



Sage ERP MAS 90 and 200 Roadmap

September 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.

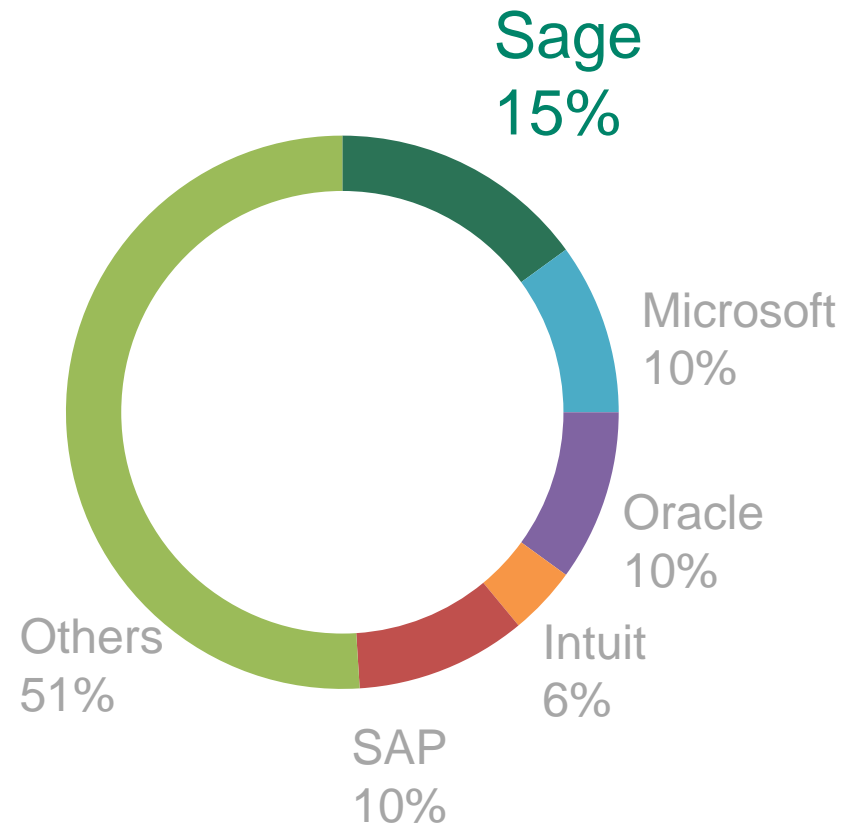
*The information is **subject to change** at any time without notice.*

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

Version 4.5

Q4 2011

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

Online

Q4 2011

- Cloud deployment option
- Hosted by Sage

Version 5.0

Q4 2012

- SData Web Services
- Sage Web Toolkit
- Sage Exchange
- Auto-update
- SageCRM workflows
- Mobile Reports



2011

2012

2013

Intelligence

Q4 2011

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

SageCRM 7.1

Q4 2011

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

Version 5.1

Q4 2013

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



Sage ERP

**Sage ERP MAS 90 and 200 4.4
Product Update 6**

Now Available!



Now Available: Product Update 6

Released
July 2011

- Printer information saved by workstation
 - By popular request from www.sagemas.com/MAS_90_200_feedback
 - Printer information now saved by workstation and form code or report setting

Sage ERP Solutions planned Suggest Collaborate Vote Login | Sign Up

78
Vote for

Provide ability for all reports (not just STANDARD reports as in 4.3) to remember printer settings by FORM name and USER.

by: Larry E. | about a year ago | 8 - General Enhancements

Provide ability for all reports (not just STANDARD reports as in 4.3) to remember printer settings by FORM name and USER.

by: Larry E. | about a year ago | 8 - General Enhancements

Cast your vote or comment ...

[return to idea list](#)



Sage ERP

Sage Connected Services

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 Avalara
 - Credit Card Processing, powered by Sage Payment Solutions
 - Sage eMarketing, powered by Swiftpage
 - Business credit monitoring services, powered by Experian

AvaTaxTM

Aatrix
eFile Center

Swiftpage 

 ExperianSM



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 logo consisting of a light green, teardrop-shaped background with the text "A Sage Connected Service" in a dark green font.

