Sage 200 2013 – What’s New (July 2013)

Features & Benefits Sage 200 2013

Sage 200 2013 delivers on our vision of “Sage 200 for a connected world” by offering customers an online product and introducing a new web user. It also offers more choice by giving customers total freedom and flexibility, with Sage 200 2013 providing choice of deployment (on premise or online), the ability to pick and mix modules to tailor the solution, as well as a choice of payment methods with both deployment options being available on a subscription payment basis.

Sage 200 2013 also sees the introduction of the Sage 200 Online Services portal which can be used to manage Sage 200 Online, it includes Partner billing, provisioning and key analytics and diagnostics which makes providing software and support services much easier.

In addition to the main theme of choice we have added several new product features that deliver on some of the top wish list items – delivering upon the wishes of over 400 of our customers. A detailed list of new features and benefits per module is given below.
<table>
<thead>
<tr>
<th>Reference</th>
<th>Feature</th>
<th>Explanation</th>
<th>Benefits</th>
<th>Location in software</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sage 200 2013 Enhancements:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Choice of deployment – *Sage 200 On premise or Sage 200 Online</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Sage 200 has been re-architected for the Windows ® Azure™ platform allowing customers to access Sage 200 via a desktop client and/or web client regardless of how the product is deployed.</td>
<td>• True customer choice and flexibility – choose how you deploy and how you pay</td>
<td>• *Online modules financials, commercials, Bill of Materials, project accounting and Web Timesheets and Expenses</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Customers can now choose to purchase the product on premise or online, choosing the modules and number of users that they require. In addition customers can choose to purchase perpetual or subscription licences.</td>
<td>• Only pay for what you need - add or remove modules and users as preferred. For a richer UI and long term use opt for a full user, for access on the go opt for a Web User that allows remote access via a range of browsers.</td>
<td>• On premise – all modules</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sage 200 Online</td>
<td>• Sage 200 running on Windows ® Azure™ platform accessed via a desktop client and/or web client</td>
<td>• Improved performance – the new architecture allows all customers to benefit from improved performance regardless of the deployment method.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Next generation multi tenancy solution that allows all the flexibility of customisation without the premium associated with traditional customisable online solutions.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Windows ® Azure™ gives customers a secure, resilient and highly scalable solution online – ideal for those who want the flexibility to scale operations up or down at peak times.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Reduced cost of entry as customers get all of the benefits of a shared infrastructure, whilst being able to run their own version of the application code, customised to meet their exact business needs.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Reduced IT costs as maintenance of the server and security is effectively outsourced eliminating the need for in house expertise</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Online modules financials, commercials, Bill of Materials, project accounting and Web Timesheets and Expenses</td>
</tr>
<tr>
<td></td>
<td>9050, 9132, 9688, 11761, 11879, 11880, 12039, 12139, 23781, 25908, 36, 125, 1256, 357, 450, 767, 784, 1256, 1620, 1906, 2094, 2169, 2379, 2441, 2475, 2729, 2896, 2897, 2960, 3408, 3490, 3495, 3496, 3515, 3572, 3618, 3656, 3854, 4053, 4125</td>
<td>New improved workspaces</td>
<td>• Greater efficiency as data and actions which have traditionally been available via the menu and list view are now available and actionable via a single screen.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Workspaces are general purpose screens which contain all the information currently available through the main enquiry screens in the application. The *majority of enquiry screens have adopted the workspace UI, with a range of new workspaces which are web enabled and are available both through the desktop and through the web client. Workspaces can be accessed via the web client regardless of how the customer has deployed the solution.</td>
<td>• Tailored to the user’s role. All workspaces are easily configured by the user to meet their individual needs. In addition workspaces can easily be customised and extended via the workspace designer.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Workspaces are now the default view replacing the traditional list view within the application, and in addition all workspaces can now be launched from the individual module menus.</td>
<td>• Anytime, anywhere read access to all workspaces using supported PC/clients and devices running a supported web browser – please see full system requirements for more details.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• A conversion tool is available to allow the migration of bespoke workspaces from older versions.</td>
<td>• Satisfies the wishes of 127 customers.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>*Project Accounting enquiry screens remain as is</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ITS ref</td>
<td>Feature</td>
<td>Explanation</td>
<td>Benefits</td>
<td>Location in software</td>
</tr>
<tr>
<td>---------</td>
<td>---------</td>
<td>-------------</td>
<td>----------</td>
<td>----------------------</td>
</tr>
</tbody>
</table>
| Sage 200 2013 Enhancements: | Web User | • The Sage 200 Web User targets a wide range of customers who do not require full access to Sage 200 but who wish to use the system for intermittent, lightweight tasks  
• The web client has cross browser support on PCs. We also have recommended browsers on certain devices i.e. Safari on iPad, IE10 on Win 8 tablets and Android on Nexus 10. Please refer to System Requirements for full details  
• Users can access Sage 200 via devices using these browsers to enter timesheets, expenses, authorise purchase orders and view data that is available in a workspace. Includes the ability to run enquiries and reports.  
