

# Sage 200 Extra

Open up to more

Insight  
support  
choice



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Open up to

more



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# About Sage

## We've got the personal touch

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All businesses are different and change over time. Recognising both these facts helps us shape our software to give you choices. So what makes us different from other software companies? We like to think it's the personal touch and the fact that we've got 30 years' worth of industry experience and customer trust.

We're a FTSE 100 company with 5.7 million customers worldwide. Our headquarters are in the UK, where we first started, and more than 800,000 of the UK and Ireland's businesses, including more than one third of the FTSE 100 choose Sage software.

We work with a country-wide channel network of over 1000 Partners and Developers, many of whom have been around for as long as we have. Our Partners and Developers are one of the many reasons customers choose Sage and we believe that we have one of the strongest and widest support networks in the industry. We aim to support our customers with exceptional service, delivering a fantastic customer experience.

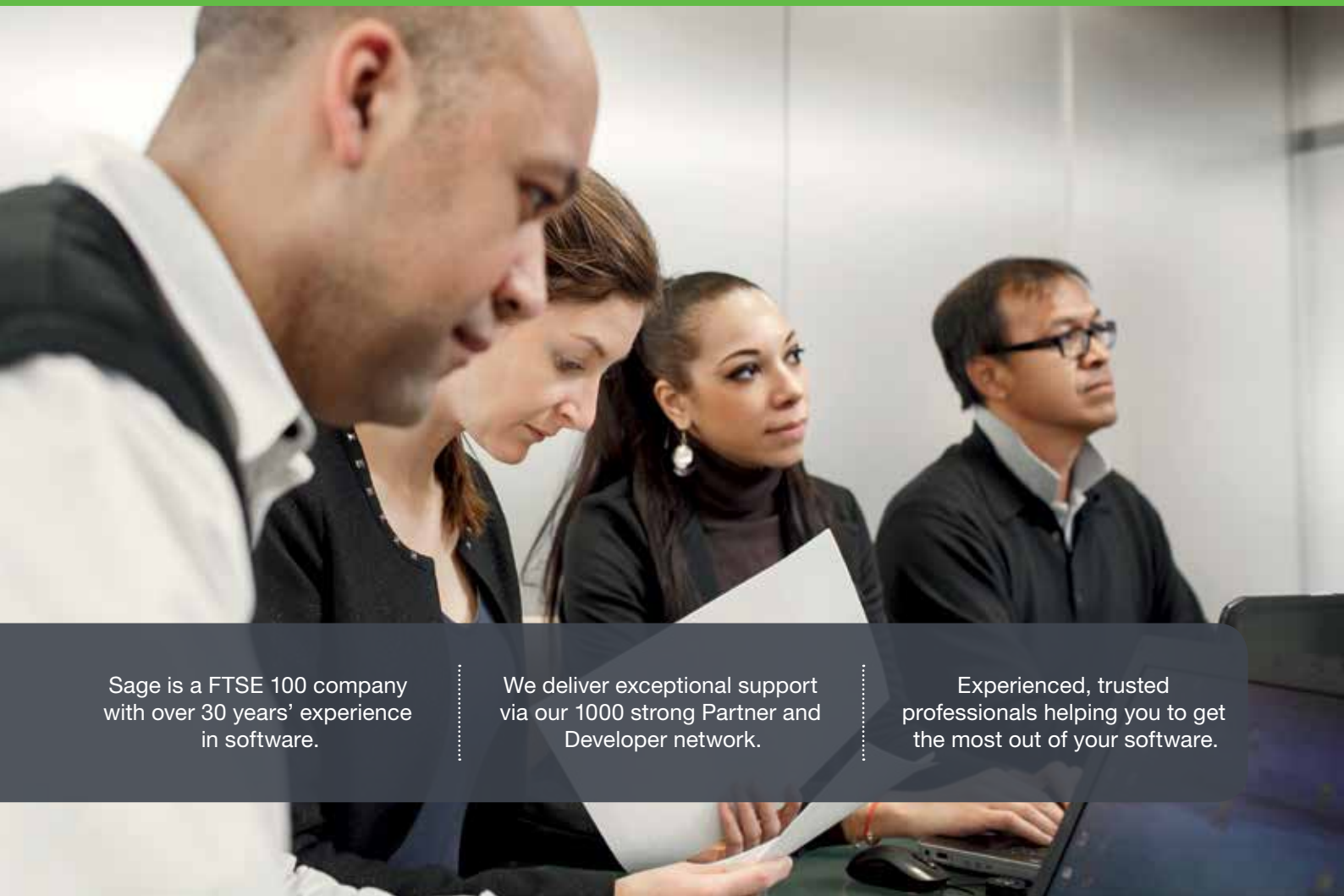
We give you the confidence that we're taking care of your accounts and the knowledge there's always someone nearby who understands your business, so you can focus on the important things.

Our extensive network of independent Developers create specific solutions and add-ons to help make our software work alongside your business' processes or industries.

So, if your business needs something that isn't exactly standard, our Developers are there to help.

Together with our network of Business Partners and Developers, we have the innovation and expertise to design, build and integrate solutions with Sage software so it meets your specific needs and business objectives.

So, whatever your business needs, we've got it.



Sage is a FTSE 100 company with over 30 years' experience in software.

We deliver exceptional support via our 1000 strong Partner and Developer network.

Experienced, trusted professionals helping you to get the most out of your software.

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# Sage 200 Extra

## A solution for your growing business



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

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

If this matches your business profile, you might want to consider Sage 200 Extra now or in the future as it delivers a greater depth of functionality for more complex businesses and you can pay monthly, enabling you to get up and running quickly.

