



# Sage ERP MAS 90 and 200 Roadmap

May 2011



*This roadmap is intended for use as a guideline and for information purposes only, and represents Sage's current view of its product direction.*

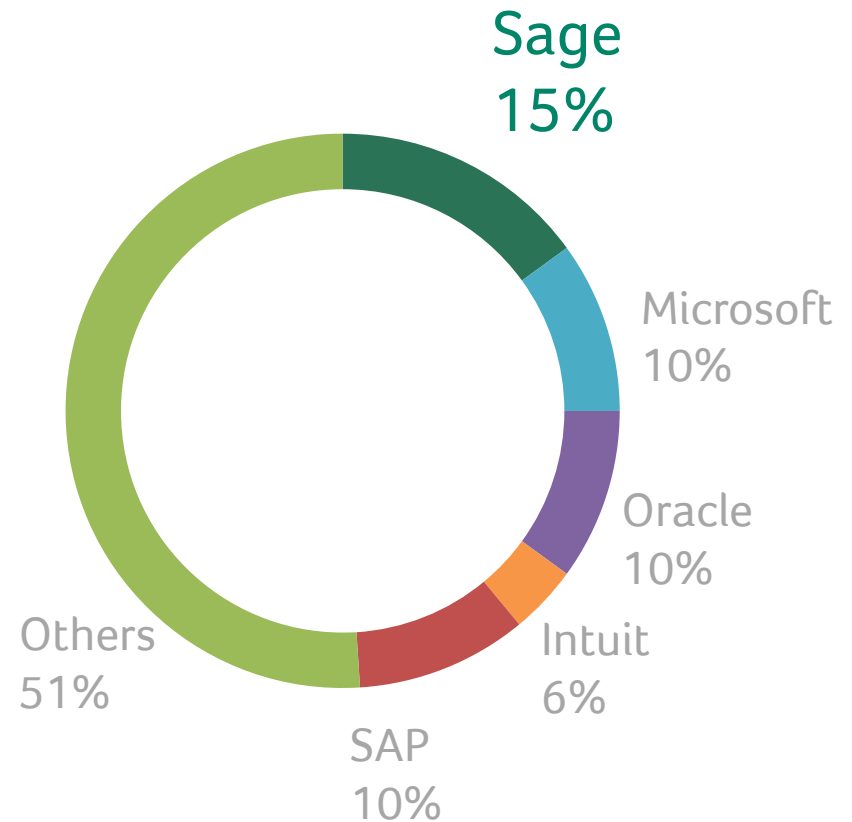
*The information is **subject to change** at any time without notice.*

*As Sage develops products using an Agile development methodology, any one of the milestones, features, release periods or versions could change. None of the information should be interpreted as a commitment on the part of Sage.*



# Sage is #1 Worldwide\*

- A global publicly traded company
- Over 13,000 employees
- Over 6 million customers
- Over 25 years of experience



Source: \*IDC #220937, Worldwide ERP 2008 Vendor Analysis, published December 2009. Based on ERP revenue small business; <1000 employees



# Sage Overview

## Market

Global company with over 13,400 employees

6.3 million customers worldwide

One of the market leaders in the UK, North America, Europe, South Africa and Asia

## Finances

Revenue of \$2.24B for FY2010

Market capitalization of approximately \$4.3 billion

Made over 40 acquisitions since 1991

## Customers

Provide advice to customers through 1.7 million support contracts

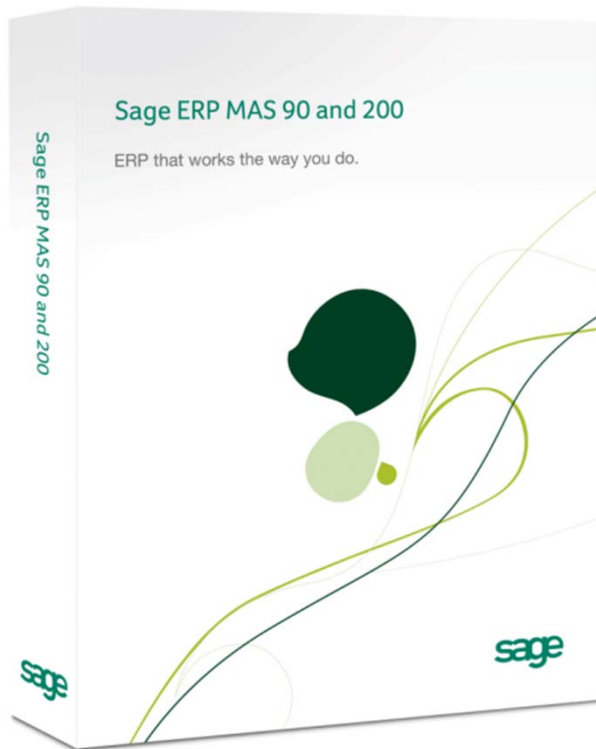
Manage around 40,000 customer calls each day

Work with over 27,000 reseller partners and over 40,000 accountants worldwide



# Sage ERP MAS 90 and 200

Serving over  
**45,000**  
customers



- Sage ERP strategic product
- Fully integrated business management solution
- Superior architecture that grows with your business
- Collaborative ecosystem of development partners, authorized resellers, consultants and CPAs
- Deployment options for on-premise or on-demand (cloud)



# Sage ERP MAS 90 and 200 Roadmap

## 4.4 Product Updates 5 & 6

March & July 2011

- 7 Extended Solution titles
- 941 form update
- Print by workstation

## Online

2H 2011

- Cloud deployment option
- Hosted by Sage

## Version 4.5

Q4 2011

- SageCRM v7.1 integration
- Free SageCRM license
- Migration to MS SQL database
- 14 Extended Solution titles

## Version 5.0

Q4 2012

- SData Web Services
- Sage Web Toolkit
- Sage Exchange
- Auto-update
- SageCRM workflows
- Approval workflows

2011

2012

2013

## Sage Connected Services

Q2 2011

- Sage Sales Tax
- Sage SmartBusinessReports
- Sage eFiling
- Sage Payment Processing

## Intelligence

Q4 2011

- Reporting Trees
- Report distribution
- Performance
- FRx conversion utility

## SageCRM 7.1

Q4 2011

- eMarketing
- Total campaign management
- MS Exchange integration
- Interactive dashboard
- iPhone App
- Twitter integration

## Version 5.1

2013

- Mobile Apps
- Sage Portal
- Sage Advisor
- Sage Payroll





Sage ERP

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**Sage ERP MAS 90 and 200 4.4  
Product Update 5**

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Now Available!

**sage**



# Now Available: Product Update 5

- Product Update 5 includes the main features and functionality of 7 Extended Solutions titles to enhance Inventory Management and Accounts Payable
  - **Inactive items** (similar to IM-1244) - Designate Inventory Items as 'inactive' in Inventory Management so they can no longer be purchased or sold, while maintaining its associated information
  - **Physical Count with count cards** (similar to IM-1119) - Conduct a physical count of diverse inventory in a large warehouse more quickly by entering of individual count card information
  - **Security in item inquiry** (similar to IM-1111) - Improve security by restricting order entry personnel from accessing your standard cost information and access to vendor information including receipts
  - **Multiple company aged invoice report** (similar to AP-1101) - Print the Accounts Payable Aged Invoice report in a multi-company format, combining vendor information across all the selected companies
  - **Expense distribution tables** (similar to AP-1043) - Streamline the entry of standard invoices in Accounts Payable by pre-defining your GL account distribution and their percentages for automatic allocation across multiple departments
  - **Accounts Payable check sorting options** (similar to AP-1077) - Decrease your postage costs by printing checks alphabetically by vendor name in Accounts Payable
  - **Company-specific background colors** (similar to LM-1028) - Assign a different, easily identifiable background color for each company when managing multiple companies
- 941 Form 2011 update





# Now Available: Product Update 5

The screenshot displays the 'Sage ERP Solutions' feedback interface. At the top, it says 'Sage MAS 90 and 200 and Extended Enterprise Suite Ideas. We are listening!' and 'Tell us your idea!' with a text input field. Navigation icons for 'Suggest', 'Collaborate', and 'Vote' are visible. A summary box on the right shows '19 Ideas of 832', '62 Comments', and '502 Votes'. The main content area lists four implemented ideas, each with a vote count and a 'completed' status:

- 50 Votes** | **Support Microsoft SQL Server as a database option** | completed  
Support Microsoft SQL Server as a database option  
Comments (10) | by: Erik k. | Status changed 7 hours ago | 8 - General Enhancements
- 58 Votes** | **Ability to choose a color for a specific company code.** | completed  
Allows user to quickly identify the company by a glance.  
Comments (4) | by: Roberta V. | Status changed 26 days ago | 8 - General Enhancements
- 107 Votes** | **Ability to inactivate or hide items which are no longer being used.** | completed  
Items could still be there but hidden from view to make the inventory items list not as long.  
Comments (7) | by: Roberta V. | Status changed 26 days ago | 3 - Sales & Distribution
- 18 Votes** | **Ability to pre defined general ledger account number distribution ...** | completed  
Streamline entry of Accounts Payable invoices, especially when multiple GL distributions are necessary.  
Comments (2) | by: Roberta V. | Status changed 26 days ago | 1 - Financial Management

Feedback from  
[www.sagemas.com/MAS\\_90\\_200\\_feedback](http://www.sagemas.com/MAS_90_200_feedback)



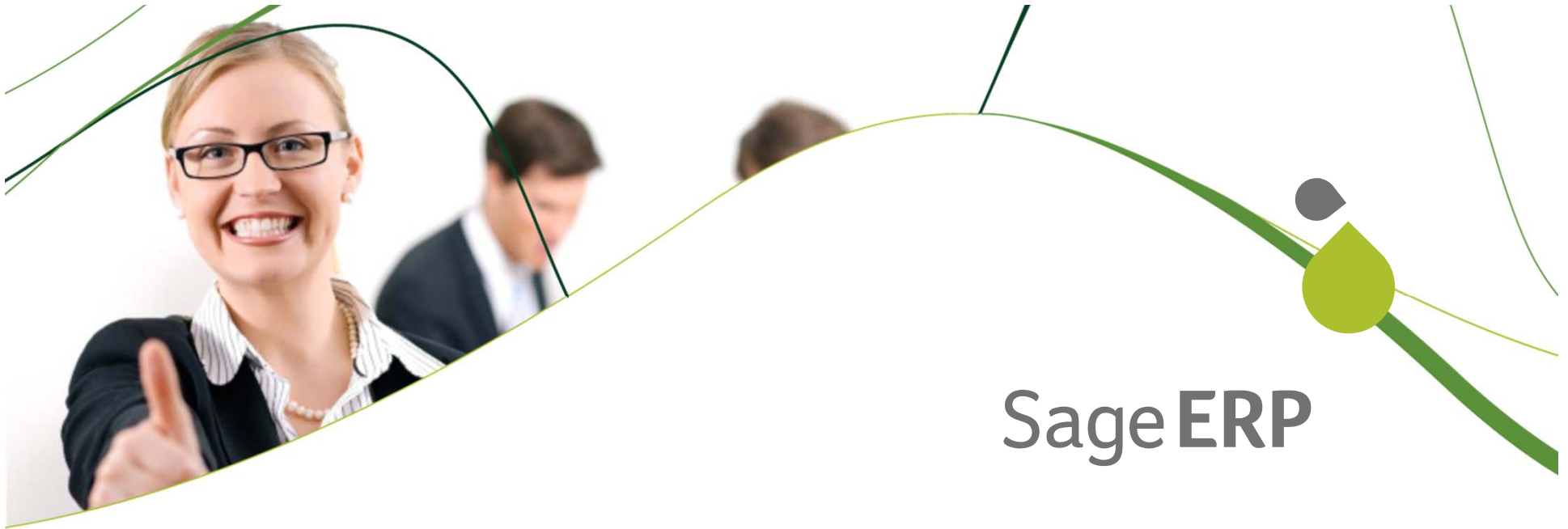
# Coming soon: Product Update 6

Available  
July 2011

- Printer information saved by workstation
  - By popular request from [www.sagemas.com/MAS\\_90\\_200\\_feedback](http://www.sagemas.com/MAS_90_200_feedback)
  - Printer information now saved by workstation and form code or report setting

The screenshot shows a web interface for Sage ERP Solutions. At the top left is the logo "Sage ERP Solutions". To its right is an orange "planned" badge. Further right are icons for "Suggest", "Collaborate", and "Vote", with "Login | Sign Up" text to the right. The main content area features a grey box with a "78 Vote for" button and the text: "Provide ability for all reports (not just STANDARD reports as in 4.3) to remember printer settings by FORM name and USER." Below this is the author information: "by: Larry E. | about a year ago | 8 - General Enhancements". To the right of this box is a red box with the text "Cast your vote or comment ..." and a "return to idea list" link. Below the grey box is a smaller version of the same text and author information.





