



# Sales Toolkit

Sage 50 Accounts 2009

sage



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# Approach to version 2009 release

## Working together to deliver the best software to our customers

Our customers, partners and accountants community together with the Sage 50 Accounts Business Team are instrumental in ensuring we deliver the best solution to our market on a timely basis that makes a difference.

We undertake a rigorous process not just to determine which features we select but also in how they are implemented, communicated and supported.

Sage 50 Accounts 2009 is coming in August and we are going to make sure we get it spot on and give the customer a great experience building on the success of our 2008 release.

Each year, we put even more effort into getting the software absolutely right for our customers. A lot of time has been spent talking to our customers, accountants and partners and reviewing their wishes to make sure we introduce the changes that matter most. We also want to make sure everyone is fully prepared, informed and able to support the successful delivery of the UK's leading accounts software.

## System Requirements

### Getting the best performance from Sage 50 Accounts

To obtain the best possible performance from Sage Accounts, it is important to check that your PC meets the **recommended** requirements of the software. Sage Accounts works most efficiently on PCs running with the **recommended** system requirements. Whilst Sage programs do run on PCs with the minimum requirements, performance cannot be guaranteed.

A PC that meets the **recommended** requirements of the software will:

- Process transactions and report results swiftly
- Allow faster maintenance checks and back up routines
- Give increased storage capacity for transactional data, layouts and reports

The current recommended PC specifications are as follows:

#### Recommended Specification

An IBM compatible PC with a 2 GHz (or equivalent) processor

At least 1GB RAM

At least 1GB of free disk space after

Windows has been installed  
Windows XP (recommended); Windows 2000;  
Windows Server 2003; Windows Vista  
Network users only: 1Gbps network cards and switches with Microsoft Windows networking  
Please ensure that the latest Microsoft updates are installed.

Performance will be improved with higher specification computers and networks.

#### Minimum Specification

**Note:** Whilst Sage programs do run on PCs with the minimum requirements, performance cannot be guaranteed.

An IBM® compatible PC with 1Ghz (or equivalent) processor

512MB RAM

700MB of free disk space after Microsoft Windows® has been installed

Windows XP (recommended); Windows 2000;  
Windows Server 2003; Windows Vista

Network users only: 100Mbps network with Microsoft Windows networking

Please ensure that the latest Microsoft updates are installed.

Performance will be improved with higher specification computers and networks.

Full details can be found in the Sage 50 Accounts area on <http://www.sage.co.uk/productsandservices/>

# Sage 50 Accounts 2009 Upgrade & Licence Policy

Sage 50 Accounts 2009 will be available for pre order from 4th August 2008.

## **Accounts – Licence only upgrade policy**

A license only upgrade is defined as

Additional user(s)

Additional company(s)

Up the range e.g. Sage 50 Accounts to Sage 50 Accounts Plus

Sage Accounts license only upgrades are only

available on the following current registrations

Line 50 Accounts version 11

Line 50 Accounts version 12

Line 50 Accounts version 2007

Sage 50 Accounts 2008

Any registration from version 10 or below has been issued with a Lifecycle Policy and has two options to obtain the latest version of software 1) by purchasing SageCover Extra 2) New Product Price Upgrade.

## What's New – Upgrade features at a glance

The following table represents a summary of the features to be introduced in v2009. These features are best positioned to customers on a 'task' or 'process' basis and are available in all variants. Also, all features have been introduced in all variants. Sage 50 Accounts variant now includes ability to have multiple delivery addresses and dispute items.

Business Task	Feature	Feature Type
Working with Sage 50	Diary	New
	Outlook integration	Improved
	Assistance	Improved
	Easier corrections	Improved
	Practice company	Improved
	Automatic Updates	New
Managing customers	Dashboard	Improved
	Chase debt	Improved
	Communications	Improved
	Contacts	New Accounts
	Disputes	Improved
	Payment method	New
	Reports	New
	Statement	New
	Letters	New
Managing suppliers	Dashboard	Improved
	Prioritise payments	Improved
	Communications	Improved
	Contacts	New
	Payment method	New
	Reports	New
	Remittance	New
Managing my money	Cashflow	Improved
	Bank reconciliation	Improved
	Retrospective Bank Reconciliation report	New
Reporting	Batch reports	New
	Secure PDF	New
	Easier to use	New
Department	Advanced budgets	Improved
VAT	EC sales narrative	New

# What's New – Upgrade tips

## **Hardware**

Check that the customer is running the recommended specifications.

## **Data conversion**

Data can be converted from any version from version 8 or later.

## **Performance & quality issues**

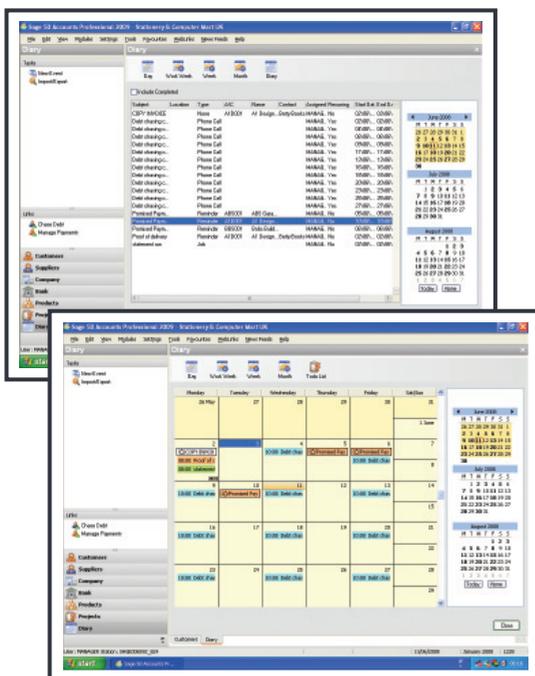
We have found that the most common cause of speed issues is due to service packs not being installed or running on low spec machines.



# What's New – Upgrade features in more detail

## Managing your workload

Sage 50 Accounts Diary helps you to create tasks and prioritise workload for the day, week and months ahead. Recurring tasks can be set up to make sure regular tasks are completed such as payment run dates, statements, debt chasing days, letters etc. Diary events can be associated with a customer or supplier right down to the contact of the account. Integration with Microsoft Outlook means that the Sage 50 Accounts Diary can be synchronised with outlook making sure tasks are not forgotten about. Each individual can see their own tasks and the manager can view tasks of all staff. Diary events can be automated such as following up of promised payments. The events can be associated with the type of activity (including user defined) and colour coded allowing customers to see easily what type of event needs to be completed. Times can be associated with the task, important to ensure customers and supplier follow ups take place at a time convenient for both for example if the contact works part time or is on holiday. This helps to create a positive impression with your customers and suppliers to build on your relationships.



## Scenarios

- Follow up promised payments
- Follow up tasks to resolve disputes
- Set recurring events – payment run dates, statement run dates, chase days

## Qualifying questions

- Do you know what needs to be done, today, tomorrow and over the coming week/weeks?
- Did you complete all of the tasks you should have done yesterday?
- Do you know what your staff are doing to follow up customers and supplier queries?
- Would you like to make sure that all of the regular jobs get done such as statement runs, letters, cheque runs etc?

## Managing your customers

Cash is the lifeblood of your business and having your customers pay you on time helps you to survive and grow your business. Inevitably, not all customers pay you on time, sometimes for genuine reasons, sometimes they may need prompting. With Sage 50 Accounts 2009, chasing and managing your debt has never been an easier task and when put to good use in your business, you can guarantee to reduce the average days your customers take to pay you and increase your cash flow.

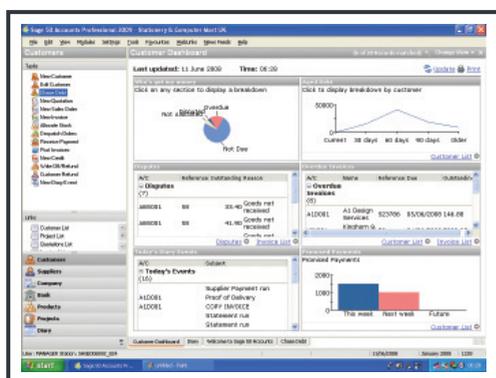
## Qualifying questions

- Do you have a problem getting paid?
- Do you have many customers to deal with?
- How do you manage chasing your customers for payment and how often?
- Do you always know what payments have been promised?
- Do you have many different contacts to deal with?
- Would you like to you send information electronically such as statements, letters etc?

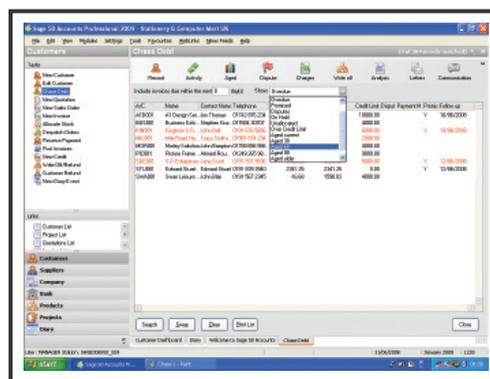
# What's New – Upgrade features in more detail

## An improved dashboard view

It is important to understand the credit position of your business. The improved customer dashboard gives you an instant snapshot of your credit position. At a glance you can see your exact position including who's got your money in terms of what is due, overdue, disputed and to be allocated. How old your customer debt is, what is on dispute, invoices overdue, promised payments and when they are due and diary events that need to be dealt with today. You can drill down to the detail and help you plan for the day and week ahead to focus your time on the areas that will reduce your debt.



helps you prioritise which customers you should be spending your time chasing for monies owed to you. The Chase Debt feature in Sage 50 Accounts allows you to work with the customers that are owing you money and displays all of the information you need to prioritise, you might want to make sure all money is allocated on the accounts before you start chasing debt to make sure the information you have is accurate. You might want to chase those customers who only pay you by cheque and have outstanding money that is more than 30 days old. You might want to make sure that you are on top of any disputes on the accounts that is stopping your customers from paying you such as copies of invoices and proof of delivery have been provided, queries/disputes on prices and discounts have been resolved.



## Scenarios

- The Financial Controller wants to get a clear position of debt and find out what is being done about it
- The bookkeeper/clerk wants to see what her debtors position is to work out who to chase

## Qualifying Questions

- What overdue payments do you have?
- How many promised payments do you have?
- How useful would an instant snapshot of debt and activity be?

## Proactively chasing debt is easy to do with Sage 50 Accounts 2009

Time is precious for every business and it is important that the time available to chase debt if it is daily, weekly or monthly is spent as productively as possible. Sage 50 Accounts

Once you have identified the customers you have prioritised to work on, for example overdue accounts, it is important to decide how you are going to chase the customers. For example, you may wish to send letters to remind your customers that their account is overdue and is now due for payment. Letter templates have been provided for you to use for chasing money that is owed to you. When you generate your letters, the customer communications history is automatically updated so you can always see what was sent and when.

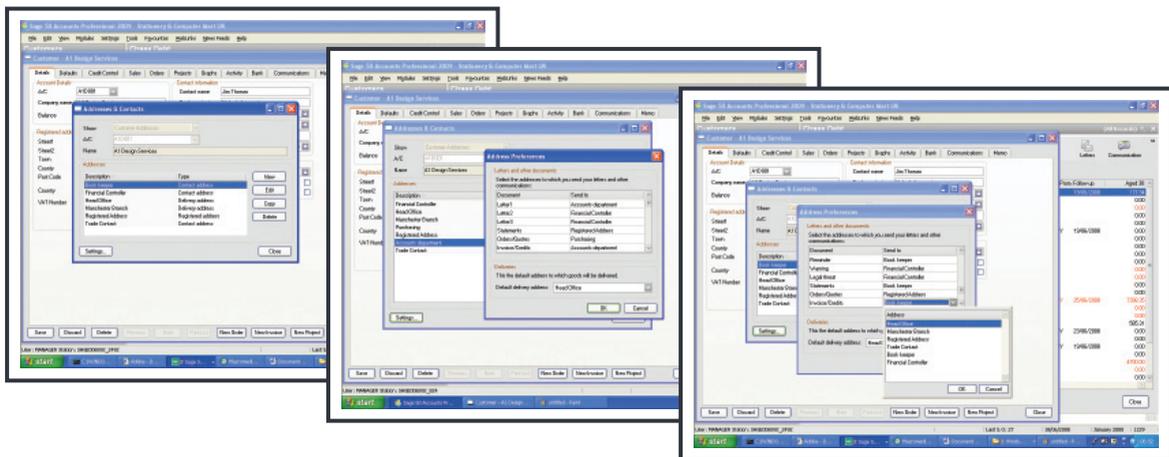


# What's New – Upgrade features in more detail

## Dealing with the right contacts

Developing lasting profitable relationships is all based around who and how you communicate with your customers. Your customers want to know who you should be dealing with, when to deal with them and how they want to be dealt with. Sage 50 Accounts has made this easier for you to manage. You can now store the contact details for each of your customer accounts including their telephone numbers, email and office addresses. This means you know who the financial controller is, who the accounts staff are and can record notes about when they are available – often people work

part time and it is good to know when that is. It is not just about who, it is also about how. With Sage 50 Accounts you can specify the contacts and mailing preferences for example who the invoices should be addressed to, who the statements should be sent to, who the debt chasing letters are to go to. If you send these by email, you can indicate this and manage in batches saving you time and money and looking after the environment too. This also helps you keep on top of your finances as you can ensure that the right contacts are receiving the right information.



