

Sage 50 to Sage 200 Migration Guide



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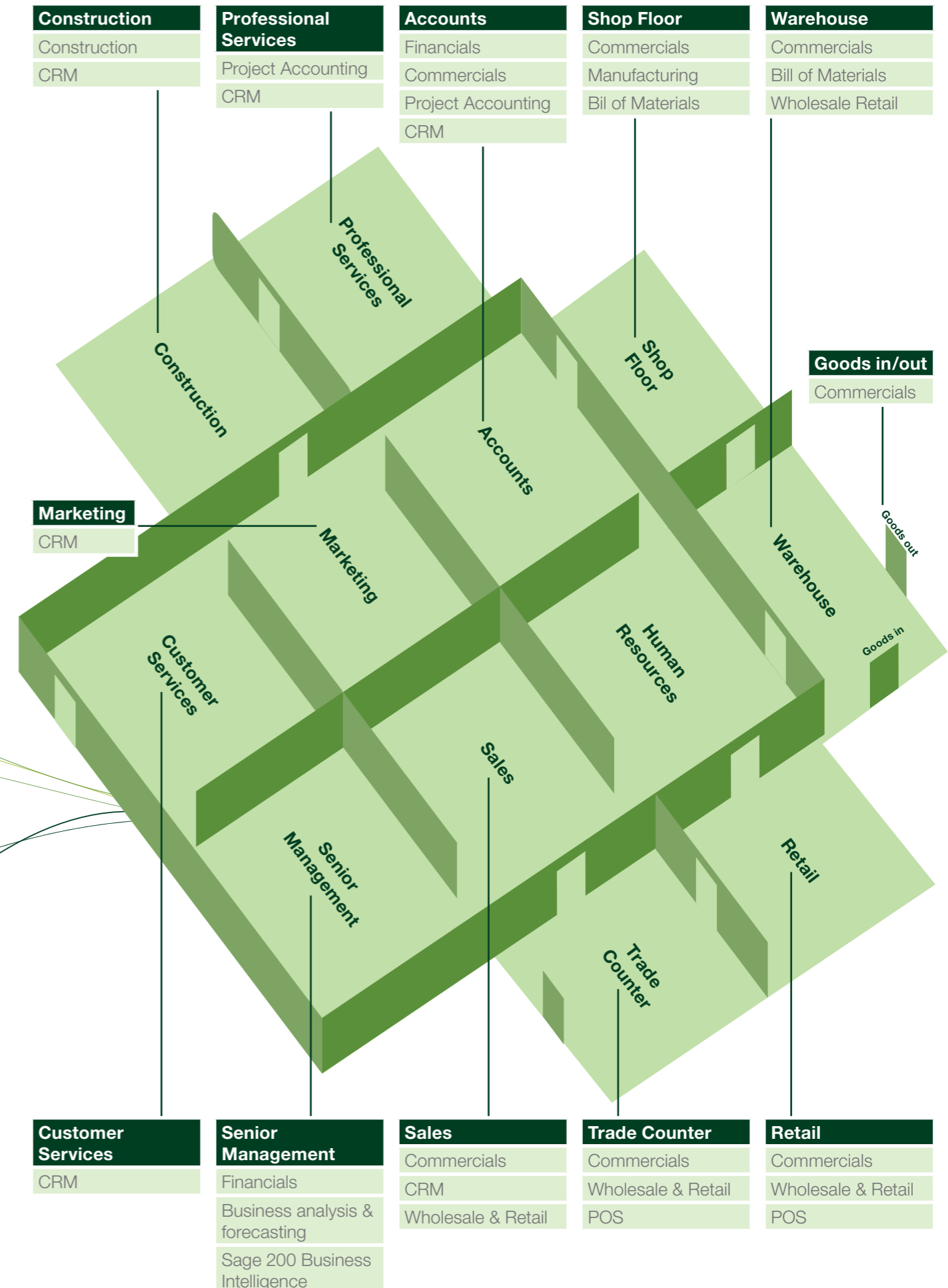
Introduction

This document is intended to be an additional, complimentary guide to the Sage 50 to Sage 200 Upgrade Guide. Where the Sage 50 to Sage 200 Upgrade Guide introduces the Sage 200 Suite, and details the functionality gained by moving to Sage 200, it is designed to help customers realise the benefits of upgrading to a tightly integrated Suite of modules, including all the benefits of Sage 200 CRM.

This migration guide is designed more as a feature comparison document and educational piece for customers considering migrating from Sage 50 to Sage 200. This document is intended for use by Business Partners to help manage customer expectations when migrating to the Sage 200 Suite. It is important that customers are aware that the Sage 200 Suite was not conceived from the smaller Sage 50 product and therefore does not mirror like for like processes and features.

The Sage 200 Suite is a business wide Suite of software which has evolved from Line 100 and MMS. It is targeted towards key business processes which are cross-departmental and are interdependent (see right).

However, increasingly Sage 200 has become the main upgrade route for Sage 50 customers who find themselves requiring a system which can manage more complex business processes and functionality. The Sage product management and development team are using a new migration tool to ease the transition from Sage 50 to Sage 200, and are reviewing both Sage 50 and Sage 200 with a view of aligning the features sets.



Why Migrate from Sage 50 to Sage 200?

At Sage, we want to provide customers with the software that works hardest for their business. However, company growth and development can put pressure on software, leading to a system that no longer matches business and customer requirements. We want to make sure that if customers are considering migrating their data to a larger software system, that they do it correctly and for the right reasons.

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

Common triggers for Sage 50 customers to upgrade to Sage 200 are:

- Company growth
- More complex business processes
- A requirement for more depth of functionality such as
 - Management reporting
 - Advanced handling of foreign currency
 - Control over financial periods
 - Storing stock in multiple warehouses
 - Batch\serial number processing
 - An increased need for customisation of systems
 - A specialism in a vertical market

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

To help our customers make an informed decision when considering an upgrade to a larger system, Sage undertook a project to review the functionality differences in Sage 50 and Sage 200, along with an evaluation of the standard reports offered by the two applications.

As expected, the project revealed there are areas where functionality in Sage 200 exceeds Sage 50, some areas where the same result can be achieved but processed in a different way, and some areas where Sage 50 has advantages in functionality.

