

Starter Pack for Sage 200



Starter Pack
for Sage 200



Data Sheet Starter Pack for Sage 200

- ✓ 10 of our most popular addons free of charge
- ✓ Speed up order processing and information retrieval
- ✓ Create new stock items and customers on the fly
- ✓ Improved purchase order generation

Starter Pack for Sage 200

The **Starter Pack for Sage 200** comprises ten of our most used enhancements to the standard Sage 200 product and is **available free of charge** to all Sage 200 users.

The facilities of these addons cover several modules in Sage 200 and assist with speeding up processes and information retrieval. These can be in areas where the standard Sage 200 product can be frustratingly slow in the amount of screens /menus which may need to be used.

The individual addons which are included in our free Starter Pack are detailed below:

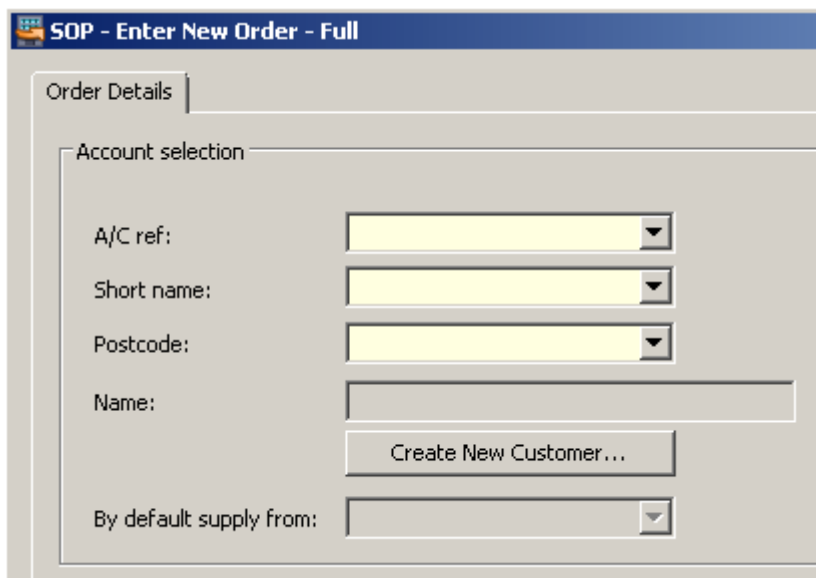
- MMS109 – Create New Customer on the Fly
- MMS110 – Sales Order Credit Warning
- MMS126 – Save & Despatch
- MMS139 – Cancel Invoice & Amend Order
- MMS157 – Create Return from Order
- MMS114 – Sales Order Enquiry Form
- MMS116 – Generate Purchase Orders Plus
- MMS162 – Expose Supplier Part Reference
- MMS107 – Create New Stock Item on the Fly
- MMS113 – Purchase Order Enquiry Form



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MMS109 - Create New Customer on the Fly

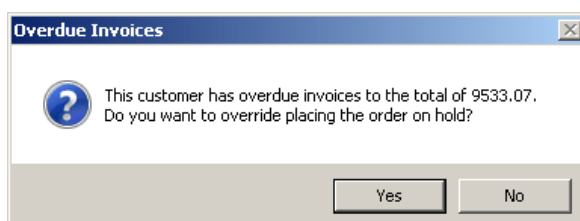


The screenshot shows a software window titled "SOP - Enter New Order - Full". Inside, there is a tab labeled "Order Details". Below the tab is a section titled "Account selection" which contains several input fields: "A/C ref:" with a dropdown menu, "Short name:" with a dropdown menu, "Postcode:" with a dropdown menu, "Name:" with a text input field, a "Create New Customer..." button, and "By default supply from:" with a dropdown menu.

Create New Customer on the Fly adds a new button on the Create Sales Order form which launches the Create New Sales Ledger Account screen. This saves time as the user does not have to change module or switch to the Favourites in order to raise a new account whilst entering a new sales order.

Once the account has been created it is automatically the one selected for the order.

