying with health and safety laws isn't easy when they change on a regular basis. Sage Health & Safety Advice will advise you of these changes, giving you the opportunity to act upon them and remain compliant.

## Retail and trading solutions for MEDIUM sized businesses

Sage 200 is comprehensive suite of software designed to integrate all operations across your business. The Sage 200 suite includes the applications needed to manage information and processes in every part of your business.

### Sage 200 Financials

Managing the day-to-day running of your business, Sage 200 Financials provides you with unrivalled business control and management reporting. It draws on the information held in the Nominal Ledger, Cash Book, Sales and Purchase Ledgers.

It can be seen as the heart of your accounts system, allowing you to budget by cost centre and department and provides powerful consolidation of multiple companies – even with different nominal structures and operating currencies. This means it can grow with your business and provide in-depth reporting and graphical analysis ensuring that you are always in control.

### Sage 200 Financials contains the following modules:

#### Nominal ledger

The Nominal Ledger provides you with a wealth of reporting and business management information.

Its multi-level structure allows cost centre and departmental breakdown, giving you total flexibility to track budgets and produce profit and loss reports by product, sales region or even individual departments. It simplifies managing your VAT, whilst providing comprehensive analysis of VAT details.

- Process transactions quickly and efficiently
- Budgetary control to monitor performance
- VAT returns made simple
- Consolidation

#### Cash book

The Cash Book controls all of your bank, investment and cash accounts, with the ability to configure all Standing Orders and Direct Debits. It offers multi-currency processing and advanced bank reconciliation, including links to online banking services.

- Automate direct debits and standing orders
- Save time and money with bank reconciliation
- Foreign bank accounts and electronic banking



### Sales and purchase ledger

Sage 200 offers total control for managing your customers and suppliers, no matter what currency they trade in. In-depth analysis and key business information is all yours at the touch of a button. These ledgers are designed to allow you to enter data quickly, by specifying defaults that suit your processes. You can attach all relevant documents to customer or supplier records, as well as details of individual trading terms. And if you have large volumes of transactions, invoice processing can be batch controlled.

- Quickly locate and interrogate transaction data
- Designed for rapid data entry
- Process foreign currency transactions
- Credit control
- Automate payments
- Automatic error correction

### Sage 200 Commercials

Sage 200 Commercials includes all the modules in the Financials module, plus Sales Order Processing, Purchase Order Processing, Stock Control and Price Book. By integrating your accounting and trading modules, you can easily automate the delivery of customer orders with effective stock management to acquire complete management control over your supply chain.

### Sage 200 Commercials contains the following modules:

#### Sales order processing

Our Sales Order Processing module gives you control of the entire sales order process, from raising a quotation or an order and ensuring stock availability, to dispatching goods and creating the invoices. All documentation is produced efficiently as part of this workflow, such as delivery notes and invoices. Additionally picking lists and order acknowledgment documents can be produced if required.

- Choice of full, rapid and trade counter order entry
- Margin and discount analysis
- Sales order details are easily accessible
- Process foreign currency orders
- Quotations and pro formas

#### Purchase order processing

Sage 200 Commercials manages the entire purchase order processing procedure, from creating a purchase order to checking goods received against purchase order and supplier invoice. Automated processes help you to manage your supply chain with confidence and efficiency - ensuring that the correct goods are always received and paid for.

- Straight forward supply chain management
- Manual or semi-automatic purchase order processing
- Full matching of POs to invoices and deliveries
- Disputed invoices
- Full back to back ordering
- Process foreign currency orders

### Stock Control

Whether your requirements are simple or complex, the software provides a complete inventory and warehouse management solution.

- Serial or batch number controlled stock items
- Unlimited suppliers for stock items
- Units of measure
- Inactive stock items
- Internally-issued goods
- Stock taking procedure
- Manage stock in multiple locations.

### Price book

Price Book allows you to easily manage prices and discounts across your customer base. The software supports two types of pricing schemes - discount-based and price-band based, and allows you to create 'communities' of customers to attach to either kind of scheme - or combinations of the two.

