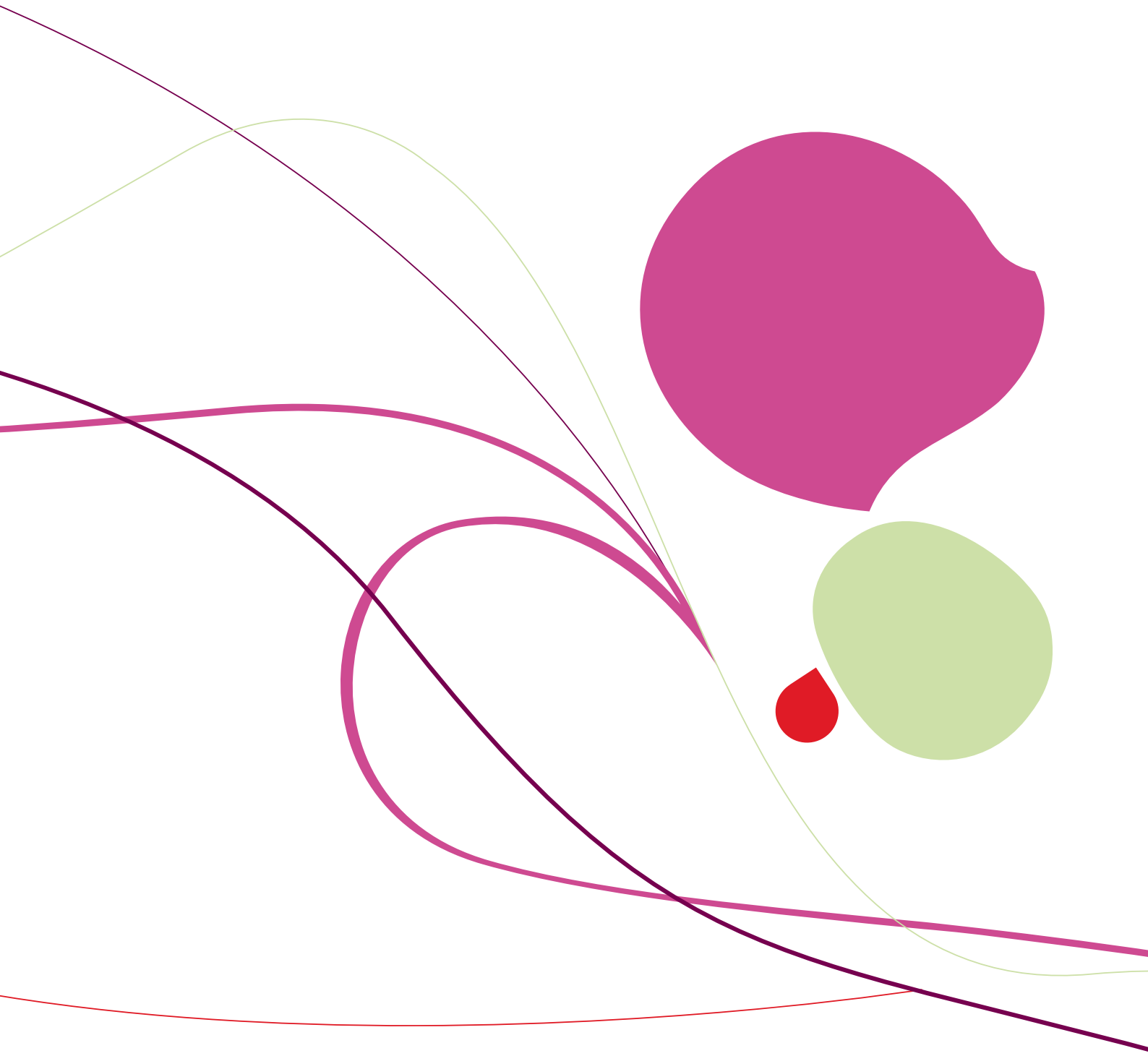



sage



# Sage 200 Wholesale & Retail



“Our extensive customer research shows that customers want suites of integrated software that work together across their business and their processes. With the Sage 200 suite, we aim to provide our customers with that software, helping them to become as efficient as possible and get real insights into what is happening in their business.”