## Managing your suppliers

It is as important to ensure you are in a position to pay your suppliers on a timely basis. Having your money coming in on a regular basis from your customers helps you to do this. Paying suppliers on time means that you can build profitable relationships with your suppliers, keep your business reputation intact and will put you in a great position to negotiate preferential prices and settlement discounts.

- Would you like to you send information electronically such as remittances, letters etc?
- Do you regularly have queries on invoices and goods received?
- Do you receive settlement discount for paying suppliers on time?
- Do you use different payment methods to pay your suppliers?

## Qualifying Questions

- Do you struggle to work out who to pay and when?
- Do you have many suppliers to deal with?
- How often do you pay your suppliers?
- Are you regularly chased for payment?
- Do you always know what payments have been promised?
- Do you have many different contacts to deal with?

## Improved Dashboard

A great place to start to get an instant snapshot of how the money you owe is made up and identify who you need to pay is the improved supplier Dashboard. With the supplier Dashboard you can get an instant snapshot of what is due today, overdue, how old your invoices are, any invoices that you have in dispute or promised to pay and when, and any diary events you need to complete today.

# What's New – Upgrade features in more detail

## **Prioritise your Payments more effectively**

With Sage 50 Accounts, you can easily prioritise who you are going to pay, when you are going to pay your suppliers and how much you are going to pay them. The Prioritise Payments feature in Sage 50 Accounts allows you to work with the suppliers that you owe and displays all of the information you need to help you who you are going to pay. You might have committed to paying some suppliers a given amount by a certain date, you can easily view who these are and use the suggested payments routine to process your payments. There may be some suppliers you have disputes with before payment can be made, you can easily view these and identify progress. You can configure your view based on supplier and aged criteria so you can see what you need to pay in the coming week and months helping you plan ahead.

Once you have identified the suppliers you have prioritised for payment payments can then be easily made. If there are any invoices that have queries on and it is preventing payment for example about price, non delivery of goods it is important that you make your suppliers aware of this as early as possible from receipt of the invoice. You can easily flag invoices that are under dispute, together with the reason and follow up action and timing. Ideally, you should contact your supplier and inform them of the issue and you can record the details of the conversation or email with the agreed course of action. This information is then updated to your communications history. If you receive a call, letter or email from your suppliers chasing you for payment, you can also record details of the communication. You will have a full audit trail of communications with your suppliers making sure you always have the right information to refer back to and helping you keep your relationships healthy and profitable and always creating a professional image with your suppliers that you are a reputable business to do business with.

## **Specify how you pay**

Different suppliers insist on being paid differently for example BACS, Cheque, Card,

Standing order etc. You can now specify how you pay your suppliers and use this to then generate your payments based on how you pay your suppliers once you have identified who you are going to pay. For example, you may send your remittances by email to those who you pay by BACS and send remittances attached to a cheque for those you pay by Cheque.

## **Dealing with the right contacts**

Developing lasting profitable relationships is all based around who and how you communicate with your suppliers. Your suppliers often want you to deal with different people in their organisation for example who you should be placing purchase orders with, who to deal with if you have a query and importantly who to send your payments to. Sage 50 Accounts has made this easier for you to manage. You can now store the contact details for each of your supplier accounts including their telephone numbers, email and office addresses and also additional information such as when they are available, office hours etc.

It is not just about who, it is also about how. With Sage 50 Accounts you can specify the contacts and mailing preferences for example who the purchase orders should be addressed to, who the remittances should be sent to. If you send these by email, you can indicate this and manage in batches saving you time and money and looking after the environment too. This also helps you keep on top of your finances as you can ensure that the right contacts are receiving the right information.

## **How much can you save by paying your suppliers on time?**

If you are offered early settlement discount from any of your suppliers you can easily now identify how much you can save by paying them on time. A new report is available in Sage 50 Accounts to help you identify who you have to pay and how much you can save keeping your cashflow healthy.

# What's New – Upgrade features in more detail

## Improved cashflow

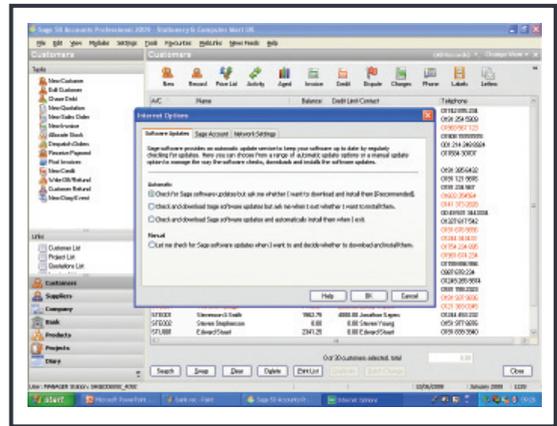
It is vital to understand your cash position at any one time. The improved cash flow helps you easily see how much is coming in to and going out of your business giving you projected daily bank balance position and helps you identify how you could improve this.

## Sage 50 Accounts 2009 – Easier to use, more efficient to work with and easier to stay up to date

### Automatic updates

It is important to keep your software up to date to ensure optimum performance. The new automatic updates feature means you can take

the hassle out of keeping your Sage software up-to-date using software updates.

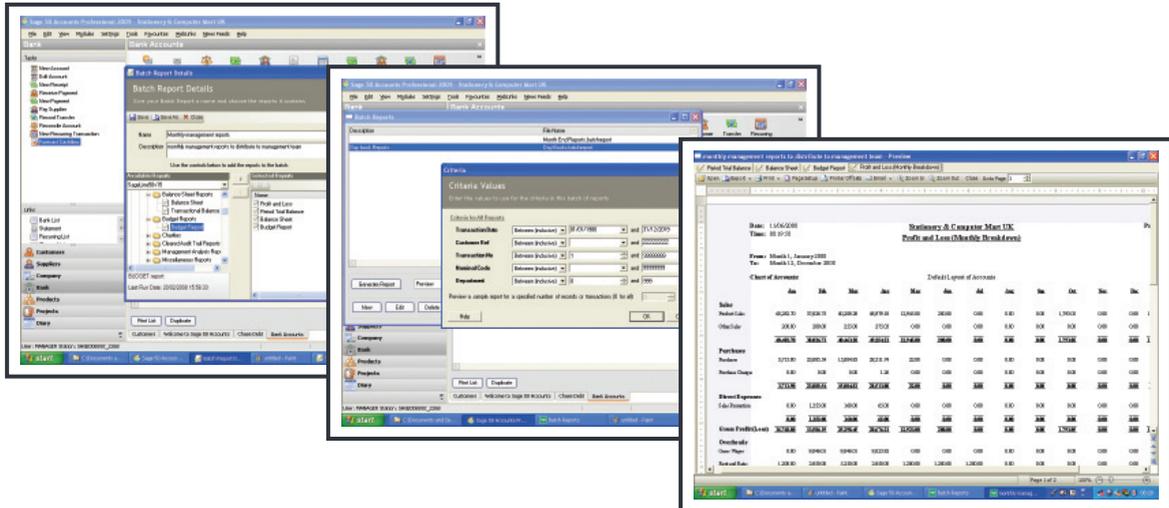


# What's New – Upgrade features in more detail

## Batched Reporting

There are many reports that you need to run on a regular basis for example at month end, quarter end and year end. With the new batched reporting feature, you create your

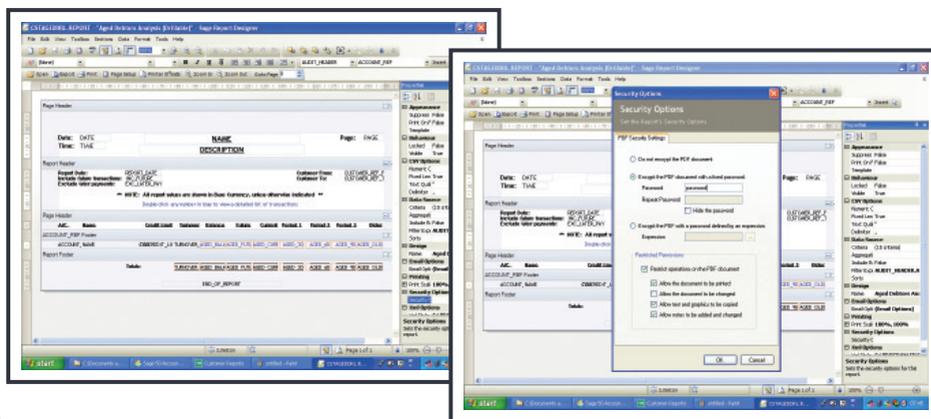
own batches of reports and run them all off in one go – be it to file (any output such as XLS, PDF, email), print or preview. This will save you valuable time and make sure reports do not get missed.



## New – Secure PDF generation

Financial information is often sensitive, with the new secure PDF generation feature, you can password protect any report you generate from

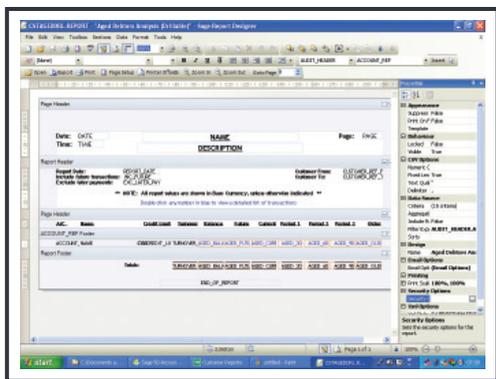
Sage 50 Accounts giving you peace of mind that only those who should be accessing and reviewing sensitive financial information can do so.



# What's New – Upgrade features in more detail

## Improved Bank Reconciliation

It is always good practice to keep on top of your bank reconciliation. We have made this routine even easier to use not only through providing more assistance on how to perform a bank reconciliation, but also on making it easier for you. Improvements such as 'smart totals' showing the value of the highlighted transactions, being able to unmatched a group of transactions and adjust the size of the screen. The new retrospective bank reconciliation report allows you to identify the bank balance as at any given date, this is important particularly at month and year end to help produce your management accounts and save hours working out what the bank balance was at a given point in time.



## Improved Error corrections

Everyone makes mistakes and correcting them has never been easier. You can now easily view and locate the transactions and make the appropriate correction at the touch of a button if it is a deletion or a change to an existing posting. There is more assistance available and videos for you to follow if you are unsure what to do or new to the correction function.

## Easier to get to grips with

If you are new to Sage 50 Accounts 2009, or just want to find out more about getting the most out of your software there is lots of help on hand to help you get to grips with your software. The improved Assistance means you can find out easily how to perform regular tasks, what's new from the version you have upgraded from. Videos are available to guide you through routines to help familiarise yourself with the software.

It is always good to practise before you put a new procedure live. With Sage 50 Accounts,

you are provided with both a practise company and demo data so you can try out a new area of the software, or a new posting without worrying about making a mistake.

## Managing your business now and in future

### Making the most of online banking

Making payments online can save you time, reduce the cost of transactions with your bank and help you maintain good relationships with your suppliers.