MMS110 - Sales Order Credit Warning



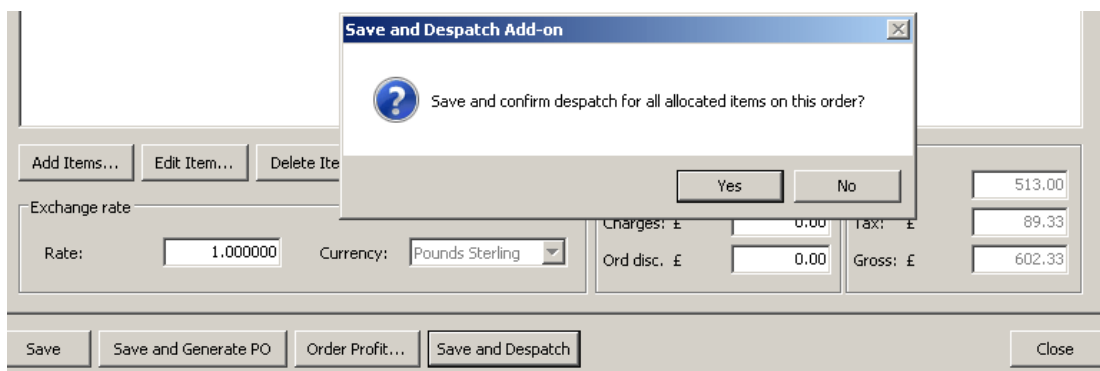
Standard Sage 200 sales order processing functionality will check to see if an account has exceeded their credit limit. However a sales account may be well under their credit limit, but have debt which has exceeded their credit terms. Our **Sales Order Credit Warning** addon checks for overdue invoices and will place the order on hold (or give the user the ability to override depending upon SOP User Permissions). This doubles up the credit checking when creating sales orders, and also prompts a user who may be talking to the customer to advise them of overdue accounts.



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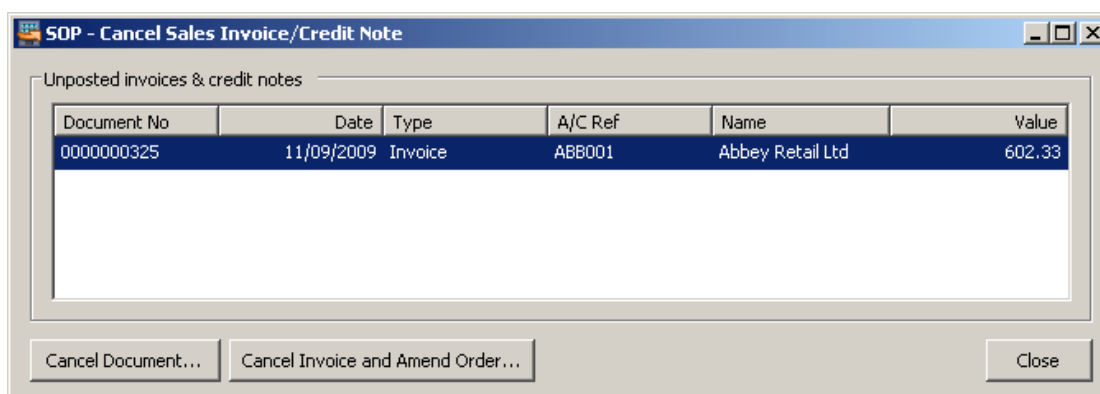
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MMS126 - Save and Despatch



Save and Despatch adds a new button the bottom of the Create/Amend Sales Order screens and vastly speeds up the production of delivery notes when allocating stock on order entry. On a click of a button, a confirmation screen allows the user to go immediately to the confirm goods despatched.

MMS139 - Cancel Invoice and Amend Order



Our Cancel Invoice/ Amend Order addon for Sage 200 saves the user a considerable amount of time when editing or amending invoices. When an invoice is cancelled, this Sage addon will then cancel the despatch. The amend sales order screen is then opened automatically to allow the user to make the appropriate amendments to the order.