Sage ERP

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## Sage Connected Services

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On Demand Solutions

sage

# Sage Connected Services

- Sage offers a number of connected services to help optimize your business
  - Federal and State e-Filing and Reporting, powered by Aatrix
  - Sage Sales Tax, powered by AvaTax
  - Credit Card Processing, powered by Sage Payment Solutions
  - Sage eMarketing, powered by Swiftpage
  - Business credit monitoring services, powered by Experian

AvaTax<sup>TM</sup>

**A**atrix  
eFile Center

Swiftpage 

 Experian<sup>SM</sup>

Sage  
Payment  
Solutions



# Federal and State eFiling and Reporting

- Streamline your tax reporting processes

- Integrated with Sage ERP MAS 90 or 200
- Populates forms with your employee and vendor data

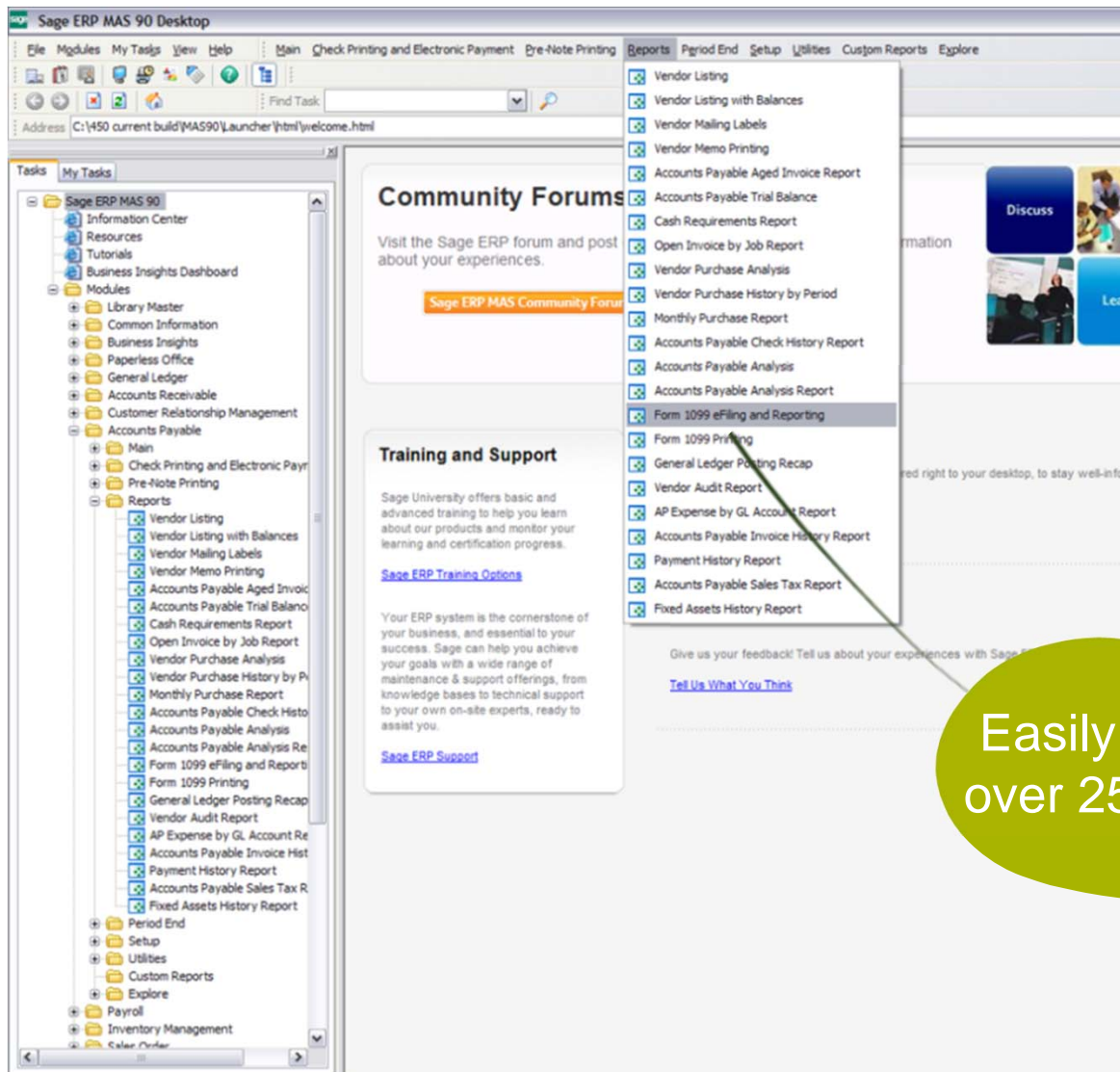
- Option to eFile or print and mail

- Eliminates manual form creation and saves time
- Choose from over 250 federal and state e-forms for Unemployment, Withholding, New Hire reports, W-2s, W-3s, and 1099s
- Complete your W-2/1099 eFiling in one step for less than \$2/employee

A Sage  
Connected  
Service



# Federal and State eFiling and Reporting



Easily access over 250 forms





# Federal and State eFiling and Reporting

State/Federal eFiling and Reporting - 2011 941 Report

File Edit View Tools Help

Review / Edit My Copy Federal Copy

1 2 pages Red Fields must be filled before continuing. Print Save Prev Step Next Step

**Form 941 for 2011: Employer's QUARTERLY Federal Tax Return** 950111  
 (Rev. January 2011) Department of the Treasury Internal Revenue Service OMB No. 1545-0029

(EIN) 9 5 - 3 5 9 6 0 0 1  
 Employer identification number

Name (not your trade name) ABC DISTRIBUTION AND SERVICE CORP.  
 Trade name (if any)

Address 123 ELM STREET, SUITE 321  
 Number Street City State or room number  
 IRVINE CA 92618  
 City State ZIP code

Read the separate instructions before you complete Form 941. Type or print within the boxes.

**Part 1: Answer these questions for this quarter.**

1 Number of employees who received wages, tips, or other compensation for the pay period including: Mar. 12 (Quarter 1), June 12 (Quarter 2), Sept. 12 (Quarter 3), or Dec. 12 (Quarter 4) 1 43

2 Wages, tips, and other compensation . . . . . 2 231871 77

3 Income tax withheld from wages, tips, and other compensation . . . . . 3 39247 17

4 If no wages, tips, and other compensation are subject to social security or Medicare tax  Check and go to line 6e.

	Column 1	Column 2
5a Taxable social security wages . . . . .	231133 52	24037.89
5b Taxable social security tips . . . . .	738 25	76.78
5c Taxable Medicare wages & tips . . . . .	231871 77	6724.28
5d Add Column 2 line 5a, Column 2 line 5b, and Column 2 line 5c . . . . .		

For 2011, the tax rate is . . . . .

**Filing Options**

Please select how you want to file your report.

**eFile**  
 Click the eFile button to electronically file this report for \$7.95.\* No printing, folding, or mailing is required.

**Print**  
 Click the Print button to open the Print window, which allows you to set up your printer, insert blank forms or plain paper, and use the Page Align feature. When you are done printing your forms, sign, fold, and mail them to the local, state, and/or federal agency.

\* Actual pricing may vary at time of eFiling due to other factors such as late fees.

Cancel

Option to eFile or print and mail





Sign up at  
<https://sagemas.aatrix.com>



Brochure

[http://www.sagemas.com/assets/SageMAS/pdf/MAS\\_90\\_200\\_TaxReporting.pdf](http://www.sagemas.com/assets/SageMAS/pdf/MAS_90_200_TaxReporting.pdf)



# Sage Sales Tax, powered by AvaTax

- Makes paying sales tax simple for any business
- Automatically performs address validation, sales tax jurisdiction research, and rate calculation
  - Seamlessly integrated with Sage ERP MAS 90 and 200
  - Covers all sales tax jurisdictions in US and Canada
- Protect yourself from the risk of an audit
- Eliminate the need to research and maintain sales tax codes or schedules
- Set best practices in sales tax compliance
- Get back to focusing on revenue-generating activities!

A Sage  
Connected  
Service



# Sage Sales Tax

## ● Auto-Address

- Decrease data entry time and reduce shipping rates with the best source of address data in the country

## ● Auto-Jurisdiction

- Auto-Jurisdiction returns correct jurisdiction and sales tax rate for each transaction

## ● Statutory Requirements

- Reduce audit risk and ensure that you are charging the correct amounts, 13,000+ jurisdictions and counting

## ● Reporting

- Access all data securely online with ease
- Consolidate data on multiple companies

## ● Returns

- Automate the entire returns process and collect sales tax information from various internal and external sources

A Sage  
Connected  
Service



Learn more at  
<http://www.avalara.com/Sage>

AvaTax<sup>™</sup>

Overview video

<http://www.avalara.com/Media/Flash/MAS90andMAS200/WalkThroughMAS.swf>

Online demo

<http://www.avalara.com/Media/Flash/MAS90andMAS200/index.html>



# Credit Card Processing powered by Sage Payment Solutions

- Automatically connects to Merchant Accounts for credit card authorizations and settlements
- Complete, secure, 24/7 online transaction reporting
  - Compliant with Visa and MasterCard Payment Card Industry (PCI) data security standard
  - Stored credit card numbers are encrypted
  - Credit Verification Version 2 (CVV2) to help verify card authenticity
  - Multiple address verification options add an additional layer of credit card authentication



# Get Your Sage Merchant Account Now!

- Engage a Sage Connected Services Specialist
  - Call 1-877-541-1681 ext. 340123, or
  - Email your contact information to [MASConnectedServices@sage.com](mailto:MASConnectedServices@sage.com)
- Call your Sage Business Partner to order the Module

Free Credit Card  
Processing  
module with a  
Sage Payments  
account



**Learn more at**  
**[www.sagemas.com/demo](http://www.sagemas.com/demo)**



Credit Card Processing Module  
<http://www.sagemas.com/products>

## **Sage University**

Anytime learning course  
<http://sageu.com/mas90>

PCI Compliance Information  
[www.sagemasinfo.com/M90PCI](http://www.sagemasinfo.com/M90PCI)



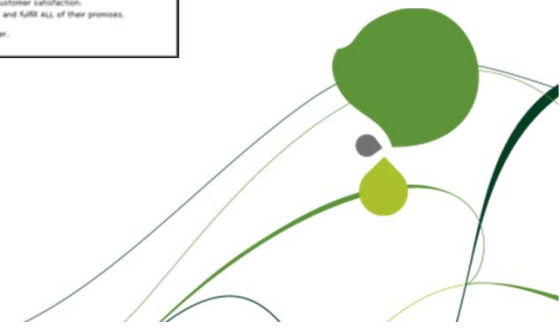


# Sage eMarketing for SageCRM

A Sage  
Connected  
Service

- Fully integrated E-marketing module to create custom, personalized e-mail marketing campaigns
  - Over 90 attention-grabbing templates out-of-the-box
  - Simple 3-step wizard for rapid execution
  - Custom landing pages for easy execution of cohesive, integrated marketing campaigns
- Low monthly subscription fee

Coming soon  
with Version 4.5  
and SageCRM  
7.1



# Sage SmartBusinessReports

A Sage  
Connected  
Service

- Powered by Experian offers you
  - Easy to read business credit reports on your company, or on your customers
  - Business credit monitoring and alerts
- Access business credit reports at
  - <http://www.smartbusinessreports.com/?link=1241>

Get one **FREE** credit report at  
<http://promo.smartbusinessreports.com/sage>





Sage ERP

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## Sage ERP MAS 90 Online

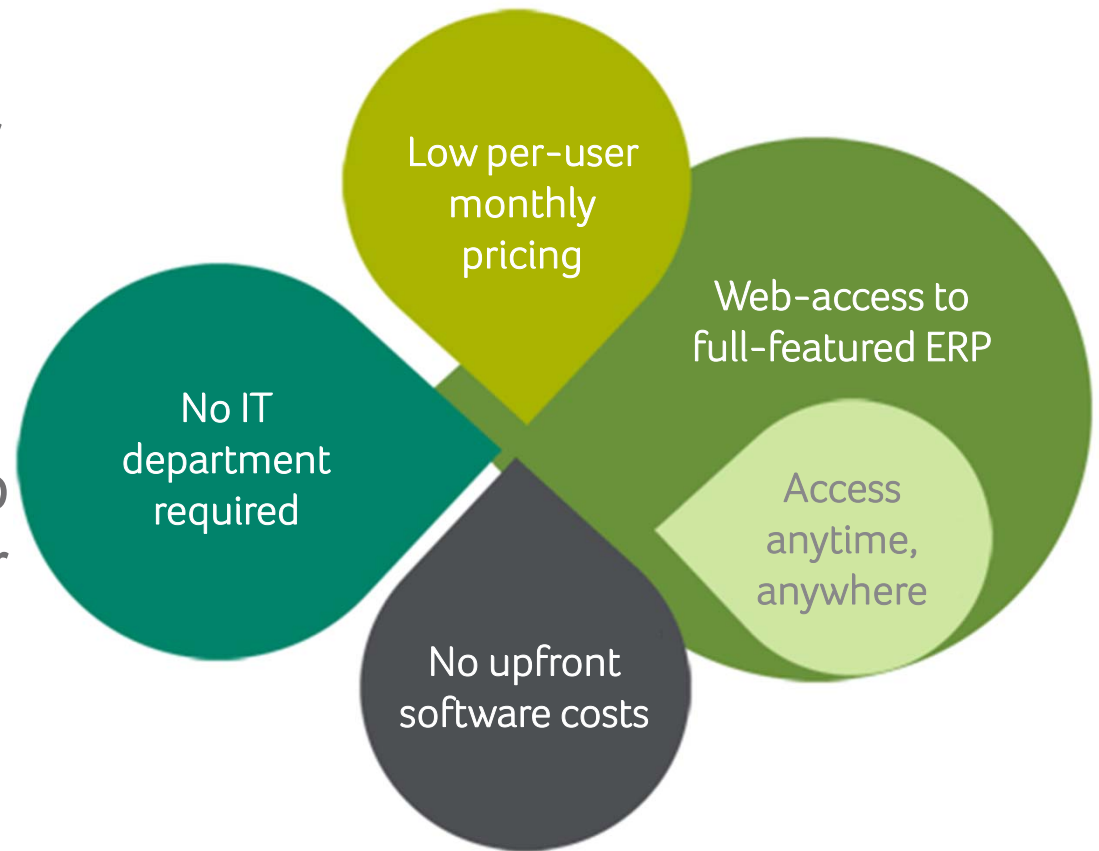
Cloud Deployment Option

sage

# Sage ERP MAS 90 Online

Launching  
2H 2011

- Cloud deployment hosted by Sage
- Deployment option for customers with
  - Short implementation timeframe
  - Limited IT staff or budget
- Seamless migration to on-premise when your business grows



