Time to take the next step?
Sage 50 upgrade guide
Time for the next step?

“While it had served us well in the early days, Sage 50 Accounts could no longer support our business requirements and was struggling to cope. Looking for a more powerful solution in the Sage range was a natural progression for our business.”

Solutions to suit different business needs

How do you know when you need to consider a larger accounting solution for your business or when you need something more powerful?

In an evolving business world and changing market, we expect you’re faced with new challenges every day. We understand how important it is to have the right software in place to support you and your growing business, whether you are expanding into new markets, require broader market insight or have increasingly complex business processes.

Common changes undertaken by Sage 50 customers include expanding their product range, increasing their employee numbers, placing more emphasis on trading with overseas customers, and the need for more complex business processes. Changes like these are the trigger to reassess a business system and look at new ways of doing things.

In our experience there are usually a number of reasons driving the need to move to a larger system i.e. not simply a need for a system that accommodates more users or larger volume of transactions.

We’ve produced this guide to help you make that decision.

“It’s reassuring that our Sage software is designed to grow with us and accommodate our future growth needs.”

Get your free business review today to explore how we can help you.

Just contact us on 0845 111 99 88 or email customer.development@sage.com
A customer's view
Using Sage 200 to produce their reports saves a specialist holiday company at least 1 hour per day.

So how do you know when to make the next move?
If you currently use Sage 50 accounts, the next most logical step is to move to Sage 200, however we want to make sure the solution is right for you, so think about you and your business before going any further.

The market & your business

<table>
<thead>
<tr>
<th>Sage 50</th>
<th>Sage 200</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Maturity</td>
<td>Established/expanding on a small scale</td>
</tr>
<tr>
<td>Size</td>
<td>Single UK site</td>
</tr>
<tr>
<td>Concurrent users</td>
<td>1-10</td>
</tr>
<tr>
<td>Estimated turnover</td>
<td>£10k - £10m</td>
</tr>
<tr>
<td>People</td>
<td>Individuals responsible for one or more specific areas of the business and need to access most features of the package to process transactions</td>
</tr>
</tbody>
</table>

Functional requirements
- UK base, not trading in foreign currencies
- Users need access to the majority of the programme
- Simple, straightforward processes – can use out of the box templates
- Want to be able to customise the software to individual requirements
- Require more control over people and processes
- Started to introduce more flexible/complex business processes
- UK based, potentially trading in foreign currencies
- Systems need to be integrated with third party applications

What do you need from your product?
- An out of the box solution – few choices and preset to the most common ways of working
- A simple accounts package that does the job
- A solution with direct support
- A complete view of customers, suppliers and their interactions across your business
- More users
- Multi company consolidation
- Full cost centre and departmental P&L
- Increased control over financial periods
- Serial no. and batch traceability, units of measure
- More extensive reporting tools with quick and easy access to detailed financial data
- Personalised dashboards
- A solution designed around your business processes
When to upgrade

If your current solution does not scale up to meet your business needs

- You have recently experienced company growth
- You have more complex business processes
- You need more detailed reporting
- You have an increased number of users which is affecting system speed and performance
- You require more users to access the system
- You need to store more history (Sales, Purchase) within the system

If you are expanding and your solution no longer meets with your requirements

- Business processes are becoming increasingly complex
- You need to manage and co-ordinate the whole business
- You need to make strategic plans for growth using informed, accurate analysis
- You need to automate as many processes as possible to reduce the amount of time spent on administrative tasks
- Your staff need to send out company information to customers quickly and easily
- You need to manage multi-stage marketing campaigns including telemarketing activities

- You can’t track budgets, costs and revenue generated against campaigns to see the ROI of individual campaigns
- You need all of your customer interactions (sales, marketing, customer service) tracked within one system

If you are missing key functionality such as:

- Increased control over financial periods
- Three tier reporting in the nominal ledger
- Flexible Period Accounting
- Advanced handling of foreign currency
- Advanced Management Reporting and Business Intelligence
- Billing stock in multiple locations / warehouses
- Batch/serial number processing or traceability (stock tracking in multiple locations)
- Pick, pack, despatch routine
- More powerful reporting tools giving you quick and easy access to financial data
- Integrated CRM functionality
- An increased need for customisation of systems
- A specialism in a vertical market
How Sage 200 can help