The Approach

Sage examined Sage 50 Financial Controller 2009 and Sage 200 2009. Please be aware that this comparison is by no means exhaustive, and has been conducted at a relatively high level (i.e. some customers may use Sage 50 at a much more granular level of detail than that used in this comparison). In this comparison we have examined over 400 pieces of functionality and in excess of 400 reports. With regards to functionality, each piece was assessed using the following criteria:

- the functionality is present in the same form in both applications
- the functionality is present in both applications but in a different form
- the functionality is present in Sage 200 but not in Sage 50
- the functionality is present in Sage 50 but not in Sage 200

With regards to reports it is important to note that the approach to the creation of standard reports in Sage 50 is fundamentally different to that within Sage 200. Each report was assessed and classified as:

- broadly the same report available in both products
- a Sage 50 report that could be produced by extending an existing Sage 200 report
- a Sage 50 report that be replicated in Sage 200 with a new user designed report
- a Sage 50 report that cannot currently be produced in S200

In order to achieve a balanced view Sage consulted with our Business partners throughout this project, with Business Partners providing feedback from over 200 customer migrations taking place over a nine month period.

Sage 50 and Sage 200 Functionality Comparison

This section details the functional differences between Sage 50 Financial controller and Sage 200, grouped by functional area.



System Wide Functions

Throughout this document we've split the analysis of comparison into three areas:

- Those where Sage 200 exceeds Sage 50 in functionality
- Those where the same result can be achieved but is processed in a different way
- Those where Sage 50 has advantages in functionality

Sage 200 exceeds Sage 50 in system wide functionality in the following areas:

- Currency - spot and period exchange rates
- Currency - exchange rate history
- Currency - support for euro triangulation
- Choice of number of accounting periods per year
- Control of length of accounting period
- Ability to open/close/re-open a period
- True transaction audit trail
- Choice of invoice or movement date for intrastat prep
- Separate create, amend and view forms
- Integrated CRM

Those areas where the same result can be achieved but is processed in a different way are:

- Security model – access rights versus menu design

Those areas where Sage 50 has advantages in system wide functionality are:

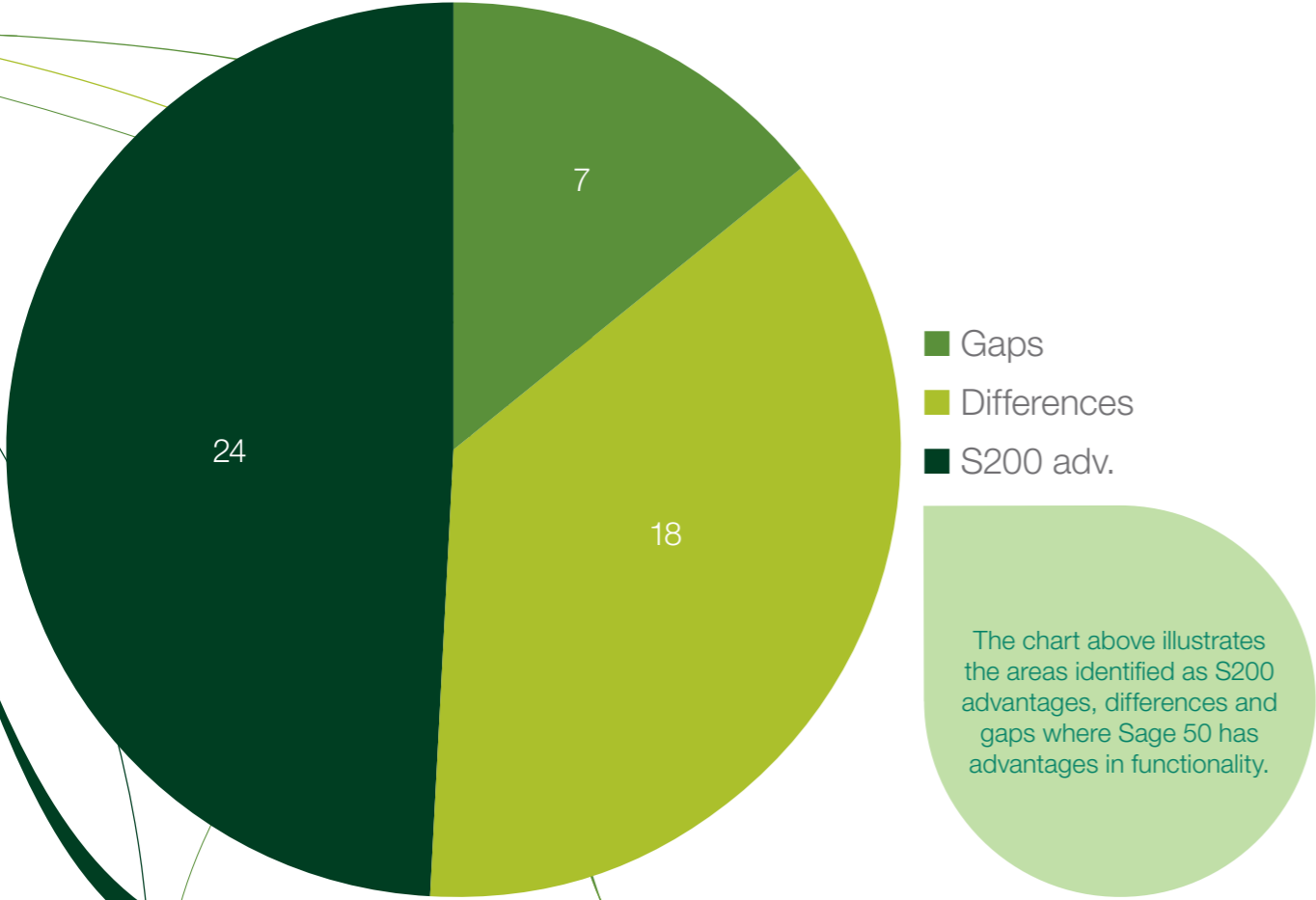
- Support for VAT Cash Accounting
- VAT E-Submissions*
- Text labels for minor currency unit - in Sage 200 the user can enter an abbreviation to be used for a currency e.g. US \$ - can show \$1.99 on reports. In Sage 50 the user can enter an abbreviation for the value before the decimal point and another after e.g. US \$ and cents therefore showing US \$1.99 cents on reports.
- Calculate net option in all data entry processes (please note Sage 200 does offer this facility in the areas of most common use such as bank payments and receipts etc.)
- Memorise data entry form content – Sage 50 allows a user to complete a data entry form such as a journal or a sales order - before saving it as a transaction the user can ask the system to memorise what has been entered and store it along with a name. Later the user can complete the same data entry screen by recalling the memorised form rather than typing it in again - good for situations where the user does virtually the same transaction frequently
- Cash Flow forecast – In Sage 50 the user can take the current bank balance, add to it the sales invoices due to be paid today, take off the purchase invoices due to be paid today to give a projected balance for the end of today, repeat this for tomorrow, the day after and so on.
- Global data changes – In Sage 50 the user can set the same characteristic on all (all or group) of customers, suppliers and stock items by altering one record and having the rest update rather than editing each record in turn
- Portrait reports - out of the box nearly all of the Sage 50 reports are portrait while Sage 200 the standard layout of reports in landscape
- Built in database backup and restore
- Accountants Link – the user can send a copy of their data to their accountant, the accountant can make adjustments while the user keeps working on their copy of the data. The accountant then sends a file back to update the accountants their adjustments into the users system without losing what they have been doing.
- Audit preparation pack - a set of reports that allows the user to check data for the kind of anomalies that accountants and VAT inspectors look for so they can be addressed before the accountant or VAT inspector arrives.
- VAT self audit
- Event log – the user can configure the system to record whenever one of a nominated set of processes is run so later the user can see what has been happening. The diary mimics the calendar in Outlook with import and export options for integration
- Credit Controller function
- Batch reporting
- Automatic updates
- Practice company
- “Secure” pdf reporting