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

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

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

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

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

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# Sage 200 Extra

## Software that fits your business

All businesses are different and change over time. Recognising both these facts helps us shape our software to give you choices. Choose upfront or monthly payments. Choose the modules you need to manage your business. Choose the options that are right for you.

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We pack our Sage 200 Extra solution full of tools that you can use straight away to help you run your business smartly and efficiently, but we know that's not the end of the story.

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

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

### **Accurate, timely insight that helps you drive success**

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

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

### **Work smartly and efficiently with greater control**

Because it offers more than just accounts, Sage 200 Extra helps you build a joined up, efficient business, connecting all your different teams from sales to customer services, dispatch to financials.

Get the right data to the right people, so they see what they need to see without being distracted by too much information. Control access with different levels of admin rights to maintain control over sensitive data.

### **Software that fits your business**

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

Add or remove modules and scale the number of users up or down to match the needs of your business. And choose the payment and deployment options which make sense to you.

Plus our Business Partners and Developers can help you tailor the software to your individual business needs and integrate existing tools and applications.





### **Access data any time from anywhere**

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

Sage 200 Extra makes it easy to access critical information when you're out of the office visiting customers or suppliers, and makes home working straightforward.

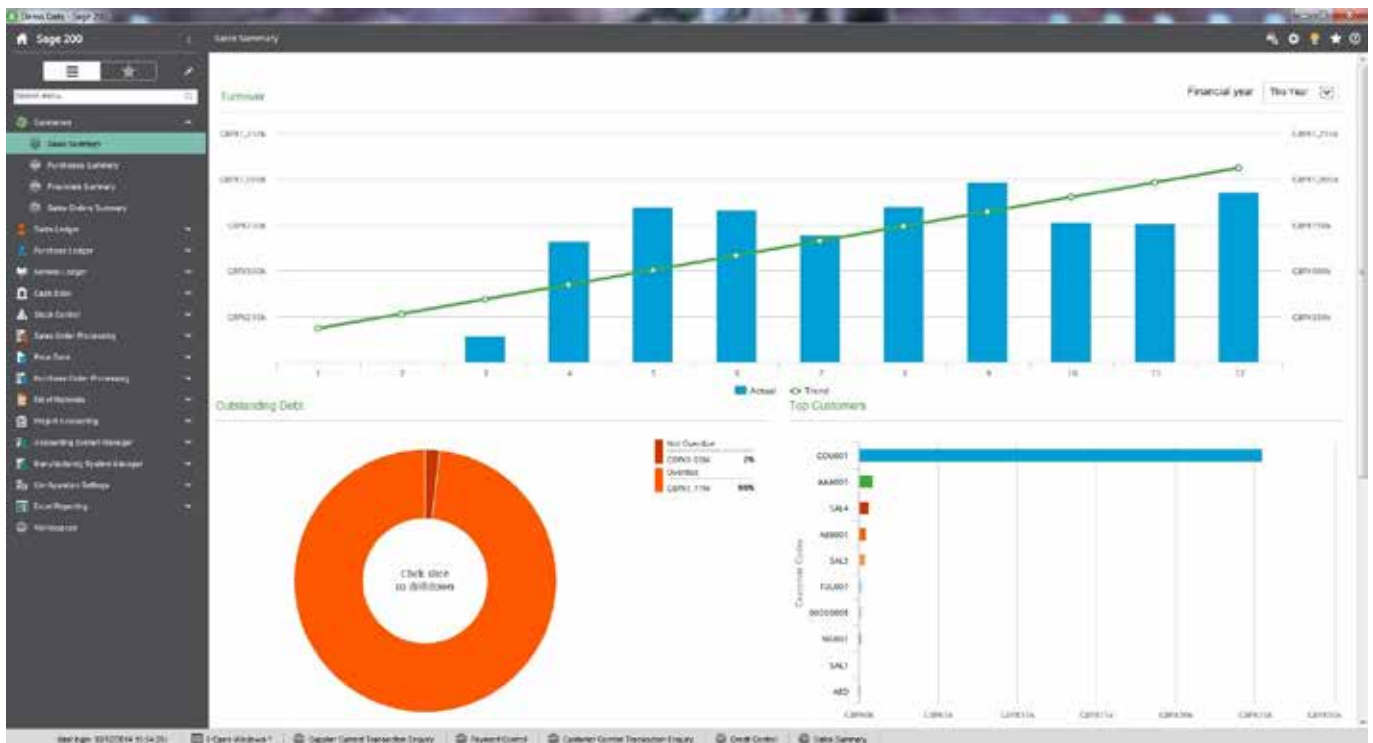
### **More advice, more insight, more success**

At Sage, we believe that helping you achieve business success is about more than just great software. That's why when you invest in Sage 200 Extra, you'll receive much more than software, you'll experience the support and insight that come with Sage 200 Services. Sage 200 Services offers you more – more expertise, more guidance, more insight - to help you fulfil your business potential. Helping you make the most of your software and extend your business network.

Enjoy access to the Report Design Service, providing you with up to three customised reports each year and a library of 'How to' webinars on a range of topics including product hints and tips, business advice and current legislation.

### **Get up and running quickly and easily**

Our Getting Started homepage is designed for new users and includes one-click access to the help centre, so you'll quickly become familiar with the software and there's always help at hand. You'll find how-to videos, quick links to key functions and lots of useful information to help you use the software.



### Detailed reporting

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

### Manage your cash flow

Effectively manage your cash flow with Sage 200 Extra. Make sure you're up to date with the latest company information at your fingertips.

### See your balances

See at a glance the liquidity of your accounts using bar charts and line graphs to bring figures to life.

