



# Advent's Sage 200 Add-ons

Developed Exclusively by Advent



## Distribution Add-ons for Sage 200

Add-on Overview	Add-on Benefits	How does the Add-on Work?
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### Add-on: Sales Order Margin Alert (MOD17)

<p>This add-on enables you set a Minimum and Target margin level against a Customer Analysis Code (e.g. Customer Type). It has been designed to notify the user when a sales price entered does not meet the minimum percentage target margin level.</p> <p>In addition, an email alert is sent whenever the minimum margin level has not been reached.</p>	<p>This add-on is particularly useful for companies who allow their users some degree of flexibility when it comes to pricing orders.</p> <p>It facilitates this but wraps a degree of control around it so that businesses can keep a close eye on margins and profitability.</p>	<p>Once the customer has been set-up with an Analysis Code attached to it, then it is simply a matter of setting up a Minimum and Target margin level against this analysis code in the Parameter Settings.</p> <p>You can also set a default Minimum and Target Margin. These default values will be automatically populated on all new customer records where no Minimum or Target levels have been set up against the Analysis Codes for this customer.</p>
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### Add-on: Sales Order Below Buying Price Alert (MOD05)

<p>This add-on notifies the user if a price for a stock item entered on the Sales Full Order Entry Screen is below the average buying price.</p>	<p>Similar to the Sales Order Margin Alert, the purpose of this add-on is to highlight situations where margins are not being maintained.</p> <p>This particular add-on will alert users if they have accidentally entered a sales price that is below the cost price, thus preventing companies from losing money as a result of human errors.</p>	<p>A message will pop up on the screen if the Unit Selling Price is below the Average Buying Price for a particular Stock Item.</p> <p>If this message is received, the user can continue to process the order as this add-on's purpose is to highlight situations where the selling price is less than the average buying price. A decision can then be made as to whether to amend the selling price or continue to process the order.</p>
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### Add-on: Landed Costs at Goods Received (MOD12)

<p>This add-on enables additional costs such as Duty &amp; Freight to be captured at the Goods Received stage and applied back to the average cost of the stock item(s).</p>	<p>Many companies who import goods from abroad will require the facility to capture Landed Costs. This will enable them accurately present the true cost price of the goods.</p> <p>The standard Sage system includes a Landed Cost facility, which works on the basis that the landed cost is entered at the Purchase Order Entry stage. Many companies do not know the landed cost amount at this stage, but would instead prefer to capture this cost at the point of Goods Received, either as a Fixed Amount or as a percentage.</p>	<p>Using this add-on, different Landed Cost Types can be defined in the settings area. Here you can also specify whether the Cost Type is Percentage or Fixed Value.</p> <p>When entering the Goods Received details, a new screen pops up once the Goods have been received into stock and you simply enter the appropriate percentage or fixed amount. The average buying price is then updated with the new buying price, giving you a more accurate reflection of the true cost price of your stock.</p>
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### Add-on: Extra Stock Analysis Fields (MOD21)

<p>Using this add-on, you can enter additional information relating to a stock item onto a separate screen.</p>	<p>This add-on allows you capture additional information on each Stock Item. For example, you may wish to capture a barcode or packaging information for Repak reporting purposes.</p>	<p>An additional tab has been added to the Stock Item Record. The screen contains 10 user-defined Text Fields; 10 user-defined Numeric Fields and 4 user-defined Date Fields.</p>
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### Add-on: Sales Order Carriage Fee Alert (MOD08)

<p>This add-on alerts the user when no carriage fee has been entered onto the Sales Order.</p>	<p>The alert will remind users to enter a carriage charge onto the Sales Order. Particularly in situations where goods are imported, forgetting to pass on the carriage charge to the customer can result in significant margin reductions.</p> <p>Flagging the user that no carriage has been entered should eliminate this potential problem.</p>	<p>Once all of the line items have been entered onto the Full Sales Order and you click on Save, a message will pop-up if no carriage charge has been entered.</p> <p>By choosing Yes, the order may be processed without entering a carriage fee. By choosing No, the order cannot be saved until a carriage fee has been entered.</p>
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<b>Add-on: Sales Order Unit Selling Price Enquiry (MOD14)</b>		
<p>This add-on provides a fast and easy way to enquire on previous prices charged to customers for all stock items or for a specific stock item.</p>	<p>This add-on gives you a quick view into customer's previous buying history. It enables you quickly determine the price that you charged a particular customer for all items or a specific item.</p> <p>In situations where prices charged fluctuate, this enquiry enables you quickly view the previous prices charged to the customer.</p>	<p>Using the New Selling Price History Enquiry screen, you simply select the customer and then select to show either Prices for All Stock Items or Prices for a selected stock item.</p> <p>By clicking on the Order Number reference, you can drill-down into the original sales order, giving you access to additional relevant information.</p>