# Sage ERP MAS 90 Online

## Available modules and options

- System Setup
- Library Master
- General Ledger
- Accounts Payable
- Account Receivable
- Inventory Management
- Sales Order
- Purchase Order
- Bill of Materials
- Bank Reconciliation
- RMA
- Electronic Reporting
- Sage ERP MAS Intelligence



# Hosting Infrastructure



- ◆ 99.874% recorded uptime for 2010
- ◆ Hosting facilities operated by QTS Atlanta Metro Data Center
  - ◆ 2nd largest data center in the world
  - ◆ 990,000 square feet in total enclosed space
  - ◆ On-site Georgia Power substation and direct fiber access
- ◆ SAS-70 Type II compliant

Learn more at

<http://www.qualitytech.com/facilities/atlanta-ga.jsp>





Sage ERP

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## Sage ERP MAS Intelligence

Sage's FRx Replacement Solution

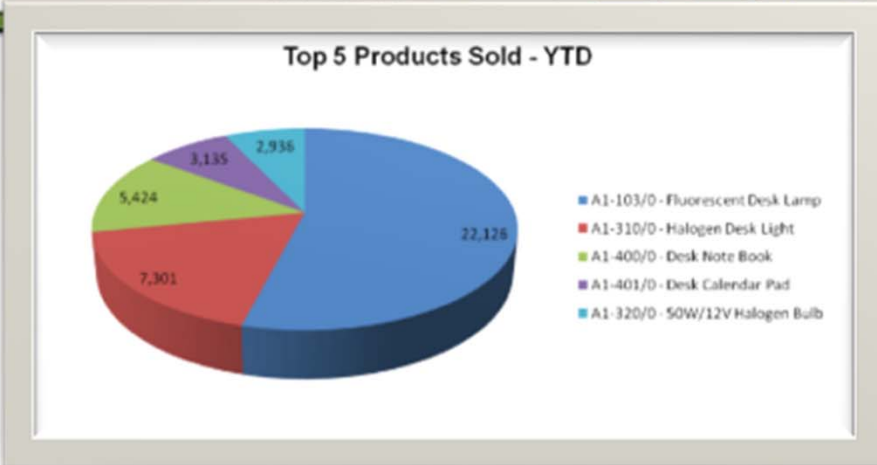
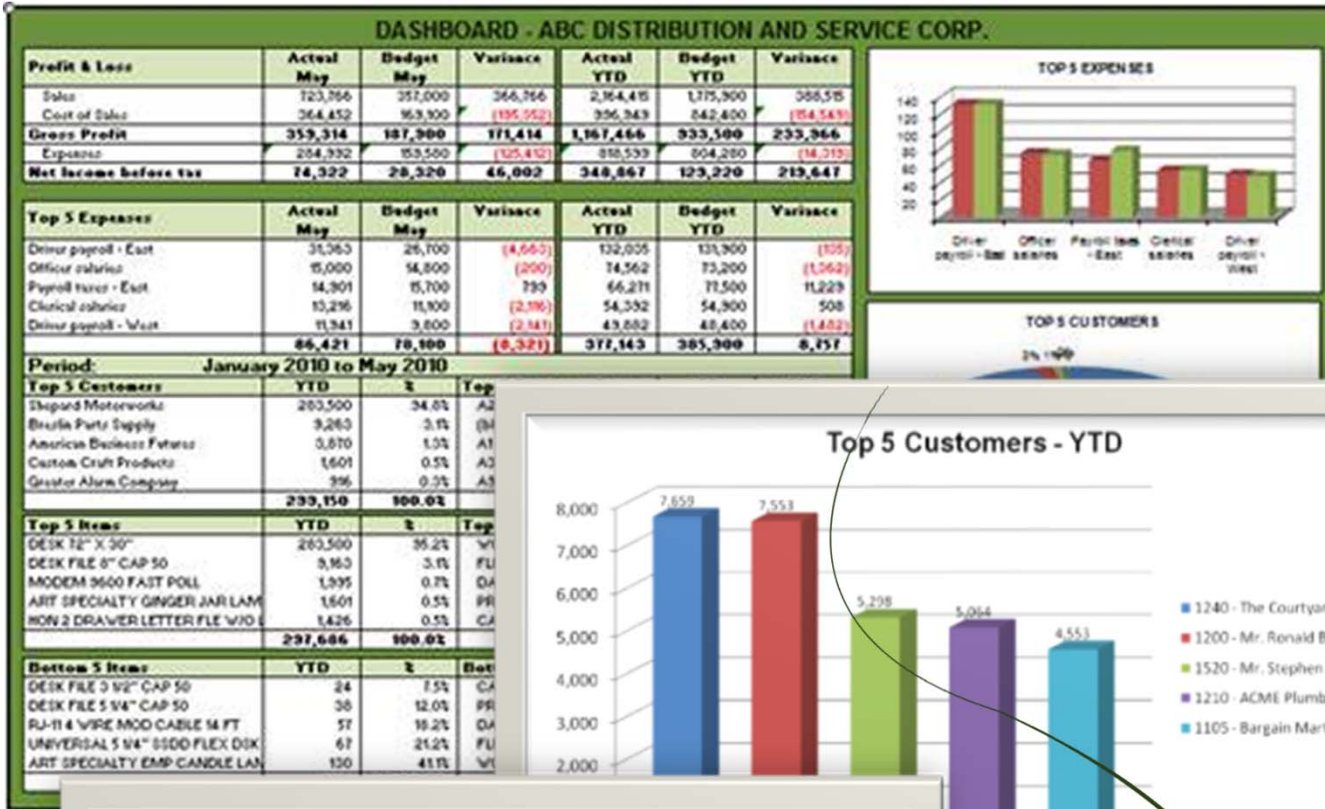




# Sage ERP MAS Intelligence

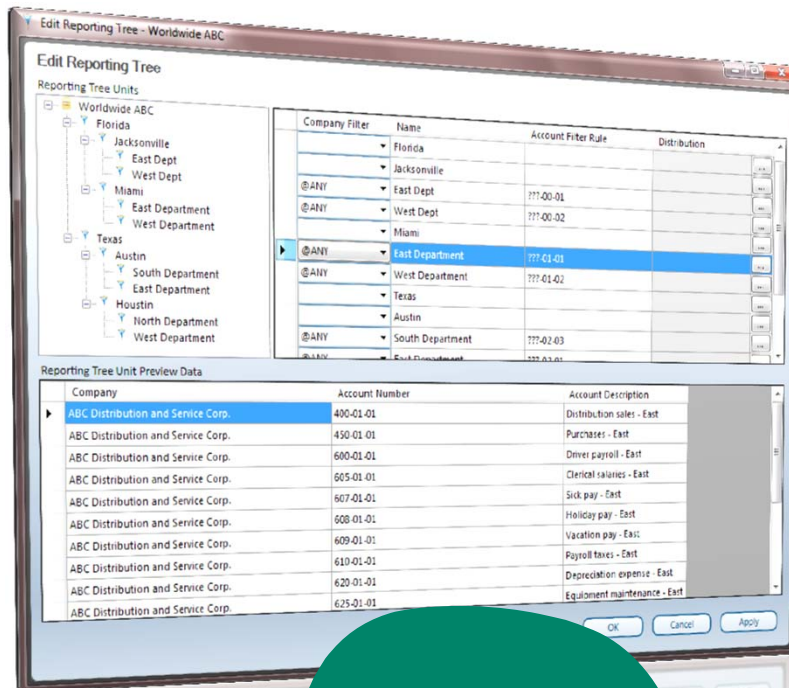
- Complex reporting made easy
  - Business Intelligence in a familiar Microsoft Excel interface
  - Easily customizable “out of the box” financial, sales, purchasing, and inventory report templates and dashboards
- Predefined financial and operations reports for management, sales, purchases and inventory
- Access to all modules and data (not just GL!)
- Dashboard and trend analysis reports
- Consolidation of multiple companies and databases
- User-level security





Your data pulled directly into **Excel**

# Intelligence – What's New



Available  
with v4.5

- Reporting Trees
  - Easy to learn organizational reporting
  - Multi-company consolidations supported
- Performance improvements
  - GL data loading up to 6x faster
  - General report loading 2x faster
  - Aggregated financials available
- Report distribution
  - Easy setup to fully automate report distribution
  - Rich text email distribution
  - Conditional distribution based on report content
  - Multi-format (PDF, XLS, HTML) file publishing to local and networked locations
- Create convenient Windows shortcut for any report



# FRx Conversion Utility

Beta available  
at Summit  
2011

- Utility to assist converting FRx files to Intelligence files
- The utility will
  - Convert native columns like Actual/Budget columns
  - Convert calculated columns that involve basic arithmetic
    - Proprietary FRx formulas will not be converted
  - Map limited row formats to Report Designer row structure
    - Due to limited correlation between FRx and Intelligence row formatting, manual rework will likely be required post-conversion
  - Convert Reporting Trees to the reporting tree structure implemented in the Report Designer (for v4.5 only)
  - Convert Catalogs to layouts in the Report Designer if the Catalog's column layout and the row format can both be converted



Learn more at  
<http://www.sagemas.com/intelligence>



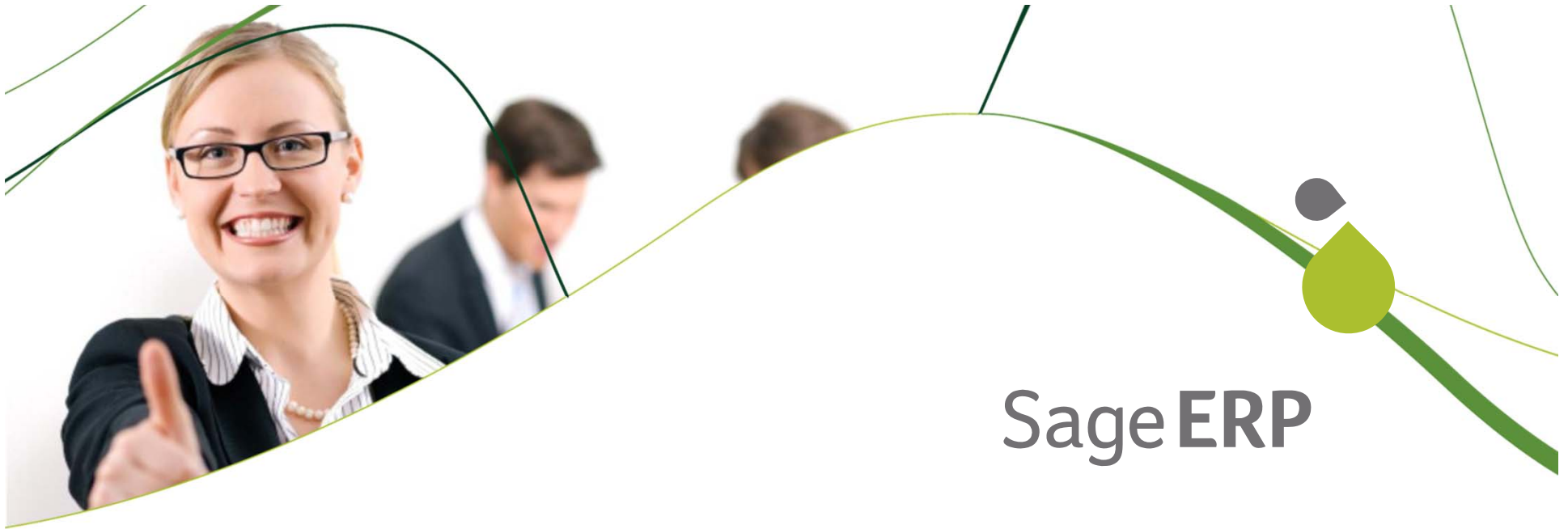
## Sage University

Free anytime learning course  
<http://www.sageu.com/mas90>



The Sage ERP Learning Channel  
[www.youtube.com/user/SageUERPLearning](http://www.youtube.com/user/SageUERPLearning)