• In addition, customers can also add, edit, delete or change the status of memos when accessing via a web browser. This write back functionality is available on the following workspaces:  
  - Customer Account Enquiry  
  - Customer Current Transaction Enquiry  
  - Supplier Account Enquiry  
  - Supplier Current Transaction Enquiry  
  - Bank Account Enquiry  
  - Nominal Account Enquiry  
  - Stock Status Enquiry  
  **Note:** Any Online customer accessing web services via a developer add-on will be required to purchase a Web User license | • Allows users to access Sage 200 via a secure connection using a pure play browser. Anytime, anywhere view access to all workspaces using supported PCs/laptops and devices running a supported web browser – please see full System Requirements for more details  
• Anytime access to write back memos, timesheets, expenses and purchase order authorisation via supported web browsers (as above) | • All modules on premise and online |
| 2095 | *Single sign on | • Customers now have only one log on which automatically handles authentication and authorisation, allowing customers to access the relevant areas of the product according to their permissions  
• On premise customers can now automatically logon to Sage 200 using their Windows ID  
**Note:** Sage 200 Online customers credentials are authenticated using Sage ID and they can have one set of credentials for both their Desktop and Web User | • Greater efficiency and time saving with only one logon to access all areas | • *Sage 200 on premise only |
| | *One click deployment | • The Sage Online Services portal allows Business Partners to deploy the smart client remotely to all client machines  
**Note:** Pre-requisite – all client machines must have .NET 3.5 installed prior to one click deployment.  
**Note:** For an initial short term period, Sage will be managing this on behalf of Business Partners | • Rapid implementation as the speed of client setup is much quicker and easier and can be done remotely | • *Sage 200 Online only |
<table>
<thead>
<tr>
<th>ITS ref</th>
<th>Feature</th>
<th>Explanation</th>
<th>Benefits</th>
<th>Location in software</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sage 200 2013 Enhancements:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
|         | Sage Report Designer enhancements | • Following customer feedback we have simplified the UI of report designer creating a new default view which has all advanced edit tools hidden from view. The user can then choose to show any of the hidden content on an incremental basis, with the option to reset back to the default view.  
• In addition an Edit option has been added to the preview screen which will launch the Sage Report Designer. There are also a number of new usability enhancements, for more information please refer to knowledgebase article number 29326. | • Improved ease of use and a better user experience as new report designer and underlying reporting layer result in an easier to use and more intuitive offering.  
• Ensures consistency as customers moving from Sage 50 now experience a smoother upgrade experience as they can use the same report designer which should be familiar to them. | All Sage 200 modules with the exception of Sage 200 CRM |
|         | Support new technology platforms | • Support for Windows 8 Enterprise and Professional clients  
• Support for Microsoft Windows 2012 Server (including Essentials)  
• Support for Microsoft Office 2013 (32 & 64 bit) and Microsoft Office 365 (NB: Office 2013 is not supported with CRM until we support v7.2- see CRM section)  
• Support for Internet Explorer 10 | • Ensures customers are supported on modern and up to date technology platforms | Sage 200 – all modules |
|         | Office 365 integration | • Sage 200 offers the same level of integration with Microsoft Office 365 as we offer to on premise Microsoft Office  

**Note:** For an initial short term period Sage will be managing this on behalf of Partners  
| | | | Ensures customers can integrate with Microsoft Office regardless of deployment method | |
|         | Sage 200 Online Services portal | • The deployment and management of Sage 200 on Windows © Azure™ is made simple through this web based management portal which is used by Sage, Business Partners and customers to manage the provisioning and monitoring of their Sage 200 solution.  

**Note:** For an initial short term period Sage will be managing this on behalf of Partners | • Rapid and efficient implementation via the Sage 200 ERP Online Services portal enabling Business Partners to create new sites, add users and modules, grant access permissions, deploy service packs and patches and view billing and subscriptions.  
