



Sage 200 Commercials



About itas

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Trusted by our clients since 1995, we deliver tailored software solutions and expert advice that gives your growing business the tools it needs to succeed.

Our team of experienced dedicated consultants will get to know you and understand your business so we can design and deliver the right solution for you.

With years of industry experience in CRM, process design, manufacturing and accounts, we have the knowledge you need to get the most out of your systems.

The itas support team are handpicked for their knowledge, great sense of humour and the fact that they get a buzz out of solving your problems.

So no matter what your issue is, you know you have a friendly voice waiting to receive your call.

Even our training is designed to get you up to speed faster, with engaging trainers and a focus on practical activities, so you can hit the ground running.

With our expertise and passion for finding the right solution, our systems and our support gives you the freedom to focus on what you do best.

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Sage 200 Commercials automates the delivery of your customer orders with effective stock management. By responding to product and pricing demands quickly and effectively you can maintain customer loyalty and customer satisfaction and you have the complete control required to manage your supply chain. In addition, tight integration with Sage Payment Solutions enables credit control, and customer service staff, to quickly and easily accept credit card payments from customers.

A flexible, customisable solution with a choice of deployment (on premise or online) and payment. Our solution is designed with our customers in mind, it's easy, simple and quick to use.

Sage 200 has an intuitive, modern interface, easy navigation, toolbars and search to make sure you can get to the information you need quickly and easily.

We've also provided tools to make extracting and interpreting information easy, in a format you know how to use – Excel™.

Feature	Benefit
Summary Pages	
Summary Pages	<p>The Sales Order summary page is highly visual and interactive. For example, customers can zoom-in to focus on specific areas of a chart and drill into chart segments. These enable customers to see performance of each of these areas at a glance.</p> <p>All summary pages are browser based and therefore can be accessed via supported browsers on mobile devices (purchase of a web user required).</p> <p>At a glance visibility of the KPIs of their business, dynamic graphics enable quick and easy interpretation of customer data. Remote anytime, anywhere access of key business metrics on the go.</p>
Sales Order Processing	
Order Documentation	Order acknowledgements, picking lists, delivery notes and invoices.
User Privileges	Configurable user rights for margin calculation, discounting and other options.
View Stock Availability	Availability of stock across locations can be easily viewed at order entry.
Flexible Order Cycle	Configure the system to match your company's workflow.

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Feature	Benefit
Prospect Quotations	Quotations can be created for prospect customers who do not have an account. On conversion of the quote, you will be prompted to create a new account or link the prospect to an existing account.
Stock Allocation	Stock can be allocated to Sales Orders in a number of ways, including by product group. In addition, stock usage can be improved by allocating stock by priority, either by date, sell by date, by bin order, by first in first out or a user defined order. You can rate each customer by importance to ensure that stock is allocated to your most valuable customers first.
Stock Reporting	Full stock reporting is available.
Foreign Currency Orders	Enter orders in any currency
Support for Flexible Pricing and Discounts	In conjunction with the Price Book, complex pricing schemes can be easily adopted and managed.
Price and Availability Queries	Quickly deal with speculative 'price and availability' queries for customers, with applicable discounts.
Control of Tax Code	Choose between the stock item tax code or the tax code on the customer record and override at order entry if required.
Multiple Invoice Layouts	A default layout and customer specific layouts can be created.
Sales Order Profitability	Sales orders record original 'estimated' profit for stock items and a 'realised' profit which is updated either at point of despatch or invoice. True Sales Order profitability is therefore recorded as the actual cost of the item is posted back to the order/order line.

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Feature	Benefit
Part Exchanges	Negative free text items are allowed on a sales order to represent any part exchanges agreed as part of an order.
Multiple delivery addresses	Orders can be delivered to a number of different customer delivery addresses.
Full link 'Back to Back' orders	A Purchase Order can be raised automatically against an item that is not normally carried in stock.
Managing orders	Customer order templates can be saved for repeat orders and run on a weekly, monthly, quarterly or user-defined basis. In addition, new orders can be created based on a previous one, to save re-keying the same information.
Order comments lines	Can be used internally, for example on a picking list, or can appear on customer documentation.
Order consolidation	Multiple orders can be grouped onto a single sales invoice.
SSD (Intrastat) return	Required entries for these returns are collected automatically
Custom analysis codes	User defined analysis codes at order header and order line level can be used for reporting.
Create Purchase Order from Sales Order	<p>Single or multiple purchase orders can be generated directly from the sales order entry screen. This functionality eliminates the need to use the 'generate orders' feature for those who wish to generate individual purchase orders for individual sales orders.</p> <p>Saves you time as you no longer have to access a different menu to generate purchase orders.</p>
Archiving	Older information can be archived to speed up performance, but is readily available for viewing and analysis.
Purchase Order Processing	
Narrative	<p>The Narrative data entry field allows up to 6000 characters to be entered.</p> <p>All reports that currently include the Narrative field display the amount of text that fits within the current column width of the report. Where the narrative text length exceeds the column width the report is appended with "..." to indicate that there is more text.</p> <p>Delivers easy data entry and use and allowing customers to capture more data against individual transactions.</p>
Direct delivery	Back to Back orders can be marked to be delivered directly to the customer's address.