A Sage
Connected
Service



Federal and State eFiling and Reporting

The screenshot displays the Sage ERP MAS 90 Desktop application. The main window shows a navigation pane on the left with a tree view of modules and reports. The 'Reports' menu is open, listing various reports. The 'Form 1099 eFiling and Reporting' report is highlighted. The main content area displays 'Community Forums' and 'Training and Support' sections. A green callout bubble points to the 'Form 1099 eFiling and Reporting' report in the menu.

Community Forums

Visit the Sage ERP forum and post about your experiences.

[Sage ERP MAS Community Forum](#)

Training and Support

Sage University offers basic and advanced training to help you learn about our products and monitor your learning and certification progress.

[Sage ERP Training Options](#)

Your ERP system is the cornerstone of your business, and essential to your success. Sage can help you achieve your goals with a wide range of maintenance & support offerings, from knowledge bases to technical support to your own on-site experts, ready to assist you.

[Sage ERP Support](#)

Give us your feedback! Tell us about your experiences with Sage ERP.

[Tell Us What You Think](#)

Reports

- Vendor Listing
- Vendor Listing with Balances
- Vendor Mailing Labels
- Vendor Memo Printing
- Accounts Payable Aged Invoice Report
- Accounts Payable Trial Balance
- Cash Requirements Report
- Open Invoice by Job Report
- Vendor Purchase Analysis
- Vendor Purchase History by Period
- Monthly Purchase Report
- Accounts Payable Check History Report
- Accounts Payable Analysis
- Accounts Payable Analysis Report
- Form 1099 eFiling and Reporting**
- Form 1099 Printing
- General Ledger Posting Recap
- Vendor Audit Report
- AP Expense by GL Account Report
- Accounts Payable Invoice History Report
- Payment History Report
- Accounts Payable Sales Tax Report
- Fixed Assets History Report

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** (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 ZIP code
 IRVINE CA 92618

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

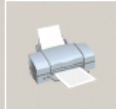
4 If no wages, tips, and other compensation are subject to social security or Medicare tax Check and go to line 6e.

	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		

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



Sage Sales Tax, powered by Avalara

- 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

A Sage
Connected
Service

● 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



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



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
- 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