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MMS157 - Create Return from Order

Our **Create Return from Order** addon for Sage 200 makes the process of issuing a sales return a lot easier for the user. It is a simple addon which allows a sales return to be created directly from the sales order.

Individual order lines can be selected to be returned.

| Order No | Order Date | Order Status | Customer Order No | Order Value | Order Taken By | Order Priority |
|------------|------------|--------------|-------------------|-------------|----------------|----------------|
| 0000000347 | 08/09/2009 | Live | | 11.74 | STEVE | A |
| 0000000346 | 02/09/2009 | Live | | 1505.82 | STEVE | A |
| 0000000345 | 02/09/2009 | Live | | 301.16 | STEVE | A |
| 0000000339 | 11/08/2008 | Live | 90807 | 19609.44 | L | A |
| 0000000323 | 20/07/2008 | Completed | 53763 | 5827.22 | L | A |
| 0000000309 | 17/05/2008 | Completed | 8787 | 4212.83 | L | A |
| 0000000281 | 06/02/2008 | Completed | 76909-0 | 1697.78 | L | A |

| Item | Description | Quantity | Unit Price | Disc % | Tax Rate | Net |
|------------------|-------------------------------|----------|------------|--------|---------------|---------|
| ACS/TOASTER | Polished Steel 4 Slice Toa... | 5.00000 | 209.00000 | | 0.00 Std Rate | 1045.00 |
| ACS/FILTER-CO... | Filter Coffee Maker | 5.00000 | 169.20000 | | 0.00 Std Rate | 846.00 |
| ACS/MIXER | Professional Mixer 3 Speed | 5.00000 | 120.00000 | | 0.00 Std Rate | 600.00 |
| WW/DISHWASH... | Dishwasher full size | 2.00000 | 210.70000 | | 5.00 Std Rate | 400.33 |
| WW/FRIDGE/26... | Fridge Freezer Retro 265... | 2.00000 | 156.00000 | | 5.00 Std Rate | 296.40 |
| WW/WASHER/1... | Washing Machine 1200 spm | 2.00000 | 210.70000 | | 5.00 Std Rate | 400.33 |

This ensures that the same prices and discounts which have been used on the order are applied to the return. This closes a gap in standard Sage 200. For example, if an order is entered at £50 and then the item's selling price is changed to £60 at a later date. If a return was then raised after the price change, then the credit value would be £60, not the original £50 in standard Sage 200.



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MMS114 - Sales Order Enquiry Form

Select Orders

Despatched Status No Part Complete Customer

Invoiced Status No Yes

All Orders

| Order No | Order Date | Order Status | A/C Ref | Customer | Customer Ref No | Value | Outstanding Value | Despatched | Invoiced |
|------------|------------|--------------|---------|----------------|-----------------|----------|-------------------|------------|----------|
| 0000000330 | 03/08/2008 | Live | WHI001 | Whiteware... | 5634g | 3760.10 | 195.00 | Part | Yes |
| 0000000332 | 02/08/2008 | Live | TOT006 | Total Home... | 7657khgf | 21571.50 | 0.00 | Complete | Yes |
| 0000000334 | 03/08/2008 | Live | TOT001 | Total Home... | 87678-kj | 1875.00 | 0.00 | Complete | Yes |
| 0000000339 | 11/08/2008 | Live | ABB001 | Abbey Ret... | 90807 | 16701.32 | 0.00 | Complete | Yes |
| 0000000340 | 17/08/2008 | Live | BET001 | Better Kitc... | 87645 | 38396.89 | 38396.89 | No | No |
| 0000000341 | 18/08/2008 | Live | FUT001 | Future Ho... | 765F476 | 13741.20 | 13741.20 | No | No |
| 0000000342 | 12/09/2008 | Live | FE5001 | Festival Ho... | 346346 | 10340.55 | 0.00 | Complete | No |
| 0000000343 | 07/09/2008 | Live | NAN001 | Nantes Ho... | 346889 | 13362.52 | 13362.52 | No | No |
| 0000000344 | 01/09/2008 | Live | GRE001 | Greene Kit... | e56858 | 4080.00 | 4080.00 | No | No |
| 0000000345 | 02/09/2009 | Live | ABB001 | Abbey Ret... | | 256.50 | 256.50 | No | No |
| 0000000346 | 02/09/2009 | Live | ABB001 | Abbey Ret... | | 1282.50 | 1282.50 | No | No |
| 0000000347 | 08/09/2009 | Live | ABB001 | Abbey Ret... | | 10.00 | 10.00 | No | No |
| 0000000348 | 08/09/2009 | Live | ABB001 | Abbey Ret... | | 50.00 | 50.00 | No | No |
| 0000000349 | 08/09/2009 | Live | GEO001 | George Gr... | 5 | 1.00 | 1.00 | No | No |
| 0000000350 | 11/09/2009 | Live | ABB001 | Abbey Ret... | | 513.00 | 0.00 | Complete | Yes |