• Allows Business Partners to deliver greater customer service by providing scalable, on demand solutions that can be flexed up or down quickly and easily. In addition provides peace of mind as they have visibility of the system status and history, control of administrative elements, access to diagnostic and support tools – all providing confidence in the integrity of the system and its continued operation. | Sage 200 Online only |
|         | Online help | • Help files can now be accessed by standard search engines.  
• HTML 5 output provides improved look and feel.  
• Rationalisation of topics to provide suite-wide approach, instead of modular.  
• Help files can be updated outside of the standard release cycle ensuring customers always have access to the most up to date information. | • Users can find official Sage 200 help by searching the internet in addition to searching within the product.  
• Users can find topics more easily because HTML5 output improves the ranking of topics in the search and provides a brief overview of what the topics contain within the search window. | All Sage 200 modules with the exception of Sage 200 CRM |
<table>
<thead>
<tr>
<th>ITS ref</th>
<th>Feature</th>
<th>Explanation</th>
<th>Benefits</th>
<th>Location in software</th>
</tr>
</thead>
</table>
| 4140, 28 | Print Spooler enhancements | • The spooler list is now available within a workspace which can be accessed either via the desktop or the web client  
• Customers now have the ability to sort the spooler by the date/time Column  
• In addition customers can now run company specific reports | • Improved UI and experience with the ability to sort and access remotely via a browser  
• Access to reports anytime, anywhere via a standard web browser  
• Satisfies the wishes of over 80 customers | All Sage 200 modules with the exception of Sage 200 CRM |
|        | New Sage 200 licencing   | • From version 2013 onwards the licencing mechanism has changed and customers no longer use activation strings  
• We have introduced one mechanism for both on-premise and online  
• NB: CRM continues to use a separate licencing mechanism | • Allows us to check customers entitlement to use the product against server machine ID, payment and registration  
• Provides an automated, dynamic and more seamless process for activation and renewal of Sage 200 licences | All Sage 200 modules and users with the exception of Sage 200 CRM |
<table>
<thead>
<tr>
<th>ITS ref</th>
<th>Feature</th>
<th>Explanation</th>
<th>Benefits</th>
<th>Location in software</th>
</tr>
</thead>
</table>
|         | Price book workspaces | • We have introduced 4 new workspaces which improve the price book UI and make enquiries much quicker:  
  • Stock Item Pricing Enquiry  
  • Stock Item Discount Enquiry  
  • Customer Pricing Enquiry  
  • Customer Discounts Enquiry | • 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. |  |
| 223     | Simple cash flow report | • Following customer feedback we have introduced the ability to produce a simple cash flow forecast report that allows customers to enter budget values for nominal accounts for up to five future years, as well as design their own financial statement layouts, based on this budget data. The cash flow report allows a customer to:  
  o Report on Sage 200 budget data to the end of next financial year  
  o Report on Sage 200 data combined with external data for up to five years (this year and next year budget from Sage 200 and remainder from spread sheet)  
  o Report using external spread sheet values only.  
  • For each accounting period the report will show information for Cash in Hand, Value for each income heading, Total cash receipts, Value for each expenditure heading, Total cash paid out and Closing cash position. | • Enables customers to quickly and easily obtain an accurate view of the financial state of the organisation based on actuals and budgets for up to five years  
• Produce financial statements in familiar formats that aid business planning and funding applications.  