Credit Card Processing Module
www.sagemas.com/creditcardprocessing

Sage University

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

PCI Compliance Information
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

Available 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>





Sage ERP

Sage ERP MAS 90 Online

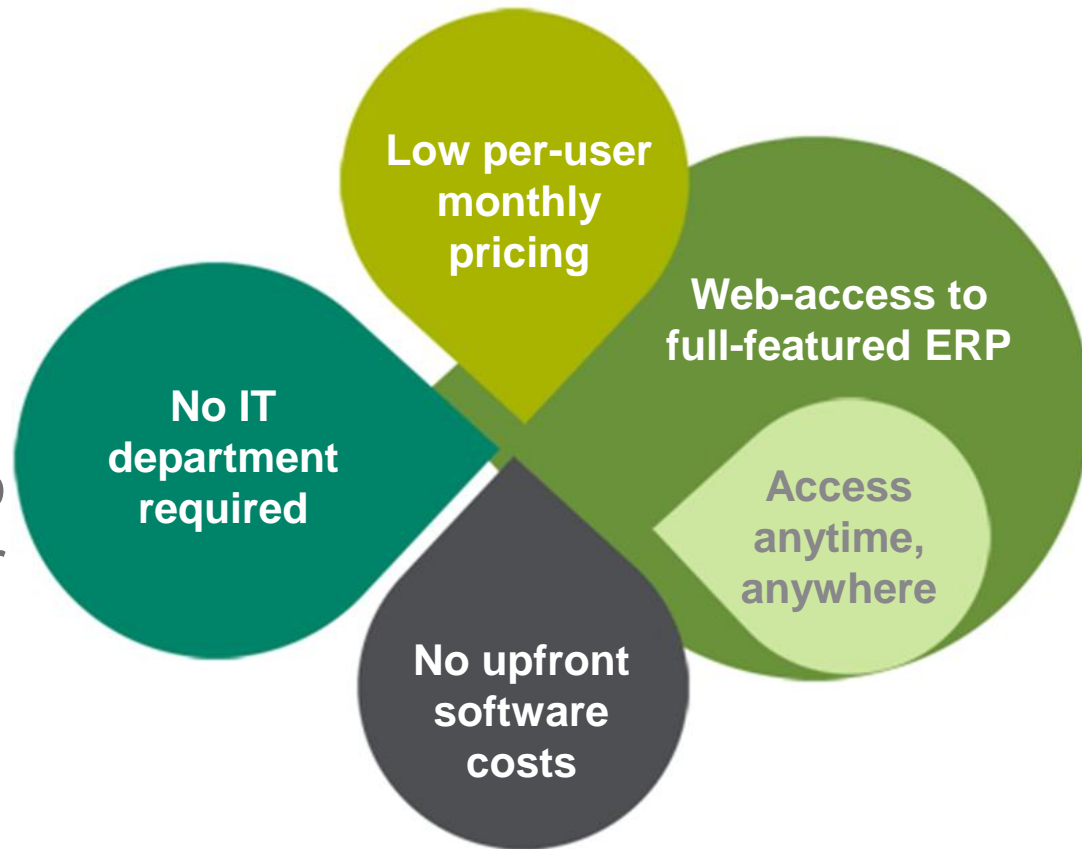
Cloud Deployment Option



Sage ERP MAS 90 Online

Launching
Q4 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 (1099)



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

Sage ERP MAS Intelligence

Complex reporting made easy

sage

Sage ERP MAS Intelligence

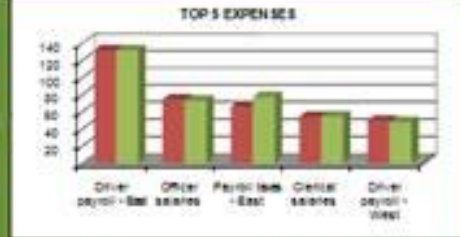
- Complex reporting made easy
 - Business Intelligence in a familiar Microsoft Excel interface
 - Easily customizable “out of the box” financial, sales, purchasing, and inventory report templates and dashboards
- Predefined financial and operations reports for management, sales, purchases and inventory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



DASHBOARD - ABC DISTRIBUTION AND SERVICE CORP.

Profit & Loss	Actual May	Budget May	Variance	Actual YTD	Budget YTD	Variance
Sales	123,766	357,000	366,766	2,164,415	1,775,300	389,515
Cost of Sales	364,452	863,900	(195,952)	936,363	862,400	(74,543)
Gross Profit	359,314	187,900	171,414	1,167,466	933,500	233,966
Expense	294,932	153,500	(125,432)	810,533	604,280	(206,253)
Net Income before tax	74,322	28,320	46,002	348,667	123,220	225,447

Top 5 Expenses	Actual May	Budget May	Variance	Actual YTD	Budget YTD	Variance
Driver payroll - East	31,263	26,700	(4,663)	132,905	133,300	(395)
Office salaries	6,000	14,800	(200)	14,562	73,200	(1,562)
Payroll taxes - East	14,301	6,700	799	66,211	71,500	(1,229)
Clotical salaries	11,296	11,900	(2,396)	54,352	54,900	508
Driver payroll - West	11,341	3,800	(2,141)	43,882	48,400	(1,452)
	64,421	70,100	(8,321)	317,143	305,900	8,157



Period: **January 2010 to May 2010**

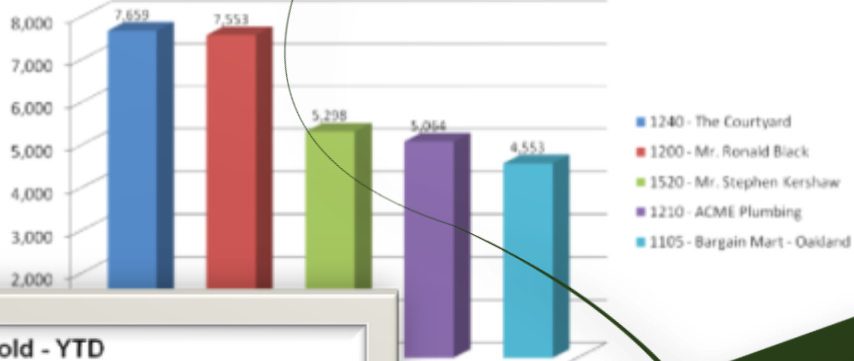
Top 5 Customers	YTD	%	Tag
Shepard Motorworks	283,500	34.0%	A2
Bearla Parts Supply	3,263	3.1%	B4
America Business Partners	3,070	1.0%	A1
Custom Craft Products	1,601	0.5%	A3
Greater Alarm Company	396	0.3%	A3
	233,150	100.0%	