- Unlimited prices per item
- Unlimited quantity breaks for discounts
- Customer price and discount groups
- Complex pricing made simple
- Price book validation during sales order entry

### Sage 200 Wholesale and Retail

Sage 200 Wholesale and Retail, is designed to enhance the standard 200 Commercial module with Retail, Wholesale and Trade Counter specific functionality. The software integrates with Sage POS, so that changes in such things as the stock file, pricing and promotions need only be changed in one area of the system which eliminates duplication of data entry - so often seen as an expensive and time consuming activity in non-integrated solutions. The ability to share information between the point of sale, front and back office systems has been identified as providing clear competitive advantage for companies that successfully introduce it.

Sage 200 Wholesale and Retail enhances stock management with the introduction of a Merchandise Hierarchy which allows a true reflective view of how the customer wants to define how stock is managed. It offers single entry, company wide promotions structure that enhances the already powerful promotional pricing application in the standard Commercial suite.

It introduces a Company Hierarchy that can be designed to accurately represent the physical make up of your company - Regions, Areas, Stores and Warehouses. The structure of the module also allows movement of stock (Allocations & Despatch) and price changes, to be handled as complete ranges (by department, supplier etc), again a powerful enhancement of the standard module which tends to be designed to deal with individual rather than collective groups.

All of these enhancements, and there are more, such as advanced serial & batch number traceability, barcode management, multiple pricing, price rounding and margin control, to name but a few, are specifically designed to add to the already powerful portfolio of reports, making this module an invaluable addition to the suite for retailers, wholesalers and trade counter environment's

By integrating Sage 200 Wholesale and Retail, your company will maximise its IT investment by providing more comprehensive, timely and meaningful information to all key staff. This will give you operational and strategic advantages that will repay you time and again.

## Sage 200 Wholesale and Retail contains the following modules:

### Company hierarchy

As a business grows it becomes more expansive and its structure gains in complexity, especially as new branches are opened. Sage 200 Wholesale and Retail enables you to map your logistical structure within the software to support the way you operate. So a retailer or trader may wish to set up the system with the following hierarchy:

1. Company head office
  2. Company warehouse(s)  
Company stores.
    3. Names warehouse(s)  
Stores by region
      4. Stores by area
        5. Named stores

They may then define up to nine levels of store hierarchy, allowing the maintenance of store details to facilitate replenishment. These attributes, for example, could be:

- Location types – city, town, rural, etc
- Store types – large, medium, small, etc
- Operational status – active, planning outstanding, being shop fitted, closed, etc
- Store status – active, dormant, etc
- Replenishment methods – store to store, warehouse to store, etc
- Replenishment sources – warehouses, stores, etc

### Merchandise hierarchy

This works in a similar manner to the company hierarchy and can be produced to match the way your products are structured across your company. At 'Stock item' levels, in-built 'Product Matrix' technology can be utilised, offering the flexibility to structure a product that has 'variants' associated to it, such as size-colour-style. We call these 'Dimensions.' The products can be grouped flexibly across a matrix, depending on what suits you best, such as:

- Dimensions - colour, size, brand, etc
- Dimension Sets - Summer, Winter, Autumn, Spring
- Dimensions Breakup - colour ranges: red, blue, black, etc

### Promotions management

This enables you to increase stock turnover with special offers such as '3 for 2' and 'buy one get one free'. Customers expect consistency across a network of branches for the same company, so Sage 200 Wholesale and Retail supports this with company wide promotions that can be set up centrally.

Nominated buyers can be assigned to any given promotion and different reward types can be offered, such as a discount, within a defined time line. If you wish to set a limit to the number of offers that an individual customer can claim in a single transaction, there is also the ability to set up such thresholds.

### Purchase orders

Setting up and processing purchase orders is made as easy as possible, providing all the information needed so you can quickly and accurately replenish stock wherever it's needed. You can simply drag and drop items into a purchase order from the merchandise hierarchy that you've defined. If you have set parameters such as a rule dictating that even quantities of a certain range should be replenished, then this can be accounted for too. Entering a total quantity of any item would split this quantity evenly across the product variant range.

### Sales orders

Sales orders can be processed in exactly the same manner. The drag and drop facility is particularly popular in telesales environments when speed of processing is important because customers should not be expected to be kept waiting whilst requesting a list of items they want. The systems also accounts for multiple currencies if trading with companies or customers abroad. As you would expect, all existing quantities of stock are on hand at any given time.

