



New Features Guide



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Introducing the Sage 200 Platform

Traditionally, business management software for all but the largest organisations has been based on many different software applications - each running in separate parts of the business. The Sage 200 platform highlights our commitment to deliver integrated business management software and provides our customers with the software to control finance, distribution, CRM, Retail, Manufacturing and a host of other business processes all within one integrated business management suite.

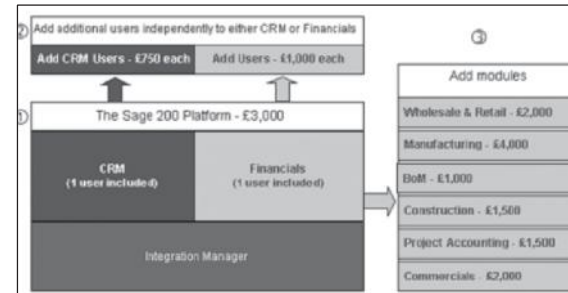
March 2007 marked the first key milestone in the roadmap for Sage 200 with the launch Of:

- Sage 200 Financials
- Sage 200 Commercials
- Sage 200 Bill of Material
- Sage 200 Project Accounting
- Sage 200 ACT! Link

The release of v4.10 sees the launch of the Sage 200 Platform, Sage 200 CRM and the new eagerly awaited Web, Time & Expense module. The Sage 200 Platform forms the base layer onto which customers can build their Sage 200 solution, it includes:

- Sage 200 CRM single user
- Sage 200 Financials single user
- Sage 200 Integration Manager.

The Platform allows a strong financial and commercial system to integrate with a market leading CRM system, providing efficiency and consistency across the business in areas such as customer service, marketing and sales. The diagram below, highlights the components of the Sage 200 suite, (1) the Sage 200 Platform, (2) the option to add extra users and (3) the option to add additional modules:



Point 1: The Sage 200 Platform contains:

- The Integration Manager – responsible for the integration and the synchronisation of data across the Sage 200 modules.
- A single user Sage 200 Financials.
- A single user Sage 200 CRM.

Point 2: Extra users:

- Extra users can be added to either the Sage 200 Financial modules or to the Sage 200 CRM module – users across both these modules are concurrent.

Point 3: Extra modules:

- Extra modules can be added to the Sage 200 platform as required, for example the Sage 200 Commercials modules can be added – please note that any modules added to the platform utilise the Sage 200 Financials user counts from point 2.

NB: Both Wholesale and Retail and Sage 200 Manufacturing will be available on the release of v4.20 later in the year.

An introduction to Sage 200 CRM

Sage 200 CRM is an internet-based CRM solution, designed to bring the real benefits of Customer Relationship Management (CRM) to your organisation. It's designed to be easy to use and deploy, affordable and packed with useful features and integration. With Sage 200 CRM, you can quickly analyse, manage and synchronise sales, marketing and customer service activities across all points of contact.

Integration:

Accounts - Integration with your accounting system will allow your accounts staff to access the critical customer information, behavior and buying history usually held within the sales department, enabling them to resolve issues and queries promptly.

Marketing - Devise targeted and trackable campaigns to drive sales more successfully and make best use of your marketing spend. You have all the tools necessary to proactively communicate with your customers in a consistent and timely manner – from emailing purchasers of specific products to contacting lapsed customers, to opening a dialogue with prospects.

Customer Service - Customer-facing staff have all the tools at hand to increase customer loyalty by providing a consistently high-quality experience, regardless of location or channel. Staff have secure, instant access to all relevant customer information, helping fast resolution of customer enquiries or issues. Integration with the Sage 200 financial and trading system, will allow your staff to access on vital financial and stock information.

Sales - Sales professionals have instant access to calendars, accounts, reports, pipeline, contacts and call lists – in short, all the tools that empower sales people to sell. Integrating Sage 200 Commercials with Sage 200 CRM software equips sales teams with critical information normally held within the Accounts department, so they have complete visibility of the sales and payment history of their accounts and become aware of issues and opportunities.

Professional Services - Build the strong profitable relationships crucial to any successful customer-facing department. All staff share a single, comprehensive view of clients across the business based upon all their interactions with you. You build up a clearer comprehensive record of all your clients, gaining a deeper understanding of what different client groups demand and where to capitalise on missed sales opportunities, so your clients return time and time again.

Sage 200 New Features

Enhanced Pipeline Management

The tight integration between the opportunity and the quotation allows greater visibility and control over the pipeline. Quotations for potential or existing customers can be raised within the CRM opportunity area (fig 1).

Fig. 1

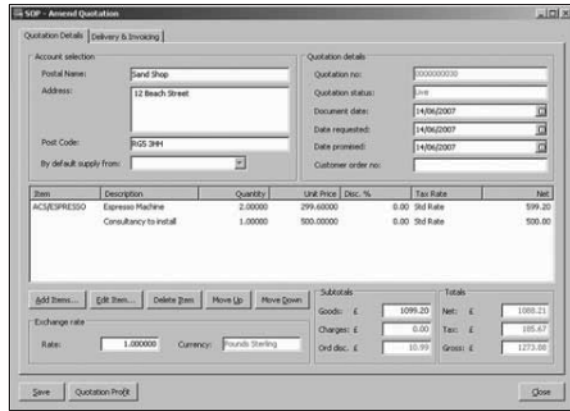


Total Quote and Order Values are updated when quotes and order are created or updated.

Forecast Value – the user can update the sales forecast value using the readily available quote and order information.