*these functions are planned for inclusion of the Sage 200 2010 release



Sage 50 and Sage 200 Functionality Comparison

Functionality Around Customers



Sage 200 exceeds Sage 50 in customer functionality in the following areas:

- More account identifiers
- Option to auto generate account numbers
- More account types
- More search fields during data entry
- More contacts per account
- More telephone numbers per account
- More web addresses per account
- More analysis codes per account
- Transaction archive period set at account level
- Access to archived transactions for enquires and reports
- Customer order priority
- Wider choice of payment terms base
- Larger number of finance charge rates
- Extended account memo records
- Active memo flag
- Transaction memos
- Bad debt provisions
- Revalue outstanding foreign currency balances
- Statement address hierarchy
- Consolidated billing option
- Flexible overdue periods
- Trading period analysis
- Stored transaction due dates
- View currency revaluations for customer

Those areas where the same result can be achieved but is processed in a different way are:

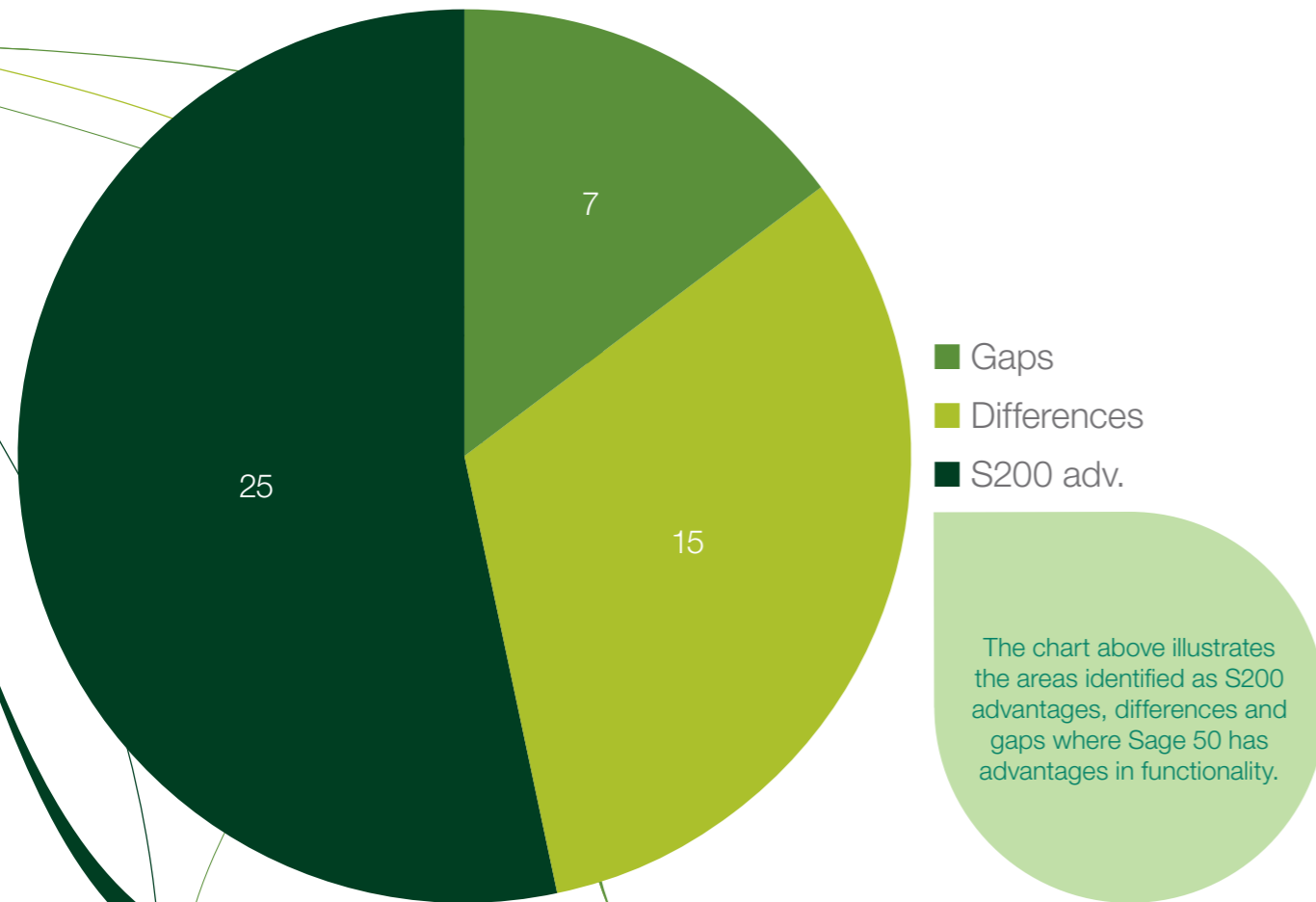
- Contact names linked to documents
- Default line discount
- Default order discount
- Restricted mailing flag
- Telephone dialler
- Call logging and history
- Data entry style - invoices and credit notes
- Batch control data entry

- Dispute transactions
- Letter criteria
- Statement layouts
- Statement criteria
- Control of statement content
- Invoice layout
- Credit Note layout
- Simple Invoice
- Transaction reversal
- Amend allocation

Those areas where Sage 50 has advantages in customer functionality are:

- Multiple account states - it is possible to define a range of account states and assign a customer to one of the states. A particular state may or may not place an account on hold.
- Account state set by debtors letter – it is possible to automatically change the account state when a debt chasing letter is generated for a customer.
- Customer bank details stored
- Generate invoice from customer telephone call - it is possible to schedule a telephone call to a customer which, on completion, will create an invoice that charges the customer for the call.
- User definable statement text - it is possible to change the wording used for invoices, payments, etc on customer statements
- Full transaction editor
- Postal addresses for account contacts - the people linked to an account can have a postal address stored for them that is different from the main account address.