With Sage 50 Accounts 2009 all the tools you need to use e-banking services with your accounts are included as standard in your software. So even if your bank charges you an additional fee for its online services, we don't.

Because many banks now provide electronic statements it's easier to keep your accounts and bank reconciliations up to date. Simply download your statements and the step-by-step guide will help you reconcile your accounts quickly and without errors.

Now we can also offer you a greater choice of major banks whose online services work with your Sage 50 Accounts software.

A full list of compatible banks can be found on [sage.co.uk](http://www.sage.co.uk/productsandservices/) at <http://www.sage.co.uk/productsandservices/>

## Doing more business online

If you're looking for ways to reduce the costs and increase the speed of doing business whilst increasing the levels of service you offer, being able to manage your invoices and orders electronically can help.

With Sage 50 Accounts 2009 you can send and receive orders and invoices via email directly from your accounts software, saving the delays and expense associated with traditional printing and postage.

Your customers and suppliers can view and print the orders no matter what accounting software they use. But if they also use Sage software (and 730,000 customers in the UK do) they can automatically process the information.

Because there's no need to manually enter order and invoice details, you reduce the risk of errors, speeding up the whole process and improving customer service.

# Upgrades – Like for like

Area	Feature						
		V10	V11	V12	2007	2008	2009
<b>Working with Sage 50 Accounts</b>	<b>New Diary with views by day, week, month</b>						■
	Recurring tasks/events						■
	Delegate tasks (network versions only)						■
	Diary synchronisation of tasks with Outlook						■
	Ability to assign tasks to customers/suppliers and their contacts						■
	<b>Automatic update of software</b>						■
	More assistance including tutorials, getting started and upgrades						■
	<b>Improved corrections easily access and correct data</b>						■
	Practise company						■
	Option to access demo or practise company on startup						■
	RSS feed informing of updates & product news					■	■
	Information centre					■	■
	New active set up wizard, improved activity, smart links to stock & project				■	■	■
	Multicompany - resizable list & can be printed				■	■	■
	Process Maps & Dashboards			■	■	■	■
	Improved Data Import - easier to import, import project records			■	■	■	■
	Document Manager		■	■	■	■	■
	Excel Integrated Reporting		■	■	■	■	■
	Copy & Batch Change Facility		■	■	■	■	■
	Smart Totals & Smart Links		■	■	■	■	■
Drill down to source transaction	■	■	■	■	■	■	
<b>Working with customers and suppliers</b>	Improved Dashboards - Easily see where money is, what is outstanding, who is due aged, days to pay and tasks for the day						■
	Improved Chase debt by overdue, promised, disputed custom views with smart columns to personalise view to suite needs						■
	Prioritise Payments - who needs to be paid, what disputes need to be resolved, who you have promised to pay. Customise the view with information required using new smart columns and develop own view of money owing						■
	Easily access account record and view activities and communications with customer and supplier						■
	Easily view all communications with customers and suppliers in one single place						■
	Account balance when communication took place automatically added						■
	Communications automatically updated when statements and letters sent						■
	Easily record new communications and follow up						■
	Store details of account contacts including address, telephone numbers and email						■
	Record notes against contact and delivery addresses						■
	Set preferences for issuing of documents such as invoices, statements, letters, orders etc including both contact to issue and email						■

# Upgrades – Like for like

Area	Feature	Version						
		V9	V10	V11	V12	2007	2008	2009
<b>Working with customers and suppliers</b>	Contact and delivery addresses available in Accounts variant							■
	Easily view disputed items							■
	Disputes introduced into Accounts variant							■
	Record method of payment – cash, cheque, card, SO/DD, factoring, invoice discounting							■
	New drillable reports – aged debt, credit management summary							■
	Communications history by customer							■
	Easier to send statements to correct contact and by email							■
	Automatically update communications history						■	■
	Easier to send letters to correct contact and by email						■	■
	Automatically update communications history						■	■
	Improved reporting - drillable aged debt and credit management summary report						■	■
	Contact and delivery addresses available in reporting and on documents						■	■
	Refunds- Customer payments and supplier receipts					■	■	■
	Recurring Invoices - Ability to edit recurring invoices & generate recurring transaction reports					■	■	■
	Store customer bank details					■	■	■
	Intrastat defaults available for suppliers and customers							
	Improved quotations				■	■	■	■
	Improved Discounting – one-off discounts to individual items				■	■	■	■
	Cash Sales (Accounts Pro only)				■	■	■	■
	Intrastat support			■	■	■	■	■
	Reprint delivery notes			■	■	■	■	■
	Repeat Invoices & Orders		■	■	■	■	■	■
	Batch conversion of Quotes & proformas		■	■	■	■	■	■
	Supplier Price list		■	■	■	■	■	■
	Transaction e-mail	■	■	■	■	■	■	■
	Create Purchase Order from BOM	■	■	■	■	■	■	■
Individual Customer Pricing & Custom Price Lists – Accounts Plus & Pro	■	■	■	■	■	■	■	
Goods Received Notes	■	■	■	■	■	■	■	
Multiple Delivery Addresses – Accountant Plus & Pro	■	■	■	■	■	■	■	
<b>VAT Management</b>	Message & Tax code analysis for EC service sales							■
	Ability to change HMRC bank account							■
	Online submissions & payments incl agent submission via client manager						■	■
	Electronic VAT 3 Form (Ireland)						■	■
	New VAT Ledger, Manual adjustments to VAT Return, Unique identifier, automatic archiving						■	■
	Improved EC sales list & Carousel Fraud						■	■
VAT Audit Reports	■	■	■	■	■	■	■	

# Upgrades – Like for like

Area	Feature	Version						
		V9	V10	V11	V12	2007	2008	2009
<b>Financials &amp; Management reporting</b>	Cahsflow separates incomings and outgoing, includes credits							■
	Rebuild department actuals based on transactions							■
	Updated Dept Number table to be numeric only							■
	Depts - Improved year end actuals all transferred to prior year							■
	Improved prior year, budget and actual reports for Departmental reporting							■
	New management reports - month by month, quarterly, drill to transactions						■	■
	More information available - current year, prior year and budget on onw report						■	■
	Copy chart of accounts						■	■
	Departmental budgets, per nominal code per department					■	■	■
	New department ledger, store up to 5 years of data & budget for 1 year in the future					■	■	■
	Improved Journal Reversals - can specify the date when reversing journals					■	■	■
	Cashflow Planner	■	■	■	■	■	■	■
	Archive management	■	■	■	■	■	■	■
	Recurring Entries - Customer & Supplier Accounts	■	■	■	■	■	■	■
	Reversing Journals	■	■	■	■	■	■	■
<b>CIS</b>	CIS Module - see toolkit					■	■	■
<b>Reporting</b>	Batch reporting							■
	Password protection							■
	Easier to use - assign name, spell check, joining tables							■
	Generate report output to Excel or Word					■	■	■
	New Report Designer					■	■	■
	No limit to variables/data that can be included on any report					■	■	■
	Criteria can be defined per report, apply formulas					■	■	■
	Run wizard to amend existing reports					■	■	■
Change reports whilst in preview					■	■	■	
<b>Working with your Accountant</b>	Accountant Link VAT & Bank Reconciliation changes can be automatically applied					■	■	■
	Accountant Link - easily work with accountant to exchange information and process adjustments			■	■	■	■	■
	Audit Assistant		■	■	■	■	■	■
<b>Project Costing</b>	Correct transactions & allocate project to payments or receipts					■	■	■
	Project Hierarchy, committed costs, improved reporting				■	■	■	■
	Project Costing - new module available in Accountant Plus & Financial controller to manage project costs			■	■	■	■	■

# Upgrades – Like for like

Area	Feature	Version						
		V9	V10	V11	V12	2007	2008	2009
<b>Charities</b>	Usability - launch pad to make it easier to navigate and set up					■	■	■
	Improved SOFA Report - all fund types on one single report					■	■	■
	HMRC Approved Gift Aid report (R68)					■	■	■
	Support for Charities - management of funds, SOFA reporting				■	■	■	■
<b>Bank</b>	Retrospective bank reconciliation report							■
	Easier to use - smart totals, additional columns, resizable screen							■
	Works with more banks & no additional charge for e-banking						■	■
	Reverse Bank Reconciliation					■	■	■
	Improved Bank Reconciliation				■	■	■	■
<b>Foreign Trader</b> (Accounts Pro only)	Foreign Trader transactions corrections & display foreign bank balance					■	■	■
	Foreign bank revaluation				■	■	■	■
	Foreign currency price lists		■	■	■	■	■	■
	Foreign Trader introduced	■	■	■	■	■	■	■
<b>Stock</b>	Improved BOM (Acc Plus & Fin Con, 50 levels)				■	■	■	■
	Stock allocation (acc plus & Fin Con)				■	■	■	■
	Stock shortfall & stock take	■	■	■	■	■	■	■

# Upgrading up the range - Triggers at a glance

Feature	Sage 50 Accounts	Sage 50 Accounts Plus	Sage 50 Accounts Professional	Client Manager
<b>Working with Sage 50 Accounts</b>				
Process Maps	■	■	■	■
New Diary with Outlook integration	■	■	■	■
Improved Dashboards	■	■	■	■
Multi-company and multi-user options*	up to 2 users	up to 2 users	up to 10 users	up to 10 users
<b>Working with your customers and suppliers</b>				
Sales and Purchase Ledgers	■	■	■	■
Improved debt chasing and prioritised payments	■	■	■	■
Invoicing & quotation management	■	■	■	■
Discount management	■	■	■	■
Improved Contact and delivery address management	■	■	■	■
Document Manager	■	■	■	■
Card payments	■	■	■	■
Project Costing		■	■	■
Individual Customer Pricing and Custom Price Lists		■	■	■
Multiple Delivery Addresses	■	■	■	■

## Upgrading up the range - Triggers at a glance

Feature	Sage 50 Accounts	Sage 50 Accounts Plus	Sage 50 Accounts Professional	Client Manager
<b>Working with your accounts</b>				
Nominal Ledger	■	■	■	■
Departmental Analysis	■	■	■	■
Budgeting	■	■	■	■
Bank Records & Bank Reconciliation	■	■	■	■
Cash Flow Planner	■	■	■	■
VAT Management & Audit Assistant	■	■	■	■
HMRC recognised VAT e-submissions	■	■	■	■
Profit & Loss and Balance Sheets with flexible reporting options	■	■	■	■
Report Designer	■	■	■	■
Excel Integrated Reporting	■	■	■	■
Support for Charities	■	■	■	■
Historical Data Analysis	■	■	■	■
Accountants Link	■	■	■	■
e-Banking Functionality	■	■	■	■
Transaction e-Mail	■	■	■	■
Cheque Printing		■	■	■
Foreign Trader, Bank Account Revaluation & Intrastat Support			■	■
<b>Working with your products and services</b>				
Stock Control		■	■	■
Bill of Materials		■	■	■
Stock Allocation		■	■	■
Sales Order Processing and Fulfilment		■	■	■
Purchase Order Processing		■	■	■

## Upgrading up the range - Triggers in more detail

### When to upgrade to Sage 50 Accounts?

- **Credit Control** - Instant Accounts provides many small businesses with the basic accounting system they need, but if they want to grow, they really need to take more active control over their business. Sage 50 Accounts provides more sophisticated features to control the business – such as Credit Control to help manage cash flow in and out of the business.
- **Report Capabilities** - The reporting in Sage 50 Accounts is also stronger than Instant – including Excel Integrated Reporting to allow managers to analyse their business performance in far more detail.
- **Frequent Transactions** – Recurring invoices, customer receipts & supplier payments, allowing

automation of regular transactions.

- **Refund Management** – Recording payments made to customers and receipts from suppliers directly onto their accounts, simplifying refund process and reconciliation procedures for VAT and Bank procedures.
- **Department Management** - Whilst extended recording capability in Sage 50 Accounts has been introduced, if departments are a key requirement to the business, they can produce Profit & Loss, Balance sheets per individual department or for a range of departments based on date or accounting period, allowing them to monitor business performance and key trends no matter what they are used for.