### Allocations and despatch

Allocations and despatches can be controlled between warehouses and stores, as your hierarchy dictates. Once the stock has been allocated, the system will print picking lists for each store and despatch notes can then be produced. A very simple process which ensures total control over stock movements.

### Budgetary control

A key strength of Sage 200 Wholesale and Retail is its advanced budgetary control plus its ability to analyse the performance of cost centres and departments across your business. Analysis of budgets versus actuals can be viewed graphically, with the option of displaying up to five years of historical data, and the coming year's budgets. By drilling down to the individual transactions you can easily see the detail behind those trends.

Support is also provided for the consolidation of multiple companies, including those with different operating currencies.

### Analysis tools

Throughout the system, custom analysis codes allow you to 'slice and dice' information any way you want. For example, you may choose to categorise your customers by region, sales person and account type, so you can analyse sales performance across these categories.

### Report designer

Sage 200 Wholesale and Retail is supplied with over 250 ready-made reports covering all aspects of the system, plus a wide range of documents such as credit letters and invoice layouts for everyday use in your business.

You can easily customise these reports and documents or add new ones from scratch. New fields can be added using a wizard; you can add fields which calculate values 'on the fly', based on custom formulae. Logos and other graphics can easily be added to customise your reports and documents.

When you run a report, a powerful filter helps you select the information to be retrieved. This includes any appropriate custom analysis codes. For example, you could run a sales report based on a particular region or sales person. You can save particular 'views' for future use, and frequently used reports can be added to the Sage 200 menu for easy access.

Reports and other documents can be previewed, e-mailed, printed directly or sent to a print manager for printing at a convenient time. Access rights for the print manager can be set to ensure that sensitive documents are not accessed inappropriately.

### Sales enquiries

Sage 200 Wholesale and Retail lets you take this reporting one step further. You can run sales reports across all the detail within the company and merchandise hierarchy. So you can compare sales by region, area or store, and by the departments and products within these. So if an electrical retailer wants to know how many Sony Model XYZ DVD Players were sold last week, they have the answer in moments.

### Drill downs

Throughout Sage 200, key business information is readily available. Intelligent drill downs allow you to view detailed information, to transaction level if required. Additionally you can drill across to view all related information. For example, you can view the nominal ledger as a Profit & Loss and Balance Sheet, drilling down to view nominal accounts and all related transactions.

### Excel integration

A library of Excel functions is supplied to allow information to be pulled from Sage 200 into Excel for analysis. Sample spreadsheets are supplied for Profit and Loss, Balance Sheet and Key Performance Indicators. It is easy to amend these or create new spreadsheets to suit your own business.

## Other modules available as part of the Sage 200 Suite include:

### Sage 200 Project Accounting

Sage 200 Project Accounting is a highly configurable and flexible costing module, ideally suited to businesses running projects or providing services. It can be adjusted to suit particular industry needs, whether the requirement is for a simple costing and analysis structure or for a more detailed one. Sage 200 Project Accounting provides you with in-depth analysis and reporting features, ensuring that projects remain on track and profit levels are maintained.

### Sage 200 CRM

Sage 200 CRM is an easy to use, web-based CRM solution with out-of-the-box yet customisable business process automation. See overleaf for more detailed information.

### Sage 200 Construction

Sage 200 Construction provides business-wide efficiency for companies operating in the construction sector. From helping you to keep within contract budgets, to complying with complex and ever-changing HMRC legislation, to reducing your costs and managing your cash flow, Sage 200 Construction is ideally suited to businesses with more complex contracting requirements. Many of your processes are supported – from receiving the initial enquiry to the final accounting, leaving you free to focus on building a profitable business.

### Sage Bill of Materials (BOM)

The Sage BOM module follows your bill of materials process from beginning to end. It breaks down the manufacturing operation into easy-to-access areas, including materials, labour, machines, operations and reporting.