Functionality Around Suppliers



Sage 200 exceeds Sage 50 in supplier functionality in the following areas:

- More account identifiers
- Option to auto generate account numbers
- More account types
- More search fields during data entry
- More contacts per account
- More telephone numbers per account
- More web addresses per account
- More analysis codes per account
- Transaction archive period set at account level
- Access to archived transactions for enquires and reports
- Supplier order priority
- Wider choice of payment terms base
- Extended account memo records
- Active memo flag
- Transaction memos
- Invoice authorisation
- Revalue outstanding foreign currency balances
- Flexible overdue periods
- Trading period analysis
- Stored transaction due dates
- View currency revaluations for customer
- Prepare payments for later processing
- Richer criteria for payment processing
- Group suppliers for payments using different documents
- Link supplier to factor house

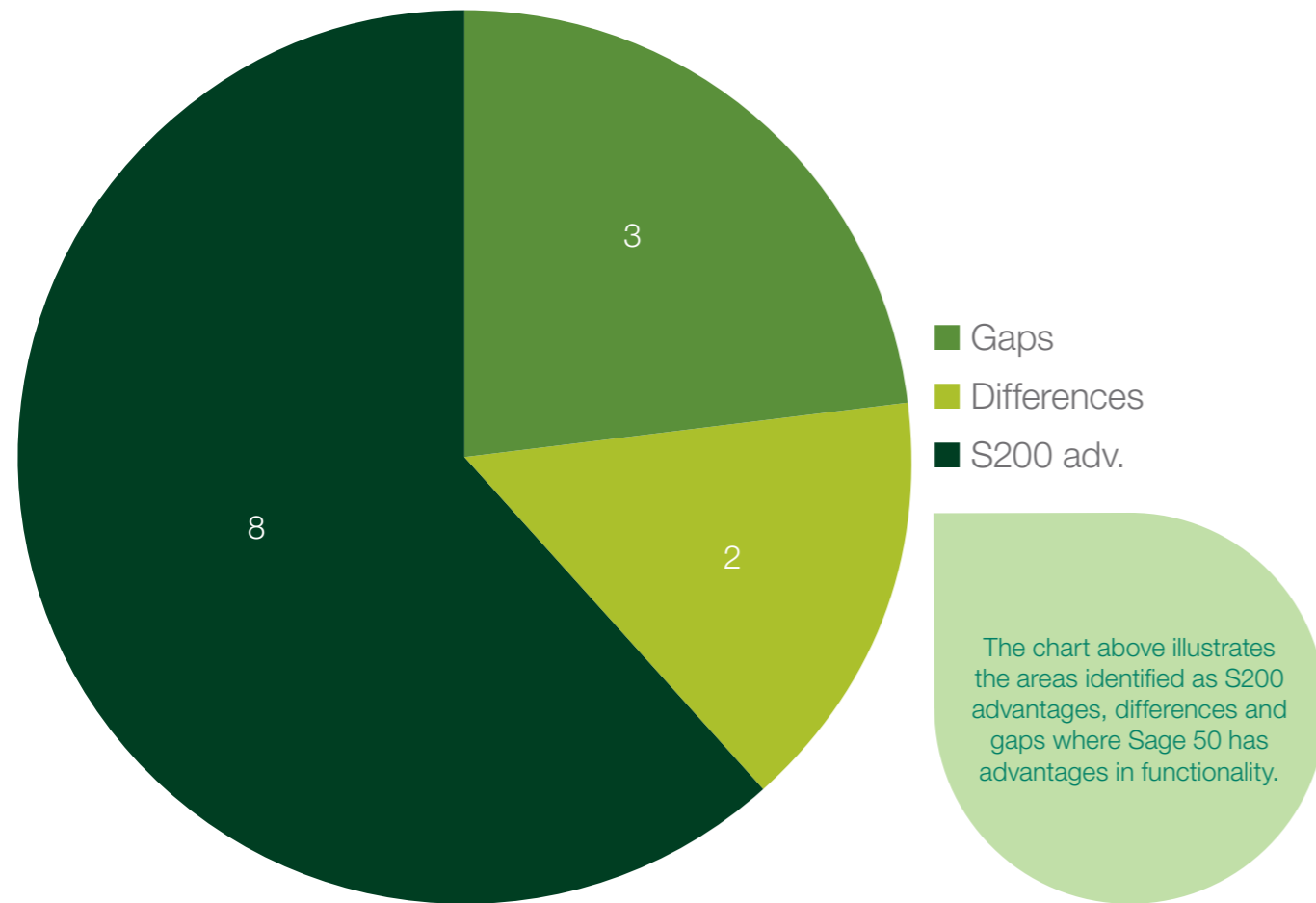
Those areas where the same result can be achieved but is processed in a different way are:

- Contact names linked to documents
- Default line discount
- Default order discount
- Restricted mailing flag
- Telephone dialler
- Call logging and history
- Data entry style - invoices and credit notes
- Batch control data entry
- Dispute transactions
- Letter criteria
- Statement layouts
- Statement criteria
- Control of statement content
- Transaction reversal
- Amend allocation

Those areas where Sage 50 has advantages in supplier functionality are:

- Multiple account states - it is possible to define a range of account states and assign a customer to one of the states. A particular state may or may not place an account on hold.
- Full supplier bank details stored
- User definable statement text - it is possible to change the wording used for invoices, payments.
- Full transaction editor
- Supplier delivery addresses - it is possible to store delivery addresses that differ from the supplier's main address to be used when goods are returned to the supplier.
- Supplier payment priority indicator - it is possible to mark key suppliers to ensure that they receive payment first when payments are generated from the system.
- Limited suggested payments to available funds - when generated payments it is possible to specify the amount of cash available and pay suppliers up to that limit based on their priority

Cash Book Functionality



Sage 200 exceeds Sage 50 in cash book\bank functionality in the following areas:

- Bank accounts independent of nominal accounts
- More email addresses per account
- More web sites per account
- Payments involving 3 currencies supported
- Receipts involving 3 currencies supported
- SO/DD history
- Post sales receipts and supplier payments during bank reconciliation
- Create specific payment page