• Enhanced import routines to allow the import of budgets using the profiles, and to import multiple future years budgets. Satisfies the wishes of over 25 customers. | Sales ledger and sales order processing  
Customer/supplier account imports |
|         | Short term cash flow projection | • Following customer feedback we have introduced the ability to produce a short term cash projection within Sage 200 similar to the cash projection within Sage 50  
• Short term cash projection allowing the forecast of the amount of cash available in the bank accounts after outstanding transactions have been paid  
• The short term cash flow projection forecast is built on cash book data and is generated using a date range with predefined options of next 7 or 14 days, next month, next 2 or 3 months together with the ability to manually define the date range  
• The forecast can be based on a single bank account, a range of bank accounts or all bank accounts. The system uses the current book balance (as at) of the selected account(s) in base currency to produce an opening balance for the forecast. The forecast is then constructed based upon regular payments, forecasted payments, regular receipts and forecasted receipts  
• Customers can print a report showing a day by day breakdown of cash for the date range entered. In addition a customer can choose to send to Excel to produce a single Microsoft Excel spread sheet with the Summary First, Bank Accounts, and then transaction list | • Allows customers to quickly and easily manage cash flow by understanding the short term financial position instantly by easily seeing who owes money and identify outstanding expenses  
• Allows customers to immediately see the impact of an unexpected expense or a delay in the processing of an unexpected receipt  
• Ensures consistency as customers moving from Sage 50 now have a familiar cash flow projection screen | Cash book |
<table>
<thead>
<tr>
<th>ITS ref</th>
<th>Feature</th>
<th>Explanation</th>
<th>Benefits</th>
<th>Location in software</th>
</tr>
</thead>
<tbody>
<tr>
<td>1354, 27</td>
<td>Free text credit note</td>
<td>Previously customers could only create and print free text invoices in the sales ledger; they could not create and print equivalent credit notes. Customers now have the ability to create and print free text credit notes within the sales ledger</td>
<td>Improved UI and customer experience with the introduction of new and enhanced functionality • Enables customers to reduce the turnover for the relevant customer's account • Increased flexibility and efficiency • Satisfies the wishes of over 70 customers</td>
<td>Sales ledger, enter transactions</td>
</tr>
<tr>
<td>824</td>
<td>Improved imports: import email and website address</td>
<td>The existing import routines have been extended to allow the import of email address and website address for preferred contact for customer/supplier accounts</td>
<td>Removes some of the limitations of the customer/supplier account import routines by enhancing the type of data that can be imported • Satisfies the wishes of over 50 customers</td>
<td>Customer/supplier account imports</td>
</tr>
<tr>
<td>223, 790</td>
<td>Improved imports: nominal</td>
<td>New import facilities have been introduced to enable the import of cost centres and departments. Users will be prompted as to whether the import should overwrite existing departments or not – default will be to overwrite • In addition, the import nominal budget routine has been enhanced to allow users to import up to 5 years budgets (current plus 4). This feature supports the import of annual and profiles budgets</td>
<td>Removes some of the limitations of the nominal account import routines by enhancing the type of data that can be imported • Satisfies the wishes of over 30 customers</td>
<td>Nominal imports</td>
</tr>
<tr>
<td></td>
<td>Updated EU countries list</td>
<td>Croatia joined the EU in July</td>
<td>The list of EU countries within the product has been updated to include Croatia</td>
<td></td>
</tr>
<tr>
<td>ITS ref</td>
<td>Feature</td>
<td>Explanation</td>
<td>Benefits</td>
<td>Location in software</td>
</tr>
<tr>
<td>--------</td>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
<td>----------------------</td>
</tr>
</tbody>
</table>
|        | Support for CRM v7.1 patch i | - Sage 200 v2013 will ship with Sage CRM v7.1 patch i  
- We will aim to support CRM v7.2 with Sage 200 v2013 service pack 1 which will be circa end of Oct 2013  
- **Note:** MS Office 2013 is not supported in v7.2 yet – as above. Any customers who wish to use Sage 200 v2013 with MS Office 2013 and Sage 200 CRM will need to wait until Sage 200 v2013 SP1 (when we support v7.2) before upgrading | - Incorporates all fixes within v7.1i                                                           | Sage 200 CRM         |
|        | Cross browser support for Sage 200 CRM | - Users can now access Sage 200 CRM via tablets using a supported browser. | - Allows users to access Sage 200 CRM via a secure connection using a pure play browser.  
- Anytime, anywhere access using a tablet running a supported web browser | Sage 200 CRM         |
|        | CRM marketing groups         | - Following customer and Business Partner feedback we have introduced the ability to create groups based on products purchased.  
- Customers can now create groups within a specified date range based on products purchased, returned or quoted for. | - Allows customers to quickly and easily create a marketing group and run campaigns based on the purchase history of customers.  
- Improved UI and customer experience with the introduction of new and enhanced functionality.  
- Increased flexibility and efficiency | Sage 200 CRM, Marketing |
<p>|        | Sync status                  | - Integration company status tab shows companies with their filterable Sync status and hyperlinks from the company name to the Financials tab | - Allows customers to easily identify if a sync has failed and quickly relink the company. | Sage 200 CRM         |</p>
<table>
<thead>
<tr>
<th>ITS ref</th>
<th>Feature</th>
<th>Explanation</th>
<th>Benefits</th>
<th>Location in software</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Sage 200 Manufacturing enhancements</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
|         | **Graphical Planner v12** | • Sage 200 v2013 will ship with the latest version of Preactor Graphical Planner-v12 | • Allows our customers to receive all the benefits of latest version of Preactor Graphical Planner v12.  