Improve Customer & Supplier Management

Not just accounts software - enables you to streamline your business processes and accelerate business efficiency

- 360 view of customer – one view of your business
- Quick view of multiple records
- Deal with foreign transactions
- Pay suppliers using different methods
- Identify credit risks quickly
- Manage tasks all in one screen

Enable your Sales Force

Boost productivity, reduce costs, find new customers, close sales faster and build lasting more profitable relationships

- Easily manage Marketing & E-Marketing Campaigns
- Diary & Task Management
- Accurate Stock & Price Information
- Automated workflow and pipeline management
- Interactive dashboards and workspaces to improve efficiency
- Remote access to customer and opportunity information

Better Financial Control

Customise the solution to produce standard reports tailored to your business, with the ability to quickly interrogate data.

- Accounting Period Control
- Cost centre & Departmental analysis
- Debtor & Creditor Reconciliation
- One business view for simple financial reporting
- Customise financial statements/reports to display the information you need
- Quickly and easily build or amend reports
- Trade in an unlimited number of currencies and keep track of rates

More Operational Control & Automation

Highly configurable and customisable to meet your individual business requirements

- Multiple warehouses
- Batch & serial Traceability
- Dispatching / Receiving Goods
- Stock takes
- Sales order processing / purchase order processing entry
- Generation of purchase orders
- Back to back order processing
- Order fulfilment
- Manage tasks all in one screen

Effectively Manage Service Issues

Enables your business to be more responsive and deliver improved customer satisfaction.

- Manage the complete customer lifecycle and increase customer retention
- Role-orientated workspaces and menus that enable your people to be much more productive
- Access data in the way you want, when you want
- Collaborate effectively across your wider business community
- Control Service Level Agreements
- Case Management
- Remote access to essential data when you’re on the road via mobile

Improve Management Information

Smarter business decisions with Sage 200 offering a unified view of all your data with complete management dashboards and analysis as standard as part of the software package

- Make informed business decisions by analysing metrics and KPIs e.g. who are the worst/best paying customers? Where am I overspending/losing money? How are we doing compared to last year?
- Enables you to embrace strategic planning for business growth
- More responsive with the ability to support future planning and identify opportunities
Sage 200 gives you one view of your business

As your business is growing, are you losing that ‘single customer view’? Even the most sophisticated companies cannot get a simple view of their customer.

Sales Representative
- Great customer
- Entitled to a 10% discount
- Has recently moved offices

Marketing Director
- Has received 5 marketing campaigns in 3 months
- Responded to 1 campaign
- Total spend £40, with 5% discount

Support Manager
- Problem customer
- Over 20 calls using 30 hours of support
- Cost over £1500 last month

Financial Director
- 90 days past due
- On credit hold
- Phone no. is disconnected

Disparate systems that don’t talk to each other?
1. Not just accounts software: an integrated, business-wide solution for accounting, interrogation of data, contact and pipeline management.

2. Regular product updates: We provide regular product updates free of charge offering new features based on what our customers tell us they want.

3. Get up and running quickly: it takes from only 5 days to implement with our migration tools to easily transfer your data from Sage 50 to Sage 200.

4. More automation, reduce errors: build processes and reports to reflect how your business works – add fields, screens and custom controls; use automated alerts for users to highlight errors e.g. when a credit limit has been reached, improving efficiency and reducing errors.

5. Bigger solution, better control: Sage 200 allows up to 50 concurrent users to access the system, so you can access an account even if someone else is in it unlike Sage 50. Start considering Sage 200 if you need 8 or more users.

6. Award winning reporting: We won the Software Satisfaction Award 2011 for our Business Intelligence reporting tools. Sage 200 gives you comprehensive reporting and analysis with over 250 ready-made reports and layouts with enhanced Excel integration and business intelligence tools, including configurable workspaces brought together in one screen – see the information you need at a glance and customise it to different users so sales to finance to customer service all have access to the information they need quickly.

7. More choice: pay upfront or use finance to spread the cost over months/years to get up and running quickly even when budget is a stumbling block.

8. Anywhere, anytime access: to business critical information on customers, sales, stock items and suppliers as well as full system access control – configurable to your business.