The **Sales Order Enquiry** addon for Sage 200 creates a new SOP enquiry screen that gives an enquiry similar to that found in Sage 50, e.g. list part despatched, despatched but not invoiced etc. The addon lists all outstanding sales orders giving the stage that they are at, e.g. part delivered, allocated, invoiced etc. and can be filtered by any of these, or by an individual customer. A selected order on the list can be can also be viewed and amended.



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MMS116 - Generate Purchase Orders Plus

| Item Code | Item Name | Product Group | Supplier | Supplier Ref | Stock Unit | Qty Required | Confirmed Qty ... | Confirmed Value | Confirm Status |
|-------------------|----------------------|---------------|----------|-----------------|------------|--------------|-------------------|-----------------|----------------|
| ACS/MIXER | Professional Mixe... | ACCESSORIES | JOH002 | 445RRT-99/889 | Each | 10.00000 | 0.00000 | 0.00 | None |
| ACS/TOASTER | Polished Steel 4... | ACCESSORIES | MOL001 | MO-YSE/44/3/... | Each | 30.00000 | 0.00000 | 0.00 | None |
| CA/BASE/SNG/B... | Beech Base Singl... | CABINETS | ZZZ999 | | Each | 60.00000 | 0.00000 | 0.00 | None |
| CA/WALL/H92/O... | Oak Wall Cabinet... | CABINETS | ZZZ999 | | Each | 30.00000 | 0.00000 | 0.00 | None |
| DOOR/BASE/50... | Beech Base Door... | DOORS | KEN001 | Bee0034 | Each | 50.00000 | 0.00000 | 0.00 | None |
| IR/SCREW/4x10 | Screws wood 4m... | IRONMONGERY | TEX001 | WoodScr-4X1 ... | 100 Pack | 50.00000 | 0.00000 | 0.00 | None |
| PA/SHELF/DBL/... | Shelf Dblw 45cm... | PANELS | PBT001 | 45-96/SHLF | Each | 62.00000 | 0.00000 | 0.00 | None |
| PA/SHELF/SNG/... | Shelf Single 45c... | PANELS | PBT001 | 45-57/SHlf | Each | 50.00000 | 0.00000 | 0.00 | None |
| PAINT/BEIGE/M... | Paint beige Matt | PAINT | TEX001 | | 4 Ltr Tin | 10.00000 | 0.00000 | 0.00 | None |
| PM/TAP/DUAL/... | Dual Control Mix... | PLUMBING | BGT001 | TAP-DU-4456 ... | Each | 20.00000 | 0.00000 | 0.00 | None |
| TILE/BEIGE/10X... | Tiles Beige 10cm... | TILE | NAP001 | DFR-S546-DDE | 100 Pack | 40.00000 | 0.00000 | 0.00 | None |
| TILE/WHT/10x10 | Tiles White 10cm... | TILE | DIR001 | WHT-10x10-4... | 100 Pack | 40.00000 | 0.00000 | 0.00 | None |
| WT/BEIGE/LAM/... | Speckle Beige La... | WORKTOPS | DON001 | WT/MARGR/L... | Each | 48.00000 | 0.00000 | 0.00 | None |
| WT/GREY/LAM/... | Marble Grey Lam... | WORKTOPS | DON001 | WT/MARGR/L... | Each | 48.00000 | 0.00000 | 0.00 | None |
| PM/SINK/DOUBLE | Sink Double Bow... | PLUMBING | BGT001 | SK-DB-445333 | Each | 37.00000 | 0.00000 | 0.00 | None |
| WW/WASH/1600 | Washing Machin... | WWRE | SAZ001 | W5-1600-666 ... | Each | 4.00000 | 0.00000 | 0.00 | None |
| ACS/BLENDER | Professional Blen... | ACCESSORIES | MOL001 | MO33349-92 | Each | 76.00000 | 0.00000 | 0.00 | None |