# Upgrading up the range - Triggers in more detail

- **Advanced Budget Management** - The budget management feature gives businesses a much tighter control over their performance and the ability to spot issues more easily allowing them to take the necessary corrective action.
- **Multi companies** - It may be the business has expanded – opened another shop or office, the additional companies in Sage 50 Accounts will help them manage this.
- **Charities** – Sage 50 Accounts has specific functionality to support the needs of not for profit organisation including Fund Management and Gift Aid reporting.
- **Sage Additions** – It may be the business requires a third party add on or Sage Software to manage specific requirements for your business e.g. direct debit collection, web integration.

## When to upgrade to Sage 50 Accounts Plus?

If the volume of business increases, then some of the features in Accounts Plus will help provide a professional management of a growing customer-base.

- **Price Management** - Features like individual customer price lists removes the need to rely on memory or manual systems and reduces the risk of error.
- **Batch Processes** - and batch conversions of quotes will increase efficiency and flexibility of customer management processes.
- **Stock Management** - Increasing the volume of business can cause problems with increased stock holding – holding back further growth because of the financial impact. The advanced stock management and Bill of Materials capabilities in Accounts Plus (version 12 onwards) can help reduce stock holding, whilst maintaining flow.
- **Projects/Jobs** - For many businesses that need to manage projects – either for customers or internally – then the Project Costing feature in Accounts plus is a great benefit. It is a powerful feature for all businesses that need to control budgets and costs of their projects.

- **Asset Management** - Management of assets ensuring accurate postings and up to date accounts. Automate journal processes for depreciation and write off saving time and reducing the risk of error.

## When to upgrade to Sage 50 Accounts Professional?

Sage 50 Accounts Plus users understand the importance of advanced functionality, and how that can help them improve their business efficiency. Accounts Professional allows them to extend this throughout their key business processes to maximise their business performance.

- **Customer Order Management** - Allows them to manage stock allocations, preferred customers and keep tighter control of what is to be despatched, invoiced and also returns.
- **Supplier Order Management** - Allows a more profitable relationship with their suppliers and also tighter control over stock. Businesses can easily identify what is on order, what is due for delivery and needs to be reordered. It automates the process of reconciling invoices against purchase orders.
- **More users** - As businesses increase the sophistication of their computerisation, they need to process more and more transactions. Sage 50 Accounts Professional allows up to 10 concurrent users – dramatically increasing the scope of their business improvement.
- **Dealing with Business outside the UK** - Foreign trading is becoming increasingly necessary for businesses to expand – the full foreign trading capability of Sage 50 Accounts Professional allows complete control of foreign currency transactions.
- **Multi Companies** - whilst all variants of Sage 50 Accounts have multi company capability, only Accounts Professional has the Consolidation feature. This is especially useful where businesses have to produced consolidated accounts for all or some of their subsidiaries. With the new advanced budget management feature, the businesses have a much tighter control of their business performance across multiple companies and departments.

# Upgrading Up the Range

## Upgrading from Sage Instant Accounts to Sage 50 Accounts 2009

There are a number of key areas that Sage 50 Accounts 2009 offers more powerful functionality over the Instant range.

Area	Features	Benefits
<b>Credit Control – Customer</b>	Credit History, Days to pay, Sales Outstanding, Days Sales Overdue, Suggested Supplier Payments, Contact Management, Terms Setting, Disputed items, Mailing restrictions Contacts	Many businesses fail due to cashflow problems that can be more easily prevented with good credit control practice. The credit control capability in Sage 50 Accounts enables businesses to be more in control of their cashflow and how they manage their customers and suppliers. The longer an invoice is outstanding, the less profit the business gets. Thus Sage 50 Accounts offers greater control in ensuring that they set the terms for their customers, check their credit history to reduce the risk of taking on customers who cost them their business.
<b>Customer &amp; Supplier Records</b>	Default Nominal Code, Duplicate accounts, Batch change, Contra Entries <b>New</b> contact management	More efficient processing in setting up accounts, processing with the accounts and linking in to 3rd Party software for direct debit collection.
<b>Discounts</b>	Discounted Price Lists, One off discount per item, Customer Price List, Stock price list, By Invoice Value, By Quantity	Discounts are commonly used in business to reward loyal customers and provide an incentive to purchase more. Sage 50 Accounts offers much greater flexibility in managing discounts for both customers and suppliers. Different accounts can have different levels of discount depending on what, when and how much they purchase. They may use different suppliers to purchase the same goods and want to get the best price. If administering this on a more manual basis, there is a risk of goods costing more as they are not getting the best prices from the suppliers. For their customers, it is more difficult to promote the offers they have and risk over charging their customers creating unnecessary dissatisfaction, generating corrections and resulting in invoices taking longer to pay.
<b>Stock</b>	BOM (Acc Plus), Stock Take, Shortfall Stock Type – Service, Locations Images (WEB), Instratat, Last order date Last order quantity, Re-order level, Re-order quantity	If a business manages stock, the Sage 50 Accounts range allows them to keep a much tighter control. If they are dealing with high volume of stock or many product lines, then Sage 50 Accounts is a more logical solution. Monitoring stock levels ensures they order on a timely basis and also the appropriate amount so they are not left short at busy times and also have too much stock in hand –reducing their profit. The stock take functionality means they do not have to keep manual systems and can account for their stock more easily.
<b>Invoicing</b>	Proformas, Mix & Match (Acc Pro Only) Labels, Recurring, Delivery Address Contacts, Additional line item, Order Reference (Fin Con Only), Courier – despatch tracking, Invoice Profit by item	The Invoicing capability of Sage 50 Accounts is much more powerful than the Instant Range. Delivery addresses ensure they deliver goods to the correct contact at the correct customer location. They can easily deal with tracking delivery enquiries via the despatch tracking. They can also track profit per item or per invoice allowing them an instant view of how much profit they make with each invoice. This together with order processing, recurring transactions allows businesses to operate much more efficiently.
<b>NEW Report Designer</b>	Advanced capability	Much more flexible, removes the need to generate multiple reports or perform calculations externally. Allows a suite of reports totally customised to the needs of each individual business that uses Sage 50 Accounts.
<b>IMPROVED Departments</b>	Transactional P&L, Balance Sheets (Acc Plus & Accounts Professional)	Many businesses use the department analysis extensively – sales reps, locations, jobs, vans, departments. The department capability in Sage 50 Accounts is much more flexible, not only in its use, but more importantly in the analysis. The New Report Designer is the perfect compliment for any business using departments for analysis as it will enable them to generate the reports they require, when they require them.

# New Sales

## **Product Positioning - The Accounts range**

There is a range of solutions available to satisfy the different requirements of individual businesses, as well as providing different levels of sophistication to meet customer budgets...

### **Startup**

Sage Startup is a complete solution encompassing both software and service – aimed at people just starting out or new to businesses. This service provides everything a business needs to plan, start and run their business.

The software aspect is designed to provide businesses with simple record keeping needs who have no knowledge of accounts. As their business becomes established and needs become more sophisticated to manage their customers, suppliers, stock, how they invoice, when they invoice then Sage 50 Accounts is the ideal solution they can easily upgrade to. Whilst the presentation and terminology of the application is different to Sage 50 Accounts, the underlying data is Sage 50 Accounts and can be easily upgraded.

### **Instant Accounts & Instant Accounts Plus**

Sage Instant Accounts and Instant Accounts Plus provide a low-cost entry point to computerised accounts software for new and very small businesses wanting to take control of their business finances.

Instant Accounts products are based on the same technology as the Sage 50 Accounts range – so upgrading to Sage 50 accounts couldn't be simpler.

### **Sage 50 Accounts**

As companies grow and become more established they demand more from their business software. Sage 50 Accounts provides a sophisticated business management system that uses a highly developed and robust accounting solution to provide efficient management control.

The Process Based Navigation and Process Reporting in Sage 50 Accounts allow growing businesses to develop and manage effective business processes. The Payment Process Control means that the most critical processes are fully controlled, and the Drill-Down Analysis means managers can quickly identify the root cause of any exceptions.

Sage 50 Accounts is suitable for businesses who are looking for a solution to improve management of customers and suppliers (credit control processes) though have more analysis requirements (department) than Instant customers and have minimal requirements to manage stock or projects.

### **Sage 50 Accounts Plus**

Sage 50 Accounts Plus has all the same reporting and process control features of Sage 50 Accounts, but the advance costing features and customer and supplier management features allow effective control as businesses increase in complexity.

The enhanced Project Costing and Bill Of Materials functions in Sage 50 Accounts Plus allow businesses to keep control of costs in all their products and projects. And the Advanced Customer and Supplier Management features allow both customers and suppliers to be managed efficiently and professionally. Additional flexibility is offered via customer discount and price management ensuring they can automate the process of rewarding customers for loyalty and continued business.

### **Sage 50 Accounts Professional**

For established small businesses, Sage 50 Accounts Professional provides the ultimate sophisticated business management software. Sales Order Processing and Purchase Order Processing capabilities provide a powerful financial control capability for the entire business supply chain from supplier to customer. And full foreign currency operation means companies can trade effectively overseas in their customers' and suppliers' currencies.

# New Sales

Sage 50 Accounts Professional also has full multi-user capability up to ten concurrent users – so it can be built into different departments' processes. Companies can control their key transactions as they happen – not just update the paperwork later in the week. All financial, customer and supplier transactions are completed efficiently and accurately throughout the business.

## Sage 50 Client Manager

Many accountants recommend their clients to use business software to manage their business finances. Over 90% of them recommend Sage, and thousands of UK accountants use Sage 50 Accounts themselves. Their requirements are different from other companies, though, so Sage 50 Client Manager version has been developed specifically to meet their needs.

At the centre of the Sage 50 Accounts product is the Accountants' Link - which allows accountants and their clients to work together more closely. Clients can continue to process whilst their data is with their accountant - no matter what the reason. Accountants do not have to disrupt their clients operation whilst they work on their data or worry about what has been added to it.

Sage 50 Client Manager 2009 links directly to versions 11, 12, 2007, 2008 and 2009 of Sage 50 Accounts, and versions 12 and 14 of the Instant Accounts programs.

## Qualifying questions for Accounts range

### Sage 50 Accounts Professional

- Do you buy or sell overseas?  
(Foreign Trader)
- Do you need a system to handle Sales and Purchase Orders?  
(Sales and Purchase Orders)
- Do you deal in 'over the counter' sales?  
(Cash Sales)

- Do you need more than 2 users to use Sage 50 Accounts? (More than 2 user licence)

### Sage 50 Accounts Plus

- Do you need individual pricing or price lists for different types of customers?
- Do you do any jobs where you need to track their status & profitability against budget? (Project Costing)
- Do you need to view profitability & shortfalls on different products? (Advanced Stock & Depts. for Analysis)
- Do you need to manage assets, prepayments or accruals?

### Sage 50 Accounts

- Do you need to view profitability of individual departments or areas?  
(Departmental Budgets)
- Do you use Excel? How many people would you want to access the Accounts information? (Excel Integrated Reporting)
- Would you need help with managing cash flow and credit control?
- Do you need to manage discounts based on what customers buy and how much ?
- Do you manage sub-contractors? (CIS)
- Do you need more than one company to manage your business?