Brendan Flattery, Managing Director,  
Mid Market Division, Sage (UK) Limited.

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# Sage Working for Retailers and Traders

**Sage is one of the world's leading suppliers of business software and has been providing software and support to businesses like yours for more than 25 years. Over this time, we've built a deep understanding of the needs of all sizes and types of businesses who serve the retail, wholesale and trade sectors. Using this insight, we constantly develop our products and services in order to meet customer requirements.**

With over 5.5 million Sage customers worldwide, 740,000 in the UK, the network of people relying on Sage systems is growing – many include your customers and suppliers.

Sage's goal is to streamline processes between traders, suppliers and customers, helping businesses run at optimum profitability. Sage 200 Wholesale and Retail is designed to put you in total control of your business systems, whatever you sell:

- **Merchandise hierarchy** reflects the way your products are structured across your business. You have the flexibility to structure a product that has variants associated with it, such as size, colour and style.
- **Product grouping -** Products can be grouped for flexibility across a matrix, in line with your business.
- **Multi-branch control -** Define the physical make up of your company - regions, areas, stores and warehouses, using the company hierarchy.
- **Batch allocation and despatch -** Update by complete ranges, such as department or supplier.

- **Multiple pricing and promotional control -** Apply promotional offers and price changes by branch or company wide.
- **Company-wide promotions** can be set up and managed centrally. Your customers experience consistency across your branch network, and stock turnover is increased.

## **Integrated Operations for a Competitive Advantage**

Whilst efficient resource planning is pivotal to a successful trader, being able to quickly analyse facts and spot developing issues can make all the difference to your profitability. Whether tracking costs across departments or defining items that make the most profit, having integrated software enables you to link your buying, finance, distribution and customer facing operations.

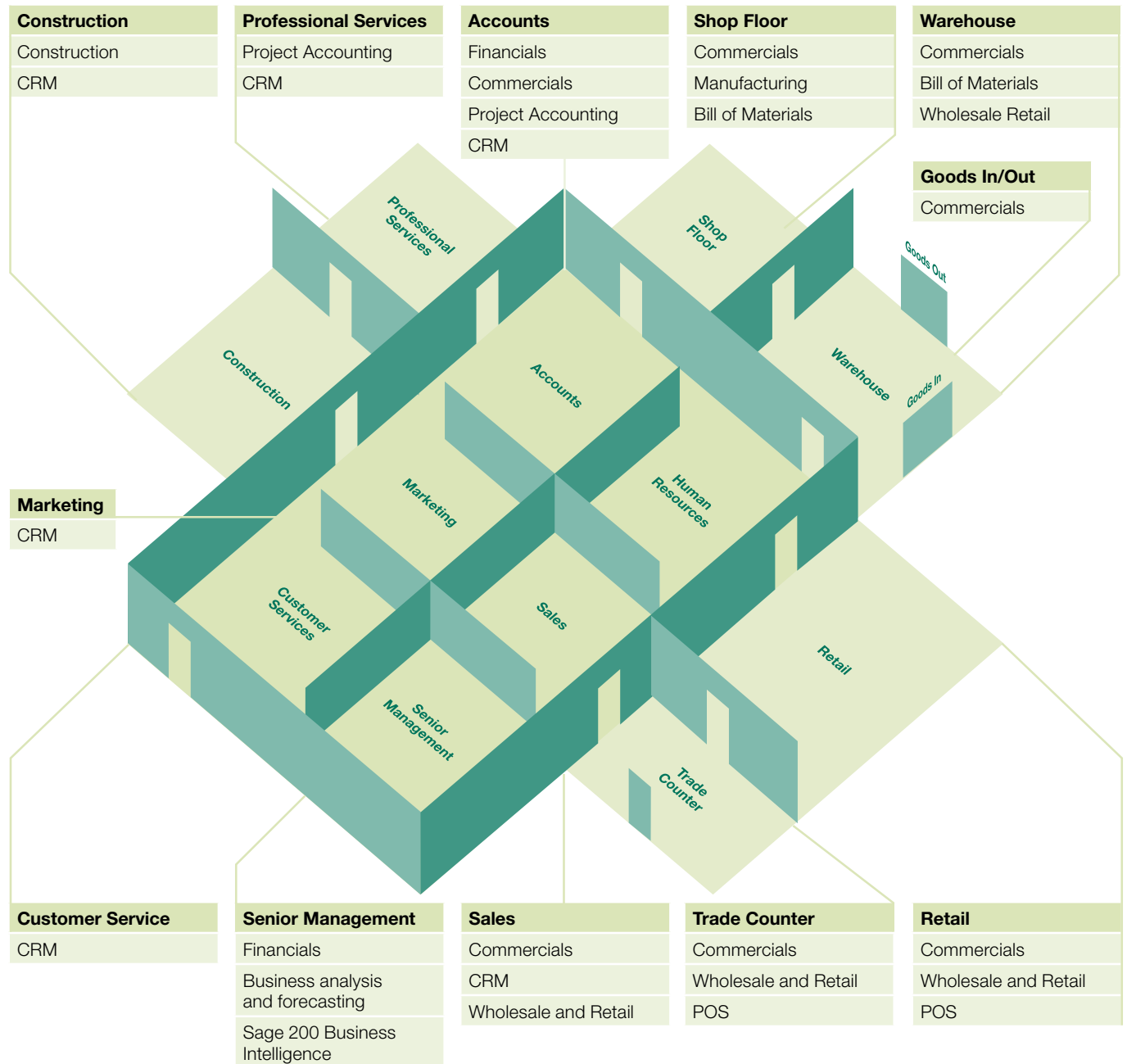
This can help you gain that competitive edge in the competitive retail and trading business arena. By implementing a complete suite of software, your business will benefit from simplified ownership and a single point of contact and accountability. The components of the Sage 200 Suite are designed to work together. Whatever the pressures and challenges you face, the suite will help you manage your finances, people, customers, stakeholders, suppliers, stock and operations more effectively. You'll make optimum use of limited or expensive resources and be well positioned to plan your future success.