### Sage 200 Manufacturing

Manufacturing is one of largest revenue generating sectors in the British economy, employing over 3.5 million people. With over 80,000 Sage UK customers currently involved in activities which could be assisted by Sage 200 Manufacturing. Many companies are not primarily manufacturers but could use elements of Sage 200 Manufacturing to support assembly, repackaging of bulk items, resource planning, scheduling work and materials. The Sage 200 Suite is perfectly placed to provide an integrated system that controls the whole manufacturing process, from planning materials to monitoring realtime works orders. Sage 200 Manufacturing gives you greater control over your manufacturing processes through effective scheduling of work, close tracking of resource utilisation and improved business analysis.

### Sage 200 Business Intelligence (BI)

Sage 200 BI is a new and exciting addition to the Sage 200 Suite. This Business Intelligence solution enables you to extract real intelligence about your business from data accumulated every day in the normal course of operations. Sage 200 BI provides a powerful analysis and reporting tool which will transform your data into meaningful intelligence.

Sage 200 BI can be used and understood by all users as there is no technical knowledge or pre-requisites required to use the tool. The initial launch delivers the ability to report on financial data within Sage 200 with further analysis cubes reporting on Commercial and CRM data set to follow in 2009.

Sage 200 BI ensures you receive the maximum benefit from your business systems and data helping organisations in all sectors to build a significant competitive advantage.

## Sage 200 CRM

**Sage 200 Customer Relationship Management is easy to use, web based CRM software with out-of-the-box and customisable business process automation. It can be easily deployed on premis or on demand, delivering freedom of choice and rapid ROI. Award winning Sage 200 CRM is feature-rich and offers a broad range of functionality to businesses worldwide.**

Sage 200 CRM supports the complete customer lifecycle from lead generation to order fulfillment through to cash collection. As a result of tight integration between Sage 200 CRM and Sage ERP systems, Sage 200 CRM drives key business process automations right across the organisation from back office to front office.

### How Can Sage 200 CRM Improve Your Business?

#### Improve sales performance and effectiveness

Sage 200 CRM provides tools to help your sales organisation perform to its maximum allowing you to grow revenue more quickly, predictably and profitably. It provides productivity tools for individual sales people to let them concentrate on their primary purpose - selling. It allows them to find and retrieve vital information quickly and easily. It organises their time and saves effort on administration and search. It gives them access to analysis and understanding of where they are in a deal so that the target is always visible and the path to reaching it clear. Quotes and orders can be easily created and saved so they can be pulled again rapidly saving valuable sales time being spent on administration. In addition, Sage 200 CRM provides a snapshot of the sales cycle from first contact to final sale, allowing sales teams to effectively analyse and manage the sales pipeline.

#### Manage sales groups more effectively

For sales management Sage 200 CRM delivers the reports that let you know how the team is performing, who's winning and who needs help. It eliminates the shocks and surprises that can destroy a good quarter. It allows you to organise teams and schedule calls with simple point and click technology that co-ordinates and fills diaries. It allows the sales and lead processes to be defined by you to suit your business. It brings control to your fingertips to sell and focus on the priorities.

#### A familiar system – a mobile system

Sage 200 CRM is completely synchronised with MS Outlook allowing users to stick with their familiar e-mail and contact tools but enhancing them through direct synch with CRM. Also, Sage 200 CRM features a simple fast and reliable laptop version that allows you to use the system while on the run and not connected to the home or office internet. The synchronisation of the laptop client is extremely fast so time is not wasted getting back online and down to work.



# Retail and trading solutions for LARGER businesses

## Build a Detailed Profile of Your Audience

Sage 200 CRM enables you to build up a detailed profile of your customers and prospects over the course of the relationship. Lists can be assembled based on multiple criteria from your database, responses to campaigns can trigger sub-lists for the next stage of the campaign with successful responses moved to sales and non-responses kept on a reminder list or removed if requested. This information can be stored, reported and segmented for future campaigns.

## Closely manage your marketing campaigns

Manage and track every element of your campaign. View activities, objectives, leads generated and lead follow-up. You can drill down to specific activities within a campaign including communications, opportunities, responses, budget, actual cost and the list of prospects. This in-depth campaign view allows you to eliminate the guesswork and put your marketing resources to their best use.