Generate Purchase Orders Plus extends the display to show three additional columns: Product Group, Default Supplier and Supplier Reference.

It also allows the end user to filter the form by the product group or default supplier. This means that purchase orders can be created by product group or by default supplier.

Additional buttons at the bottom of the form allow for rapid confirmation of the order lines which in the standard Sage 200 screen can be time consuming, as each item has to be individually confirmed.

MMS162 - Expose Supplier Part Reference

Expose Supplier Part Reference is particularly useful when supplier part numbers are more important than your own. The addon exposes the supplier part reference on the item grids in the following POP screens:

- Confirm Goods Received
- Amend Purchase Order
- Record Purchase Invoices

This is most useful when supplier documentation only shows the supplier references rather than yours from Sage 200.



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POP - Confirm Goods Received

Account selection
 A/C ref: MOL001
 Short name: Molster
 Postcode: CT3 9PE
 Name: Molster Style

Supplier goods received note details
 Reference: 38748
 Date: 11/09/2009
 Narrative:

Receiving warehouse
 Warehouse: All

Stock code
 Show internal stock code Show supplier stock code

| | Order No | Order Date | Status | Auth | Supp. Part Ref | Item... | Warehouse | Bin | Qty Outstanding | Qty Received |
|-------------------------------------|------------|------------|--------|--------|-----------------|----------|-----------|-------------|-----------------|--------------|
| <input type="checkbox"/> | 0000000365 | 03/09/2009 | Live | Not... | MO33349-92 | ACS/B... | WAREHOUSE | Unspecified | 8.00000 | 0.00000 |
| <input checked="" type="checkbox"/> | 0000000365 | 03/09/2009 | Live | Not... | DEC/PAPER/BEIGE | DEC/... | WAREHOUSE | Unspecified | 100.00000 | 0.00000 |

Display order lines marked for direct delivery Print labels Record Invoice

Select All Reset Receive Selected

Order line details
 Description: Professional Blender 5 Speed Buying unit: Each View Order

Save Save and Allocate Find... Amend Batch/Serial... Close

MMS107 - Create Stock Item on the Fly

Our **Create Stock Item on the Fly** addon allows the user to create a new stock item without leaving the create/ amend sales order or purchase order screens. Once the stock item has been created, it is added to the order line.

This addon replicates the functionality of Sage 50 and is particularly popular with customers that have migrated from Sage 50 to Sage 200.

SOP - Create New Order Item Line

Line type
 Standard item Free text item Additional charge Comment line

Product item
 Code: Warehouse: Amend item line description Select Alternative...