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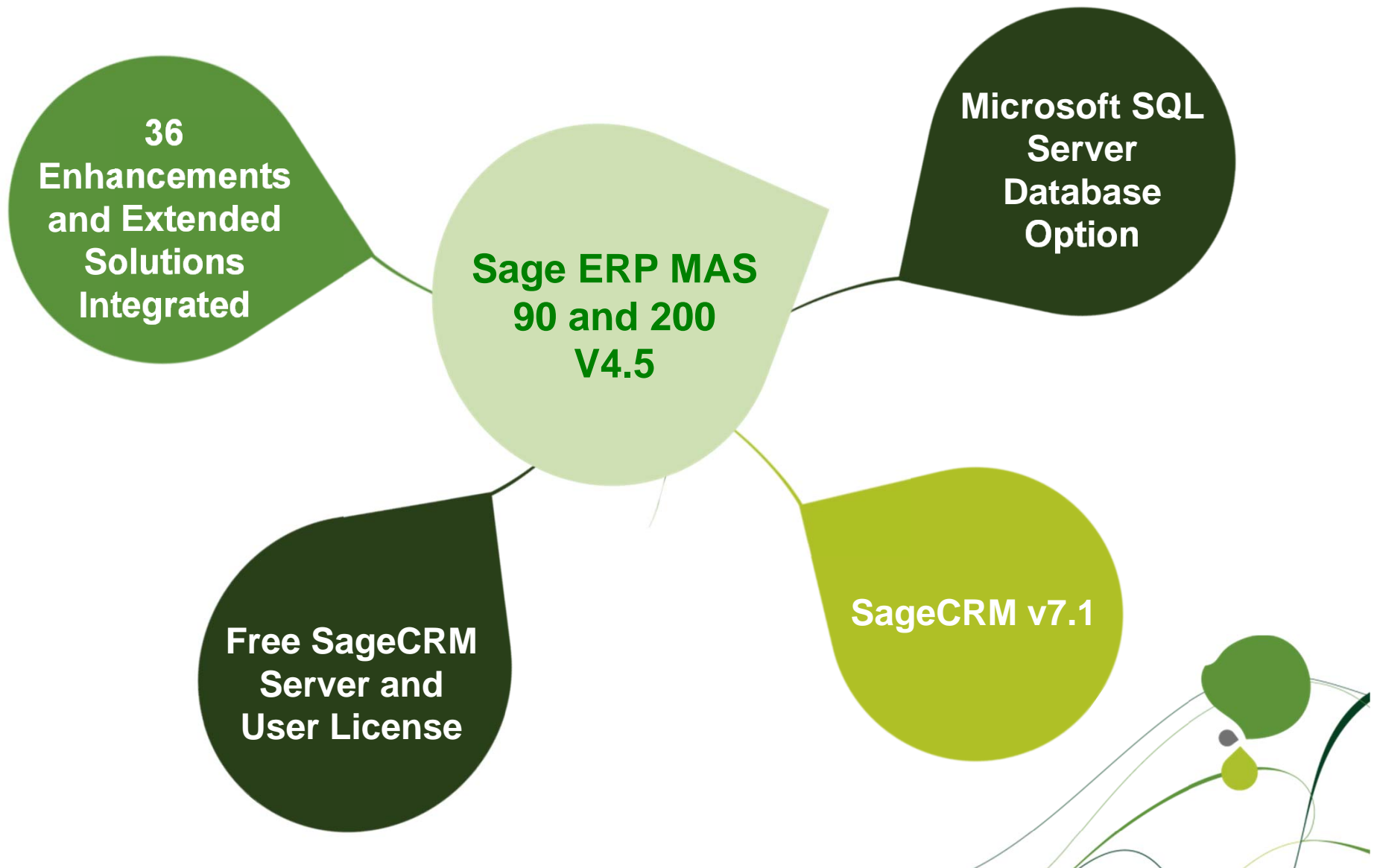
## **Sage ERP MAS 90 and 200 Version 4.5**

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Coming Q4 2011



# Version 4.5 – What's New





# Version 4.5 – Enhancements and Extended Solution Integrations

- 36 Enhancements delivered in Product Updates 1 through 5 are incorporated in v4.5, including the main features and functionality of 18 Extended Solutions titles
- The main features and functionality of 14 additional Extended Solutions titles are incorporated in v4.5 with enhancements to
  - Payroll
  - Sales Order and Purchase Order
  - Accounts Receivable



# Version 4.5 – Enhancements

- 18 enhancements delivered in Product Updates 1 through 5 are incorporated in 4.5

## General

- Enhanced credit card security
- Enhanced searching ability in data file display and maintenance
- Product update pre-installation scan feature
- Office 2010 support
- 941 Form 2011 update

## Bank Rec

- Enforce tighter controls over bank reconciliation adjusting entries
- Enter checks, deposits, and adjustments on-the-fly
- Conveniently use recalculate outstanding entries totals utility
- Positive pay export wizard
- Expanded comment field
- Post to general ledger
- Check, deposit and adjustment entry and reconcile bank
- Transaction register task
- Security events for bank reconciliation
- Paperless office options for bank reconciliation

## Accounts Payable

- Record wire transfers

## Sales Orders

- Print back ordered information on picking sheets
- Avoid duplicate picking sheet printing

# Version 4.5 – Extended Solution Integrations

- The main features and functionality of 18 Extended Solutions titles delivered in Product Updates 1 through 5 are incorporated in 4.5

Accounts Payable	Accounts Receivable	Bank Rec	Job Cost	Sales Order	Inventory Management	Payroll	Library Master
<ul style="list-style-type: none"> <li>•AP-1043 - Distribution table for invoice entry</li> <li>•AP-1063 - ACH electronic payment for accounts payable</li> <li>•AP- 1077 - Additional check printing sort option</li> <li>•AP -1095 - Paperless office: AP checks &amp; direct deposit stubs</li> <li>•AP-1101 - Multiple company aged invoice report</li> </ul>	<ul style="list-style-type: none"> <li>•AR-1027 - Enhanced invoice history search</li> <li>•AR-1200 - Cash receipts entry by invoice number</li> </ul>	<ul style="list-style-type: none"> <li>•BR-1004 - 'Positive pay' export</li> <li>•BR-1005 - Bank reconciliation import</li> </ul>	<ul style="list-style-type: none"> <li>•JC-1046 - Job status posting control</li> </ul>	<ul style="list-style-type: none"> <li>•SO-1035 - Enhanced quick print</li> <li>•SO-1096 - Enhanced customer PO number validation</li> <li>•SO-1271 - Authorized purchase control by customer or state</li> </ul>	<ul style="list-style-type: none"> <li>•IM-1111 - Security for inventory inquiry</li> <li>•IM-1119 - 'Physical count' entry by ticket number</li> <li>•IM-1244 - 'Inactive' item designation</li> </ul>	<ul style="list-style-type: none"> <li>•PR-1018 - Automatic earnings code maintenance by employee</li> </ul>	<ul style="list-style-type: none"> <li>•LM-1028 - Background color by company code</li> </ul>

# Version 4.5 – Additional Extended Solution Integrations

- The main features and functionality of 14 additional Extended Solutions titles will be incorporated in 4.5

## Payroll

- PR-1067 - Additional deduction calculation methods
- PR-1116 - Deduction recalculation in payroll entry
- PR-1015 - Deduction calculation based on earnings type
- PR-1031 - Payroll data entry import utility
- PR-1091 - Enhanced benefit accrual

## Sales Order and Purchase Order

- SO-1489 - Auto generate purchase orders from sales order entry
- PO-1020 - Purchase orders created from sales orders
- SO-1005 - Price level by customer/product line
- SO-1173 - Item pricing by total quantity
- SO-1530 - Enhanced sales order integration with job cost
- SO-1175 - Lot/serial distribution entry from sales order
- SO-1417 - Maintain split commissions by customer
- SO-1354 - Commission rate table by salesperson/customer/item

## Accounts Receivable

- AR-1068 - Customers with national accounts



# Version 4.5 – Payroll Enhancements

- Additional deduction calculation methods – similar to PR-1067
- Deduction recalculation in payroll entry – similar to PR-1116
- Deduction calculation based on earnings type – similar to PR-1015
- Payroll data entry importing – similar to PR-1031
- Enhanced benefit accrual – similar to parts of PR-1091



# Version 4.5 – Payroll Enhancements

- Additional deduction calculation methods

Paid Hours  
Pay Rate  
Regular + Overtime Hours  
Percentage of Total Hours  
Percentage of Deduction  
Method

Deduction Code Maintenance

Deduction Code 05 Description Savings

Deduction Type Employer Contribution

Calculation Method Percentage of Gross

Standard Amount/Rate

Standard Limit

W2 - Box 12 Code

Automatically Apply Deduction

Deduction Accrual Account 765-00-04 Miscellaneous expense

Contribution Expense Account 665-01-00 Miscellaneous expense

Apply... Taxes...

Equal to Earnings Code

Frequency of Deduction

Every Pay Period

Pay Period 1  Pay Period 4

Pay Period 2  Pay Period 5

Pay Period 3

More... Accept Cancel Delete

FQC ABC 9/30/2010

# Version 4.5 – Payroll Enhancements

- Deduction recalculation in payroll entry

Payroll Options

1. Main | 2. Additional | 3. Integrate | 4. Forms | 5. Direct Deposit

Accrual Benefit Description:

Accrual Report Display Option: Hours

Round Benefit Hours:

Reset Employment:

Take Automatic Deductions in Selective Entry:

Print Data Entry Audit Report in Detail:

Method to Recalc Deductions: All

Recalc Deductions in Data Entry: Prompt

Allows deductions that depend on information from earnings lines to be recalculated in Payroll Data Entry

Payroll Data Entry

Line	E/D	Cd	ST	Loc	Dept	Description	Cost Code	W/C Code	Rate	Hours	Amount
1	E	01			01	0000002 REGULAR Journeyman		ALL	25.000	24.00	600.00
2	E	02			01	0000002 Overtime Journeyman		ALL	37.500	2.00	75.00
3	E	03			01	0000002 Doubletime Journeyman		ALL	50.000	.00	.00

Ins Del Recalc Deductions

Remaining to Goal: 900.00





# Version 4.5 – Payroll Enhancements

- Deduction calculation based on earnings type allows you to use payroll deduction codes according to a specified earnings type in order to calculate based on “Percent of Gross” or “Total Hours Worked”.

Deduction Code Maintenance

Deduction Code 06 Description 401k Plan

Warning - Data Entry in Progress!

Earnings... Taxes...

Apply...

Deduction Type Pension Plan

Calculation Method Percentage of Gross

Standard Amount/Rate 5.000%

Standard Limit 10,000.00

W2 - Box 12 Code D

Reset Balance at Year End

Automatically Apply Deduction to Earnings Code

Equal to Earnings Code

Frequency of Deduction

Every Pay Period

Pay Period 1  Pay Period 4

Pay Period 2  Pay Period 5

Pay Period 3

Deduction Accrual Account 665-01-00 Miscellaneous expense

Contribution Expense Account

Accept Cancel Delete

Enter Description for this Deduction Code SDN ABC 9/21/2010

Select a specific earnings type to be used for calculations



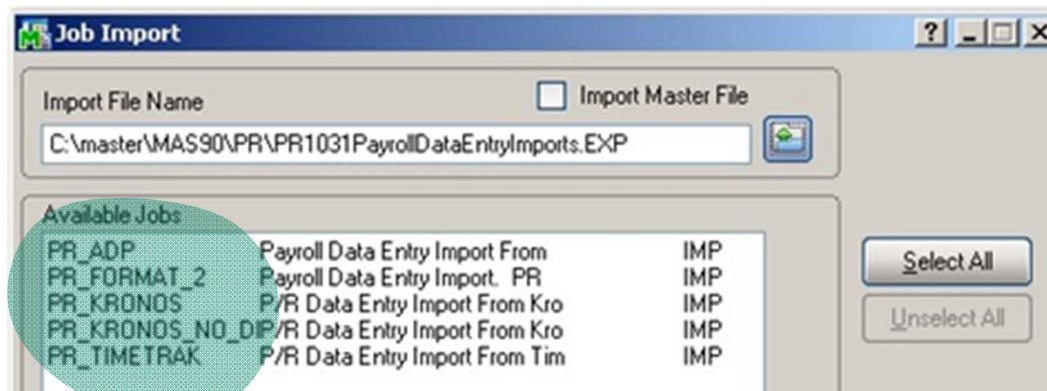


# Version 4.5 – Payroll Enhancements

- Payroll data entry importing

- Visual Integrator was redesigned to allow importing of 5 common payroll formats

- Fixed Field Format
    - ADP Format
    - ‘TimeBank’ or Kronos Connect Format with department + employee number imported
    - TimeBank’ or Kronos Connect Format with only employee number imported.
    - Fixed Field Format for Timetrack v8.0





# Version 4.5 – Sales Order Enhancements

- Auto generate purchase orders from sales order entry – similar to SO-1489
- Purchase orders created from sales orders - similar to PO-1020
- Price level by customer or product line – similar to SO-1005
- Item pricing by total quantity – similar to SO-1173
- Enhanced sales order integration with job cost – similar to SO-1530
- Lot/serial distribution entry from sales order – similar to SO-1175
- Maintain split commissions by customer – similar to SO-1417
- Commission rate table by salesperson/customer/item – similar to SO-1354



# Version 4.5 – Sales Order Enhancements

- Auto generate purchase orders from sales order entry and create purchase orders created from sales orders

The screenshot displays the 'Sales Order Entry (ABC) 5/2/2011' window. The interface includes a menu bar with '1. Header', '2. Address', '3. Lines', and '4. Totals'. The 'Order Number' is 0000112, and the 'Order Date' is 5/3/2010. The 'Order Type' is 'Standard Order'. The 'Customer No.' is 02-CUSTOM, and the 'Salesperson' is 0300. The 'Order Total' is 4,558.88. A green oval highlights the 'Generate PO...' button.