<b>Add-on: Sales Order Unique Customer Order Reference (MOD13)</b>		
<p>This add-on alerts the user if a Customer Order reference for the same customer has already been entered.</p>	<p>This add-on will cut down on duplicate customer orders being processed in error. In addition, the customer order number field will change to yellow if no customer order number is entered.</p> <p>Alerting the user in this way will greatly reduce the number of orders processed with no customer order reference and as a result will help reduce the number of queried invoices where no order reference has been entered. Reducing the number of invoices under query should result in faster payments being processed and improved cashflow.</p>	<p>If a duplicate order number has been entered, a message will pop-up on the screen to flag the user. At this stage, the user may choose Yes to continue on using the duplicate order number or No in which case an alternative order number must be entered in order to proceed with the Sales Order.</p> <p>The Customer Order Number field will change to Yellow if No Order Number has been entered.</p>

<b>Add-on: Sales Order Quick Save, Despatch &amp; Invoice (MOD10)</b>		
<p>This add-on has been designed to enable users to quickly convert Sales Orders to delivery dockets or invoices without having to go through some of the other steps normally associated with entering Sales Orders.</p>	<p>This add-on is ideal for businesses which operate a Trade Counter. This routine enables orders to be entered and invoices generated in one quick and easy step.</p> <p>In addition, if for any reason there is a negative stock balance on the Sage 200 system, this add-on will still allow you to sell the item.</p>	<p>In the Full Order Entry screen, you now have two additional buttons on the main screen:</p> <ul style="list-style-type: none"> <li>• Save and Print Delivery Docket</li> <li>• Save and Print Invoice</li> </ul>

<b>Add-on: Sales Order Customer Hold Alert (MOD18)</b>		
<p>This add-on has been designed to provide an additional level of credit hold, which we have termed "soft hold".</p> <p>This enables specific customer accounts to be flagged as on "soft hold", which will flag the user of a credit issue during the Sales Order entry process, but will still enable the user to process the order in any case.</p>	<p>The standard Sage 200 system will allow you to put a Customer "On Hold". Once the Customer has been put "On Hold", you cannot enter a Sales Order for this customer. This scenario is very much black and white and does not provide any degree of flexibility. Although the Credit Hold Override option exists in the User Permissions, this will enable the credit hold for ALL orders to be overridden.</p> <p>This add-on is ideal for customers who wish to enter Sales Orders for specific customer accounts that are on hold. This could be used for your top 10 customers, for example. This will ensure that orders are taken and recorded on the system and are not lost while waiting for the issue with the account to be sorted out.</p> <p>In brief, this add-on provides a low level of credit hold, which gives the user the flexibility to make a call as to whether or not to process the order.</p>	<p>We now have an additional tick box on the Customer Account Status screen. By ticking this box, the "on soft hold" functionality will kick in.</p> <p>Once a customer has been flagged as being "on soft hold", an alert will pop up on screen when entering a Sales Order for this customer. The purpose of the alert is to notify the user of credit information such as Current Balance, Credit Limit, Trading Terms and Last Payment Date.</p> <p>The add-on has been designed to allow users to accept the alert and continue on with the order.</p>

<b>Sales Order Account Manager Drop Down List (MOD06)</b>		
<p>This add-on has been designed to enable users select an Analysis Code, for example Account Manager from the Main Sales Order Entry screen.</p>	<p>The standard Sage 200 system uses a separate screen on the Delivery &amp; Invoicing tab to capture the Analysis Code. This is a free-text entry and the field does not include a drop-down list of Account Managers.</p> <p>The Sales Order List is now available on the first screen and includes a drop-down. From a data entry perspective, it is less likely that the user will forget to assign or amend the Rep Code as it is on the main screen. In addition, by having a drop-down list, it eliminates any possibility of incorrectly entering or choosing the wrong Rep Code.</p>	<p>Firstly, in the Sales Order Processing Maintenance area, the source of the Analysis Code (e.g. Rep) must be set to "Customer Account" in order for this add-on to work.</p> <p>On the Sales Order entry screen, you will now see a new drop-down box which includes all of the Account Managers.</p> <p>You then process the order in the normal way.</p>