### Instant Accounts Plus

- Do you need some basic stock control?
- Do you need to be able to give fixed discounts to certain customers?
- Do you need to see an overview of the business on one screen? (Dashboards)

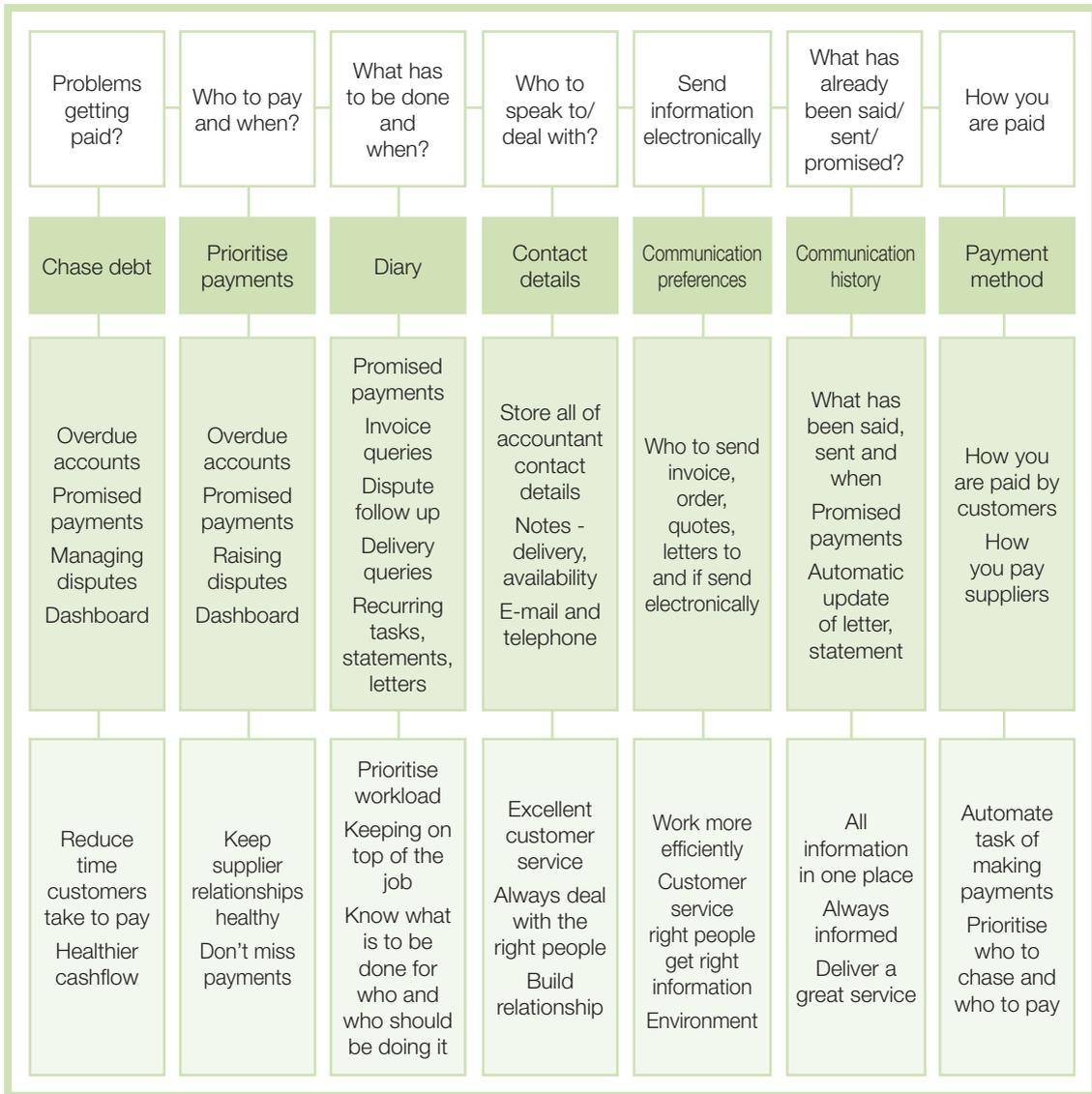
### Instant Accounts

- Do you need to generate financial reports such as Profit & Loss reports & Balance Sheets?
- Do you need a comprehensive accounts system to manage your customers, suppliers and financials?

If not any of the above recommend Startup.

# New Sales

## Managing your debt and building lasting profitable relationships



## Working efficiently



# Qualifying New Sales - Switching to Sage

## From Outsourcing

### Likely Profile

- Many businesses choose to outsource their accounts early in their start-up or growth stages to allow them to concentrate on their core work – providing service to customers and gaining new customers.
- As businesses grow, they need far more control over their finances – as they get more customers they need up-to-the-minute records of their customer accounts, for instance.
- As they establish more products and services, they need to be able to control their stock and resources, and understand the impact on their finances.

### Comment

- Outsourcing early on allows businesses to focus on getting established, but it doesn't give them the control they need to grow.
- Transition from outsourcing to in-house accounts is a big step and needs support from their accountant.

### Why buy Sage 50 Accounts?

- Changing from outsourcing to using in-house computerised accounts will give them the control they need to grow, and reduce their dependence on their accountant.
- They will need to be certain they can still get all the support and advice they need from their accountant – Sage 50 Accounts is the market leader, and 92% of accountants who recommend accounting software recommend Sage.
- Sage 50 Accounts has Process Maps that really help new users to learn and operate their accounts software.
- Sage 50 Accounts includes the Accountant Link, so they can easily get their accountant to check and correct their accounts if they need to while they are learning. They can also use this feature to take a phased approach to taking control of their finances for example, they could start using their data

to do the invoicing, customer and supplier management processes allowing their accountant to undertake bank and VAT reconciliations. This process could then be brought in house at a later date.

- There is a high possibility that their accountant is also using Sage 50 Accounts, their accountant can supply a copy of their data to restore into their program making it a smooth process to get up and running.

## From Manual Accounts – Excel and Paper

### Likely Profile

- Many businesses start off using manual systems for tracking costs and their basic accounts. This used to be paper, but often now Excel spreadsheets they have written themselves.
- Users may be satisfied with their Excel systems for controlling basic finances, but they don't have the detail they need to really keep full control. Often details of cash flow, credit control and tax are not included.
- The companies are likely to be very small – with their non-standard accounts systems holding back their company growth.

### Comment

- If the business is to grow they need to standardise their accounts to give the owner/manager time to focus on the business rather than maintaining the accounts.
- They may want to hire someone to manage the books, but they can't really do this using a system that they have written themselves that isn't standard.
- Excel systems are usually not very reliable – without proper security or backups, and data entry is usually very slow compared to a proper accounts program.

# Qualifying New Sales - Switching to Sage

## Why buy Sage 50 Accounts?

- Sage 50 Accounts is a complete professional accounts system - with efficient data entry and complete financial analysis capability as standard. It gives far greater business control than Excel systems.
- Sage 50 Accounts is the clear market leader, so if they need to hire someone to manage the bookkeeping (now or in the future) then they know they can easily hire someone without worrying if they can operate the accounts system.
- Sage 50 Accounts has the new Process Maps to help new users learn and operate their accounts - making it far easier to change from manual systems to computerised accounts.
- Sage 50 Accounts includes the Accountant Link feature, so getting support from their accountant will be far easier and more efficient using Sage 50 Accounts than using non-standard Excel spreadsheets.

## From competitor software

### Likely Profile

- Small businesses that use competitor software (eg QuickBooks, MYOB, IRIS Financials) already understand the benefits of computerised accounts, but may have reached the limit of capacity of their program.
- Larger companies may be using legacy mid-market programs (Pegasus Opera, Access, Multi-soft) and need to update but don't need the scale of a modern mid-market program.
- Their business is expanding and are looking to take on more staff, it is much easier to take on staff with knowledge of Sage 50 Accounts than any other software.

### Comment

- For smaller companies outgrowing their current software, Sage 50 Accounts provides a logical next step with full functionality and industry standard operation.

- For larger companies that bought a mid-market program several years ago to get the functionality they needed, Sage 50 Accounts provides mid-market type functionality at a fraction of the price if they do not need the scale of a mid-market solution.
- They may be looking for a complete solution encompassing support and training, Sage has award winning service that can support them through expansion.

## Why buy Sage 50 Accounts?

- Small companies wanting to grow may need to hire more people who will need to use the software – either in the accounts, or in other areas, like stores. Because Sage 50 Accounts is the market leader, they will find it easier to hire people who already know Sage than other programs.
- If their current program doesn't allow them to keep complete control of all their business processes (eg purchase order processing, or foreign currency operation) then Sage 50 Accounts Professional has all the functionality they need, and the Process Maps make the program very easy to learn and operate.
- Sage 50 Accounts Professional can support up to 10 users – so gives far greater scope for growth than other small-business programs.
- Sage 50 Accounts Professional has functionality usually only expected in mid-market programs – like full multi-currency operation – but at a fraction of the price, either to purchase or for ongoing support.
- Sage 50 Accounts is the clear market leader, so there is no problem getting support from an accountant.



# New Sales

Feature comparison Accounts range - Startup, Instant and Sage 50 Accounts

Feature	Startup	Instant Accounts	Instant Accounts Plus	Sage 50 Accounts	Sage 50 Accounts Plus	Sage 50 Accounts Professional	Sage 50 Client Manager
Money In/Money Out	■	■	■	■	■	■	■
New Business Diary	■	■	■	Advanced	Advanced	Advanced	Advanced
Business Overview (Basic)	■	■	■	■	■	■	■
Business Tools & Information	■	■	■	■	■	■	■
<b>Sales, Purchase, Nominal Ledger</b>		■	■	■	■	■	■
<b>Credit Control</b>	Basic	Basic	Basic	Advanced	Advanced	Advanced	Advanced
<b>Improved contact &amp; delivery address management</b>				■	■	■	■
<b>VAT Return</b>	■	■	■	■	■	■	■
<b>Online VAT submissions</b>		■	■	■	■	■	■
<b>VAT Schemes</b>	Standard, VAT Cash Accounting	Standard, VAT Cash Accounting, Irish Cash Accounting					
<b>Bank</b> (Cash Book) including bank reconciliations	■	■	■	■	■	■	■
<b>Invoicing</b>	■	■	■	■	Advanced	Advanced	Advanced
<b>Quotations</b>	■			■	■	■	■
Report Output format	PDF HTML	PDF HTML	PDF HTML	PDF HTML Word Excel	PDF HTML Word Excel	PDF HTML Word Excel	PDF HTML Word Excel
Pre-defined Reports	■	■	■	■	■	■	■
Process Maps, Wizards (including my business set up) & Help Files	■	■	■	■	■	■	■
Smart Link, smart columns & totals	■	■	■	■	■	■	■
Improved intergration with MS Office	■	■	■	■	■	■	■
<b>E-Banking Payments &amp; Reconciliation</b>		■	■	■	■	■	■
<b>Financial Reports – Trial Balance, Profit &amp; Loss, Balance Sheet</b>		■	■	Advanced	Advanced	Advanced	Advanced
<b>Budget Management</b>		Basic	Basic	Advanced	Advanced	Advanced	Advanced
<b>Accountant Link</b>		■	■	■	■	■	■
Task Manager		■	■	■	■	■	■
Improved Email Reports, Invoices, Credit Notes, Statements & Remittance Advice(PDF)		■	■	■	■	■	■
Access/Security		Password only	■	■	■	■	■
Recurring Entries		■	■	■	■	Advanced	Advanced
<b>Transaction E-Mail</b>		■	■	■	■	■	■
Euro Currency Calculator & Invoices		■	■	■	■	■	■
<b>Discounts</b>		■	■	■	■	Advanced	Advanced
<b>Department Management</b>			Basic	Advanced	Advanced	Advanced	Advanced

# New Sales

Feature comparison Accounts range - Startup, Instant and Sage 50 Accounts

Feature	Startup	Instant Accounts	Instant Accounts Plus	Sage 50 Accounts	Sage 50 Accounts Plus	Sage 50 Accounts Professional	Sage 50 Client Manager
Proforma				■	■	■	■
<b>Stock Control</b>		Record only	Basic	Basic	■	Advanced	Advanced
<b>Improved Report Designer</b>			Basic	Advanced	Advanced	Advanced	Advanced
Data Import			Basic	■	■	■	■
Improved Dashboards			Basic	■	■	■	■
<b>Card Payments</b>		■	■	■	■	■	■
Cash Flow Planner				■	■	■	■
<b>Historical Data Analysis &amp; Management Reporting</b>				■	■	■	■
<b>Support for Charities</b>				■	■	■	■
Prepayments & Accruals					■	■	■
Repeat Invoices (& Orders FC only)				■	■	■	■
<b>Product Valuation &amp; Profit Reports</b>				■	■	■	■
<b>Excel Integrated Reporting</b>				■	■	■	■
<b>Document Management</b>				■	■	■	■
Event Logging & crash checking				■	■	■	■
Multiple Delivey Addresses				■	■	■	■
<b>Project Costing</b>					■	■	■
Cheque Printing					■	■	■
Fixed Assets					■	■	■
Scale Charges					■	■	■
<b>Individual Customer Price Lists</b>					■	■	■
<b>New Stock Allocations Reservers</b>					■	■	■
Bill of Materials					■	■	■
Mix and Match Invoices (Service & Stock)						■	■
<b>Sales Order Processing</b>						■	■
Sales Order Fulfilment						■	■
<b>Purchase Order Processing</b>						■	■
<b>Cash Sales</b>						■	■
<b>Foreign Currency including Price Lists, bank transfers &amp; revaluation</b>						■	■
Consolidation						■	■
Sage 50 ACT! Intergration		Basic	Basic	Advanced	Advanced	Advanced	Advanced
Integrates with Sage 50 Payroll		■	■	■	■	■	■
Integrates with Sage 50 Financial Forecasting				■	■	■	■
Integrates with Sage 50Intelligent Reporting				■	■	■	■
<b>Integrated Retail, Manufacturing &amp; Construction Solutions</b>				■	■	■	■
<b>Sage Additions (Integrated 3rd Party applications)</b>				■	■	■	■
<b>Support</b>	Included	Additional Charge	Additional Charge	Additional Charge	Additional Charge	Additional Charge	Additional Charge
Full Upgrade Path	■	■	■	■	■	■	■
<b>Network Capability Option</b>	Single	Single	<b>2 User*</b>	<b>2 User*</b>	<b>2 user*</b>	<b>10 User*</b>	<b>10 User**</b>
<b>Companies</b>	Single	Single	<b>Single</b>	<b>Multi*</b>	<b>Multi*</b>	<b>Multi*</b>	<b>Multi*</b>

\* Max optional users (standard product will be normally one user option only)

\*\* Line 50 Client Manager base product is sold with a 25 company licence and a 2 or 6 user break.