9. Only enter information once: we ensure that all data is the same wherever part of the system you access – no need to relay information, saving you time.

10. A solution for the future: SQL database means you can have unlimited numbers of users and transactions with no deteriorations in speed and no file locking. Having an SQL database also makes it much easier to integrate with 3rd party systems. Also has data validity to help stop data corruption.

11. Regular product updates: We provide regular product updates free of charge offering new features based on what our customers tell us they want.
Sage 200 Financials and Commercials

Managing the day to day running of your business, Sage 200 Financials and Commercials has been developed to provide you with unrivalled business control and management reporting, utilising information held in the Nominal Ledger, Cash Book, Sales and Purchase Ledgers. Take complete control of your supply chain, managing every element, including quotations, price books, the delivery and receipt of goods, and sophisticated stock management with a system that fully integrates your financial and trading modules.

1. Advanced multi-currency capabilities: particularly when an increasing amount of trade is with foreign customers and/or suppliers, process foreign currency transactions, monitor exchange rate fluctuations and impact on finances across all ledgers and cash book.

2. Flexible accounting periods: with up to 20 periods, which can be open, closed and re-opened as required; which can also control the length of period and period structures can also be set up in advance for future years.

3. A flexible nominal code structure: including departments and cost centres as well as Profit and Loss and Balance sheet reporting linked to specific jobs or projects and option to group accounts for reporting purposes (merge nominal ledger of different companies or departments across the group). Make adjustments to previous year journals and roll changes forward to ensure your accounts are accurate and up to date.

4. Batch data upload: enter a batch of journals and place transactions on hold for authorisation before committing them to the Nominal Ledger.

5. Support for EU triangulation: improved functionality for Sales Ledger and Order Processing.

6. Reflects different trading periods: and you can do batch data/journal entry in sales and purchase ledgers, saving you time.

7. Automate statements, direct debits and standing orders: set up processes to send statements or copies directly to customers or head office if you need to and/or set up/view standing orders or direct debits to maintain company cashflow. Get a view of all outstanding customer payments in a few clicks and view invoices and automate payments to suppliers.

8. Improved reporting: define analysis codes and link to Sage or Purchase ledger (or both) and add a list of values provided to ensure accuracy of the data captured. Produce detailed reports by region, sales representatives, industry type, customer rating, account manager, partner etc.

9. Store unlimited customer and supplier contact details: (phone numbers, addresses, websites etc) against customer and supplier records and assign rules by contact to ensure the right information goes to the right contact.

10. More VAT flexibility: choose VAT inclusive or exclusive prices so you can set up as many VAT codes as you want and choose whether to account for the VAT on a deposit at the point of entering the payment against the order or at point of invoice ensures compliance with regulation and reduces credit control.

11. Manage stock over one or more warehouses: each location can be operated independently in terms of replenishment, sales, reporting and stock takes. Allows businesses that have fast moving stock who use the stock level routine to realign stock levels quickly and accurately, giving a more complete view of the stock held in your business.

40 more reasons to upgrade from Sage 50
Upload unlimited supplier price lists: and last price against individual stock items, particularly useful when you’re dealing with multiple suppliers and want to make sure you have the best price or flag preferred suppliers. Quickly enables you to identify other suppliers when something is out of stock and supports margin-based selling e.g. 100 products in stock – costs £40 for 50 of them, £45 for 20 and £42 for 30 items. Sage 50 is restricted to one supplier per item.

Better stock traceability: batch and serial number traceability, trace items by ‘sell by’ and ‘use by’ and stock group, particularly useful for perishable goods. Pick and record items from a list and amend at dispatch if necessary and record user-defined information against each batch or stock item and allocate/auto generate serial numbers to individual items. Up to 20 customisable fields can be populated for stock transactions, so you can monitor movements and trace back the order.

Keep track of stock internally: monitor internal movements to different areas of the business as opposed to departments defined in the nominal ledger improving efficiency and maintaining budget control e.g. how much stationary is used by a particular team in a department.

‘Real world’ stock take: enables you to count the most valuable items or particular products in stock.

Easy look up: find stock items by name or reference number for quick access when you’re dealing directly with customers over the phone.