### Bank reconciliation

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

### Advanced multi-currency options

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

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

### Understand how changes impact your cash flow

Get an accurate view of your financial status based on actuals and budgets for up to 5 years. See your short-term and long-term cash position and quickly understand how unexpected delays and expenses will affect your cashflow.

### Fixed Assets

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

You can view this via a new workspace or choose from two reports for details and valuation.



# Financials

## Managing your financial position

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

### Accurate and up to the minute finances

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

### Interactive Dashboards

We've introduced brand new interactive dashboards for sales, purchases, sales orders and financials, giving you an even greater view of the health of your business.

### Flexible accounting periods

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

### Flexible nominal code structure

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

### Batch data upload

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

### VAT flexibility

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

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

Set up processes to send statements directly to customers. Get a view of all outstanding customer payments and invoices to help you maintain cashflow. Easily and clearly view and track all standing orders and direct debits, with details of the day they are paid, frequency, number of payments made, number still to pay and much more.

### Store unlimited customer and supplier contact details

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



# Business Intelligence

## Gain greater control over your business

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

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### Effectively analyse critical business information

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

### Easily build your own reports

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

Bring your business data to life using charts and graphs.

### Improved insight

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

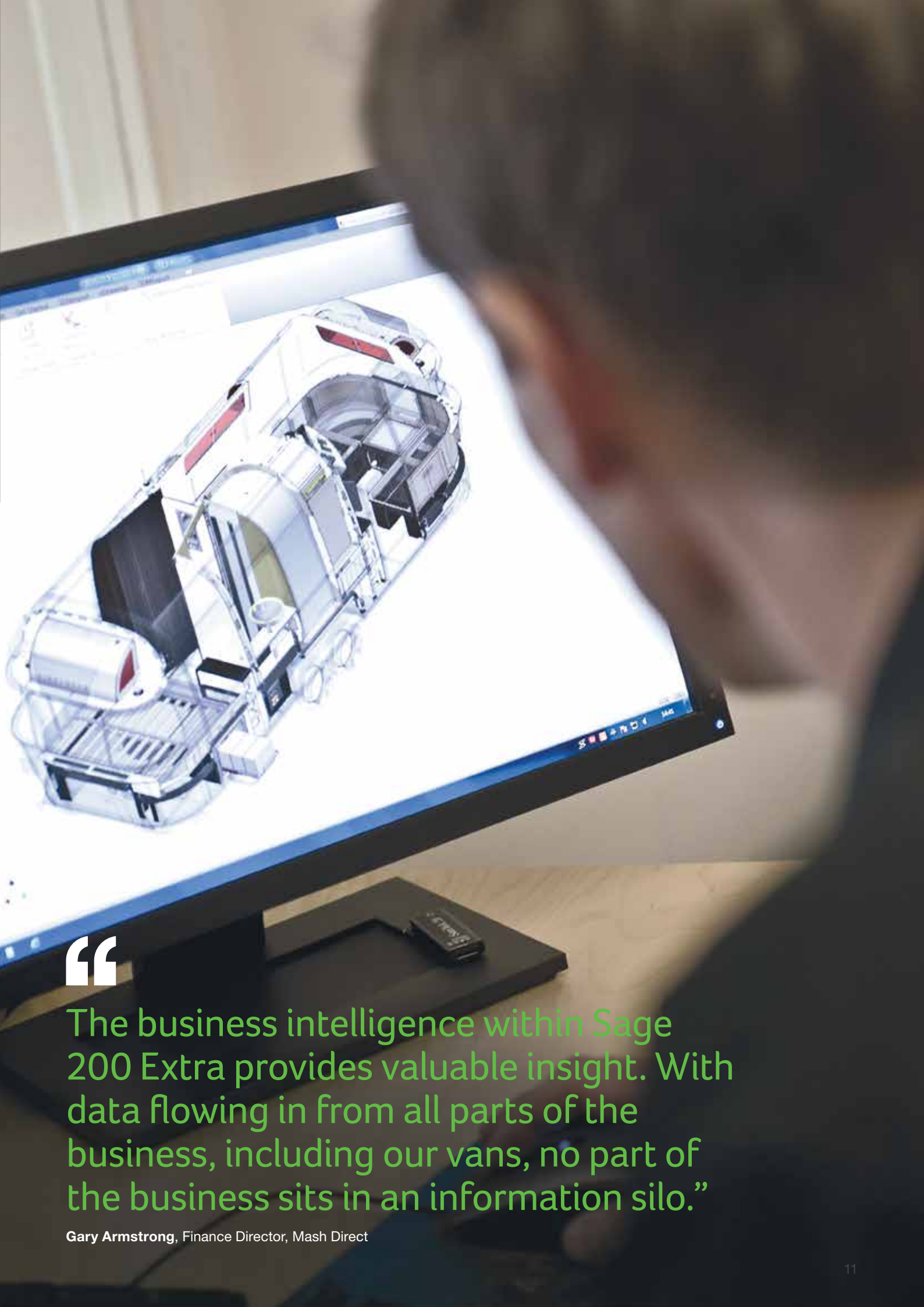
### Effectively manage your customer relationships

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

### Benefit from greater Business Intelligence

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

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



“

The business intelligence within Sage 200 Extra provides valuable insight. With data flowing in from all parts of the business, including our vans, no part of the business sits in an information silo.”

Gary Armstrong, Finance Director, Mash Direct

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# Excel Reporting for Sage 200 Extra

## Better reporting and more detailed analysis

We know how important it is to have the right tools and functions to hand, to make finding and interpreting information about your business easy. With this in mind, Sage 200 Extra now comes with reporting in a format you know already how to use – Excel™.