## Control your telemarketing campaigns

Sage 200 CRM provides telemarketers with the tools they need for effective telemarketing. Calls can be automatically scheduled for the telemarketers and the outcome of the calls can trigger the development of the next stage of the campaign. Details of calls can be saved and shared throughout all departments for future reference. Call length and outcome recording capabilities are built-in.

## Marketing evaluation tools

With Sage 200 CRM you can view a campaign status at any time and evaluate return on investment. Analyse marketing campaigns by lead source or evaluate other important campaign details by using sophisticated, user-friendly tools and reports. Sage 200 CRM not only tracks response rates, it also lets you match sales revenues to specific campaigns, providing immediate cost versus revenue analysis

## Improve customer service levels

Resolve customer issues efficiently by providing customer service staff with user-friendly tools to access relevant customer data including purchases, call and escalation histories, interactions, e-mails and documents sent and received. Armed with this knowledge they can handle queries more efficiently, which in turn enhances and strengthens the customer experience, whilst highlighting cross-sell or up-sell opportunities.

## Find the right information quickly

Sage 200 CRM allows for the pooling of all transactions and communication history into a single screen. This gives customer service staff a 360 degree view of your customers. This information is stored in one central location allowing staff from any office to access and share vital customer information.

## Empower your customer – offer multiple channels

Sage 200 CRM lets your customers help themselves by providing them with web access to their own 'customer portals' which can be accessed at their convenience. These password protected self-service areas on your website allow customers to log queries, make service requests, view the status of existing or past requests and the area can be easily customised to incorporate the look and feel of your website, ensuring that your company's brand remains consistent.

## Integrate with back-end software for deeper knowledge

Sage 200 CRM integrates with Sage 200 Financials and Commercials giving Account Managers access to key customer information such as credit status. Account Managers can view current product information, pricing and discounts to capitalise on potential cross-sell and up-sell opportunities when interacting with customers.

Sage 1000 is a powerful application that seamlessly unifies information from finance, distribution, manufacturing and service operations. This creates a comprehensive management system for the vast majority of your business – from prospecting for new customers and taking orders to after-sales service, on the shop-floor and in the warehouse and more.

As a single solution from a single source, Sage 1000 offers all the benefits of simplification in deployment, training, licensing, upgrading and support.

## Sage 1000 contains the following modules:

### Accounting, Finance & Payroll

In accounting, finance and payroll functions, Sage 1000 ensures critical management decisions are firmly based on solid information that has been consolidated from across your enterprise. It gives managers and staff access to all the facts and figures in easily absorbed formats, so that they can see at glance where intervention is required. Sage 1000 supports your entry into new markets, providing control over your local or international business. Sage 1000 can report in local and head-office currencies at any level in the company hierarchy.

Benefits in brief:

- Provides tight financial control with full visibility of costs committed before expenditure is incurred
- Includes powerful reporting tools to assist informed strategic decisions
- Maximises cash flow through close budget control
- Supports international business with comprehensive multicurrency and multi-company features
- Includes extended support for credit management teams
- Lowers administrative costs by increasing user productivity

### Supply chain management and distribution

Close partnerships with your suppliers and associates are a vital part of delivering quality and value to your customers. Sage 1000 helps you to monitor and improve the way you source components and materials to make products or provide services with increased efficiency and reduced costs. It supports you in formulating the effective supply chain management processes that become the cornerstone of your consumer response strategy.

With comprehensive reporting and evaluation of market trends, analysed by product, market sector, and geography, you build the intelligence to identify and capitalise on new opportunities for innovation and business growth.

Benefits in brief:

- Helps you manage a seamless flow of information and goods from supplier to end consumer
- Maximises cashflow through efficient purchase requisitioning
- Maximises the value of your supply chain and supports you in building strong partner networks
- Offers maximum flexibility in fulfilling customers' individual requirements
- Improves stock management and cuts costs by minimising your investment in inventory
- Optimises expensive transport resources

### Manufacturing

If you run a responsive, agile manufacturing organisation, engineering or assembly, you'll find Sage 1000 provides support to your manufacturing business. Mixed mode manufacturing, making standard or configured products and project-based manufacturing are all comprehensively covered.

In complex manufacturing environments, it is hard to keep your finger on the pulse at all times. Sage 1000 provides tight financial control of associated material and processing costs, along with real-time valuations of completed operations and work in progress. It helps you manage the resources involved in manufacturing on your own shopfloor and with subcontractors.