Flexes to match your supply model: helps you handle customer or supplier expectations and reduce time taken from order to shipment, e.g. you can choose not to stock an item and instead ship it direct from your suppliers to your customers and if that item is returned you can choose to ship it out to the next customer even if you don’t usually carry it in stock. Also prioritise your most important customers first, so you keep them happy and allocate stock to orders as it is received, reducing time taken to fulfil orders.

Improve stock control: flag items as ‘inactive’ so they can’t be ordered but remain on the system with full history. This can be applied permanently or temporarily and is useful if you cannot order items when a warehouse is quarantined, bonded, undertaking a stock check or the goods are damaged. The sales order flag also enables you to exclude these items from the sales ordering process to prevent errors and increase efficiency of the ordering process.

Labelling: Match to label production and automate production or required stock items.

Supports simple or complex pricing: from discount to price band based schemes, easily apply this to multiple customers without having to recreate it each time and easily manage price bands in more than one currency. Apply promotions or price changes quickly and easily by exporting to excel and reloading to Sage 200 in one go.
Accommodates your pricing model and units of measure: unlimited price bands for each stock item and with custom labels, it’s easier to understand and maintain prices; create prices by units of measure (e.g., bottle, case and crate) adapted to your business.

Automatic validation: to make sure your pricing schemes are sensible, there are no negative prices and margins remain as expected.

Improved analysis: view the profitability of each product by month allowing you to analyse product activity down to a customer or supplier level and show orders in the sales order and purchase order allowing you to identify who purchased and sent the order and when it was dispatched.

Choice of full or rapid order entry: switch from full to rapid order entry with ease, saving time for straightforward orders – only one click to switch between screens.

Quickly create and store quotes: no need for a sales account to be created for quick quotes but can easily link to existing accounts if they want to make an order, keeping your accounts ‘clean’.

Multiple invoice layouts: tailor invoice layouts to individual customers or suppliers, allowing multiple layouts in one print run.

EC sales list regulations: provides information in required format for current HMRC submission.

Enhanced purchase order processing and remote alerts: apply various levels of authorisation limits and also authorise orders remotely via a secure website whilst out of the office, making sure your business doesn’t stop when you’re not at your desk.

Effective supply chain management: easily manage all your purchase orders, quickly finding individual orders and drilling down to view the details.

Supports complex supply and delivery models: select different delivery addresses per order line, specify different delivery addresses to one supplier and provides information to help you with order fulfilment and price negotiation and see the full ‘story’ of an order.

Choice of full or rapid order entry: switch from full to rapid order entry with ease, saving time for straightforward orders – only one click to switch between screens.

Quickly create and store quotes: no need for a sales account to be created for quick quotes but can easily link to existing accounts if they want to make an order, keeping your accounts ‘clean’.

Multiple invoice layouts: tailor invoice layouts to individual customers or suppliers, allowing multiple layouts in one print run.

EC sales list regulations: provides information in required format for current HMRC submission.

Enhanced purchase order processing and remote alerts: apply various levels of authorisation limits and also authorise orders remotely via a secure website whilst out of the office, making sure your business doesn’t stop when you’re not at your desk.

Effective supply chain management: easily manage all your purchase orders, quickly finding individual orders and drilling down to view the details.

Supports complex supply and delivery models: select different delivery addresses per order line, specify different delivery addresses to one supplier and provides information to help you with order fulfilment and price negotiation and see the full ‘story’ of an order.

Choice of full or rapid order entry: switch from full to rapid order entry with ease, saving time for straightforward orders – only one click to switch between screens.

Quickly create and store quotes: no need for a sales account to be created for quick quotes but can easily link to existing accounts if they want to make an order, keeping your accounts ‘clean’.

Multiple invoice layouts: tailor invoice layouts to individual customers or suppliers, allowing multiple layouts in one print run.

EC sales list regulations: provides information in required format for current HMRC submission.
Sage 200 Business Intelligence and CRM

Effectively analyse critical business information for agile decision-making and improved visibility across your organisation with powerful analytical tools. Manage your customer and supplier relationships and offer the highest quality of service and support. Improve the effectiveness of marketing campaigns, easily identify new customers, and take care of those you already have.