"Our customers want to be in the air as soon as possible. Time on the ground is time wasted! Now customers simply swipe their card through the touchscreen terminal every time they have a lesson or flight. It enables us to recognise patterns in what's selling best, with clear visibility of which packages are our biggest revenue earners. This in turn, means we can plan our instructor staffing levels and appropriately schedule expensive resources such as our fleet of aircraft, parts and fuel"

Michael Black, Finance Director,  
Bristol Flying School

# Sage 200 Suite - software to meet your business needs

The Sage 200 Suite provides integrated software for every part of your business, from accounting to customer service, from the shop floor to sales and professional services to retail.



**Notes**

CRM - Customer Relationship Management  
 POS - Point of Sale

# Sage 200 Wholesale & Retail

**Sage 200 Wholesale & Retail is ideal for mid market companies that operate in the wholesale, retail or trade counter arenas, offering a multi-store, retail and merchandising management system that enhances both back-office control and point of sales effectiveness**

It is designed to enhance the standard Sage 200 Commercial module with retail, wholesale and trade counter specific functionality. Sage 200 Commercial includes all the modules of the Financials module, plus sales order processing, purchase order processing, stock control and price book. By integrating these accounting and trading modules, you can easily automate the delivery of customer orders with effective stock management to acquire complete management control over your supply chain.

Sage 200 Wholesale and Retail encompasses key capability such as:

- Multi-branch control
- Comprehensive merchandise management
- Stock allocation and despatch
- Multiple pricing and promotions control
- Advanced serial & batch number traceability
- EPoS
- Comprehensive reporting