To keep jobs flowing, Sage 1000 monitors and reports – on the shop-floor issues that might affect productivity. No time is lost in resolving problems, as managers and supervisors benefit from readily available detailed information on work in progress, as well as on events such as machine breakdowns or absenteeism.

Benefits in brief

- Helps meet the requirements of broad markets or individual customers
- Controls associated material, inventory and processing costs
- Helps you optimise production to reduce costs and remain flexible
- Full batch/serial number traceability
- Eases the complexity of managing your own resources and subcontractors

### Project management

Sage 1000 is perfect for handling internal or external projects and helps build tighter control in managing and accounting for business operations. It gives managers a true picture of costs incurred in carrying out projects and payments received at any point.

Any costs committed before expenditure are fully visible; expenses may be validated against budgets; and costs closely tracked throughout. Customers may be billed using staged invoices or by using cost-plus calculations for maximum flexibility.

Benefits in brief

- Sophisticated project accounting and project management
- Project-by-project managing and accounting for tight control
- Billing methodology including cost-plus and staged payments
- Manages and bills after-sales service.

### Sales management

Sage 1000 gives you every support in the drive to boost sales, while reducing the cost of sales. At every level – sales director, manager, executive and administrator – it provides instant access to the real-time data needed for increased effectiveness.

Information can be readily rolled up, tracked and reported on generating continuous, meaningful and accurate reports on exactly how well a sales organisation is performing. It allows you to define sales and lead processes to suit your business and priorities. It puts control at your fingertips in creating a lean, successful sales organisation.

Benefits in brief

- Puts you in complete control of your sales teams and sales pipeline
- Frees sales teams to focus their efforts on selling, not administration
- Reports at every level to let you know who's winning and who needs support
- Helps you grow revenues faster with the tools to focus on the right deal at the right time
- Supports every aspect of your sales operation... face-to-face selling, telesales operations, point of sale and mail order

### Customer management, service and support

With ever-increasing supplier choice and ever-greater demands for service, staying close to your customers is the secret of business success. Your Sage1000 solution helps you create a more concise, accurate and complete view of your customers from marketing and sales to order despatch and credit control.

You'll understand not just what they've bought and when, but their preferences and priorities; the business challenges they face; whether price or service is their main criterion; recent contact with your company, and the outcome.

Benefits in brief

- In conjunction with other areas of the system, gives you a 'joined-up' view of the customer
- Enhances revenue and profits by acquiring and retaining high value customers and maximising opportunities
- Provides value-added services that are difficult for competitors to replicate
- Improves your product development and service delivery processes
- Arms your staff with in-depth knowledge of the customer's needs
- Streamlines the customer experience through faster problem resolution
- Reduces frustration – customer information entered once can be used over and over again

### Marketing management

Sage 1000 hones your ability to target the right customer first time and measure the effect of your marketing. In doing so, it eliminates guesswork to ensure your company's marketing resources bring best return.

Benefits in brief

- Helps maximise return on investment by precisely targeting your marketing
- Reduces the effort in administering campaigns
- Fully supports telemarketing campaigns
- Offers powerful tools for managing, tracking and analysing marketing performance

### Web access and self-serve

It would be unthinkable nowadays for any corporate solution not to draw on the power of the web to facilitate communications internally and across the extended enterprise of customers, suppliers and partners. Web technology has demonstrated its value in helping forward-looking businesses to sharpen their competitive advantage.

Benefits in brief

- On line self-service access to vital business information for your customers
- Any-time access to your business management software for your staff – from wherever they are

### Business information, dashboards and reporting

Accessing the wealth of data stored in any business system is crucial. Sage 1000 offers users and managers powerful tools for extracting meaningful information, to assist them in day-to-day operations and strategic decision-making. The provision of information in personalised workspaces and dashboards, facilities to locate information quickly in response to ad hoc queries, powerful reporting tools, and the ability to deploy SageBI – a full business intelligence application.