# Qualification – New sales in detail

## Working with your Customers and Suppliers

- What information do you hold about your customers/suppliers?
- What credit control procedures do you have in place at the moment?
- What debt chasing issues do you have?
- What sectors of the market do you sell to?
- Do you have different prices for those different customers?
- How often do you reward customers by giving them discounts or even special prices for certain products?
- Do you ever have to deliver to a different address to where the order came from?  
E.g. A head office

## Customer Records – All variants

Provides detailed records of your Customers - Name, Address, Credit Terms etc...

View your customers buying history/activity.

## Customer Ledger – All variants

A comprehensive list of all your customers with the facility to process batch invoices, view what invoices are outstanding, print labels, letters, statements and reports.

## Supplier Records – All variants

Provides detailed records of your Suppliers - Name, address, Credit Terms etc...

View your buying history/activity with your Suppliers.

## Supplier Ledger – All variants

A comprehensive list of all your suppliers with the facility to process batch invoices, view your outstanding invoices, print labels letters and reports.

## Credit Control – All Sage variants

Record detailed credit information about your customers and suppliers – Credit Terms, Payment due days, On-line credit checking facilities, etc.

All credit control functionality is brought together in one central place. A Suggested Supplier Payments option and Days Sales Outstanding graph help you measure the

performance of your company against industry norms and who best to allocate available funds to. A full credit history is available to control and track all credit control related dealings with both customers and suppliers.

## Invoicing – All variants

Generate invoices for your customers either by using the product records you created or details of the services you provide.

## Quotation Handling Process – All variants

Create quotations and proformas. Choose whether you want to turn a quotation into an order/invoice, or whether you want to keep the quotation for your records, or to use again in the future. Analysis and reporting tools help you to track the conversion of quotations to orders and invoices, monitor the top performers, monitor how many orders you win and lose, and how long it takes to turn a prospect into cash.

## Discounts – All variants

Range of discount options available from basic % discounts on customer records to invoice value (If the value of an invoice exceeds an amount, discount will be applied) and stock quantity (When a customer buys over a certain quantity then a discount rate is applied) You can now see and change discounts as you enter invoices and orders. Whether you want to apply one-off discounts to individual items, or across the board, Sage 50 Accounts helps you make short work of providing your customers with a clear indication of the total discount allowed.

## Document Manager – All variants

Document Manager allows you to maintain control over all documentation relating to a number of areas within Sage 50 Accounts such as Customers, Suppliers, Products, Transactions etc. You can store, view, modify & print attachments such as letters, price lists, delivery & assembly instructions. The report generator capabilities have also been enhanced to include PDF output allowing you to share information even easier than before.

# Qualification – New sales in detail

## **Project Costing – Accounts Plus & Accounts Professional**

Allows many businesses from builders to management consultants to create project records for specific projects & specific customers, assigning project references to them. Organise your projects in logical groups, record committed costs against projects, analyse rolled-up costs and budgets, and compare costs incurred against budgeted amounts. Transactions relating to the projects can be viewed & traced back to original documents. In addition there is a flexible reporting system that allows you to produce information enabling you to monitor & understand costs.

## **Individual Customer Price Lists – Accounts Plus & Accounts Professional**

As well as the overall Sales price, a product code can now contain a Sales price for each individual customer.

## **Multiple Price Lists – Accounts Plus & Accounts Professional**

You can set up a number of Price Lists for your product records.

## **Multiple Delivery Addresses - All variants**

This feature will allow a user to store and manage multiple customer, supplier and company delivery address. Used when creating Sales invoices, Sales & Purchase orders.

## **Working with your Accounts**

- How do you keep track of your sales and costs/assets and liabilities?
- How do you monitor your bank balance and cash flow?
- How beneficial would it be for you to see at a glance how much money is due in, due out and the effect it will have on your bank?
- How do you track how much money you have to pay out?
- How do you pay your suppliers?
- How do you normally reconcile your bank statement?

- How often and how long does it take you to produce financial reports?
- How difficult do you find tracing information back from the profit and loss and balance sheet?
- What information about your business do you need to know and be able to analyse?
- How do you produce your VAT return at the moment?
- How long does it take you to prepare for an audit inspection? How do you ensure your information is correct?
- How do you currently invoice your customers?
- How beneficial would it be to receive orders/invoices via e-mail and import them directly into your Sage program?
- How do you currently store and view previous years data?
- Are your customers/suppliers outside of the UK?

## **Nominal Ledger – All variants**

This is the heart of your accounting system where all your business information on your assets, liabilities, income and expenditure are held. This forms the basis of your profit & loss and balance sheet reports which can be run at month and year ends.

## **Accounts Analyser – All variants**

Displays the nominal ledger as a comprehensive on-screen set of charts that can be investigated in more depth by drill-down from the same screen with just one click. Stores a snapshot of your business (per month, per year, cumulatively) instantly. Compare this year vs. last year instantly or against budgets.

## **Bank & Bank Reconciliation – All variants**

Record multiple bank accounts and their details. Enter payments and receipts. Match bank transactions against those on your actual bank statement. Save bank reconciliations part-way through - essential if you're interrupted during the process, or if you need to work in another area of Sage 50 Accounts. See at a glance which transactions have already been matched to the statement, and which remain. Retain a PDF image of each reconciliation.

# Qualification – New sales in detail

## **Cash Flow Planner – All variants**

Displays at a glance outstanding payments due in and out. Allows forward cash flow planning, including the effect making or receiving payments will have on your finances over the next few weeks.

## **Profit & Loss and Balance Sheet Reports – All variants**

accounting information stored within Sage 50 Accounts both of these financial reports can be generated at the touch of a button.

## **Report Designer – All variants**

Gives you the ability to produce reports and information in a way that meets your needs.

## **Advanced Budget Management – All variants**

Many businesses use departments for many different reasons – eg staff, location, jobs, company department.

No matter what you are using the department analysis for in your business you can now monitor performance even more closely and efficiently than ever before.

More in control of department performance can identify most profitable, cost effective, best performance and poorest performance easily on a month by month basis

Easier to use – no need to generate report to view budgets/ or departments performance  
Easier to manage transition into new financial year – can set and monitor budget performance in advance of running year end.

## **Excel Integrated Reporting – All variants**

Microsoft Excel can now link directly to your Sage 50 Accounts data so that directors & managers can access & analyse accounts information without needing to use Sage 50 Accounts themselves or have it installed on the same pc. You can modify and refresh data ranges, change the chart of accounts used and take any Sage 50 Accounts report (even a report you've designed yourself) and use it in Excel as a Sage Data Range!

## **Support For Charities – All variants**

Sage 50 accounts has features designed to make running and reporting on a charity's operations easier and more efficient. By working closely with accountants specialising in working with charities, we've included fund management, charity-specific financial reports, and an improved chart of accounts designed just for charities.

## **VAT Returns & Audit Assistant – All variants**

A VAT return can be generated and completed and submitted on-line at the touch of a button in hours rather than days by including all of your inputs and outputs within a specified date range. Checks customers data for accuracy and helps prepare for an audit. Identifies suspect/duplicate transactions. Runs checks for possible VAT queries and errors.

## **Historical Data Analysis – All variants**

Allows users to archive a complete set of company data before running the year-end. You can then analyse and report on archived data, which is immediately available without having to restore a back-up. Store an unlimited number of years archived data.

## **Accountant Link – All variants**

Send information to your accountant electronically. The Accountant can then load, view and record transactions. Corrections can be easily merged back into your data whilst you continue to process your daily transactions.

## **Card payments integration with Sage Payment Solutions – All variants**

As more and more businesses want the option of taking card payments from customers, we've developed tools to help you do it quickly and securely whilst automatically updating your accounts.

Sage Payment Solutions allows you to validate and take card payments by telephone or mail order. It offers secure and instant validation, saving you time and reducing the risk of fraudulent card use.

# Qualification – New sales in detail

## **E-Banking – All variants**

**E-Payments** – Enables customers to make direct payments through BACS by making the supplier payment in the usual way and then transferring to the bank software using the E-payments button.

**E-Bank Reconciliation** – Reconciles transactions in Sage with those in your banking software. Download a bank statement into your Sage accounts program and automatically reconcile payments and receipts against both statements.

## **Transaction E-mail – All variants**

Allows orders and invoices to be sent & received by e-mail instead of printed out & sent by post. Imports received orders & invoices directly into the accounts software, so there is no need to re-key the information. Provides confirmation messages throughout the order-processing cycle.

## **Cheque Printing – Accounts Plus and Accounts Professional**

Ability to print cheques directly from your Sage 50 accounts software.

## **Foreign Trader & Foreign Bank Account Revaluation – Accounts Professional**

Process foreign currency transactions in all major currencies. Produce invoices, credit notes, sales and purchase orders in foreign currency. (Works With Tmail) Make & receive payments in foreign currencies. Maintain foreign currency price lists, handle exchange rate fluctuations, and comply with legislative requires for declaring foreign trade on their VAT returns and in Intrastat declarations in both standard and cash-based VAT accounting.

Management of foreign currency bank accounts is simple with an improved revaluation wizard, and a new 'revaluations' tab on each foreign currency bank record to help you keep track of the true value of your foreign currency assets over time. Transfer funds between foreign currency bank accounts.

## **Working With Your Products and Services**

- How do you record your stock details?
- How do you currently know how much stock you have?
- Are your products made up of individual components?
- What processes do you go through when selling or buying in stock?
- How do you know if you are short of stock when placing an order?
- What process do you go through to fulfil the order?

## **Product Records – All variants**

Create product records, review product activities, analyse monthly sales values and quantities sold, apply discounts and generate valuation and profit reports.

## **Bill Of Materials – Accounts Plus & Accounts Professional**

An easy-to-use Bill of Materials editor allows you to set up records of the basic 'kit of parts' for your manufactured or assembled items, now allowing up to 50 hierarchical levels – more than enough for even the most demanding small manufacturing business. The stock transfer option allows you to record the use of stock items to make up one of your manufactured or assembled items. Check Bill of Materials allows you to see whether you have enough stock to make up your assembled items and the Stock Explosion and Makeup Reports display and print details of your manufactured and assembled items.

## **Stock Allocation – Accounts Plus & Accounts Professional**

As well as allocating stock to sales orders, you can now allocate to projects, or set aside stock for specific purposes – essential for those occasions where you need to reserve stock, whether for a specific customer, works order, job, or anything else! You can then review and modify these reservations, and when the time comes, just issue the stock to record the fact that you've used it.

# Qualification – New sales in detail

## Cash Sales – Accounts Professional

Generating all the paper work for a cash sale can be time-consuming. Sage 50 accounts v12 now helps you to execute trade counter sales quickly and easily. The Cash Sale button is configurable, so you can choose which documents should be printed, but whatever you and your customer end up with, you can be sure that all the stock movements, invoice generation and update, and sales receipts are properly handled.