Field	Value
Order Number	0000112
Order Date	5/3/2010
Order Type	Standard Order
Customer No.	02-CUSTOM
Salesperson	0300
Amount Subject to Discount	4,186.32
Discount Rate	10.000%
Discount Amount	418.63
Taxable Amount	3,767.69
Non-Taxable Amount	553.63
Ship Zone	A
Ship Weight	00010
Freight Amount	11.50
Payment Type	NONE
Check Number	
Deposit Amount	.00
Commission Rate	11.500%
Sales Tax Amount	226.06
Order Total	4,558.88

Generate purchase orders from sales order entry or auto generate batches of purchase orders created from sales orders

# Version 4.5 – Sales Order Enhancements

- Price level by customer or product line

The screenshot shows the 'Sales Order Options (ABC) 5/2/2011' dialog box with the following settings:

- Use Alternate Warehouse for Out-of-Stock Items:**
- Use Item Default Warehouse:**
- Check for Available Quantity:**
- Display Unit Cost:**
- Display Profit Margin Percent:**
- Profit Margin Percent to Display Warning:** 10
- Purchase Control:**
  - Enable Purchase Control of Items:**
  - Select Items Based On:** Customer
  - Control Purchases Based On:** Items Not Allowed
- Item Pricing by Total Quantity:**
  - Item Pricing on a Total Quantity Basis:** Product Line
  - Unit of Measure for Total:** Standard
  - Apply Item Pricing Automatically:** Yes
- Allow Discount Rate by Detail Line:**
- Default Special Items to Drop Ship:**
- Warranty:**
  - Warranty Calculation Based On:** Ship Date
  - Recalc Expiration if Ship/Invoice Date Changed:**
- Price Level by Customer:**
- Enable Default Price Level by Customer:**
- Base New Price Level Records On:** Price Code
- Lot/Serial Distribution in Sales Order Entry:**
  - Enable Lot/Serial Distribution:**
  - Require Lines to be Fully Distributed:**

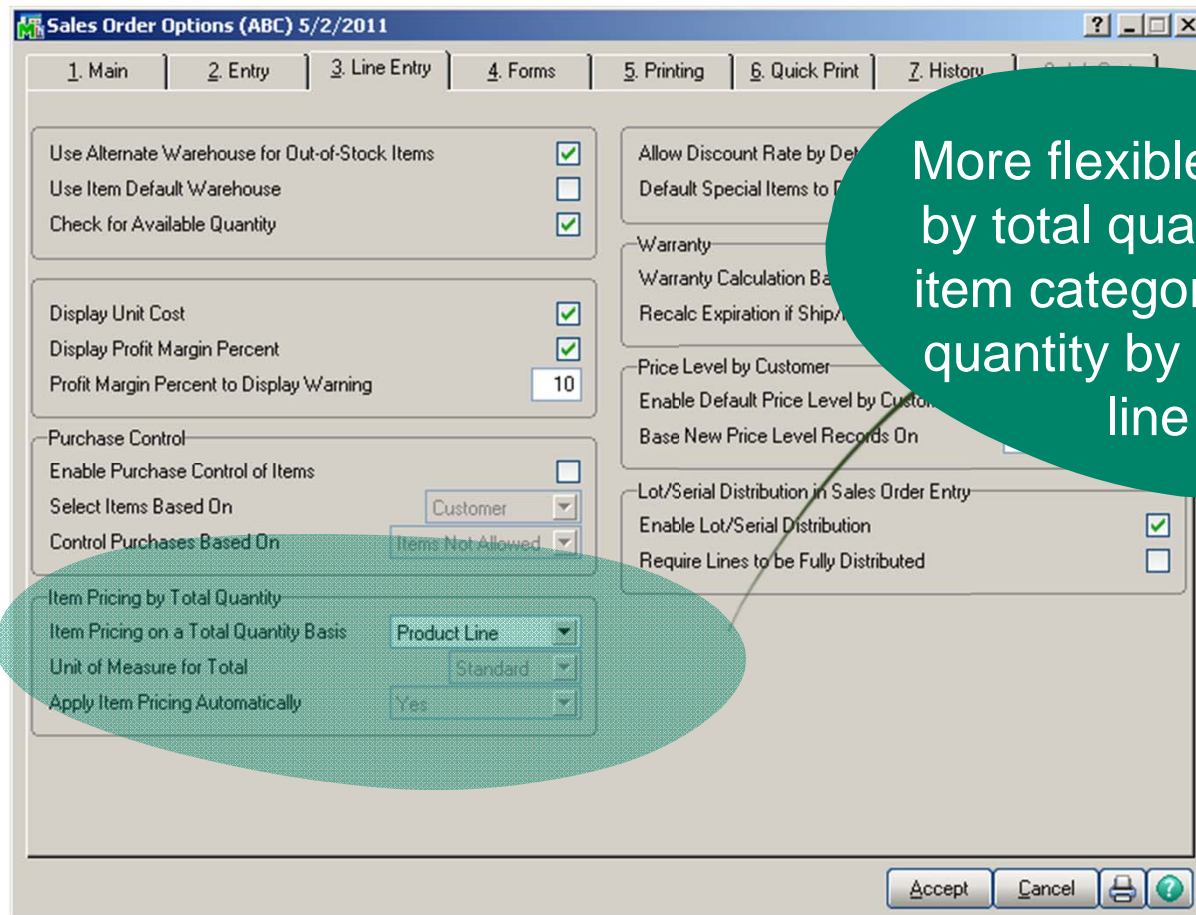
Buttons at the bottom: Accept, Cancel, Print, Help.

Provide customers with special discount pricing at the product line level in order to meet competitive pricing pressures



# Version 4.5 – Sales Order Enhancements

- Item pricing by total quantity



More flexible pricing by total quantity, by item category, or for quantity by product line

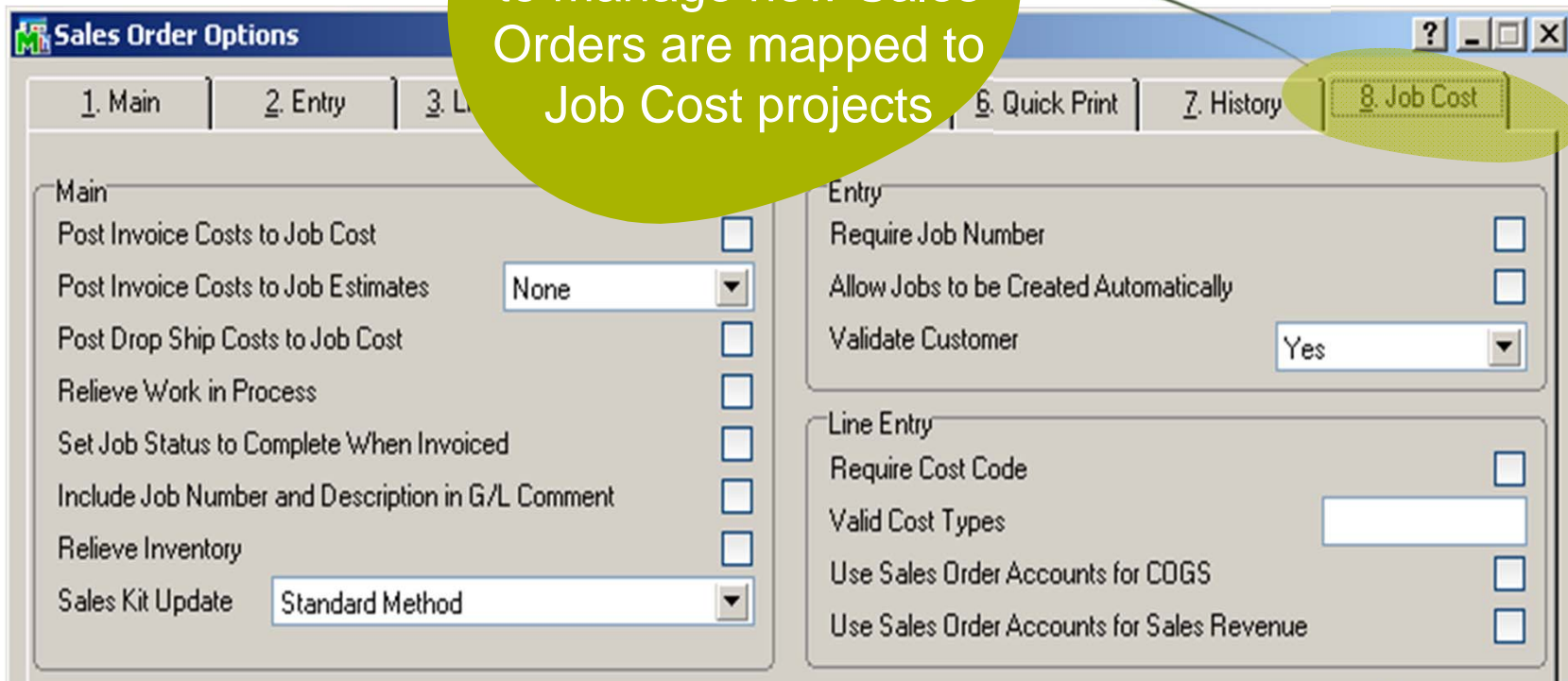




# Version 4.5 – Sales Order Enhancements

- Enhanced sales order integration with job cost

New Job Cost tab offers additional ways to manage how Sales Orders are mapped to Job Cost projects



The screenshot shows the 'Sales Order Options' window with the following tabs: 1. Main, 2. Entry, 3. Line Entry, 6. Quick Print, 7. History, and 8. Job Cost. The 'Job Cost' tab is highlighted in green. The window is divided into three sections: Main, Entry, and Line Entry.

Section	Option	Value/Status
Main	Post Invoice Costs to Job Cost	<input type="checkbox"/>
	Post Invoice Costs to Job Estimates	None
	Post Drop Ship Costs to Job Cost	<input type="checkbox"/>
	Relieve Work in Process	<input type="checkbox"/>
	Set Job Status to Complete When Invoiced	<input type="checkbox"/>
	Include Job Number and Description in G/L Comment	<input type="checkbox"/>
	Relieve Inventory	<input type="checkbox"/>
	Sales Kit Update	Standard Method
Entry	Require Job Number	<input type="checkbox"/>
	Allow Jobs to be Created Automatically	<input type="checkbox"/>
	Validate Customer	Yes
	Line Entry	
Line Entry	Require Cost Code	<input type="checkbox"/>
	Valid Cost Types	
	Use Sales Order Accounts for COGS	<input type="checkbox"/>
	Use Sales Order Accounts for Sales Revenue	<input type="checkbox"/>

# Version 4.5 – Sales Order Enhancements

- Lot/serial distribution entry from sales order

Reserve specific lots and/or serial numbers for particular customers and improve tracking for potential product recalls

**Sales Order Options**

1. Main | 2. Entry | 3. Line Entry | 4. Forms | 5. Printing | 6. Quick F

Use Alternate Warehouse for Out-of-Stock Items <input checked="" type="checkbox"/>	Allow Discount Rate by Detail L <input type="checkbox"/>
Use Item Default Warehouse <input checked="" type="checkbox"/>	Default Special Items to Drop Ship <input type="checkbox"/>
Check for Available Quantity <input checked="" type="checkbox"/>	
<b>Warranty</b>	
Display Unit Cost <input checked="" type="checkbox"/>	Warranty Calculation Based On <input type="text"/>
Display Profit Margin Percent <input checked="" type="checkbox"/>	Recalc Expiration if Ship/Invoice Date Changed <input checked="" type="checkbox"/>
Profit Margin Percent to Display Warning <input type="text"/>	
<b>Price Level by Customer</b>	
<b>Purchase Control</b>	Enable Default Price Level by Customer <input type="checkbox"/>
Enable Purchase Control of Items <input type="checkbox"/>	Base New Price Level Records On <input type="text" value="Price Code"/>
Select Items Based On <input type="text"/>	
Control Purchases Based On <input type="text"/>	
<b>Lot/Serial Distribution in Sales Order Entry</b>	
	Enable Lot/Serial Distribution <input type="checkbox"/>
	Require Lines to be Fully Distributed <input type="checkbox"/>
	Auto Adjust Invoice Tier Distribution <input type="checkbox"/>





# Version 4.5 – Sales Order Enhancements

- Maintain split commissions by customer

Establish and maintain default split commissions between multiple salespeople by customer

Additional Salespersons	
Salesperson	Percent of Commission
01-0200 Shelly Westland	20.000%
02-0200 Jonathan Miller	20.000%
02-0300 Harvey Earlwright	20.000%
02-0400 Ginny Hernandez	20.000%

# Version 4.5 – Sales Order Enhancements

- Commission rate table by salesperson/customer/item

Line Item Commission Maintenance

Salesperson No. 01-0100

Name Jim Kentley

Customer No. 01-ABF American Business

Item Code 1001-HON-H252 HON 200

Effective Date 05/31/2010

Item Commission

Commission Method Percent of Gross Profit

Commission Rate 10.000%

Base Commission 100.00

Commission Type Percent

Commission Rate 20.000%

Accept Cancel Delete Print Help

The new commission rate tables will provide an established and automatic method to ensure salespeople are paid correctly