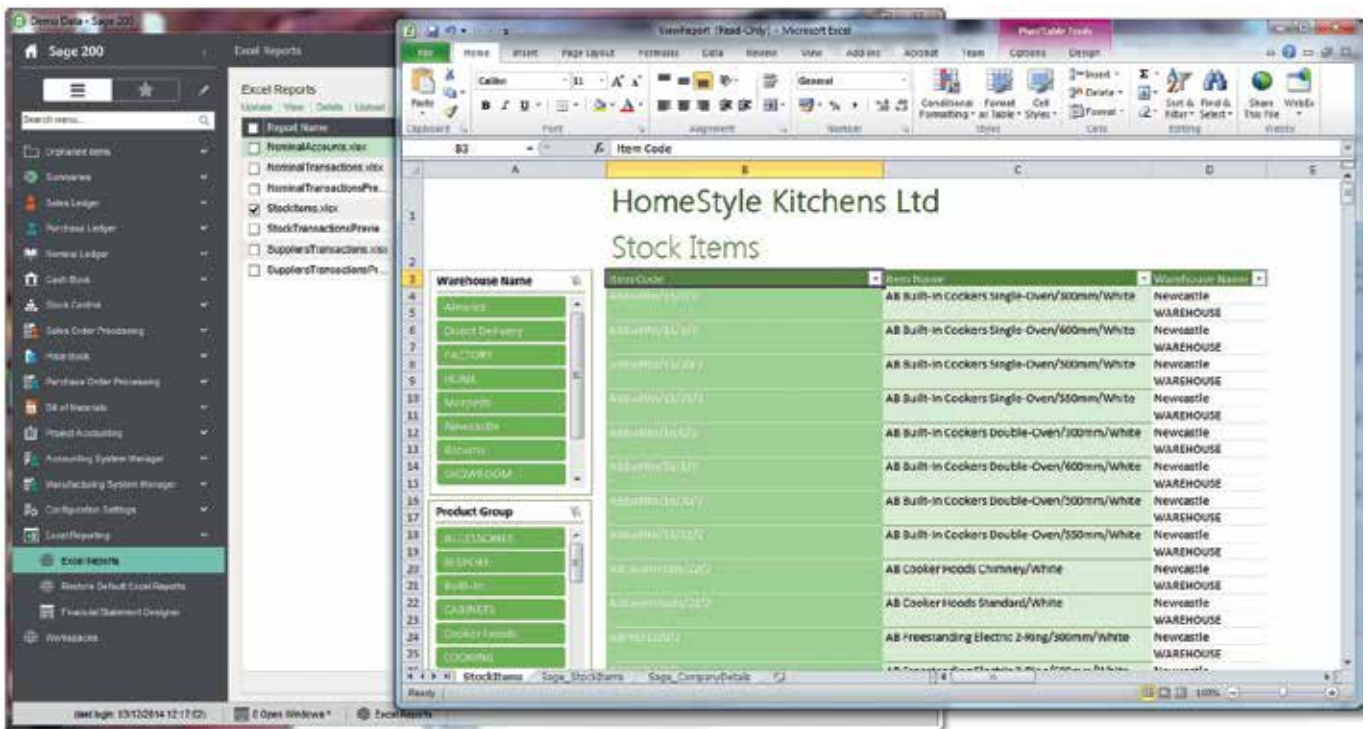
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This customisable reporting tool allows you to take data from Sage 200 Extra and filter, format and formulate within the familiar environment of Excel.

You can also add your own data to workbooks along with charts and formulas; workbooks can easily be uploaded in one click and you can run them time and time again with refreshed data. Sage 200 Extra makes it as easy as possible to get updates on your business data and access deeper analysis where required.

This intuitive tool is easy to use, meaning you get the information you need in a format you are familiar with.

A number of reports are provided out-of-the-box including nominal, customer, supplier and stock. For those you require more in depth analysis on a particular business function, such as financials or stock levels, we offer additional Excel reports and packs at an additional cost.



## Excel Reporting for Sage 200 Extra

Take these areas of the programme into Excel where you can pivot and analyse in more detail.

### Free Excel Workbooks

- Nominal accounts
- Customer accounts
- Supplier accounts
- Stock records\*

### Optional Reports available when you subscribe to Sage 200 Extra Excel Reporting:

Nominal Transactions  
 Nominal Waiting Postings  
 Nominal Held Journals  
 Nominal Archived Transactions  
 VAT Transactions  
 Supplier Transactions

Supplier Batched Transactions  
 Supplier Suggested Payment  
 Supplier Turnover by Period  
 Supplier Archived Transactions  
 Customer Transactions  
 Customer Batched Transactions  
 Customer Reversed Charge VAT Transactions  
 Customer Turnover By Period  
 Customer Archived Transactions  
 Cashbook Transactions  
 Stock Transactions

### Optional top ups

Excel Report Packs that you can choose to add if required:  
 Stock Pack - reports covering stock allocations, stock period values, stock cost history, movements and much more  
 Financial Data Layouts Pack - includes trial balance, revenues, expenses, assets and liabilities