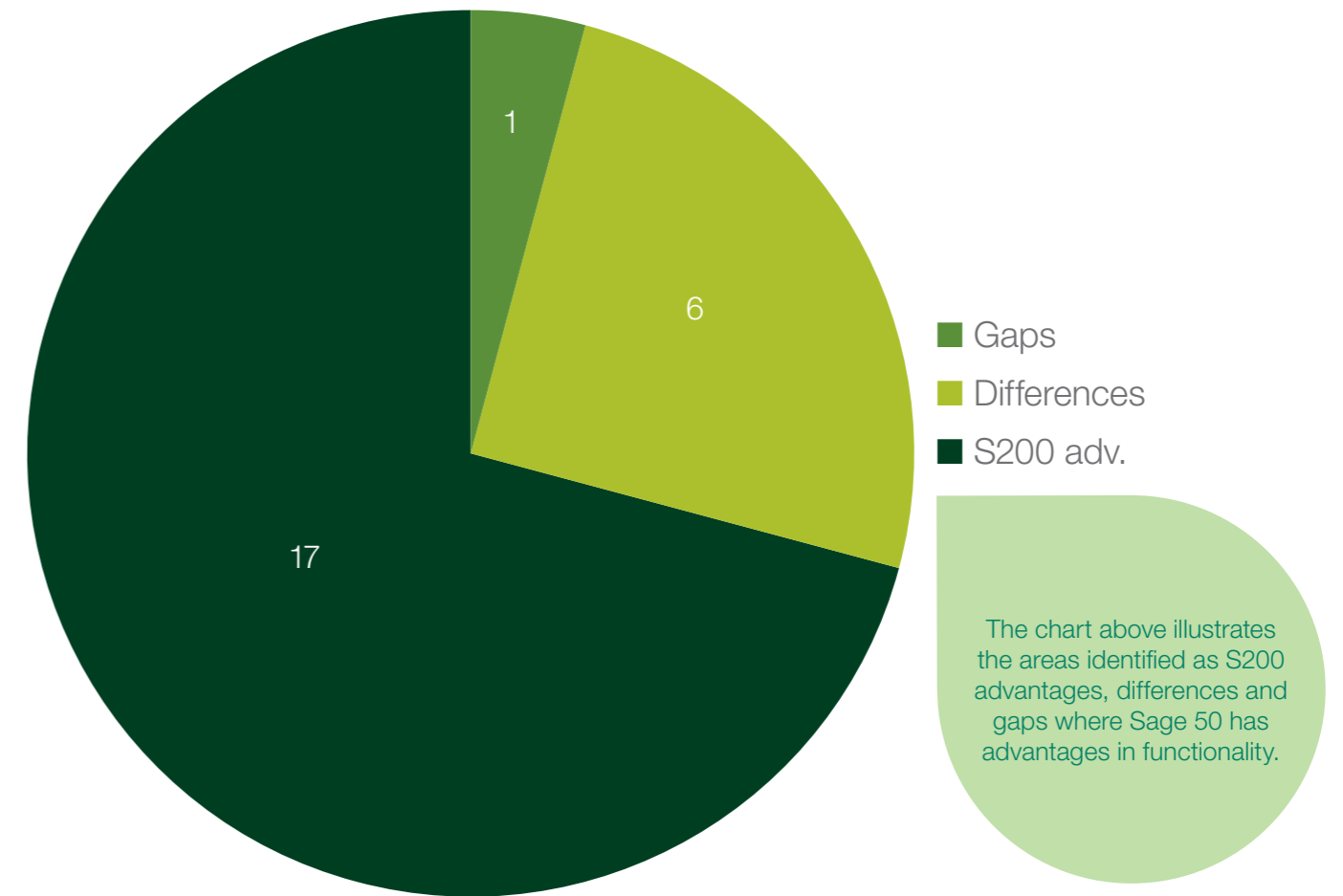
Those areas where the same result can be achieved but is processed in a different way are:

- Presentation of account balances
- Approach to SO/DDs

Those areas where Sage 50 has advantages in cash book\bank functionality are:

- Mark bank account as not need reconciliation
- Hold reconciliation for later completion
- Copy bank account

Nominal Ledger Functionality



Sage 200 exceeds Sage 50 in nominal ledger functionality in the following areas:

- 3 segment account reference
- Alphanumeric account references
- Choice of account type
- Control of manual posting to an account
- Option to use summary postings
- Transaction archive at account level
- Option to show account balance on account lookup
- Full skeleton journal function
- Previous year journal for auditor adjustment
- User defined financial statement structure
- User defined totals in financial statements
- Support for wildcards in financial statements
- Financial statement structure independent of nominal account references
- Budget templates

- Budgets for next year
- Consolidation across currencies
- Consolidate companies with different charts of accounts

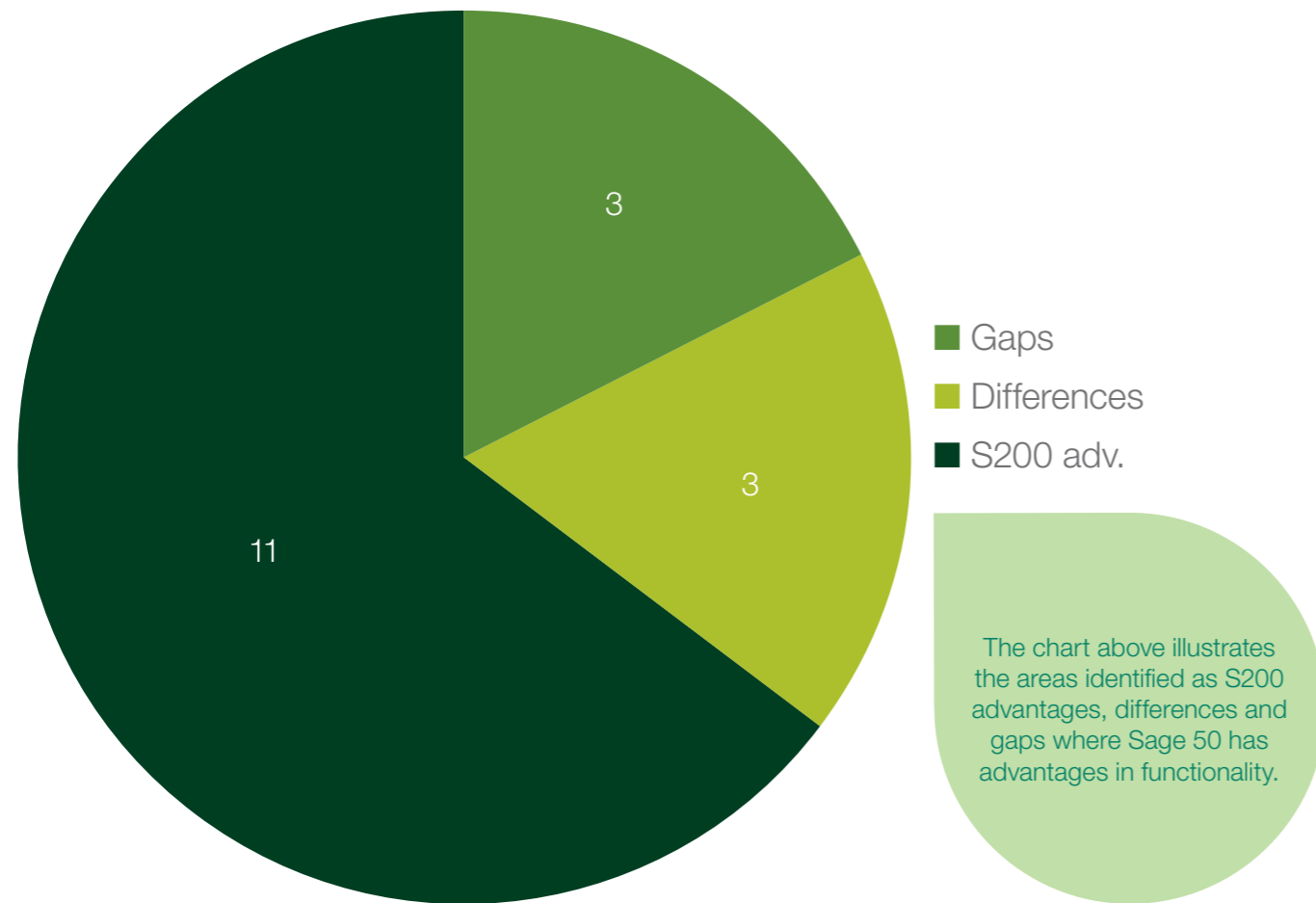
Those areas where the same result can be achieved but is processed in a different way are:

- Approach to recurring journals
- Design of financial statements
- Prepayments
- Accruals
- Departmental budgets
- Departmental financial statements

Those areas where Sage 50 has advantages in nominal ledger functionality are:

- Quick Ratio Enquiry

Price Book Functionality



Sage 200 exceeds Sage 50 in price book functionality in the following areas:

- Larger number of quantity breaks per matrix
- Larger number of matrices
- Validation of prices

Those areas where the same result can be achieved but is processed in a different way are detailed below. However customers should be made aware that the Sage 50 approach to price and discount management is fundamentally different to that used within Sage 200:

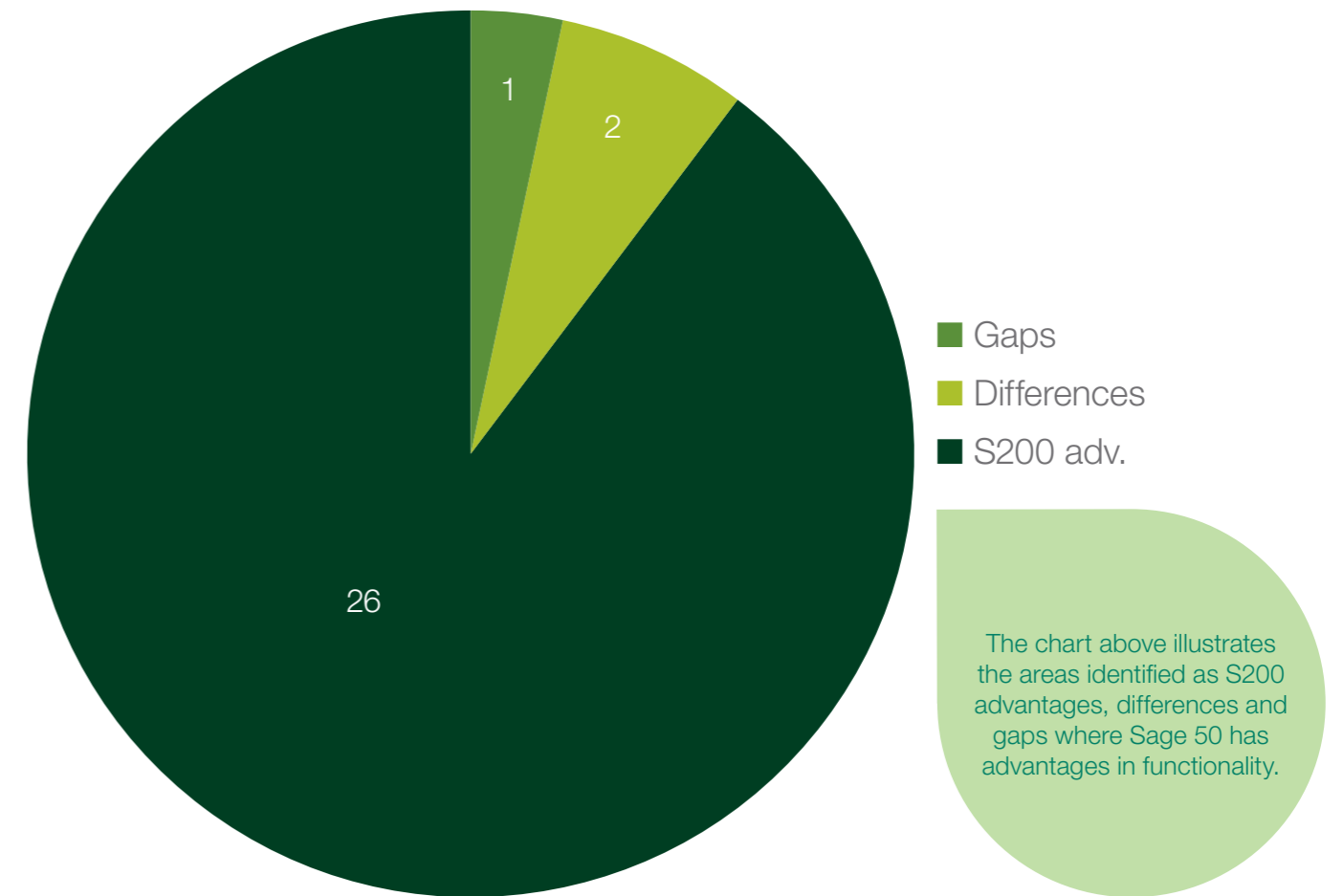
- Approach of universal selling prices
- Use of foreign currency for prices
- Method of linking customers to prices
- Vary price to specified value

- Vary price by adding percentage
- Vary price by deducting percentage
- Vary price by deducting value
- Vary price by percentage on cost value
- Vary price based on quantities
- Interaction between discounts
- Export prices

Those areas where Sage 50 has advantages in price book functionality are:

- Control of rounding for prices
- Copy structure from item to item
- Vary price by value on cost

Stock and Product Functionality



Sage 200 exceeds Sage 50 in product and stock functionality in the following areas:

- Product defaults from category/group
- Unlimited categories/groups
- Warehouses
- Multiple locations per stock item
- Move stock between locations
- Wide choice of stock valuation methods
- Serial number tracking
- Batch number tracking
- Multiple units of measure
- Extensive supplier/item record
- Choice of replenishment rules
- Allocation rules
- Support for cyclical stocktake
- Stock stocktake counts for later update
- Stocktake method supports continued stock movements
- Option to show expected stock count on count sheets