Easy-to-use reporting and analytics: Sage 200 brings business data into the familiar Microsoft Excel environment allowing quick analysis of company data from many different angles. This means the features of Excel, such as ease of managing and manipulating data, calculations and macros can all be used to enhance the reports created using Sage 200. Get a high level overview or drill down to the in depth information you need in a matter of clicks.

Pre-defined reports to get you started: quick and easy access to business critical information, change report fields in seconds for access to key information such as Profit & Loss by cost centre and department, sales by customer by month, stock valuation last 3 months, trend in overdue orders and stock movements by product group and many more.

Dashboard wizard: powerful editing tool making it easy to extract the information you want quickly.

Dashboards and charts: get the information you need in the format you require, set up daily, weekly or monthly dashboards to display the information you need on a regular basis when you want it.

Built in case tracking and pipeline management: management of opportunities and leads enabling you to track through to final sales closure. Integrates with accounting and stock modules, so customer services can have access to front and back office data if required, giving you a complete view of the customer allowing you to deliver better customer service.

Deliver marketing campaigns: create e-marketing campaigns and keep track of results – see which campaigns are most effective (using leads, budget or costs), allowing you to more effectively target customers and prove the impact of your marketing activity.
Want more?
We offer specific modules for businesses in certain industries making sure that we cater for your specialism.

**Specific module for businesses that manage projects** enables you to identify opportunities for increasing revenues and reducing costs. Sage 200 Project Accounting simplifies data capture, gives you complete control over all the financial aspects of your projects, providing the information you need to improve profitability.

**Online timesheets and expenses input:** Timesheets and expenses software allowing you to enter, print and authorise timesheets and expenses via a web browser when you’re out of the office, enabling you to keep your project costs right up to date.

**Manufacturing businesses:** A powerful manufacturing solution, Sage 200 Manufacturing enables you to track supply chain activities in detail, from end to end. It enables you to maintain maximum productivity while ensuring profitability.

**Construction businesses:** Letting you manage and control your business more effectively, increasing customer satisfaction and profitability, Sage 200 Construction manages projects from estimates to completion, enabling you to maintain maximum productivity while maintaining profitability.

Call us to talk about even more reasons to upgrade: **0845 111 99 88**
Avantec – Recruitment

“As a result of consistent growth, Avantec found that Sage 50 was no longer meeting their business requirements. Needing a solution that was flexible and suited their specific needs, it was crucial to find the right offering that would support the long term growth of the company and could be quickly implemented and easily adopted. Designed specifically for growing businesses that require greater integration, flexibility and efficiency, Sage 200 provided the optimum solution as well as a natural migration path from the Sage 50 Solution. Sage 200 will allow Avantec to streamline processes, making the business more efficient and help support their growth. The Decision to upgrade was a simple one. Our Sage Business Partner made the time to really understand the challenges we faced as a growing business and what we needed from our software. The insights that we’re now receiving from the business are allowing us to reach our full potential!”

Carol Williamson, Office Systems Manager, Avantec

Signature Works – Printers and Distributors

“We used to rely on Sage 50 Accounts and Goldmine customer relationship management (CRM) software and while these had provided good service over the years, they were approaching end of life and were unable to handle rising transactions volumes and an expanding user base.

With high levels of repeat business, it’s essential that staff can track and trace every interaction with a customer, from historical information on past orders through to a snapshot of the status of any current order.

We needed a more powerful solution that would integrate accounts and CRM, and increase efficiency while delivering excellent service to customers. With high levels of repeat business, it’s essential that staff can track and trace every interaction with a customer. From historical information on past orders through to a snapshot of the status of any current order.

With Sage 200 we have information seamlessly at our fingertips, so we can instantly respond to customers’ requirements and queries and give them the answers they need. It’s very impressive!”

Malcolm Ditty, Director, The Signature Works Ltd

See why some of our customers made the move…
At Sage, we offer a variety of software and services to help manage your business even more effectively.

Over half of the UK’s superbrands use Sage to do business, including Birds Eye, Blenheim Palace, Wates and Lloyds TSB. We’d like to offer you or a colleague a free, no commitment review to explore how we could help your organisation.

Just call us on 0845 111 99 88 or email us at customer.development@sage.com