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# Workspaces

## Access critical data out of the office

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

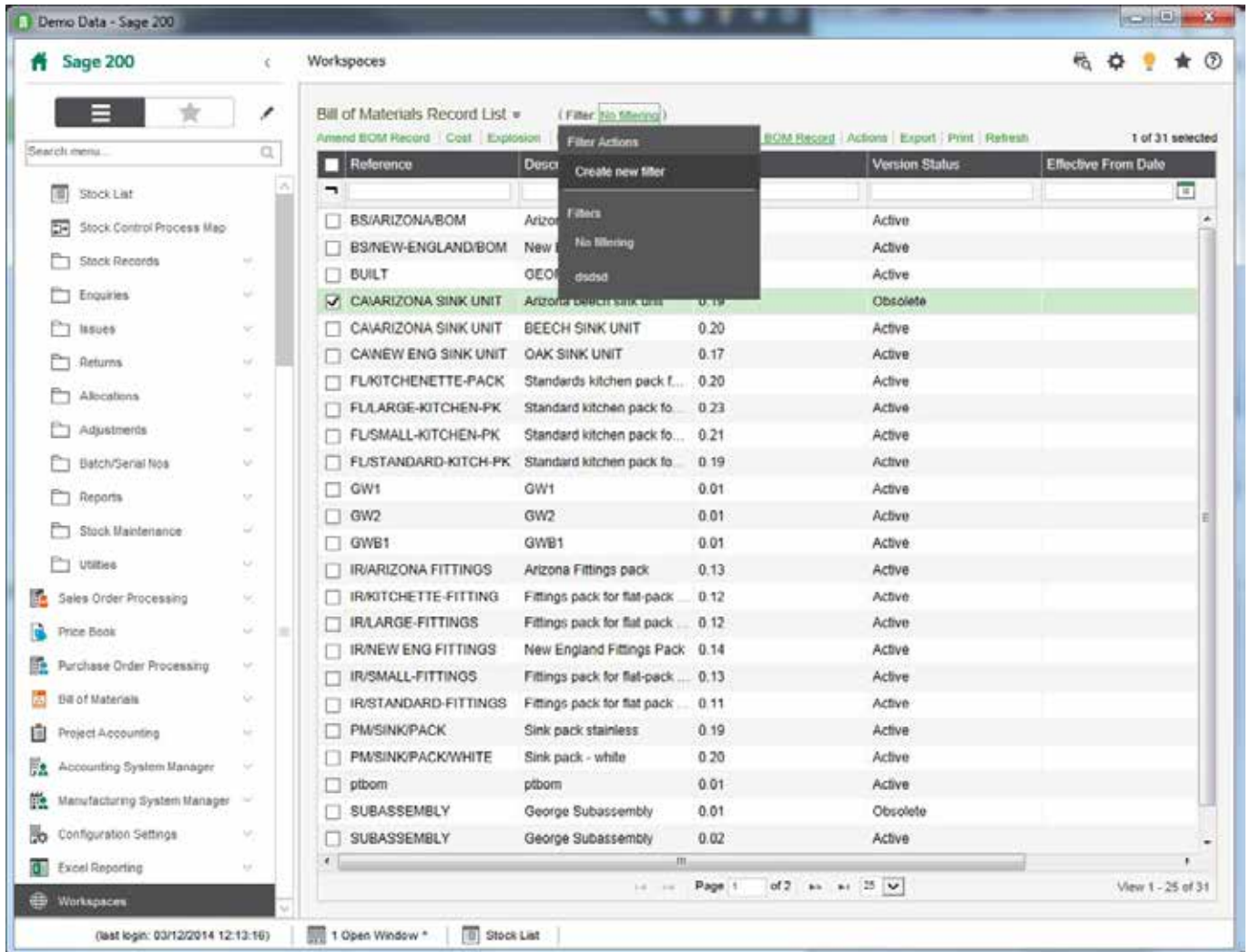
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Workspaces provide different people across your organisation relevant information quickly and easily and are customisable, so you can configure them to suit different job roles and responsibilities.

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

#### **To customise their workspace, users can:**

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



“ I can run off reports on daily sales and daily gross profit or management accounts in about 15 seconds. In terms of sales, we can see what’s up and what’s down, analyse why, and take immediate pre-emptive action.”

Richard Grethe, Finance Director, Focus Pharmaceuticals Limited

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# Commercials

## Managing your supply chain

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

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

### See the full story of an order

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

### Source goods worldwide

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

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

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

### Compile order lists based on purchase orders

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

### Keep a running total

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

### Record disputes

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

### Manage your stock

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

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



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# Commercials

## Managing your stock

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

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### **Easily control your stock**

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

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

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

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

### **Effectively manage your suppliers**

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

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

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

### **Track your stock**

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

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

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

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

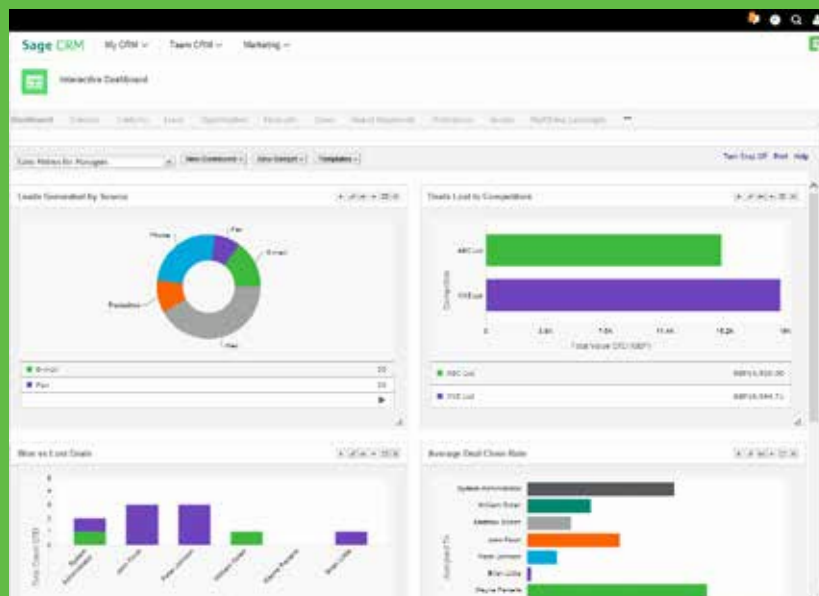
“ As our business has expanded, it has grown in complexity and Sage 200 Extra has helped us streamline our business processes. We have a better springboard for going forward.”