- Nominal ledger link
- Revalue stock
- Landed costs
- Alternative stock items
- Definable search categories
- Unlimited custom fields (via search categories)
- Mark stock item as inactive
- Mark item as not for sale
- Text for order documents
- Control over text used for description

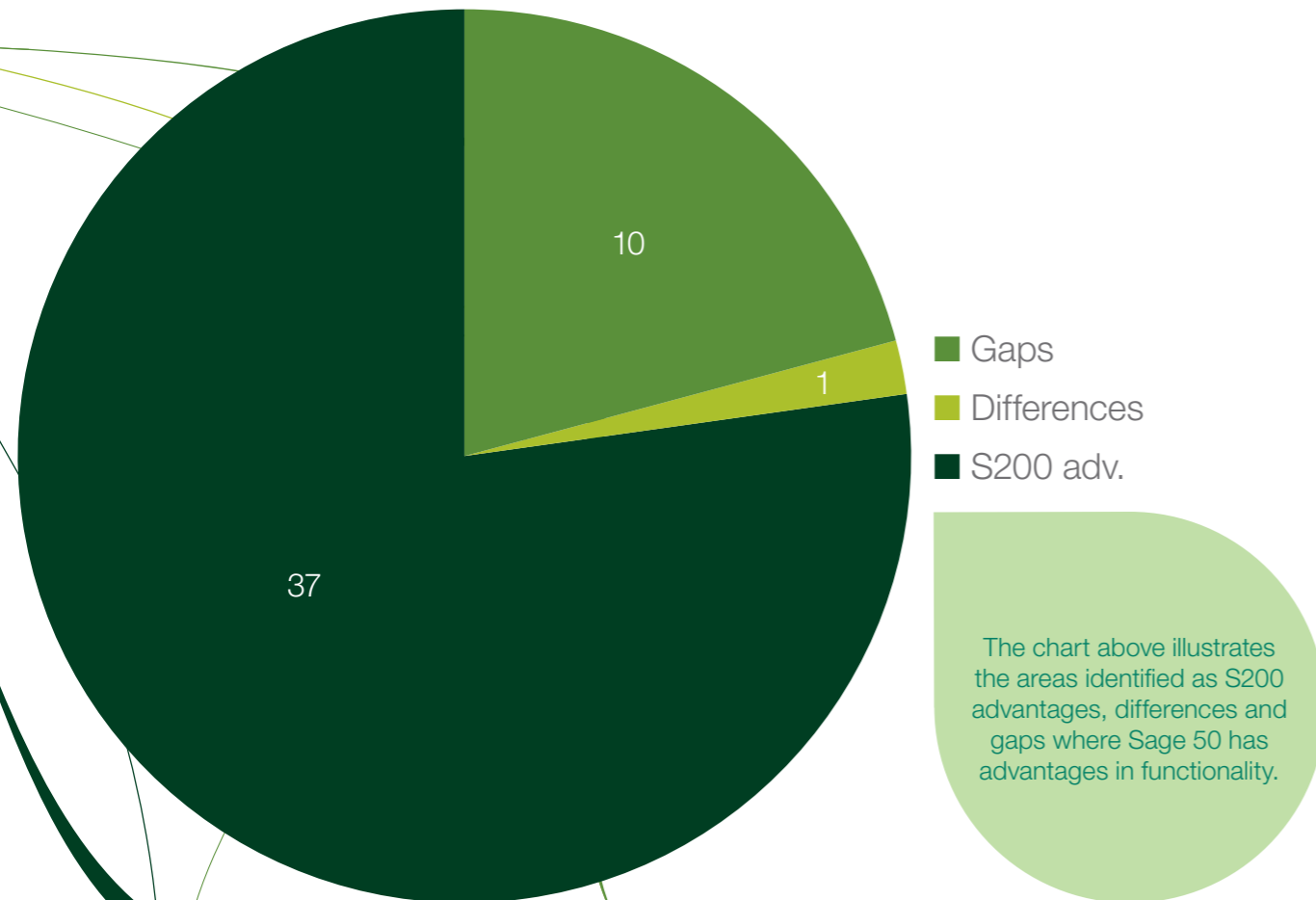
Those areas where the same result can be achieved but is processed in a different way are:

- Display of shortfalls
- Bill of materials

Those areas where Sage 50 has advantages in product and stock functionality are:

- Storage of quantity and value budgets on stock items.

Sales Order Processing and Invoice Functionality



Sage 200 exceeds Sage 50 in SOP and invoice functionality in the following areas:

- Option to allocate stock during order entry
- Criteria when performing batch stock allocation
- Option to print picking list for new orders only
- Option to print picking list for amended order lines only
- Option to auto generate picking list on order entry
- Control over timing of stock balance update
- Option to print order acknowledgment for amended orders only
- Multiple despatches per invoice
- Multiple fulfilment methods
- Automatic credit holding of orders
- Customer returns
- Larger number of order analysis codes
- Larger number of order line analysis codes
- Picking list comments
- Despatch note comments
- Larger number of additional charges
- Control over user amending nominal codes
- Control over item types allows on orders
- Control over source of order line nominal codes
- Choice of VAT exclusive or inclusive prices
- Option to confirm text items before invoice
- Confirm text items with stock items
- Retain cancelled order lines for analysis
- Batch/serial numbers on documents
- Control of text on paid invoices
- Analysis of order payment methods
- Adjust despatches for errors
- VAT only invoices
- VAT only credit notes
- Cancelled invoice register
- View orders for stock item
- Estimated profit for order

- Realised profit for order
- Control over price override by user
- Control over discount view by user
- Copy invoice marked as copy
- Re-sequence order lines