# Version 4.5 – Accounts Receivable Enhancements

- Customers with national accounts - similar to AR-1068

Accounts Receivable Options (ABC) 06/10/10

1. Main | 2. Additional | 3. Credit | 4. Entry | 5. Printing | 6. History

Open Item or Balance Forward: Mixed

Days to Retain Paid Invoices: 99

Retain Temporary Customers with Paid Invoices:

**Aging**

Age Invoices By: Due Date

Aging Categories to be Used: Days

**Aging Categories**

30 Days  60 Days  90 Days  120 Days

**National Accounts**

Bill To Customer Reporting:

Post by Bill To Division to General Ledger:

Commissions

Salesperson Commission Percentage:

Commissions Paid:

Calculation Base:

Update Commissions:

**Finance Ch...**

Computation:

Aging Category:

Exclude Existing Charges:

Standard Charge Rate:

Minimum Balance to Apply Charge:

Minimum Charge to Apply:

Accept Cancel [Printer Icon] [Refresh Icon]

Sell and ship goods to one customer, bill the invoice to another customer or national account



# Version 4.5 – Database Options

- Choice of database
  - Microsoft SQL Server 2008 R2
  - ProvideX
- Upgrade path
  - Upgrade from v3.7x SQL to v4.5 SQL
  - Upgrade from ProvideX v4.4 to v4.5 SQL



# Version 4.5 - SageCRM Integration

- SageCRM v7.1 integrated with Sage MAS 90 and 200 v4.5
  - Free SageCRM Server included
  - One (1) free SageCRM user license included with every v4.5 system
- The benefits of integrated front and back office available to all Sage ERP MAS 90 and 200 customers
  - **Be more productive** - Use SageCRM's powerful workflow engine to easily automate your most critical business processes making sure nothing falls through the cracks
  - **Provide better insight** - Quick and cost effective integration with Sage ERP MAS allows front-office staff to leverage ERP data and functionality, delivering deeper customer insight
  - **Maximize collaboration** - Achieve maximum effectiveness by reducing the errors and pushing service levels to new heights, improving customer loyalty and retention, boosting sales



# Version 4.5 – Beta and Early Adopter Program

- Be an early adopter and take advantage of the new enhancements delivered in Version 4.5

## Beta

- Sign up in June
- Runs through August

## Release

- Target General Availability: August 29

## Early Adopter

- Program runs September through November
- Highest priority access for help and fixes through Sage Support, backed up by the Sage ERP MAS 90 and 200 R&D team

## Autoship

- November



# Learn more about Version 4.5



Pre-Release Guide and  
Frequently Asked Questions  
[Partner File Center](#)







Sage ERP

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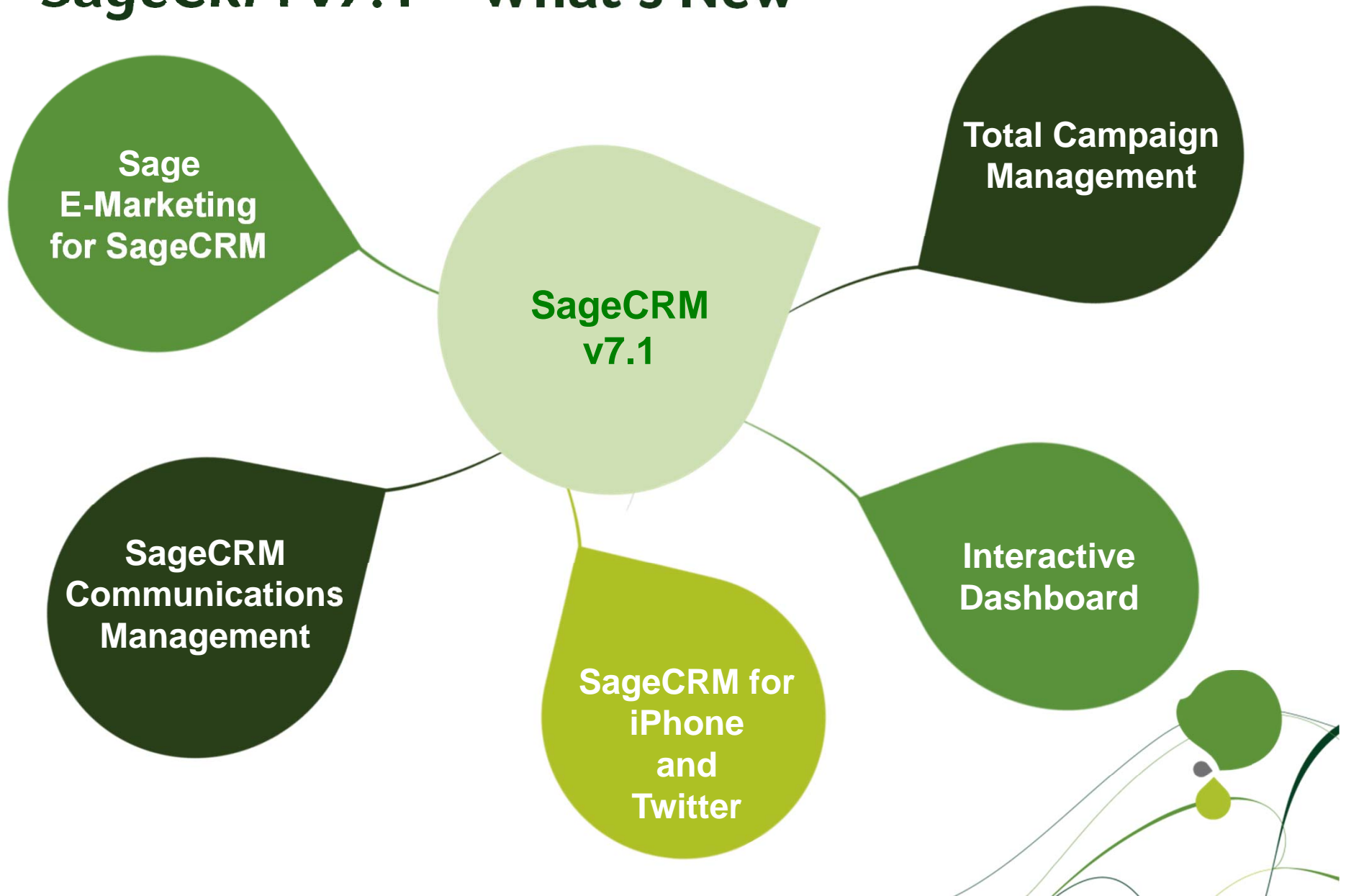
## SageCRM Version 7.1

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Integrated with Sage ERP MAS 90 and 200 v4.5

sage

# SageCRM v7.1 – What's New



# Sage eMarketing for SageCRM

A Sage  
Connected  
Service

- Fully integrated E-marketing module to create custom, personalized e-mail marketing campaigns
  - Over 90 attention-grabbing templates out-of-the-box
  - Simple 3-step wizard for rapid execution
  - Custom landing pages for easy execution of cohesive, integrated marketing campaigns
- Low monthly subscription fee



# Sage eMarketing for SageCRM

A Sage  
Connected  
Service

- Analyze results without ever leaving SageCRM
  - Track and monitor recipient interaction such as sent, bounced, opened and click data
  - View, filter, report and export the results
  - Create new groups within SageCRM from the results

E-marketing Results Summary					
Subject	Submitted	Sent	Unsent	Bounced	Unique Opens
<a href="#">Company group campaign via</a>	10				

E-marketing Results Analysis					
Select Report					
<a href="#">Opens &amp; Clicks</a>					
<a href="#">Unique Opens By Time</a>					
<a href="#">Unique Opens By E-mail</a>					
<a href="#">Opens By E-mail</a>					
<a href="#">Opens By Time</a>					
<a href="#">Unique Clicks By Link</a>					
<a href="#">Unique Clicks By E-mail</a>					
<a href="#">Clicks By Link</a>					
<a href="#">Unopened</a>					
<a href="#">Bounced</a>					
<a href="#">Unsent</a>					

Unique Opens By Time					
Local Time *	E-mail Address	First Name	Last Name	Opens	
29/01/2011 13:47	tmtnsi@gmail.com	F	qatst3	1	
29/01/2011 13:49	qatst1@sage.com	E	qatst1	2	
29/01/2011 13:50	trust.mtnsi@sage.com	B	qatst2	1	
29/01/2011 13:47	tmtnsi@gmail.com	F	qatst3	1	
29/01/2011 13:49	qatst1@sage.com	E	qatst1	2	
29/01/2011 13:50	trust.mtnsi@sage.com	B	qatst2	1	



# Sage eMarketing for SageCRM

A Sage  
Connected  
Service

- Drip Marketing: Let SageCRM do the work!
  - Easy-to-create automated E-marketing Campaigns
  - Schedule a series of E-marketing activities based on the recipient interaction
  - Automatically create outbound call-lists based on recipients who are interested in your campaign

**Drip Campaign Stage**

**Send on:**  
1 Days Before 19/02/2011 at 03:15

Contacts from previous E-mail stages, matching Response

From Stage: Drip Campaign Activity

**Notification:**  
 Send on days stage is executed

**Wave Activity**

Wave Activity Name: Drip Campaign Activity  
Status: Pending  
Start: 31/01/2011  
Activity Budget: e

**Drip Campaign E-mail**

Subject: Launch of Sage CRM v7.1

Template: Technology Template 2 (Global)

Personal Message:

**Drip Campaign Stage**

Send on: 1 Days Before 19/02/2011 at 03:15

Send To:  
 All Contacts in Drip Marketing List

Contacts from previous E-mail stages, matching Response

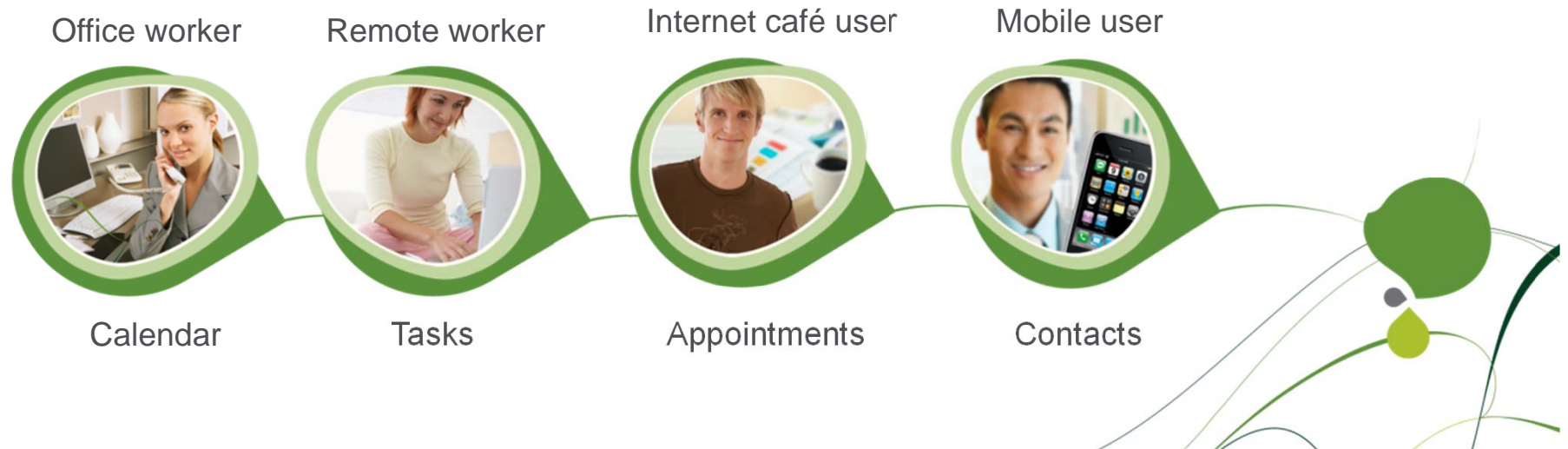
From Stage

Notification:  
 Send on days stage is executed



# SageCRM Communications Management

- Point-and-click integration with MS Exchange for seamless calendar and communications management regardless of device or location
  - MS Exchange integration with easy point-and-click deployment
  - Server to Server Sync
- Unify all customer interactions and communication history



# SageCRM Microsoft Exchange Server Integration



- Completely point-and-click based configuration
- Select specific mailboxes to synchronize
- Seamlessly store external attendees in customer meetings against relevant CRM contact
- File multiple e-mails against multiple targets

The screenshot shows the SageCRM administration interface for Exchange Server Integration. The breadcrumb trail is: Administration -> E-mail and Documents -> Exchange Server Integration -> Connection Management. The interface is divided into three main sections: Exchange Server Connection Settings, Sync Engine Options, and General Configuration Settings. On the right side, there are three buttons: Change (pencil icon), Continue (green arrow icon), and Help (question mark icon).