• This latest release includes performance and UI improvements to deliver a better user experience. | • Sage 200 Manufacturing – MRP module |
|         | **Manufacturing Resource Planning (MRP) – 11 new workspaces** | • MRP By Stock Item - Displays all data processed by MRP by selecting a Stock Item. Drill to capability available. Stock Projection chart also embedded  
• MRP By Product Group - As above, but allows selection of a Product Group. MRP data for every Stock Item in that Product Group is shown  
• Make to Stock Records - Displays Make To Stock records and the detail behind them  
• MRP By Buyer Code - Allows easy identification of MRP Recommendations via Buyer Code  
• MRP By Supplier - Displays MRP Buy Recommendations grouped by Supplier  
• MRP Recommendations By Action - Shows MRP Recommendations grouped by Action – i.e. New or Cancel  
• MRP Recommendations By Status- Shows MRP Recommendations grouped by Status – i.e. Entered or Actioned  
• MRP Recommendations By Type - Shows MRP Recommendations grouped by Type – i.e. Make or Buy  
• MRP Relationships – Goes beyond what desktop lists currently provide by providing ability to easily identify parents and descendants for MRP Recommendations. Also offers “drill to” capability for wide variety of entities  
• MRP Stock Projection - Displays Stock Projection by Stock Item/Warehouse in chart format  
• Sales Forecast Records - Displays Sales Forecast records and the detail behind them | • Greater efficiency within MRP as data and actions which have traditionally been available via the menu and list view are now available and actionable via a single screen  
• Any of the new workspaces can be tailored to the user, all workspaces are easily configured by the user to meet their individual needs. In addition workspaces can easily be customised and extended via the workspace designer  
• Anytime, anywhere view access to all workspaces using supported PCs/laptops and devices running a supported web browser – please see full System Requirements for more details | • Sage 200 Manufacturing – MRP module |
<table>
<thead>
<tr>
<th>ITS ref</th>
<th>Feature</th>
<th>Explanation</th>
<th>Benefits</th>
<th>Location in software</th>
</tr>
</thead>
</table>
| Sage 200 Manufacturing enhancements | Estimating – 10 new workspaces | - Estimate Performance - Provides comparison of successful/unsuccesful Estimates over past 12 months in both chart and list format  
- Estimate Profitability Charts - Provides charts showing data gathered from Estimating (Profit is calculated by looking at any actuals collected against associated Works Orders):  
  • Most/least profitable Stock Items  
  • Most/least profitable Customers  
  • Successful/unsuccesful Estimates in last 12 months  
  • Profit by Salesperson YTD  
  • Unsuccessful Estimates By Customer YTD  
- Estimate Profitability - As above, but in list format  
- Estimates By Customer - Displays Estimates summarised by Customer:  
  • Most/least profitable YTD Chart  
  • Customers YTD  
  • Estimates YTD  
- Estimates By Salesperson - As above, but by Salesperson  
- Estimates By Stock Item - As above, but by Stock Item  
- Estimates In Production - Shows Estimates currently in production  
- Estimates - Displays Estimates, with many connected panes to show further details  
- Multi-Item Estimate Details - As above, but groups Estimates associated with each other together  
- Multi-Item Estimate List - Replicates a desktop list, showing just the records belonging to a multi-item set. Useful for people who only have multi-item Estimates by removing the noise you get in existing desktop list | • Greater efficiency within Estimating as data and actions which have traditionally been available via the menu and list view are now available and actionable via a single screen  
• Any of the new workspaces can be tailored to the user, all workspaces are easily configured by the user to meet their individual needs. In addition workspaces can easily be customised and extended via the workspace designer  
• Anytime, anywhere view access to all workspaces using supported PCs/laptops and devices running a supported web browser – please see full System Requirements for more details | • Sage 200 Manufacturing – Estimating module |
| | Bill of Materials (BOM) workspaces web enabled | - All existing BOM workspaces, including those added in Sage 200 v2011 SP3 have now been converted to the new workspace format | • Anytime, anywhere read access to all workspaces using supported PCs/laptops and devices running a supported web browser – please see full System Requirements for more details | • Sage 200 BOM |

Please note: Sage 200 Mobile is not yet compatible with Sage 200 v2013 and as previously communicated the old report designed and transaction email have been deprecated in v2013.