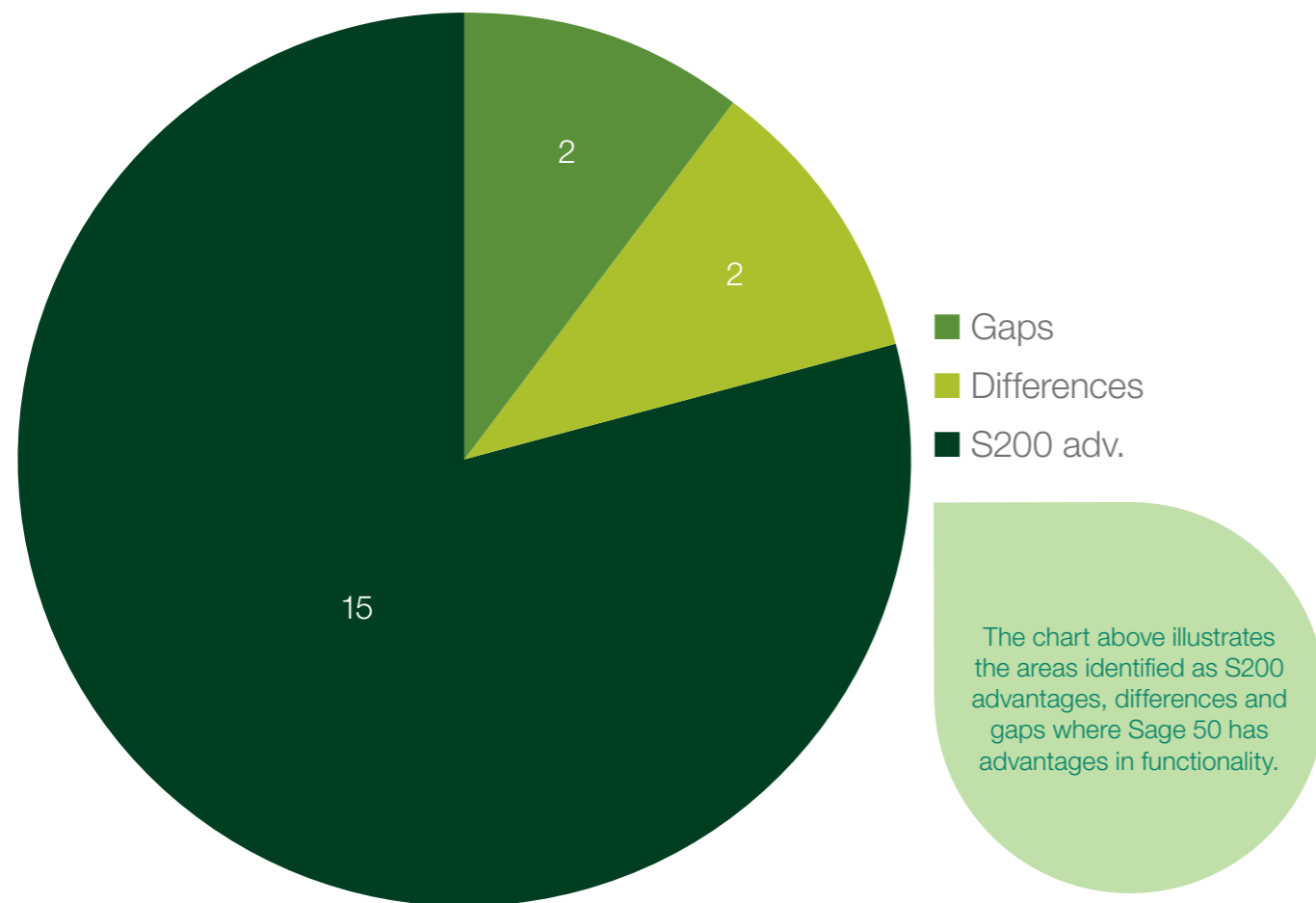
Those areas where the same result can be achieved but is processed in a different way are:

- Approach to order acknowledgments

Those areas where Sage 50 has advantages in SOP and invoice functionality are:

- Control over initial cursor position in order creation - to reduce keystrokes it is possible to specify that the cursor will move straight to the item quantity once a stock item has been selected.
- Specific codes for non stock items to use on orders - a range of reserved stock codes that allow items that are not part of the stock catalogue to be processed as if they were part of the catalogue.
- Option to specify despatch note required at run time
- Control over discount calculation method (discount unit price or line total) - discounts can be deducted from the unit price before multiplying by the quantity or deducted for total of the price multiplied by the quantity
- Control over prices that attract discount - the ability to specify that a price cannot be discounted
- Single key process order completion ("crash" processing for retrospective orders) - the ability to create an order and immediately process it to completion to match real world events that have already taken place
- Order line reference
- Order line notes/comments
- Courier and consignment details - a single consignment number linked to a courier company can be recorded on an order.
- Control over documents printed for cash sale orders - order documents, despatch notes and invoices can each be suppressed for cash sales

Purchase Order Processing Functionality



Sage 200 exceeds Sage 50 in POP functionality in the following areas:

- Dispute invoice during invoice matching
- Accrual for purchase orders
- Price variances for standard cost items
- Purchase returns
- Order authorisation
- Authorisation level
- Allocate stock during receipt process
- Direct deliver of purchase order to partner
- Control over point of stock balance update
- Cancelled order details retained for analysis
- Auto printing of order document
- View purchase orders for stock item

- Larger number of order analysis codes
- Larger number of order line analysis codes
- Re-sequence order lines

Those areas where the same result can be achieved but is processed in a different way are:

- Approach to matching invoice to order
- Viewing purchase orders for supplier

Those areas where Sage 50 has advantages in POP functionality are:

- Printed goods received note
- Single key press order completion - the ability to create an order and immediately process it to completion to match real world events that have already taken place

Sage 50 and Sage 200 Reporting Comparison

A customer installing Sage 50 Financial Controller will encounter 442 standard reports whereas customer installing Sage 200 will encounter just under 200 reports. The difference in the amount of reports is due to the way both products report, with Sage 50 using a fundamentally different approach to that of Sage 200.

The following factors lead to the apparent proliferation of reports in Sage 50:

	Effect	Example
Use of portrait	Due to lack of space Sage 50 needs several reports to show the fields contained on a single Sage 200 report	Aged debtors where Sage 50 has several reports with different combinations of name, contact and currency while Sage 200 shows this on a single report
Sorting data	Sage 50 offers several versions of the same report sorted in different ways while Sage 200 offers a single version	Aged debtors there Sage 50 has several versions sorted in different ways where sage 200 has a single report sorted by account
Filters	Sage 50 has very few run time filters while Sage 200 has many run time filters on each report	Day books where Sage 200 has a single report with a filter on transaction time where sage 50 has a separate report for each transaction type
Template reports	Sage 50 has some reports which are expected to be customised before they are useful	10% sales commission report

Effect Example

After considering these factors, and that Sage 200 has richer data and a wide feature set, the report set within Sage 50 is actually narrower than that offered by Sage 200.

Reports available in Sage 50

A number of reports are available in Sage 50 Financial controller that are not part of the standard Sage 200 reporting set and cannot be quickly added using a custom report.

Of these reports the following were identified as those which could be added to Sage 200 in future versions without significant changes to the database and/or functionality:

- Customer - accounts due for credit review
- Customer - credit managers summary
- Customer/Supplier - top customer/supplier list
- Stock - retrospective valuation
- Sales Orders - stock despatched with average days to despatch
- Purchase Orders - stock delivered with average days to deliver

Of the reports listed above, the Retrospective Valuation Report has been prioritised for inclusion in a future version of Sage 200. All other reports will be investigated and evaluated for possible inclusion in the future.



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