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MMS113 - Purchase Order Enquiry Form

POP - View Outstanding Orders

Select Orders

Delivered Status No Part Complete Supplier

Invoiced Status No Yes

Overdue Orders Orders Due Today

No Delivery Date Show All Orders

Filtered Orders

| Order No | Order Date | Order Status | Authorised | A/C Ref | Supplier Name | Supplier Ref | Total Order V... | Outstanding ... | Delivery ... | Delivered | Invoiced |
|------------|------------|--------------|----------------|---------|--------------------------|--------------|------------------|-----------------|--------------|-----------|----------|
| 0000000359 | 15/08/2008 | Live | Not authorised | PAU001 | Paul Taylor Fittings Ltd | 9384 | 4211.20 | 0.00 | | Complete | No |
| 0000000354 | 20/07/2008 | Live | Not authorised | ERN001 | Ernie Swinton White... | 346346 | 765.00 | 0.00 | | Complete | No |
| 0000000363 | 02/09/2009 | Live | Not authorised | MOL001 | Molster Style | | 62.50 | 62.50 | | No | No |
| 0000000364 | 03/09/2009 | Live | Not authorised | BGT001 | BGT Distribution Ltd | | 1.00 | 1.00 | | No | No |
| 0000000366 | 04/09/2009 | Live | Authorised | CHR001 | Chrome Decor Whole... | 187373 | 1235.00 | 1235.00 | 16/09/2009 | No | No |
| 0000000365 | 03/09/2009 | Live | Not authorised | MOL001 | Molster Style | Ref182 | 1589.00 | 1589.00 | 10/09/2009 | No | No |
| 0000000360 | 07/09/2008 | Live | Not authorised | NEW001 | New Zealand Kauri E... | 24575 | 1750.00 | 1750.00 | | No | No |
| 0000000361 | 08/09/2008 | Live | Not required | CHR001 | Chrome Decor Whole... | 36346 | 78.28 | 78.28 | | No | No |
| 0000000356 | 05/08/2008 | Live | Not required | ORT001 | Ortez Mexican Kitche... | 97767 | 1906.21 | 1715.59 | | Part | Yes |
| 0000000357 | 11/08/2008 | Live | Not required | BGT001 | BGT Distribution Ltd | 9082394 | 5964.15 | 691.74 | | Part | Yes |

View Order Amend Order Close

The POP Enquiry addon for Sage 200 creates a new enquiry screen that gives an enquiry similar to that found in Sage 50, e.g. list part received, received but not invoiced etc. The addon lists all outstanding purchase orders giving the stage that they are at, e.g. part received, invoiced etc and can be filtered by any of these or by an individual supplier. In addition this can also be filtered based on the requested delivery date on the purchase order header screen so that orders which are overdue can be easily identified. Any selected order on the list can be viewed and amended.



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Contact Us

Eureka Solutions have worked successfully with many Sage 200 customers over the past 5 years. In addition to our Starter Pack for Sage 200 and our other modules that we have written for Sage 200, we are also happy to engage in bespoke/customisation work to help tailor your Sage 200 system to meet your specific business requirements.

To download a 30 day trial of our Starter Pack for Sage 200 and for all up to date information and details of our modules, please refer to our website www.eurekaaddons.co.uk. Our bestselling addon modules include:



SO Plus for Sage 200

Our **Sales Order Plus** module has been specifically designed to provide fast order entry from within Sage 200 and aims to ensure that all information required by users entering orders is easily available from the main order entry screen. Sales Orders Plus has been really successful in telesales and tradecounter environments where fast order entry and access to sales history information is vital.



Data Exchange for Sage 200

Data Exchange for Sage 200 is ideal for two-way integration between Sage 200 and 3rd party systems, for example websites, CRM and manufacturing systems. Data Exchange allows for the transfer of information such as customer and supplier details, sales and purchase orders, stock records and stock levels, and Cash Book transactions in either CSV or XML file formats.



Plus Pack for Sage 200

Our **Plus Pack** is a collection of over 50 individual addons for Sage 200, most of which were created as a result of customer requests. The addons included in the pack range from simple sales order entry enhancements to some serious improvements to core Sage 200 functionality.

If you wish to discuss a specific project or pricing or would like further information on Starter Pack or any of our addon modules for Sage 200 then please call our head office on 01355 581 960 or e-mail us at development@eurekasolutions.co.uk.



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