Benefits in brief

- Different ways to access relevant information
- Personalised workspace for proactive information
- Powerful searching and enquiries give fast answers
- Reporting keeps the business informed
- Business Intelligence informs strategic thinking



# Sage SalesLogix

**Award-winning Sage SalesLogix is the customer relationship management software that enables larger organisations to acquire, retain and develop profitable customer relationships.**



Sage SalesLogix provides a complete account centric CRM solution designed to enable your sales, marketing, customer service and support teams to improve the management of their relationships with customers and prospects.

We understand that every business has its own way of interacting with its customers. Sage SalesLogix's strength lies in its ability to fit seamlessly with any organisation's unique sales and customer interaction process. Sage SalesLogix's powerful customisation and configuration capability allow it to be easily tailored to meet the needs of your business more rapidly than any other CRM product. Sage SalesLogix consistently scores highest and has received awards for its ease of use.

## Managing your sales staff

### A single source for customer information

Sage SalesLogix provides the tools and resources needed to effectively manage all aspects of the sales cycle and increase team sales performance. It's a single repository for customer information captured across your entire organisation that enables you to access detailed account and contact information, track opportunities from lead through to close, manage team calendars and activities, forecast revenue and report on sales activities and effectiveness.

### Increase sales productivity and performance

Sage SalesLogix helps drive opportunities through the sales cycle by automating activities such as follow-up calls, letters and literature fulfilment, based on sales and marketing processes you define.

Sales staff can send personalized communications to individual customers or groups of prospects using customised HTML e-mail templates. They can also track competitors and access the Sales Library for product specifications, frequently asked questions or marketing materials.

Advanced Microsoft Outlook Integration enables users to share contacts, send e-mails and manage calendars using Outlook from within Sage SalesLogix, and record the activity to the Sage SalesLogix account history.

### Insight for informed business decisions

Sage SalesLogix provides the insight for informed business decisions and the management tools to implement them. Accurately analyse the revenue potential and probability of close in your sales pipeline. Segment your sales opportunities by Account Manager, region or status. Use integrated Crystal® Reports to gauge individual or team effectiveness and guide territory realignment or redistribution of your marketing spend. Receive automatic alerts on pending sales opportunities based on business conditions you define.

### Advanced flexibility to match the way you work

Tailor the design and functionality of Sage SalesLogix to mirror your unique customer acquisition, retention and development processes. It is easily to manage team and territory assignments, user profiles, workflow, security controls and administration roles. Then, as your company grows and your business requirements change, Sage SalesLogix provides the flexibility and scalability to grow and change with you.

## Managing your marketing

Building lasting and profitable customer relationships means executing effective, timely marketing initiatives across all your sales channels. It is critical that your company's marketing resources are put to their best use.

Sage SalesLogix Marketing provides full-scale marketing campaign management and sophisticated analytical tools designed to identify your most profitable customers and shorten your sales cycle. Capturing rich, timely data from customer interactions across your organisation allows you to develop and execute meaningful marketing programs that drive results.

Most importantly, Sage SalesLogix delivers critical marketing intelligence, like return on investment, for your marketing campaigns, so you can focus your strategy and resources on programs that deliver results for your business.

### Identify profitable customer segments

Sage SalesLogix allows you to select the criteria of your ideal target prospect, then segment your customer and prospect lists into unique groups. With Sage SalesLogix, you can find the most responsive audience for your campaigns and increase revenues.

### Map your path to selling more

Graphically configure custom campaign processes, assign them to unique groups of prospects, and then launch the campaign. The follow-up tasks you identify are scheduled and assigned to your sales team automatically based on rules you define.

### Manage campaigns end to end

Manage and track every component of your campaigns from within the Sage SalesLogix campaign dashboard. View campaign tasks, objectives, calls-to-action and budgets. You can also view response rates and forecasted versus actual sales results in real time for each campaign.

### Measure ROI and report campaign metrics

Sage SalesLogix not only tracks response rates and ties sales revenue to specific campaigns, but also enables you to analyse marketing campaigns by lead source, region, media type and products sold, using flexible reports. In addition, a record of every campaign communication is linked to the account history, so employees from across your organisation share a complete view of your customers. With Sage SalesLogix, you'll have every detail of campaigns at your fingertips and the insight you need to increase the effectiveness of your marketing efforts and deliver sales.