**Steve Lorton**, Commercial Director, Paultons Park



# Commercials

## Managing your sales orders



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

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

### Rapid order entry

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

### Flexible ordering options

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

### Manage discounts and margins

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

### Match your stock to your customers' needs

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

### Work with stock and sales

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

### Manage multiple currencies and exchange rates

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

### Create new accounts and quotes easily

Use existing templates to quickly create quotes and accounts for new customers. Create pro forma invoices and convert them to sales orders.

### Support simple or complex pricing

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

### Maintain profit

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

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## Project Accounting

### Managing your projects

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



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

### Gain a single view of your projects

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

Share information with other areas of your business to save time and reduce administration costs. For example, convert sales orders and quotations into projects, while ordering and allocating stock for those projects. Or track time and resources and link the results to your Sage 50 Payroll system.

### Work the way your business does

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

### Effectively manage your resources

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

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

### Drive accurate and flexible billing

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

### Work in Progress

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

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

# CRM

## Managing your customers

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

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

### Build strong customer relationships

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

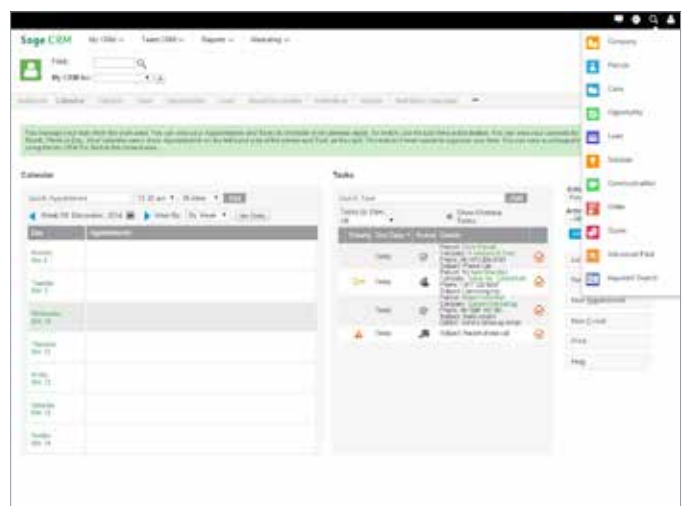
### Manage customer services

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

If there's a question or issue that isn't followed up, the system can automatically notify a customer services manager to make sure nothing gets lost between the cracks.

### Find the answers quickly

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





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### Monitor customer service performance

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

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

### An informed view of the customer

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

For example, a customer services team can view contacts, leads, opportunities or cases all in the same place; giving them accurate and up-to-date information to help them provide consistent and excellent customer service.

### Insight-driven sales management

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

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





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## CRM

# Managing your sales and marketing

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

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

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

Sage 200 Extra provides powerful tools for marketing teams to plan, execute and audit highly targeted marketing campaigns. With a clear understanding of your customers' needs, you can improve lead quality and drive higher conversion rates.

### Optimise your marketing activity

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

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

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

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

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

Empower your sales teams and increase conversion

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

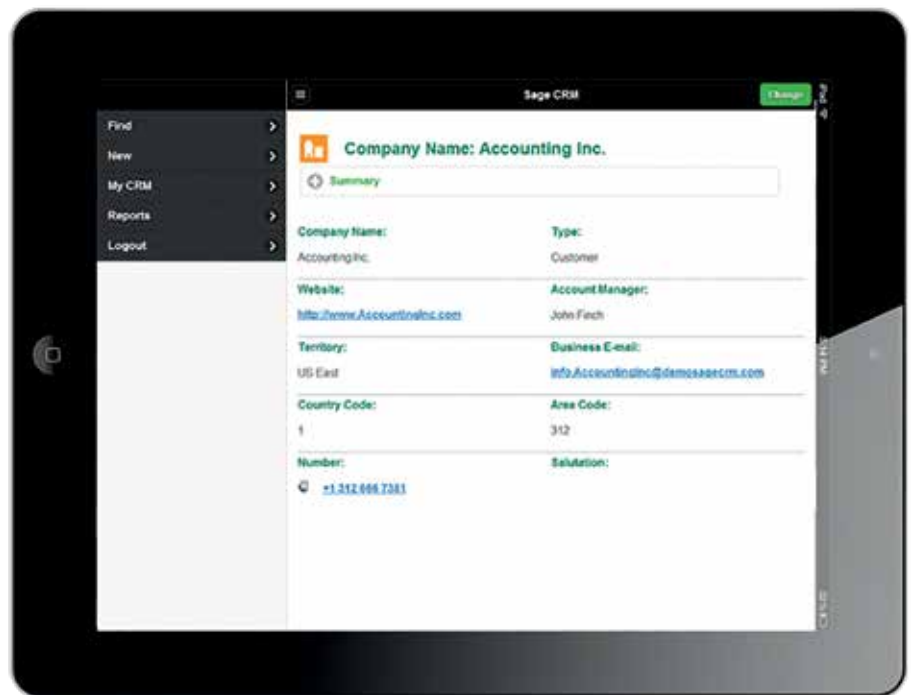
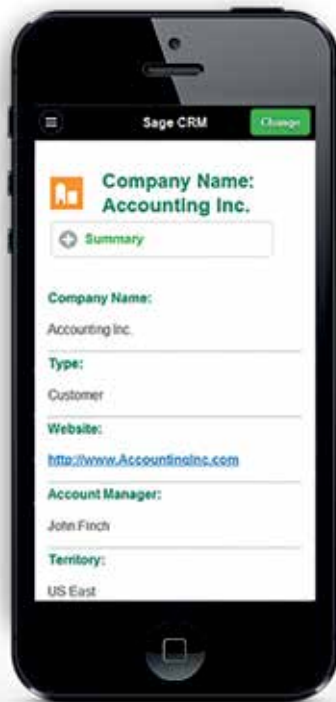
With automated workflow and pipeline management tools, make sure opportunities are quickly progressed.