## Sales Order Processing & Sales Order Fulfilment – Accounts Professional

Enables you to create orders, allocate stock, despatch stock and produce delivery notes. In addition when you don't have enough stock to satisfy orders the sales order fulfilment feature automates this process by informing you of shortfalls and automatically generating a purchase order. A new goods despatched notes option within sales order with the ability to display print and reprint all goods despatched notes relating to a particular order.

## Purchase Order Processing – Accounts Professional

Enables you to create an order, put on-order and then record delivery of the stock. Automatically generate an invoice and increase stock levels.

## Working with Sage 50 Accounts

- Would you like to be able to customise the screens to show the information important to your business?
- How easy do you find it to navigate around software?
- How useful would it be to have a step by step procedure for every process you need to record within the software?
- How are you currently processing your accounts?
- How often do you think you may need to import information into the Sage 50 Accounts program?
- How many people will need to use the software?
- How many sets of company accounts will you need to maintain and process?

## Process Maps – All variants

Each of the main areas of Sage 50 Accounts now has a map, showing you how to make light work of business processes such as sales order fulfilment. Each Process Map consists of a set of steps, connected together to show a workflow. So, if you're despatching orders for your customers, simply click on this step in the Customer Process Map, and you be taken straight to the Despatch Orders screen.

## Dashboards – All variants

All main areas of Sage 50 Accounts now have an optional Dashboard View, helping you to check your company's performance, rapidly and accurately. The Dashboards display a summary of your company's key information, providing a complete view of your company's business. You can drill-down for more information, or print the entire dashboard to keep a graphical record of day-by-day performance. The Dashboards will help you spot trends such as late payments, due bills and stock levels.

## Smart Columns, Smart Links, Smart Totals – All variants

Choose what information you want to be able to see at a glance. Intelligent navigation allowing you to access all customer/supplier transactions from one screen. View any transaction and hot link to any corresponding information or source document. Quickly total vital information – e.g. select a number of products whilst the customer is on the phone & advise them of the total sales price.

## Data Import – All variants

Choose how you want to import information into Sage 50 Accounts. The Information Import Wizard makes it even easier to import customer records, supplier records, transactions, stock and project records and project records.

## Multi-Company – Multi-User Options

Ability to store and process more than one set of company accounts. Ability to allow more than one person to access and process transactions at any one time. (Additional charges apply).

# Sage 50 Cross sell opportunities

## Managing your People

**Sage 50 Payroll** – UK's favourite makes light work of operating a payroll from processing payroll, to managing absence and completing the year end.

**Sage 50 P11D** – the ideal application to manage employees' taxable benefits easily and accurately.

**Sage 50 HR** – the latest to the Sage 50 Suite. Helps manage the employee needs of your business including maintaining records, absences, employee development and performance.

**Sage 50 HR Advice** - Sage HR Advice is a legally reliable human resource advice service. It translates the law into plain English, as well as providing advice on how to manage employees.

**Sage 50 Health & Safety Advice** - Sage Health & Safety Advice is a legally reliable health and safety advice service. It translates the law into plain English, as well as providing advice on how to fulfil business obligations.

## Managing your Future

**Sage 50 Forecasting** - Accurate forecasting is the key to business growth and success. It not only helps plan for the future, it also provides a powerful tool for managing the present.

**Sage 50 Intelligent Reporting** - Unlocks the data held within the Sage 50 Accounts software to provide detailed and easy-to-use management reports – helping to make informed business decisions.

## Managing your Customers

### Sage 50 ACT!

With more than 2.5 million individual users and 35,000 corporate customers, ACT! by Sage is the number one selling contact and customer management solution worldwide. The ACT! Product Family offers a range of solutions geared to individuals, small businesses, and corporate workgroups or teams to assist in increasing individual productivity, improving sales performance, and providing key insight into all customer interactions. Sage offers flexible deployment options including Windows, Web-based, and mobile access solutions to provide timely access to critical contact and customer information.

ACT! is renowned for exceptional end-user adoption, low overall total cost of ownership, and high return on investment for both individuals and organizations.

Sage 50 Accounts 2009 is the perfect compliment to our Sage 50 ACT! as it allows our customers the opportunity to work closer with their customers and suppliers and always have a consistent view of their business.

## Vertical Applications

There are a number of vertical applications that provide the perfect extension to the Sage 50 Suite.

### Sage 50 CIS

Sage 50 CIS is designed to work with all variants of Sage 50 Accounts 2009, to help business comply with the new CIS legislation, without generating endless paperwork or additional pressures on business time. It helps to manage subcontractor verification, issue of statements and production of monthly returns.

### Sage Construction (all variants)

Sage Construct Advanced is designed for multi-user access, and integrates with Sage 50 Accounts and Payroll. It offers increased construction control, from enquiry receipt to final account and includes management of retentions, applications for payment and comprehensive billing capability (including cumulative and self billing). The software provides instant access, at any stage of a contract, to vital management information, based on an almost unlimited number of cost elements grouped in multi-level sections.

### Sage 50 Retail Solutions (Accounts Plus and Accounts Professional only)

Sage PayPoint is designed specifically for businesses operating within a trade or retail environment and handling customer present transactions. Sage PayPoint software runs on the tills and can be customised to reflect the unique processes of any business, adopting the terminology and the look and feel they require, no matter how many bar codes and product variations they have. This makes the system easier to use and reduces staff training overheads.

# Sage 50 Cross sell opportunities

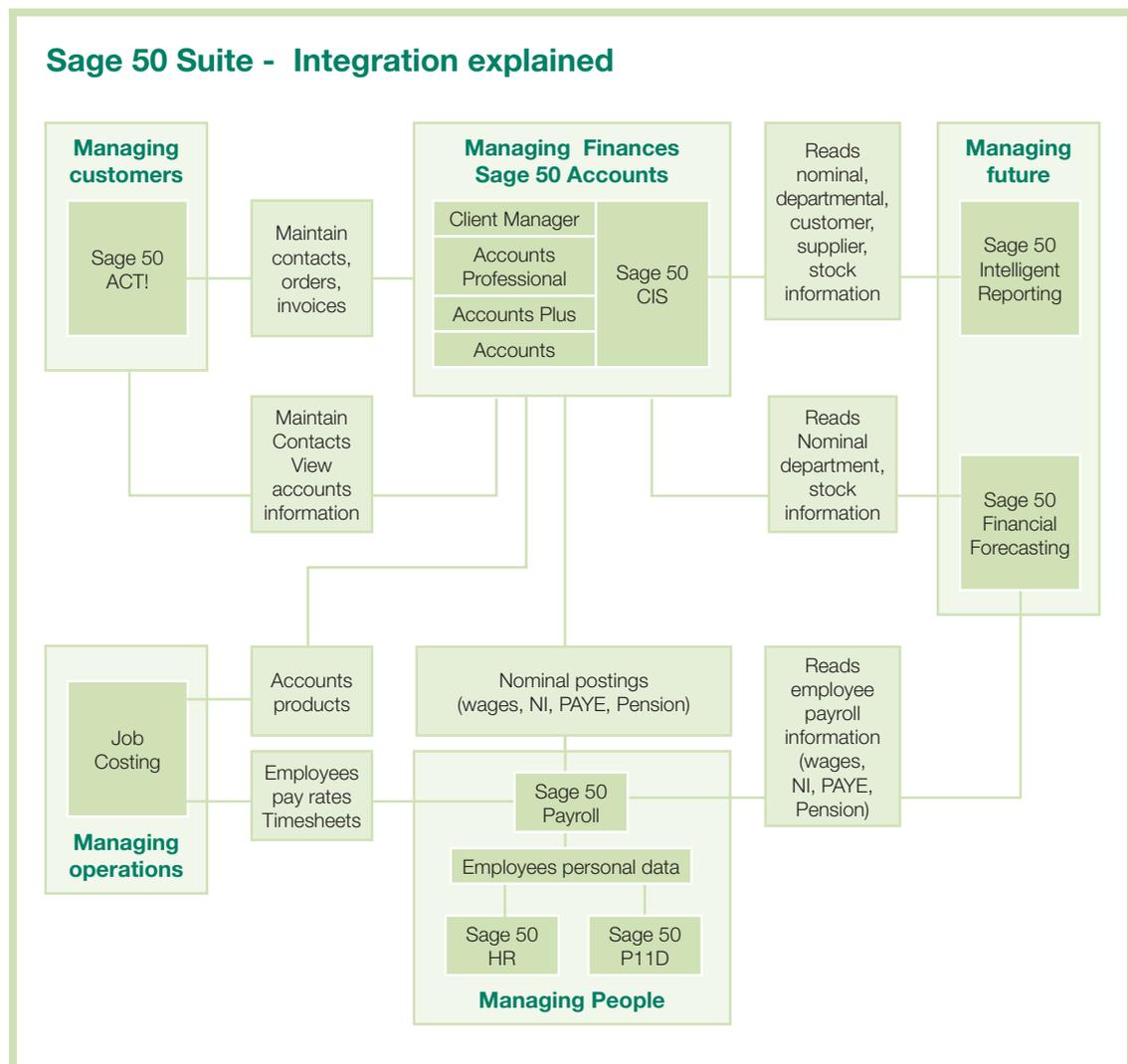
## Sage 50 Manufacturing (Accounts Professional only)

Sage Manufacturing Solutions for Sage 50 are ideally suited to smaller manufacturers and assemblers. They are fully integrated with Sage 50 Accounts Professional, saving time and increasing accuracy by eliminating the need to re-key data. Sage Manufacturing Solutions for Line 50 have the same look and feel as Sage Line 50 accounts, making the software easy to learn and use.

Sage 50 Report Designer has powerful capability that allows customers to analyse their data and drill to the detail underlying the reports. Sage 50 Intelligent Reporting extends this further providing the business with a powerful analysis tool to customise how the information is presented such as graphs, dashboards and customisation. It also provides the user with great flexibility for the production of management reports – customised chart of accounts can easily be set up for reporting on both nominal and department information.

## Sage 50 Report Designer vs Sage 50 Intelligent Reporting

Sage 50 Intelligent reporting is a great compliment to Sage 50 Accounts.