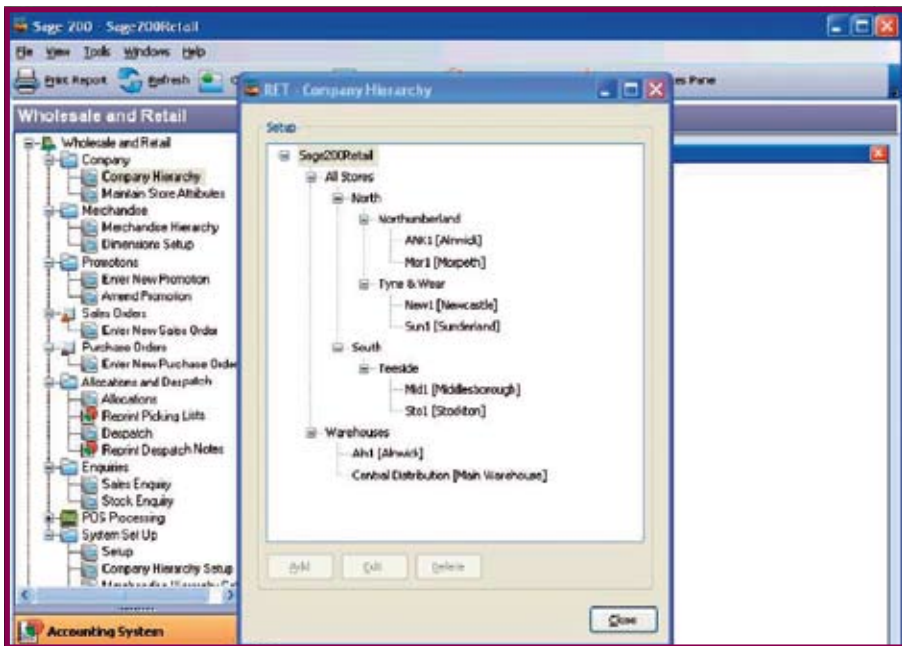
Competition in the retail, trade, wholesale and service sectors has never been more aggressive. As well as competing against traditional rivals, businesses have to contend with demanding consumers with seemingly unlimited purchasing options open to them. Any business selling products and services directly to the public or trade has to offer speedy, efficient sale and payment transactions, and provide the added value that strengthens customer loyalty.

The merchandise management system within Sage 200 Wholesale & Retail enhances your back office control and contains the following features:

## **Company hierarchy**

As a business grows it becomes more expansive and its structure gains in complexity, especially as new branches are opened. Sage 200 Wholesale and Retail enables you to map your logistical structure within the software to support the way you operate. So a retailer or trader may wish to set up the system with the following hierarchy:

1. Company head office.
2. Company warehouse(s) Company stores.
3. Names warehouse(s). Stores by region.
4. Stores by area.
5. Named stores.



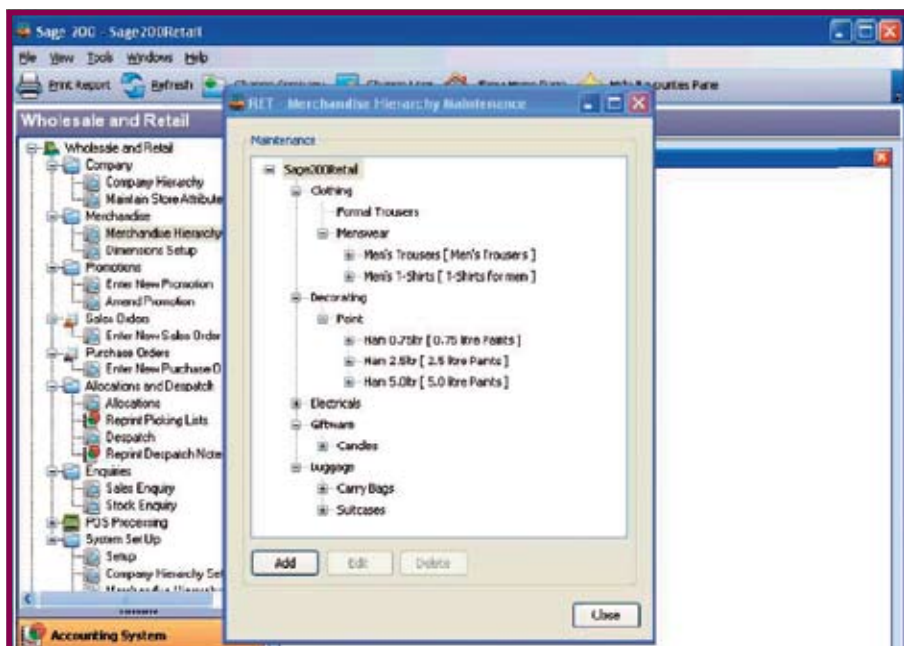
You may then define up to nine levels of store hierarchy, allowing the maintenance of store details to facilitate replenishment. These attributes, for example, could be:

- Location types – city, town, rural, etc.
- Store types – large, medium, small, etc.
- Operational status – active, planning outstanding, being shop fitted, closed, etc.
- Store status – active, dormant, etc.
- Replenishment methods – warehouse to store, store to store, etc.
- Replenishment sources – warehouses, stores, etc.