Free your sales people up to focus on selling by providing them instant access to the information they need.

Direct leads to the sales people best qualified to win the deal based on their skills and knowledge or territory, making every customer interaction more informative, more effective, and more profitable.

### Anytime, anywhere access

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



### New Mobile CRM apps for sales

Leading industry analyst Gartner predicts that in 2016, two-thirds of the workforce will own a smartphone, and 40 per cent of the workforce will be mobile.

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

### Integration with MailChimp

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

### With the latest integration you can:

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



“

Sage 200 Extra Manufacturing gives us a window to a lot more information. It enables us to collect shop-floor information by product and by warehouse, perform more detailed costing analysis and optimise resources.”

David Walsh, Finance Director, Sign + Digital

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# Manufacturing

## Managing your manufacturing and production processes

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

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

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

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

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

### **Improve business efficiency**

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

Improving how you control your production processes will also help you deliver more products on time – a key target for anyone in the manufacturing industry.

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

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

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

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

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

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

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

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



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# Sage 200 Extra Online

## Open Up To More

If our Extra version of Sage 200 isn't for you and you want to host your software in the cloud, we also offer an online solution. Sage 200 Extra Online is a cloud-based business management solution for growing businesses, that's more than just accounts software.

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The flexibility of Sage 200 Extra Online means it can cater for businesses with around 10 to 200 employees and up to £50m turnover, across all business sectors. Sage 200 Extra Online delivers a greater depth of functionality for more complex businesses and you can pay monthly, enabling you to get up and running quickly.

### Key reasons to consider Sage 200 Extra Online

- You don't have the in-house expertise to manage your technology needs and want to avoid additional investment
- Flexible, instant access to data
- Pay monthly, scaling up or down as your business needs change

- Built on the Microsoft Windows® Azure™ platform
- Compliance with industry standards for security - ISO 27001 certified European data centre
- Available 24-7 - constantly monitored to make sure you have access whenever you need it
- Automated back ups as standard - save time and money by letting the solution do it for you
- You can integrate with applications such as Windows 8® and Office 365™

We'll take the time to talk you through all the options and make sure you understand what's the best fit for your business.

“ Sage 200 Extra Online's advanced reports have been customised especially to fit our needs and have been invaluable, as we are unique in what we do and the way we operate. Being able to access Sage 200 Extra Online via a browser means that updates are automatic so we can see exactly where the sales are at any point in time”.

**Michelle Crossley**, Fundraising Director, Circus Starr



# Overview of Sage 200 range

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

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# Sage 200 Services Open Up To More

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## Offering your business more advice, more insight, more success

At Sage, we believe that helping you achieve business success is about more than just great software.

It's about giving you the insight and advice that you need, before you even know you need it, and provides you with a network of connections that will support your business today and for the future.

Sage 200 Services gives you a whole host of benefits including access to the Report Design Service, providing you with up to three customised reports each year; each one is individually tailored to your business' needs.

You'll also get access to a library of 'How to' webinars on a range of topics including product hints and tips, business advice and current legislation.

What's more, you'll have access to the Sage 200 Ideas Hub, giving you the opportunity to shape the future of the software by contributing to the wish list.

## Get more with Sage 200 Services Extra

If you want more, sign up to receive Sage 200 Services Extra and benefit from all of the benefits of Sage 200 Services, plus:

- Two free Sage 200 web users: Access key information on the go, keeping you and your business mobile
- Access to Excel Reporting Add-on: Take data from Sage 200 and filter, format and formulate within the familiar environment of Excel

## Want additional options?

If you have Sage 200 Services or Extra, you can also get a range of additional benefits that you can add to your membership, including:

- Telephone advice services: Access our professional and fully qualified advice line team for HR, Employment Law and Health & Safety advice, when you need it
- Additional reports: Get additional or more complex reports to the three included in your membership

Additional How-to Webinars: Choose to view additional tutorials that are relevant to your business