Exchange Server Connection Settings		
Exchange Web Service URL:	http://10.2.91.224/ews/exchange.asmx	
Exchange Server User Name:	Domain:	Password:
ImpersonatedUser	exchange.dev.test.com	*****

Sync Engine Options	
CRM User Name:	Use Default Sync Engine Location:
System Administrator	Yes

General Configuration Settings	
Outlook Plugin Version:	Allow Users to Manually Install Plug-in:
7,1,0,1	No
Allow Non-Organisers to Edit Linked Organiser Appointments:	Logging Level:
Yes	Errors Only





# SageCRM Total Campaign Management

- Multi-channel campaign management
- Campaign cloning
- Out-of-the-box graphical marketing campaign workflow
- Budget over-run alerts
- In-call data modification

The screenshot displays the SageCRM Total Campaign Management interface. At the top, there is a 'Marketing' header with a logo. Below it, a navigation bar includes 'Campaign Summary', 'Communications', 'Report', and 'Shared Documents'. The main content area shows details for a 'Cold Calling Campaign' with the following information:

<b>Campaign Name:</b> Cold Calling Campaign	<b>Start:</b> 02/28/1996	<b>End:</b> 04/29/1996
<b>Status:</b> Pending	<b>Campaign Budget:</b> \$ 20,000.00 £ 12,784.45 @ 1 : 0.639223	<b>Actual Cost:</b> \$ 4,000.00 £ 2,556.89 @ 1 : 0.639223

Below the campaign details is a 'Workflow' section titled 'Workflow: WaveItem Workflow'. It shows a flowchart with the following steps:

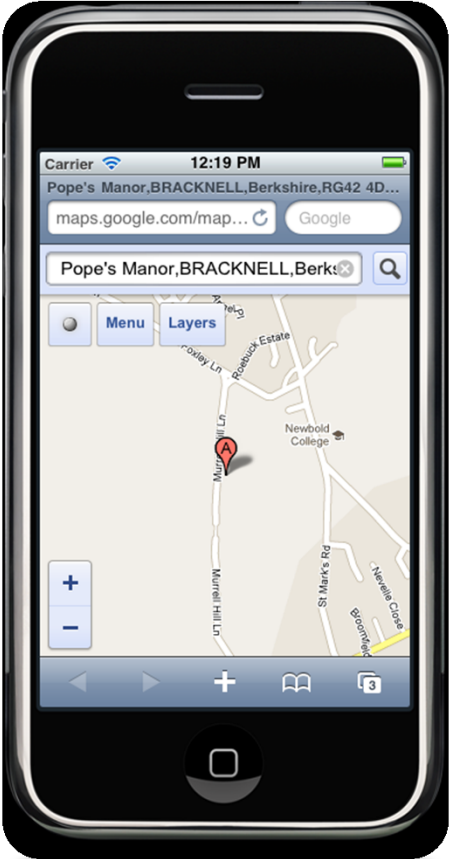
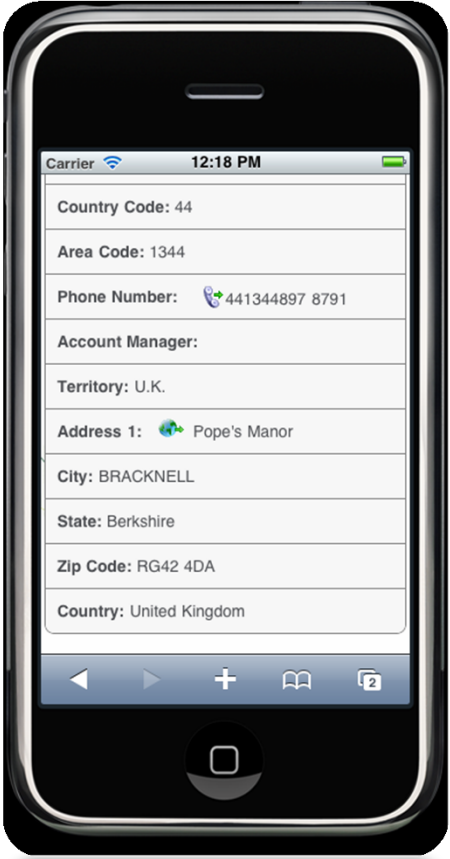
- Start
- NewWaveItem
- In Progress
- Parallel activities:
  - Do Mass Mail Merge (Complete)
  - Activate (Active)
  - Schedule Telesales (Active)
  - Create Call List (Active)
  - Create File for External Use (Complete)
- Delete Activities

On the right side of the interface, there is a vertical toolbar with the following options:

- Change
- Delete
- Response Setup
- Continue
- Clone Campaign
- Show Wave Activities
- Show Analysis
- Help
- Cancel Activities (Campaign)



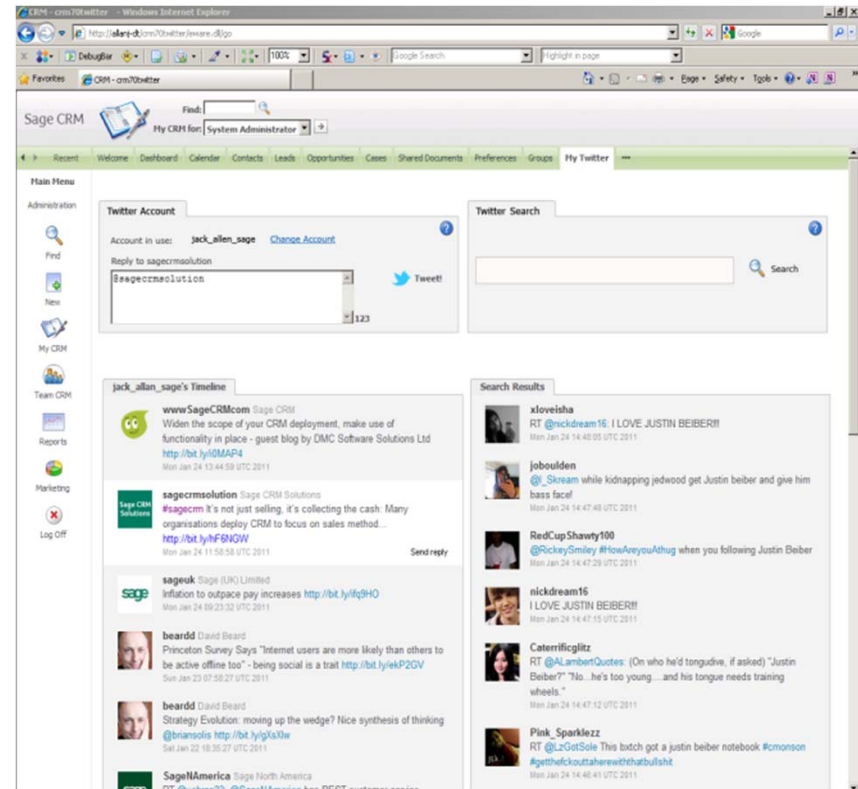
# SageCRM for iPhone



# SageCRM for Twitter



- View and update Twitter
- View and post to a company's and/or person's Twitter feed
- Search for tweets about any company/person
- Save tweets against a company or person in SageCRM



# SageCRM Interactive Dashboard

- Manage key accounts and working day from a single screen
- Delivers key business metrics for easy analysis
- Role-based dashboards out-of-the-box for Sales, Marketing, Customer Service and Management
- Flexible gadgets for maximum personalization

Company: Eurlands  
Phone: 1617 227-1336  
E-mail: info@eurlands.com

Summary Quick Look Dashboard Key Attributes Marketing Notes Communications Opportunities Cases Projects People Addresses Phone/E-mail Company Team Documents Self Service Relationships Testpage Testpage2

Select Dashboard Modify Dashboard New Dashboard Template Classic Dashboard Print Help

This is a template. Your changes may affect other users. Name: Company Quicklook Category: Company Dashboards

Date / Time	Person	Action	Subject	Status
20/12/2010 18:00	Kieran O.T...	Meeting		Pending
08/09/2011 19:20	Kieran O.T...	Phone Out	New Syst...	Complete
25/09/2011 09:20	Kieran O.T...	Letter Out	Sent quota...	Complete
28/09/2011 00:25	Kieran O.T...	Phone Out	Called Car...	Complete

Status	Description	Type	Stage	Assigne...	A...
In Progre...	100 User...	License	Qualified	Susan M...	
In Progre...	20 User...	License	Qualified	John Finch	
In Progre...	TimeEx 5...	Service	Negotiating	John Finch	

Status	RefId	Priority	Descript...	Assigne...	Stage	A...
Closed	5-1	Normal	Default s...	Kyle Ward	Confirmed	
In Progre...	5-2	Normal	User Inte...	Kyle Ward	Investiga...	
In Progre...	5-10031	Normal	Error on L...	Graham ...	Logged	
In Progre...	5-10033	Normal	Navigatio...	Graham ...	Waiting	
In Progre...	5-10034	Normal	Tab not...	Graham ...	Investiga...	

Description	Start Date	End Date	Stage	Status	Action
Training Course	31/01/2011	04/02/2011	Planning	Pending	

New Actions

- Case
- Opportunity
- All New



Learn more at  
<http://www.sagecrm.com/v7.1>



SageCRM Community  
<https://community.sagecrm.com/>





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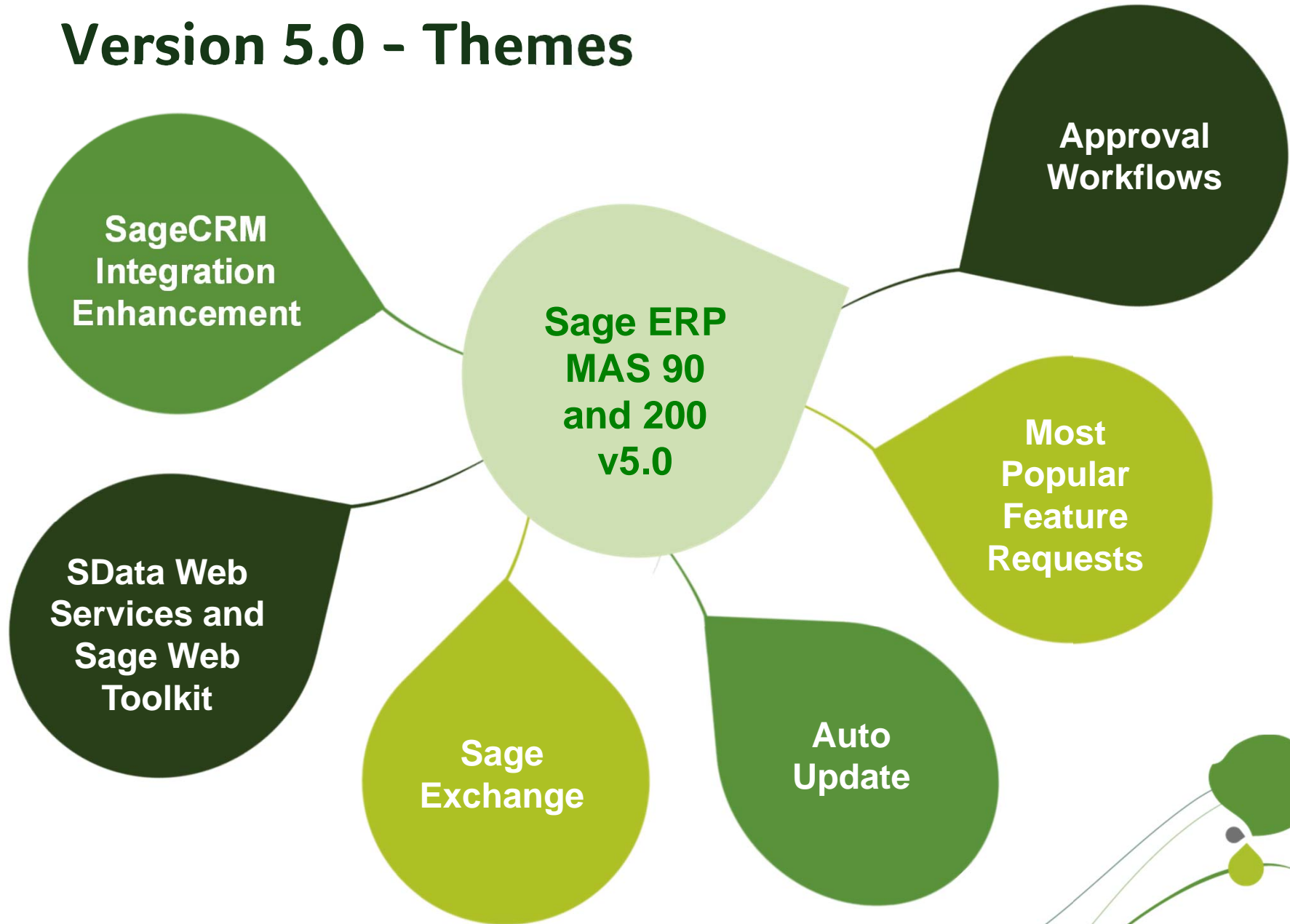
## **Sage ERP MAS 90 and 200 Version 5.0**