### Merchandise hierarchy

This works in a similar manner to the company hierarchy and can be produced to match the way your products are structured across your company. At 'stock item' levels, inbuilt 'product matrix' technology can be utilised, offering the flexibility to structure a product that has 'variants' associated to it, such as size-colour, style. We call these 'dimensions.' The products can be grouped flexibly across a matrix, depending on what suits you best, such as:

- Dimensions - colour, size, brand, etc.
- Dimension Sets - Summer, Winter, Autumn, Spring.
- Dimensions Breakup – colour ranges: red, blue, black, etc.



## Promotions management

This enables you to increase stock turnover with special offers such as '3 for 2' and 'buy one get one free'. Customers expect consistency across a network of branches for the same company, so Sage 200 Wholesale and Retail supports this with company wide promotions that can be set up centrally.

Nominated buyers can be assigned to any given promotion and different reward types can be offered, such as a discount within a defined time line. If you wish to set a limit to the number of offers that an individual customer can claim in a single transaction, there is also the ability to set up such thresholds.

## Purchase orders

Setting up and processing purchase orders is made as easy as possible, providing all the information needed so you can quickly and accurately replenish stock wherever it's needed. You can simply drag and drop items into a purchase order from the merchandise hierarchy that you've defined. If you have set parameters such as a rule dictating that even quantities of a certain range should be replenished, then this can be accounted for too. Entering a total quantity of any item would split this quantity evenly across the product variant range.

## Sales orders

Sales orders can be processed in exactly the same manner. The drag and drop facility is particularly popular in telesales environments when speed of processing is important because customers should not be expected to be kept waiting whilst requesting a list of items they want. The systems also accounts for multiple currencies if trading with companies or customers abroad. As you would expect, all existing quantities of stock are on hand at any given time.

## Allocations and despatch

Allocations and despatches can be controlled between warehouses and stores, as your hierarchy dictates. Once the stock has been allocated, the system will print picking lists for each store and despatch notes can then be produced. A very simple process which ensures total control over stock movements.

## Reporting and Analysis

### Budgetary control

- A key strength of Sage 200 Suite is its budgetary control plus its ability to analyse the performance of cost centres and departments across your business. Analysis of budgets versus actuals can be viewed graphically, with the option of displaying up to five years of historical data, and the coming year's budgets. By drilling down to the individual transactions you can easily see the detail behind those trends. Support is also provided for the consolidation of multiple companies, including those with different operating currencies.

### Analysis tools

- Throughout the system, custom analysis codes allow you to 'slice and dice' information any way you want. For example, you may choose to categorise your customers by region, sales person and account type, so you can analyse sales performance across these categories.

### Report designer

- Sage 200 Suite is supplied with a comprehensive library of readymade reports covering all aspects of the system, plus a wide range of documents such as credit letters and invoice layouts for everyday use in your business. You can easily customise these reports and documents or add new ones from scratch. New fields can be added using a wizard; you can add fields which calculate values 'on the fly', based on custom formulae.

Logos and other graphics can easily be added to customise your reports and documents. When you run a report, a powerful filter helps you select the information to be retrieved. This includes any appropriate custom analysis codes. For example, you could run a sales report based on a particular region or sales person. You can save particular 'views' for future use, and frequently used reports can be added to the menu for easy access. Reports and other documents can be previewed, e-mailed, printed directly or sent to a print manager for printing at a convenient time. Access rights for the print manager can be set to ensure that sensitive documents are not accessed inappropriately.