# There are two levels of Sage 200 Services

## Sage 200 Services and Sage 200 Services Extra

| Service   | Details   | Sage 200 Services | Sage 200 Services Extra | Additional options |
|---|---|-------------------|-------------------------|--------------------|
| <b>Sage Report Design Service</b>               | Receive access to the Sage Report Design Team who'll develop up to three bespoke reports per year, tailored to your needs.  | ✓                 | ✓                       |                    |
| <b>Sage "How to" Video Webinars</b>             | Access a library of video webinars on a range of topics, including product hints and tips, business advice and current legislation.   | ✓                 | ✓                       |                    |
| <b>Sage Ideas Hub</b>                           | Directly access the online Sage 200 Ideas Hub where you can raise, vote and keep track of your requests for change and potential product enhancements. Plus provide feedback directly to us to help shape the future of Sage 200. | ✓                 | ✓                       |                    |
| <b>Annual Licence Key</b>                       | Ensures your Sage 200 software continues to support your business as it grows.  | ✓                 | ✓                       |                    |
| <b>Access to the latest version of Sage 200</b> | Confidence that your software is up to date and legislatively compliant.  | ✓                 | ✓                       |                    |
| <b>Report Design Service &amp; Library</b>      | Access to a catalogue of ready-made free reports that you can download and use in your business every month.  | ✓                 | ✓                       |                    |
| <b>The Sage Business Community</b>              | An online business area to connect, network and discuss business topics with other like-minded businesses.  | ✓                 | ✓                       |                    |
| <b>Online HR and Health and Safety Advice</b>   | Anytime, anywhere online access to the latest HR and Health & Safety advice and support as well as guides, templates and policies.  | ✓                 | ✓                       |                    |
| <b>Free Sage 200 web users</b>                  | Additional web users allowing you anytime, anywhere access to all workspaces.   | ✓                 | ✓                       |                    |
| <b>Excel Reporting for Sage 200</b>             | Free access to Excel Reporting for Sage 200, allowing you to extract and interpret data in a familiar format.   | ✓                 | ✓                       |                    |
| <b>Sage 200 Services Additional Options</b>     | Because we know that no two businesses are the same, we're also offering an additional membership level and a range of extra benefits that you can add to your membership.  |                   |                         |                    |
| <b>Telephone Advice Services</b>                | Access our professional and fully qualified advice line team for HR, Employment Law and Health & Safety advice, when you need it.   |                   |                         | ✓                  |
| <b>Additional Reports</b>                       | You may find you need additional reports to the three included as part of your membership. If so, our expert team are there to help.  |                   |                         | ✓                  |
| <b>Additional "How to" Webinars</b>             | Choose to view additional tutorials that will help you gain the maximum value for your business.  |                   |                         | ✓                  |

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# Sage 200 Services Open Up To More

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## More insight

### Report Design Service and Report Library

Get up to three customised reports per year.

You'll get exclusive access to the Sage Report Design Team who will develop reports that are specific to your business requirements. The reports will give you a greater level of detail on things like stock levels, pricing and receipts as well as your most profitable customers and highest performing suppliers. We'll tailor your three reports to fit the specific needs of your business, giving you the chance to get more from your software and ultimately help you understand and run your business more efficiently. You'll also have access to the Report Library, where a whole bank of ready made reports is available to help get more valuable insight for your business.

NB: Report Design requests are subject to T&C of the service

## More expertise

### Sage "How to" Video Webinars

As part of the Sage Business Community, you'll get access to expert webinars. These will help you save time, show you how to make the most of your software and help you work more efficiently to really make a difference to your business.

Our Sage experts will show you how to maximise the use of your software, walking you through this step by step and showing you helpful tools you may not have used before. They'll give you online hints and tips to help you tackle tasks quickly and easily, so you're confident about applying them to your business.

The product webinars are based on the questions we're most often asked such as

- How do I quickly do a nominal consolidation?
- How do I archive my sales orders?
- What's the best way to import and process a year end?

We also have a range of videos giving you general advice about relevant business topics and current legislation changes, such as SEPA, VAT or Auto enrolment.

Visit [www.sage.co.uk/communities](http://www.sage.co.uk/communities) to see a list of webinars available.

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### More involvement

**Access the online Sage 200 Ideas Hub, allowing you to request and vote on product ideas.**

Sage 200 Services gives you the opportunity to shape the future of the software by providing you with access to the Sage 200 Ideas Hub. Here, you can vote on product enhancements and improvements that would really benefit your business.

The Sage 200 Ideas Hub provides you with full visibility of this wish list so you can easily see which feature enhancements are ranked highest and which are lower priorities as well as view the status of each idea.

### More connected

**Be part of the Sage Business Community**

Sage 200 Services opens up access to the Sage Business Community, an online area where you can connect and network with like-minded businesses, including potential customers and suppliers. A place where you can ask questions and offer your own expertise too.

It also brings a range of relevant business information to you, to save you time looking for it. Whether you're looking for hints, tips and videos to help you make the most of your software; or open to more general business advice, this is the place to find it. It's packed with useful links, articles, guides, forums, videos and downloads.

Visit [www.sage.co.uk/communities](http://www.sage.co.uk/communities) to join the discussion and see what articles are available specifically to help your business.

### More Advice

**Get online business advice on the latest HR and Health & Safety legislation**

Sage 200 Services gives you an easy way to stay up to date with the latest HR and Health and Safety legislation. Support your business with advice as well as tools and templates to help keep your employees happy and productive.

With a comprehensive, easy-to-use website, that translates the law into plain English and gives you examples of best practice, you can get up-to-date advice whenever you need it.

There's practical help too - with hundreds of guides, templates, forms and policies instantly available to help drive positive change in your business.

Everything is online and continuously updated. We provide help and practical advice across all areas of HR and Health and Safety including advice on recruitment, disciplinary procedures, employment contracts, risk assessment policies, workstation set up and a range of other subjects.





# Even more value

## Sage 200 Services Extra

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### Excel Reporting for Sage 200

Access to Excel Reporting for Sage 200 - a customisable reporting tool allowing you to take data from Sage 200 and use it within the familiar environment of Excel. You can upload workbooks with a click of a button and run them time and time again with refreshed data. Choose from a range of inclusive reports with the option to buy additional Excel reports or packs.

### Two Sage 200 web users

Two free Sage 200 web users, so you can access key business information on the go, keeping you and your business mobile. You can access Workspaces with key information specific to you, enter, print, authorise and submit timesheets and expenses. Make sure you take full advantage and access your data anytime, anywhere.

### Are you ready to open up to more?

To find out more about Sage 200 Services, please contact your Business Partner or one of our advisors:

**0845 245 6406**

**[customer.development@sage.com](mailto:customer.development@sage.com)**



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If you're interested in finding  
out more please contact our team on:

Tel: **0845 111 9988**

Email: **customer.development@sage.com**

Web: **www.sage.co.uk/sage200extra**

or contact your business partner  
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