## Manage your customer service levels

### Track and resolve customer questions, issues and requests

Sage SalesLogix Customer Service provides the advanced issue tracking and resolution tools needed to quickly resolve customer questions, issues and requests, delivering a high-quality customer experience. Each service ticket created contains detailed information including a unique ticket ID number, contact info, type, status, urgency, assignment, date required and service contract details.

From within a ticket, employees can search for solutions or schedule activities such as phone calls, meetings or to-do's to follow up on open issues. Account Managers can also easily communicate with customers by sending e-mails with attachments such as white papers, quotes or product information. Tickets are associated with Accounts and Contacts, so a record of all service interactions, past and pending is maintained in SalesLogix and can be viewed by employees from across your organisation.

### Help customers help themselves

Sage SalesLogix helps reduce costs while empowering customers to find the answers they need - online at their convenience. With the Sage SalesLogix Web Customer Portal, customers can view, add or edit tickets and submit comments or attachments. The Web Customer Portal puts the same resources and intelligence used by your service staff on your website, along with powerful search technology that simplifies the self service experience.

### Find critical information and resources quickly

SpeedSearch, the powerful knowledge base search engine in Sage SalesLogix, helps service staff quickly locate resolutions to customer issues. Staff can search prior tickets, attachments, standard problems and resolutions, procedures, activities and notes, as well as reference materials such as online manuals, frequently asked questions and white papers. In fact, an advanced keyword search can be run against any information in Sage SalesLogix or on a shared company network directory.

With SpeedSearch, staff can scan search results rapidly and efficiently, due to advanced filtering, scoring, sorting and preview capabilities. When the desired resolution is identified, staff can populate it into the ticket, communicate it to the customer and record it in the account history with only a few clicks. When successful new resolutions are identified, employees can easily input and submit them to the knowledge base for future reference.

### Integration for a complete customer view

Sage SalesLogix integrates with leading back-office applications such as Line 500, so Account Managers can access key customer information such as credit status, balance and terms, as well as reference prior orders, invoices, payments and shipping information. Account Managers can also view current product information, pricing and discounts to capitalise on potential cross-sell and up-sell opportunities when interacting with customers.

## Manage your customer support levels

Sales and Marketing deliver customers to your business, but your Customer Support department keeps them with you for the long term. With the costs of acquiring new customers 5-10 times higher than retaining existing customers, support solutions designed to help foster lasting relationships with your customers have a tremendous impact on the bottom line.

To deliver beyond your customers' expectations and exceed your support department's performance goals, service staff must be able to resolve issues quickly and effectively. Sage SalesLogix Support provides the advanced issue tracking and resolution tools as well as access to relevant customer data-including products purchased, ticket and defect history, and maintenance contract status-needed to maximise the effectiveness of each interaction with your customers.

Sage SalesLogix Support also provides powerful self-service support solutions via the web, reducing transaction costs and allowing your customers around the world to get the support they need, how and when they need it.

### Streamline support center activities

Sage SalesLogix Support provides advanced issue tracking and resolution tools, enabling you to exceed customer expectations and internal performance goals. Manage call and defect tracking, service contract renewals and return material authorisation. Sage SalesLogix also provides escalation alerts via phone, e-mail or pager, based on business rules you define.

### Keep critical knowledge at your fingertips

The powerful SpeedSearch knowledge base in Sage SalesLogix helps support staff quickly locate resolutions to customer issues. They can efficiently search resources such as prior call tickets, standard problems and resolutions, and stored procedures, or access reference materials such as manuals, frequently asked questions, and white papers.

### Help customers help themselves

Sage SalesLogix Support also uses the Web Customer Portal to put the same intelligence used by your support team on your Website. This means customers and employees around the world can also create and track support tickets online, anytime.

### Share information with sales and marketing

A record of every support interaction is stored within each customer's account history in Sage SalesLogix, so employees from Sales and Marketing to Finance can share a complete view of all account activity. Whether you're an engineering company that meticulously tracks components and improvement requests, or an appliance manufacturer concerned with efficiently managing product returns, your support team will have the resources it needs to quickly resolve issues and build lasting and profitable customer relationships.





To find out how Sage can  
help your business, call us on:

**0845 111 99 88**

Or visit:

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