### Sales enquiries

- Sage 200 Wholesale and Retail lets you take this reporting one step further. You can run sales reports across all the detail within the company and merchandise hierarchy. So you can compare sales by region, area or store, and by the departments and products within these. So if an electrical retailer wants to know how many Model XYZ DVD Players were sold last week, they have the answer in moments.

### Drill downs

- Throughout the Sage 200 Suite, key business information is readily available. Intelligent drill downs allow you to view detailed information, to transaction level if required. Additionally you can drill across to view all related information. For example, you can view the nominal ledger as a Profit & Loss and Balance Sheet, drilling down to view nominal accounts and all related transactions.

### Excel integration

- A library of Excel functions is supplied with the Suite to allow information to be pulled from the software into Excel for analysis. Sample spreadsheets are supplied for Profit and Loss, Balance Sheet and Key Performance Indicators. It is easy to amend these or create new spreadsheets to suit your own business.

# Sage Point of Sale (POS)

**Whether you are serving the trade or the public, Sage can provide you with access to the latest touch-screen point of sale and chip & PIN devices from leading suppliers, with each till linking to Sage 200 Commercials.**

for businesses operating within a trade or retail environment and handling customer transactions. Sage POS supports your business whether you operate a single point of sale or many points of sale across multiple locations and is fully compatible with industry leading hardware including Epson, IBM and J2. Whether your business transacts from a single PC or via a network of retail terminals, Sage POS is fully scalable to meet your needs

## **Improving customer service**

Sage POS is an electronic point of sale system functionality rich and easy to use. It plays an active part in increasing customer satisfaction by performing quick, accurate and secure transactions. There's no need to keep your customers waiting; they can pay by cash, cheque, on account, voucher, etc. in part or full payment, and use a mix of payment methods or currencies to settle a transaction. The software handles electronic funds transfer; prints cheques; provides clear, itemised receipts; and manages exchanges and refunds. It supports gift card loyalty schemes and can also capture customers' postcodes. Items can be quickly corrected, removed and edited within a transaction. All transactions can be printed and stored in case of subsequent queries.

## **Works the way your business does**

Sage POS easily adapts to the way you operate your day-to-day business. It can be customised to reflect your unique processes and adopts the terminology and look and feel you require.

## **Configurable display**

The operator touch-screen can be tailored to make the system easier to use, reducing staff training overheads and minimising operator errors. So you can colour code similar functions e.g. Voids and corrections could be red; category and product buttons can be grouped and arranged for maximum efficiency.

## **Customisation by sector**

The screen can be customised to reflect the characteristics of a multitude of specific retail types, making it work the way you need to operate. So a point of sale at a visitor attraction can prompt for and record a Gift Aid donation. Alternatively, a point of sale at a paint shop offering a colour match service can prompt the operator for the details of the tint used in the paint mix process.

## **Trade counter capability**

In-built trade counter capability means customer-specific pricing, such as trade or public pricing, can be applied, eliminating the need for dedicated terminals. The information is shared from the sales ledger and pricing matrices in the back office software. This enables, for example, a timber merchant selling to trade and public to conduct all payment transactions on all points of sale.

## **Promotional support**

To promote sales you can apply discounts at product level and transaction level, as you wish. This supports promotions and multi-buys such as 3 for 2, and buy 1 get 1 free; thereby delivering flexibility and customer service, whilst reducing operator intervention by automating the process. Full details are recorded on the receipt, reinforcing the value for money message.

Sage POS is designed specifically

## Multiple payment methods

Sage POS offers flexibility to the customer by supporting a mix of payment methods that may be used to settle a transaction. Customers can pay with a mixture of vouchers and cash, credit card, etc. All credit/debit card payments can be processed via integration with major card clearing systems for fast and secure processing.

## Operator security levels

Each operator can be allocated a unique ID and access levels, allowing them to operate within pre-defined parameters. This provides you with the peace of mind that the system has the necessary security and business control whilst enabling tracking and reporting per operator. Security levels means that junior staff can be restricted to certain transactions, leaving more sensitive transactions, such as refunds, to be authorised and actioned by supervisors.