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Feature	Benefit
Label printing	Labels can be printed as part of the stock booking in process
Stock allocation	You can be notified of outstanding Sales Orders waiting for items and are provided with the option to allocate if required.
Order authorisation	Rules can be set up to require supervisor authorisation on orders.
Returns and credits	Manage the return of goods to your suppliers, recording reasons if required.
Order comments	It can be for internal use only, include additional information on your order or can appear on supplier documentation.
Foreign currency orders	Place orders in any currency.
Order matching	Good received can be matched to purchase orders, supplier invoices and delivery notes.
Cancelled Orders	Record cancelled line items for analysis.
Multiple delivery address	Orders with your suppliers can be delivered to a number of different addresses, including your own different premises, customers, suppliers, sub-contractors and ad hoc addresses. You can mix addresses on the same order if required.
Goods received	Prices can be updated at the goods received stage, per stock item.
Automatic accrual	Ensures that management reports are accurate between receipt and invoicing of goods at period ends.
Preferred suppliers	Flags attempted use of non-specified suppliers.
SSD (Intrastat) return	Required entries for these returns are collected automatically
Custom analysis codes	User defined analysis codes at order header and order line level can be used for reporting.
Archiving	Older information can be archived to speed up performance, but is readily available for viewing and analysis.
Landed costs	Stock items can be flagged as subject to landed costs, which can either be a percentage cost or fixed amount.

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Feature	Benefit
Units of Measure	Buy and sell stock items in different units, for example by tile, crate or pallet.
Alternative stock	If the first choice is out of stock, the system will suggest the nearest alternative equivalent stock item.
Comment lines	Default comments from the stock file can appear on picking lists and despatch notes, which are useful for giving specific instructions to your despatch team. You can also amend or replace these comments at order entry.
Search Categories	Custom fields can be populated with keywords which can be used to narrow the search for particular products, for example white bathroom cabinets.
In-built stock taking procedures	Supports cyclical stock taking for individual items. Items can be counted by various methods, including bin location.
Internally-issued goods	Track internal use of stock items.
Attachment of files to a stock record	Attach technical specifications, product images or other documents to each stock record.
Service-type stock	Store details of service-type items - for example, carriage, labour rates and service charges.
Custom analysis codes	Up to 20 customisable fields can be populated for each stock transaction, for detailed reporting.
Negative items	Stock levels of negative stock items can be recorded on the system to give a 'real' stock level value.
Bin numbering	Bins located at each warehouse can be given their own numbering based around your warehouse policy.
Supplier price lists	A list and last price can be stored against a stock item linked to a supplier (including the option to import prices). A further option allows definition of which price is used at the point of ordering.
Landed costs	Stock items can be flagged as subject to landed costs, which can either be a percentage cost or fixed amount.
Label printing	Labels for stock can be automatically generated.

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Feature	Benefit
Price book workspaces	<p>There are 4 workspaces, making enquiries quick and easy:</p> <ul style="list-style-type: none"> • Stock Item Pricing Enquiry • Stock Item Discount Enquiry • Customer Pricing Enquiry • Customer Discounts Enquiry <p>These workspaces provide a quick and easy way to see the prices and discounts set up in the Price Book and their relationship to customers. They provide quick access to all the actions to set up and amend the data and to run reports. You have a choice of desktop list or workspace view. Updated in the latest release to improve performance and replace the sitemap (workspace menu), so workspaces are grouped by module and categorised by actions and reports.</p>
Unlimited prices per item	Unlimited price bands can be created for each item and renamed.
Price band on a customer record	The ability to link price bands and default discount groups to customers can also be done within the customers record
Multi-currency	Price bands can be allocated for different currencies.
Customer price and discount groups	Create customer price groups or 'communities' to attach to individual price schemes.
Unit of measure pricing	Set a specific price for each unit of measure, for example bottle, case and crate.
Margin calculation	If authorised, margins can be displayed during order entry to facilitate price negotiation.
Discount calculation	If authorised, the discounts making up a price can be displayed during and after order entry to quickly answer customer queries.
Unlimited quantity breaks	Unlimited quantity breaks allows you to buy and sell in different units, enabling you to reflect discounts for various units of measure.
Import/Export	Price lists can be imported and exported from spreadsheets.
Price lists	Create price lists showing standard prices or for specific customers or customer groups.

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Feature	Benefit
General	
Desktop lists	<p>Desktop lists available within Sage 200 with toolbars which dynamically re-size to ensure all options are visible. Customers can make filters 'public' within their organisation, so they can be shared with other Sage 200 users. Filters are stored within the database which means they are retained throughout an upgrade.</p> <p>Free text search allows customers to search across all visible columns within a desktop list and totals row for lists enables customers to select individual rows on screen and view totals of any numeric columns at the bottom of the screen.</p> <p>Choose from a scrollable view, meaning you can use a more traditional scroll bar. When in this mode, the application will return the first 1000 rows of data.</p> <p>Where applicable, analysis codes can be added to desktop lists via the column picker and you can customise them. For example, customers can now combine Google maps, charts, graphs.</p> <p>This delivers enhanced performance and makes it easy to use.</p> <p>Upgrade safe filters prevent customer's desktop filters being lost following an upgrade.</p> <p>It provides consistency of available fields within column picker and flexibility to create bespoke desktop lists.</p>
Application homepage	<p>Upon opening the product customers are presented with a choice of three areas – getting started, homepage favourites and frequently accessed. The application remembers which of the three homepage tabs you used when last in Sage 200. Alternatively customers can set any list view, process map or workspace as their homepage. Allows customers to have immediate and one click access to the areas of the product that they want to use.</p> <ul style="list-style-type: none"> • Getting started: designed for new users with one click access to the Help Centre, in product help videos, and quick links to key areas of the software • Homepage favourites: a designated area for customers to add links to the functions they use the most. For example, if a customer's role involves entering sales orders they can add the sales order entry form to the homepage favourites screen and have one click access to sales orders entry form upon opening the product • Frequently accessed: the application learns what you do and when you do it, providing one click access to those functions upon start-up. It's personalised, so if customers perform different activities on different days the application tailors itself around them. For example, if they perform bank reconciliation on a Monday, do debt chasing on Tuesday, and do stock control on Wednesday the application will present quick links to these areas on each of the relevant days.