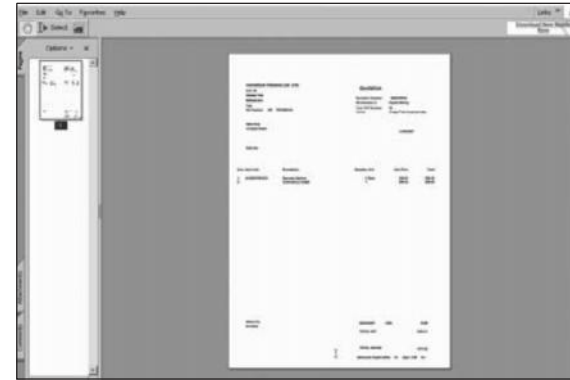
The pipeline remains accurate to reflect amendments made to quotations within CRM (fig 2) as they develop through the sale process, allowing you to view your current sales pipeline based on opportunities.

Fig. 2



An accurate communications history can be maintained allowing visibility throughout the business. Quotations can be viewed and printed within a CRM opportunity (fig 3). When the quotation is printed, a CRM communication will be added to the Opportunity and Company with the printed document attached.

Fig. 3



All pipeline opportunities can be seen aiding in the forecasting process as an enhanced Sage 200 CRM view displays quotations raised against a CRM opportunity (fig 4).

Fig. 4



When the prospect becomes a live customer, if the user has the ability, they can search the list of existing customers conveniently to prevent duplication of data (fig 5). The CRM users have an accurate, informative view of their customers allowing them to provide better customer service.

Fig. 5



The sales cycle is managed from start to end with the correct information being updated to the relevant areas. At the point that the customer accepts the quotation, Convert Quotation to Sales Order will complete the sales cycle by updating the order to Sage 200 accounts. The value of this order is updated against the opportunity and the quotation and orders totals updated accordingly (fig 6).

Fig. 6



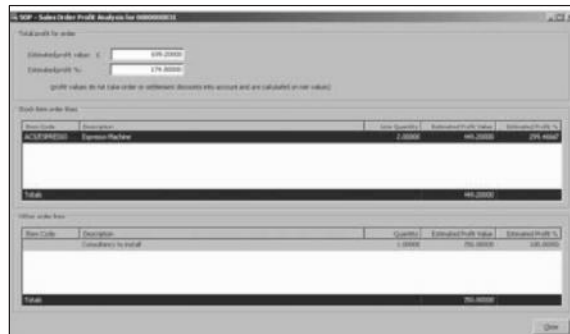
An integrated system fits with a fast moving sales environment. Should a quotation not be required this process can be bypassed and a sales order can be raised from within the CRM opportunity or company area (fig 7). The order details are updated to Sage 200 accounts and the order total within the CRM opportunity area is adjusted.

Fig. 7



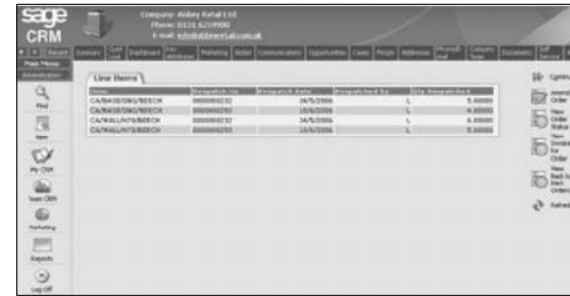
When entering or amending a Quotation or Sales Order there is an option to view the Order Profit (fig 8). Profit margins are maintained as users entering quotations or orders have accurate margin information to hand.

Fig. 8



Customer facing staff can quickly answer customer enquiries, for example the delivery status of an order. As seen below a CRM user can view which order items have been dispatched to the customer (fig 9).

Fig. 9



Customer facing staff can easily retrieve information relevant to a specific order such as invoice details associated with a sale. These can be viewed via a customised enquiry with the CRM module (fig 10).

Fig. 10



An introduction to Sage 200 WTE

The Sage 200 Web Time & Expenses (WTE) module allows Sage 200 Project Accounting users to enter and track their timesheet and expense claims remotely using a web browser. The system can be configured in a number of ways, for example supporting users who enter their timesheets and expenses online (using an internet connection) or through a company intranet. One of the additional benefits of the Sage 200 WTE module is that the user does not require Sage 200 to be installed on their PC to allow the entry of timesheets and expenses.

The resource record within Project Accounting holds a permission tick box for 'Remote User'. If this box is flagged the user is authorised to enter their timesheets remotely.

The module provides remote Timesheet (fig 15) and Expense entry (fig 16) functionality allowing the user to synchronise employee, payroll, financial, timesheet and expense data.

Fig. 15

Easy to use timesheet entry screen

New Time Entry	
History	<none>
Project	000000005 - Kitchen Install Project for Festival Homes
Activity	??? Fitting - Phase 2 - Kitchen Fitting - [100487]
Charge Rate	BAS/Basic
Cost Rate	Emp. Charge Rate A
Pay Rate	No Rates Setup
Date	21/05/2007 To 21/05/2007
Time	From 15:37 To 15:37 Total 00:00
Notes	
Submit & Stay Submit & Back	

Fig. 16

Expenses can be easily submitted by inputting a new expense entry

Timesheet for ASB, John						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
21 May	22 May	23 May	24 May	25 May	26 May	27 May
Project	Activity	Start / Finish	Time	Posted		
000000005 - Kitchen Install Project for Festival Homes	Fitting - Phase 2 - Kitchen Fitting - [100487]	10:35 - 10:35	5:00			
000000005 - Kitchen Install Project for Festival Homes	Plumbing - Phase 2 - Plumbing [100493]	15:36 - 17:36	2:00			
Project	Expense	Value	Currency	Posted		
000000005 - Kitchen Install Project for Festival Homes	Travel/Car/Car hire	600.00	Sterling			

The timesheet and expense information entered remotely is updated to the Sage 200 Project Accounting module. From here the timesheet and expense claims can be authorised or rejected in the usual way.



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