## Customer flexibility

Sage POS fully supports layaways, to help staff provide seamless service during transactions e.g. where customers add items or change their minds. Where a point of sale is set so that staff cannot void transactions, they can lay the transaction away for later recall and void by the manager.

## Electronic auditing and trading

All customer transactions are recorded electronically, removing the need for paper journal rolls and providing a paperless history and audit of transactions. The software provides the ability to drill-down to investigate queries such as no-sale transactions and discounts. Sage Point of Sale will automatically recover transactions in the rare event of a power failure or other outage.

## Flexible product entry and searching

Flexible product entry means staff can type directly onto the keyboard, scan bar codes, press pre-set keys or touch the appropriate key on-screen, as you prefer. When looking for a product in the system, an operator can search by analysis category, product group, partial stock code description and key words. We've made it as easy as possible for operators to locate products. For example, an operator in a stationers can locate a specific product such as coloured paper by entering the word 'blue' into the product search function.

## Chip and PIN compatibility

If a retailer does not have a chip and PIN acceptance device and the use of such a device could have prevented the fraud from occurring, the retailer may bear the cost of a fraudulent transaction. Sage POS is compatible with Chip and PIN devices to provide you with additional security for debit and credit card transactions with encryption ensuring compliance with PCI DSS standards. Using Chip and PIN also ensures the liability for any bad debts passes from you, to the card holder's bank.

## Reporting

Each point of sale can produce end of day/end of session reports providing a summary of takings, category sales, time analysis, operator activity and promotions applied. This assists with end of day reconciliation and provides detailed analysis of the day's takings. You can even run a Profit & Loss report on an individual point of sale, location, activity or product type.

## Secure, continuous operation

Integration with electronic funds transfer solutions delivers fast and secure processing of customer card payments. Password-protected user access and authorisation levels for different transactions support your own security procedures to help safeguard your business. Continuous trading and auto-recovery are vital to your business. You must be able to trade in the unlikely event that the link to the back office is lost. After a power failure, your Sage POS will recover and display the transaction at the point of failure, once the power is restored



# The Sage 200 Suite - software overview

**There are several Sage 200 modules for every part of your business. These modules can easily be added to your Sage 200 Solution:**

## **Sage 200 CRM**

Sage CRM forms part of the Sage 200 Platform therefore it sits at the core of the Sage 200 Suite. Every Sage 200 customer automatically receives 1 Sage 200 CRM user, therefore ensure you utilise this powerful module to its full capability. 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. With Sage CRM, you can quickly analyse, manage and synchronise sales, marketing and customer service activities across all points of contact.

## **Sage 200 Project Accounting**

Sage 200 Project Accounting is a highly configurable and flexible costing module, ideally suited to businesses running projects or providing services. It can be adjusted to suit particular industry needs, whether the requirement is for a simple costing and analysis structure or for a more detailed one. Sage 200 Project Accounting provides you with in-depth analysis and reporting features, ensuring that projects remain on track and profit levels are maintained.

## **Sage 200 Manufacturing**

With our vast industry experience, we are perfectly placed to provide integrated systems that control the whole manufacturing process, from planning materials to monitoring real-time works orders. Sage 200 Manufacturing gives companies greater control over their manufacturing processes through effective scheduling of work, close tracking of resource utilisation and improved business analysis.

## **Sage 200 Web Time & Expenses (WTE)**

The Sage 200 Web Time & Expenses (WTE) module allows Sage 200 Project Accounting users to enter and track 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.

## **Sage 200 Construction**

Sage 200 Construction provides business-wide efficiency for companies operating in the construction sector. From helping you to keep within contract budgets, to complying with complex and ever-changing HMRC legislation, to reducing your costs and managing your cash flow, Sage 200 Construction is ideally suited to businesses with more complex contracting requirements. Many of your processes are supported, from receiving the initial enquiry to the final accounting, leaving you free to focus on building a profitable business.

## **Sage 200 Business Intelligence**

Sage 200 Business Intelligence (BI) is a core part of the Sage 200 Platform so its available to every customer when they choose Sage 200. It enables you to extract real intelligence about business from data accumulated every day in the normal course of operations. Sage 200 BI provides a powerful analysis and reporting tool which transforms data into meaningful intelligence. Sage 200 BI ensures you receive the maximum benefit from your business systems and data helping organisations in all sectors to build a significant competitive advantage.