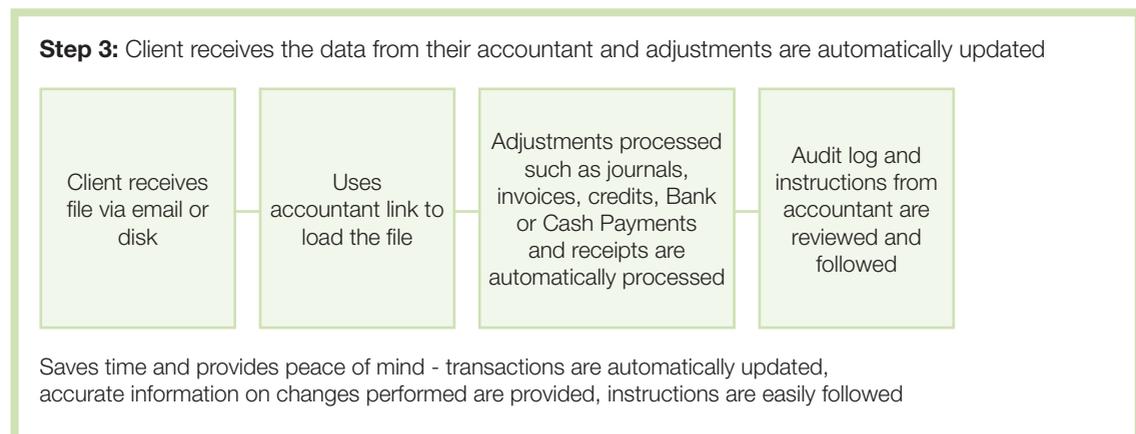
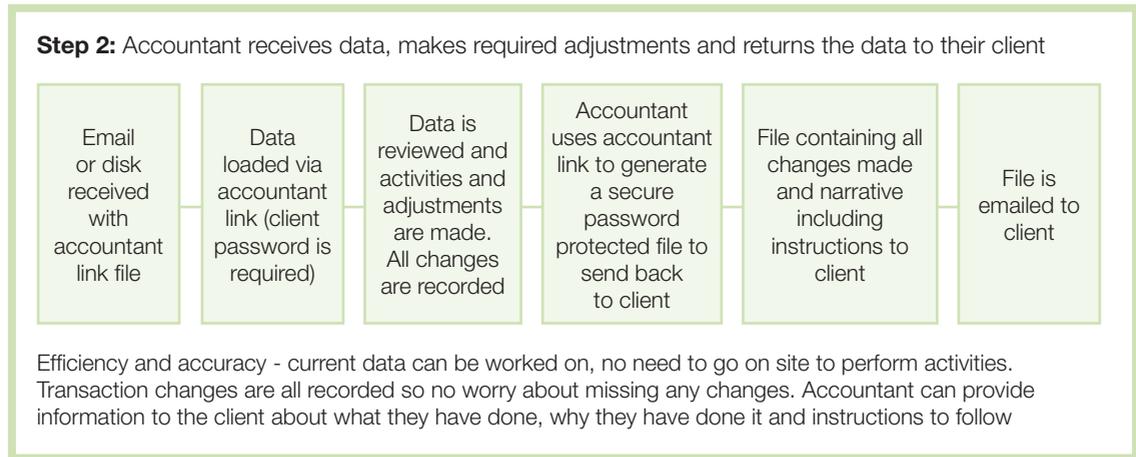
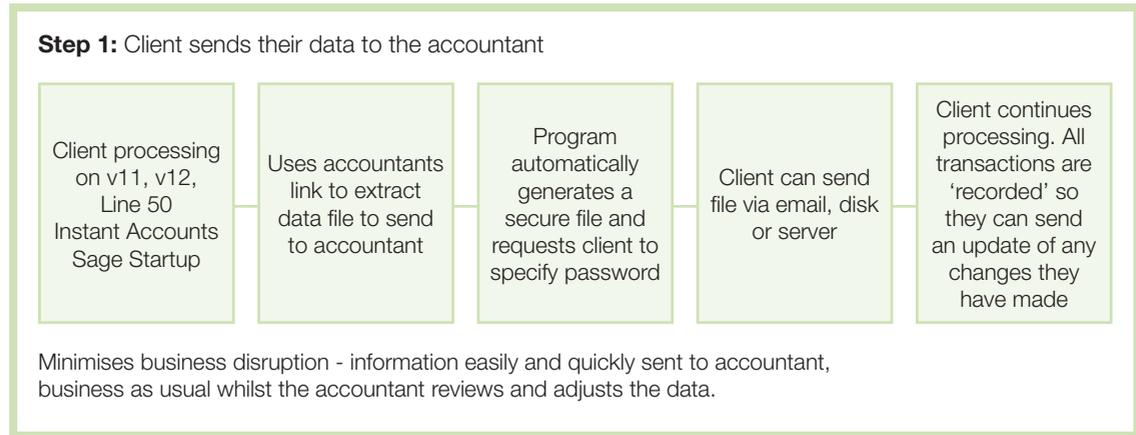


# Collaboration – Accountant & client working together via Accountant Link

Created to improve your practice's efficiency and to deal with increasing numbers of clients, Sage Line 50 Client Manager offers multi-company functionality, as well as excellent data security and data-reporting features.

Sage Line 50 Client Manager includes all the same features as Sage Line 50 Financial Contoller, plus it includes specific functionality for accountants in the form of the 'Accountant Link'.

## How does the Accountant Link work?



# Collaboration – Accountant & client working together via Accountant Link

## What transactions can be automatically updated to Sage 50 Accounts?

- Invoices & Credit notes on customer and supplier accounts.
- Journal entries (including reversals)
- Bank Payments and Receipts
- Cash Payments and Cash Receipts
- Adjustments via error corrections
- New in Sage Line 50 Accounts 2007 - VAT Reconciliations and Bank Reconciliations (client requires Sage Line 50 2007)

The Accountant can also update the client on other activities they have performed on their data and provide instructions to their data

## Useful scenarios

### Accountant Link makes it easier to get new clients get up and running on Sage 50 Accounts or Instant Accounts

Taking on new clients converting from manual systems is much easier. The client could create all of their customer and supplier accounts. They then send the data to the accountant via the Accountant Link.

The accountant processes the opening trial balance, customer & supplier opening balances. Thus the accountant ensure their client starts off with up to date accurate records.

### Helping clients with reconciliation's

VAT returns, Bank reconciliation's, debtors reconciliation's

The accountant can work independently of the client to conduct reconciliation's and make any relevant entries to correct any discrepancies in the data. When sending the data back to the client, the accountant can provide reconciliation information and the client can automatically apply the changes to their data.

### Helping clients with month end procedures

Most businesses have to do month end journals - VAT transfers, stock etc. Many businesses are confused by debits and credits - the accountant can take care of this for them.

## End of year accounts adjustments

The customer can continue processing into their new year whilst the accountant prepares the final accounts and makes the necessary year end adjustments.

Ultimately, using the Accountant Link can help the accountant provide a much more professional service and save them time in the long run as well as ensuring their client does not face any disruption to their day to day business.

## Differences between Sage 50 Client Manager and Accounts Professional

- Unlike the rest of the Sage 50 Accounts range, Client Manager is sold in "Install" breaks rather than company and user breaks. It is sold as an annually renewable licence, including Sagecover.
- Whereas all other Sage 50 Accounts variants are sold as a simple basic price, then additional costs for additional users and additional companies, Client Manager is sold "per install". Each "install" allows the program to be installed on one computer (or accessed by one computer on a network). If the practice needs three accountants to use Client Manager, then they need three Installs.
- Each Install comes as standard with 25 companies. So a practice with three Installs will have 75 company data sets – either 25 on each separate PC, or 75 on a central server solution.
- As standard, Client Manager is restricted to 2 users. If a practice has 3 Installs, then three people can use the system at one time, but only a maximum of two will be able to access a single company data set at one time. This is rarely a problem, but in cases where the practice uses Sage 50 Accounts for full bookkeeping services for a client, or where they use it for their own internal accounts, they may need more than 2 people accessing a single company's accounts at one time. In this case, an additional 6-user capability is available at an additional cost. This feature is only available for 6-Install or higher.
- Since most accountants' practices upgrade their Sage 50 Accounts software every year,

# Collaboration – Accountant & client working together via Accountant Link

Client Manager is sold on an annual renewal basis. Practices using Client Manager will be sent an invoice for renewal of their software in advance of the launch of the latest version – this includes a significant discount for those who pay the invoice by the appropriate date. An upgrade price is available for those who do not want to buy the new version straight away, but this does not have the discount.

- Client Manager is sold inclusive of SageCover.
- There is only one technical difference between Client Manager and Accounts Professional. The Accountant Link feature introduced to Sage 50 Accounts in version 11 is based around Client Manager – which acts as a hub for other Instant and Sage 50 Accounts programs with the Accountant Link feature.

## Why should businesses choose Sage 50 Accounts 2009?

### UK's favourite software

- Sage's relationship with over 650,000 UK businesses, 19,000 accountants and bookkeepers and with government organisations ensures its customers benefit from the latest business management software, services and support.
- Sage has been providing easy to use, innovative, high quality software for 27 years and is the UK's market leading payroll software provider for SMEs supplying over 500,000 in the UK with simple, effective and flexible accounts software.
- Sage 50 Accounts is uniquely successful by providing the sophistication expected of programs developed for the mid-market, but priced and developed for the small business market.

### Most recommended

- Most customers' main source of business advice is going to be from an accountant. Most UK accountants use Sage, and 92%

of accountants who recommend accounting software, recommend Sage.

- Strong customer recommendation 93% of Sage 50 accounts customers would recommend Sage (ICAEW 2006).
- Although Sage 50 Accounts has offers very powerful functionality and is uniquely presented in such a way that makes it very easy to use.
- Sage has over 500,000 customers in the UK meaning that customers are likely to be able to find staff already trained to use Sage accounts software easily.
- Some of our competitors do make their software very simple to use – but they really don't give the depth of support that inexperienced users need. Sage gives your customers **45 days of free SageCover** to help get started.
- **Sage Customer Services** were winners of of the Customer Experience award 2005, NE Call Centre Awards 2004 and runner-up in the European Call Centre Awards 2004.

### Service

- Sage staff undergo rigorous training delivered by our internal training department, which has achieved the Institute of IT Training's Organisational Accreditation.
- Sage won the 2005 European Call Centre Award for Best Customer Experience and Best Campaign (for Payroll Year End) and also the 2004 European Call Centre Award for Best Call Centre Environment.
- Business Support & Service available via Excel Support, HR & Health & Safety Advice, Business Advice, Sage Training, Stationery.

### Full integrated suite of solutions

Sage Payroll, HR, Vertical (Construction, Retail, Manufacturing), Financial Forecasting, Intelligent Reporting & CRM provide a full suite of software to meet the needs of different operational requirements of any business no matter what their size or complexities.

# Collaboration – Accountant & client working together via Accountant Link

## **Powerful reporting capabilities**

Not only within the software, but also extended further with Sage Financial Forecasting and Sage Intelligent Reporting software allowing customers to work more efficiently basing decisions on past, present and future capability.

## **Vertical Requirements satisfied via Sage and Sage Additions**

From Sage – Manufacturing, construction, Retail, CRM

From 3rd Party – over 500 developers have provided solutions that integrate with Sage Sage 50 accounts to meet specific vertical and/or business process requirements.

## **Local Service**

Available from Partner & Accountant community.



# Competitor Comparison Table

Product	Target Market	Channel	Sage USP	Network/Multi User Capability
QuickBooks Regular	Start-ups & micro and small growing businesses	Web Accountants	VAT Management - Online VAT Return, Multi Currency functionality, EC Sales, Reverse Charge, Adjustments Accountant Link Performance Project Costing Capability Financial Reporting Error Corrections & Audit capability Report Designer Stock Management Sales Order Fulfillment Archive CIS More than 5 users Brand Accountant & Customer recommendation Integration via Practice Solutions Quality of support (Service outsourced to India and lack technical and business expertise on product)	Single
QuickBooks Pro	Growing small businesses			Up to 5
QuickBooks Accountants	Accountants & advanced Small businesses			Up to 5
Microsoft SBA	Micro, small to medium	Web and Retail, setting up 'PAN' network of Accountants	Support Recommendation Report designer & reporting flexibility VAT management & online submissions Corrections – full correction capability Audit Trail and traceability Customer/Supplier management – on hold, delivery address management, dispute management, price & discount management Extensive analysis – projects & departments on all data processing. Ability to calculate net when batch processing and also change the amount of VAT. References – external, internal and descriptions on all processing screens. Batch processing capability of orders, invoices & quotes. Order & Invoicing preferences and flexibility Support for accounting procedures – Write off, Contra entries, prepayments, accruals Fixed Asset management More than one level of BOM Access control – down to specific functions Discount management Configurable lists Level of analysis on Chart of Accounts and multiple chart of accounts Products – price matrix, images Global changes Corrections Maintenance and data verification routines Charity functionality Transaction email	Up to 3

Multi Company	Integrated modules available				Online		Vertical solutions	3rd Party
	Payroll	Job Costing	Forecasting/SIR	CRM	VAT	Card Payments		
No extra charge	Y	Y (Project)	N	N	N	N	Charity Retail* Web*	SDK available Third party addons via US community of developers
No extra charge	Y	Y	N	N				
No extra charge	Y	Y	Y	N	N	Y		
No extra charge	Y	N	N	N	N	Y	N	requires info

## Competitor Comparison Table Cont.

Product	Target Market	Channel	Sage USP	Network/Multi User Capability
Iris	Small to medium	Accountants Direct	Ease of use More than 3 users CIS Module VAT Management & Online filing Project Costing Multiple Delivery address Flexible reporting	Y
	Mid-market entry Now SME via accounts office on line	Business Partner Direct	Price Service (Exchequer Accounts office online Implementation – between 5-8 days training to set up @ £650 per day) Customer satisfaction Ease of use & set up Support	Y
MYOB	Sole traders to small businesses	Direct Accountants Partners	Accountant Link Online VAT Returns & management Card payments Verticals via developers Order Processing capability Stock Management Report Designer Budget & Department Management Vertical solution Brand Channels Recommendation	Y
Pegasus Opera II	Mid-market entry	Partner	Accountant Link Price Service Customer satisfaction Brand	Y
Mamut	Enterprise E5, E4, E3, CRM & Timesheets	Web Direct	Accountant Link Brand Budget management Support Additions Price for additional user Report designer	Up to 5







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