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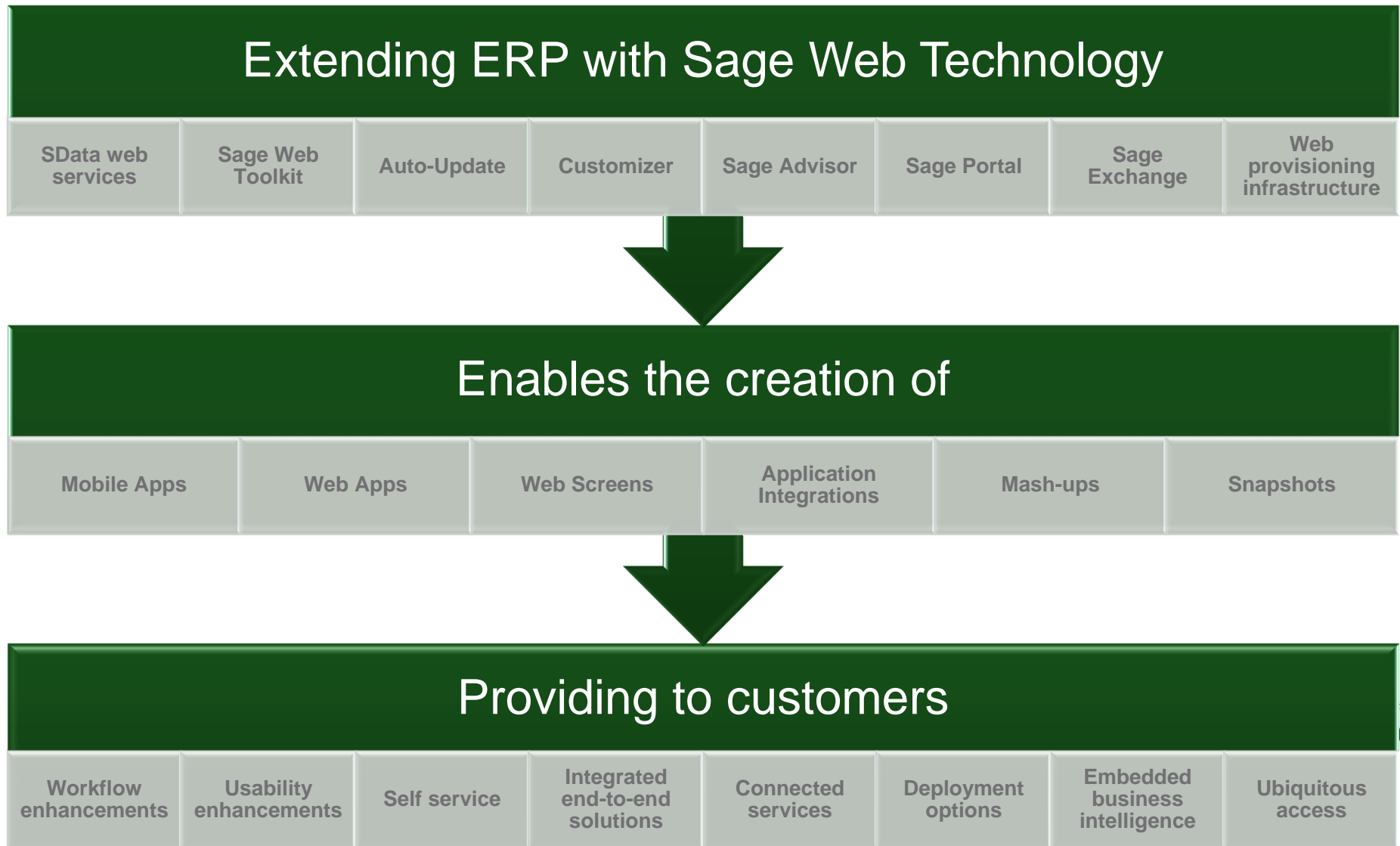


# Version 5.0 - Themes





# Sage ERP Web Technology Stack



# Version 5.0 – SData Web Services and Sage Web Toolkit

- Mobile-enabled web architecture built on industry standard technologies
  - Create web applications with Sage Web Toolkit (SWT)
    - Built using technology from Google
  - Integrate data and applications with SData (SageData)
    - Provides XML-based RESTful web services interface
    - Uses HTTP for communications
  - Browser-neutral and zero-client user interface based on HTML5/CSS3/Javascript
    - Supports iOS and Android devices and newer Blackberries
    - Supports Windows Phone with embedded IE 9



# Version 5.0 – Sage Exchange

- The Sage Exchange integrated payment solution platform provides a versatile PA-DSS certified environment that facilitates the exchange of payment data to and from business software
- Sage Exchange connects to a new Sage Exchange Virtual Terminal with card swipe capability, and new best-in-class encrypted point-of-sale terminals

A Sage  
Connected  
Service



For more information

<http://www.sagepayments.com/Sage-Services/Sage-Exchange.aspx>



# Version 5.0 – Auto Update

- Self-service management of software updates
  - View messages on availability of new releases and product updates
  - Download installation component for manual installations
  - View maintenance and support entitlement and expiration dates
  - Schedule checks for updates
  - Pre-requisite checker for updates and fixes
- Coming in Version 5.1
  - In-product installation of hot fixes and product updates
  - Smart updates to detect customizations and integrations



# Version 5.0 – Auto Update

**Manage Updates**

- Configuration
- Notification
- Messages
- History
- Manage M & S
- Manage Services

### Manage Updates

Available Updates

	Product Line	Version	Type	M&S St...	Description	Link To Detail	Link To M&S
<input type="checkbox"/>	Incorrectly Signed Test Ap...	14.02.20.002			Description for TestApplication140220002.msi		
<input type="checkbox"/>	SSDP Test Application	newone			fgsdfg		
<input type="checkbox"/>	SSDP Test Application	newone			dfgdfg		
<input type="checkbox"/>	SSDP Test Application	newone			Test7		
<input type="checkbox"/>	SSDP Test Application	newone			u yfukyf		
<input type="checkbox"/>	SSDP Test Application	newone			asdfs		
<input type="checkbox"/>	SData Bridge Demo Data S...	4			SData Bridge Demo POC		
<input type="checkbox"/>	Southwind XML Data Service	0a			Initial version.		
<input type="checkbox"/>	UK SSDP Test Product	1.2			This is the description		
<input type="checkbox"/>	Test Application	14.02.29.003			Description for TestApplication140229003.msi		
<input type="checkbox"/>	Unsigned Test Application	14.02.20.002			Description for TestApplication140220002.msi		
<input type="checkbox"/>	Unsigned Test Application	14.02.20.002			TestApplication140229003.msi		

Refresh

Download & Install | Download Only


Last Refresh  
Refresh time

**Key Information**



Current  
Nearing Expiration  
Expired

M&S expires on: 09/01/2011



**Information Links :**  
[Maintenance and Support Information](#)  
[Version information](#)

**sage**

View available updates

# Version 5.0 – Auto Update

**Configuration**

**Updates**

**Schedule Checks for Update**

The Sage Auto Update checks to see if new updates are available. Select the frequency with which these checks are made.

**Frequency:**

Start Time: 12:00 AM

Daily  
 Weekly  
 Monthly

Every 3 day(s)  
 Every weekday

Save

**Session Timeout**

When checking for updates, specify how long the system can be inactive before timing out.

Minutes: 5 Seconds: 0

When downloading, specify how long the system can be inactive before timing out.



Minutes: 5 Seconds: 0

Save

Last Refresh  
Refresh time

**Updates**

Schedule when to check for updates



Schedule when to check for updates

# Version 5.0 – Auto Update

**Configuration**

**Downloads**

**Download Location**  
The Sage Auto Update will provide a single download directory for all product lines. Please specify the location for your download.

Location:

**Download Action**  
Select a download action which can either be by a global setting or by product line (product setting overrides global setting).

Global Setting:

Product Setting:

Product Line	Download Action
Incorrectly Signed Test Application	Global Override
SSDP Test Application	Global Override
SData Bridge Demo Data Service	Global Override
Southwind XML Data Service	Global Override
UIK SSDP Test Product	Global Override

Last Refresh  
Refresh time

sage

Download fixes and updates



# Version 5.0 – Feature Requests

- Based on feedback from [www.sagemas.com/MAS\\_90\\_200\\_feedback](http://www.sagemas.com/MAS_90_200_feedback)
- Under consideration
  - Accounts payable invoice number expansion
  - Inactivate customers and vendors
  - Delete, renumber or merge inventory from “dead” warehouses



# Version 5.0 – SageCRM

- SageCRM integration and workflows
- Under consideration
  - Map multiple companies to single SageCRM system
  - Simplify the quote-to-order workflow and processing for SageCRM users
  - Enable SageCRM users to look up inventory, customer purchase history, credit information and other customer data
  - Ability to synchronize UDF fields between ERP and CRM

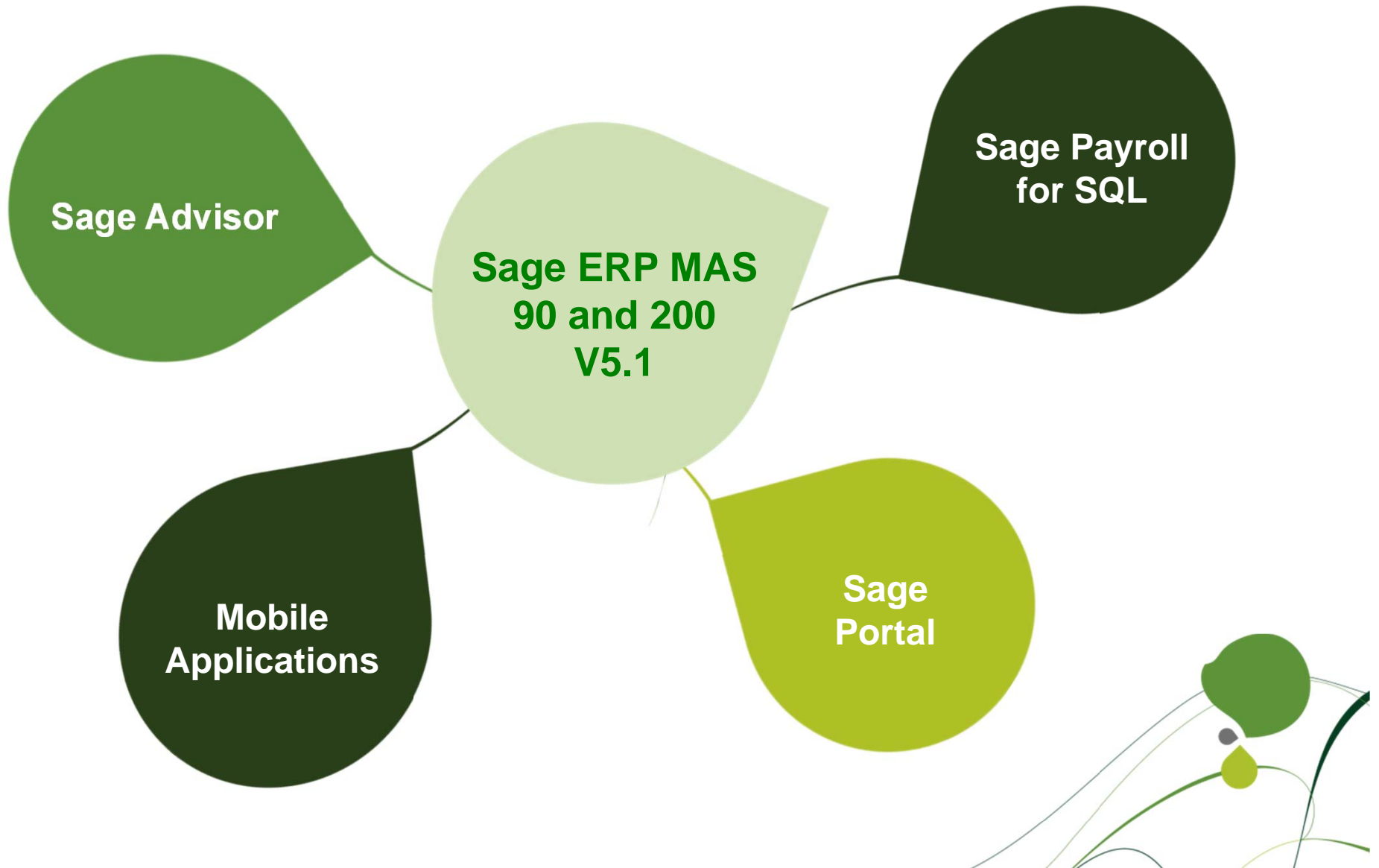


# Version 5.0 – Approval Workflows

- Enhanced workflows for key approval processes
- Under consideration
  - Purchase Order approval
  - Credit issue or override approval
  - Sales discount approval
  - RMA approval
  - Check issuance approval



# Version 5.1 – Themes



# End of Support Dates

- ◆ Versions 3.7x SQL/4.0/4.05/4.1 - September 30, 2011
- ◆ Version 4.2 – September 30, 2012
- ◆ Version 4.3 – September 30, 2013
- ◆ Version 4.4 – September 30, 2014
- ◆ Version 4.45 – March 30, 2012
- ◆ Extended Enterprise Suite versions 1.3/1.4 – September 30, 2012

For more details see  
[http://infosource.sagesoftwareonline.com/  
w\\_attach/sso/SupportPolicy\\_MAS.pdf](http://infosource.sagesoftwareonline.com/s<br/>w_attach/sso/SupportPolicy_MAS.pdf)



## Additional Resources

Sage ERP MAS Community

<http://community.sagemas.com>

Get Your Voice Heard - Enhancement Requests

[www.sagemas.com/MAS\\_90\\_200\\_feedback](http://www.sagemas.com/MAS_90_200_feedback)

LinkedIn Group

MAS 90 and 200 Users and Consultants

[http://www.linkedin.com/groups?mostPopular=&gid=1644357&trk=myg\\_ugrp\\_ovr](http://www.linkedin.com/groups?mostPopular=&gid=1644357&trk=myg_ugrp_ovr)