# Sage 200 Suite

	Sage 200 Financials	Sage 200 Commercials	Sage 200 Project Accounting	Sage 200 CRM	Sage 200 Manufacturing	Sage 200 Bill of Materials	Sage 200 Wholesale and Retail	Sage 200 POS	Sage 200 Construction	Sage 200 Business Intelligence
Accounting and Payroll	✓		✓							✓
Supply chain and distribution		✓		✓		✓	✓			
Project management and billing	✓	✓	✓	✓						
Sales management		✓		✓						
Contact Management				✓						
Customer management, service and support				✓						
Marketing management				✓						
Retail and wholesale		✓					✓	✓		
Construction	✓	✓		✓					✓	
Manufacturing and production		✓			✓	✓				
Business forecasting, reporting and analysis	✓			✓						✓

To find out how our software can help your business visit [www.sage.co.uk/sage200retail](http://www.sage.co.uk/sage200retail) or call our Customer Development Team on 0845 111 9988.

# Value added support

## **The Sage Business Advice Team**

For help in selecting exactly the right Sage software for your business, phone one of our experienced Business Advisors. They will discuss your needs, provide you with detailed product information and, if appropriate, put you in touch with a local Sage Accredited Business Partner.

## **Sage Annual Licence Plan**

The Sage Annual Licence Plan (SALP) ensures that your Sage 200 Suite product continues to support your business as it grows. You will benefit from legislative updates for Sage 200 software, access to business guides, special promotional offers and product upgrades.

## **Finance Options from Sage**

At Sage, we recognise the upfront costs associated with purchasing and installing a new IT system can often be a barrier to acquiring the solution your business really needs. This is why we have created a variety of finance options, allowing you to spread the cost of payment, and enabling you to purchase the best possible solution for your business, with no compromises.

## **A network of support**

Thanks to our unrivalled customer service and close relationships with Business Partners and Developers, we can provide the right business software for you – whatever the size and nature of your company. With over 5.5 million Sage customers worldwide - 700,000 in the UK - the network of people relying on Sage software is growing. You will find many of your customers and suppliers among them.

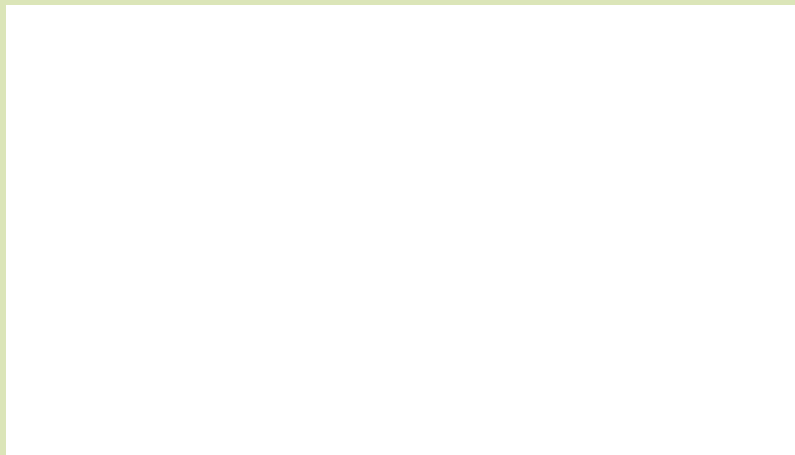
## **Microsoft® SQL options**

Sage 200 requires an approved third-party database management system to operate - currently Microsoft SQL Server. In addition, we offer highly recommended Microsoft Software Assurance - allowing you to adopt updated versions of Microsoft SQL as they become available and certified for Sage 200.





**For more information, please contact your Sage Business Partner:**



### **System Requirements**

The hardware requirements for Sage 200 will vary depending on the usage pattern on each workstation. Please see [www.sage.co.uk](http://www.sage.co.uk) or consult your Sage Business Partner for details.

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If you're looking for a particular application, feature or service, please make sure that the Sage software/service you choose is right for you.

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