Top 5 Items	YTD	%	Tag
DESK 12" X 30"	263,500	35.2%	WT
DESK FILE 6" CAP 50	3,163	3.1%	FU
MODEM 9600 FAST POLL	1,335	0.7%	DA
ART SPECIALTY GINGER JAR LAM	1,601	0.5%	PR
HON2 DRAWER LETTER FILE W/D	1,426	0.5%	CA
	297,686	100.0%	

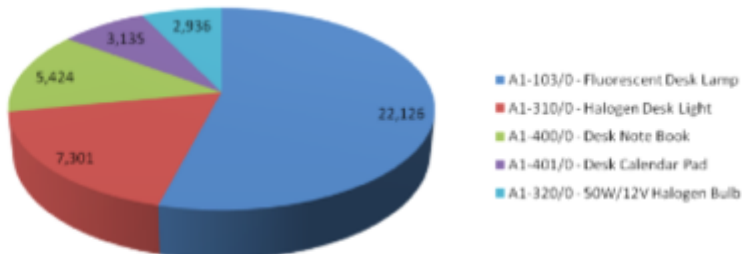
Bottom 5 Items	YTD	%	Tag
DESK FILE 3 1/2" CAP 50	24	1.5%	CA
DESK FILE 5 1/4" CAP 50	38	12.0%	PR
RJ-11 4 WIRE MOD CABLE 14 FT	57	19.2%	DA
UNIVERSAL 5 1/4" 55DD FLEX DIX	67	21.2%	FU
ART SPECIALTY EMP CANDLE LAN	130	41.1%	WT



Top 5 Customers - YTD

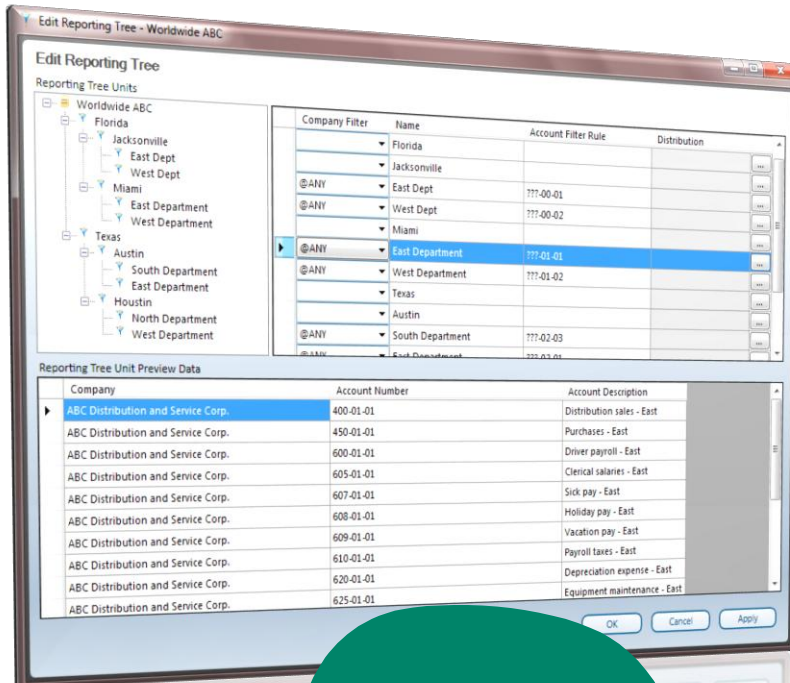


Top 5 Products Sold - YTD



Your data pulled directly into **Excel**

Intelligence – What's New



Available
with v4.5

- Reporting Trees
 - Easy to learn organizational reporting
- 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
- Multi-company consolidations



FRx Conversion Assistant Utility

Coming Soon!

- 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





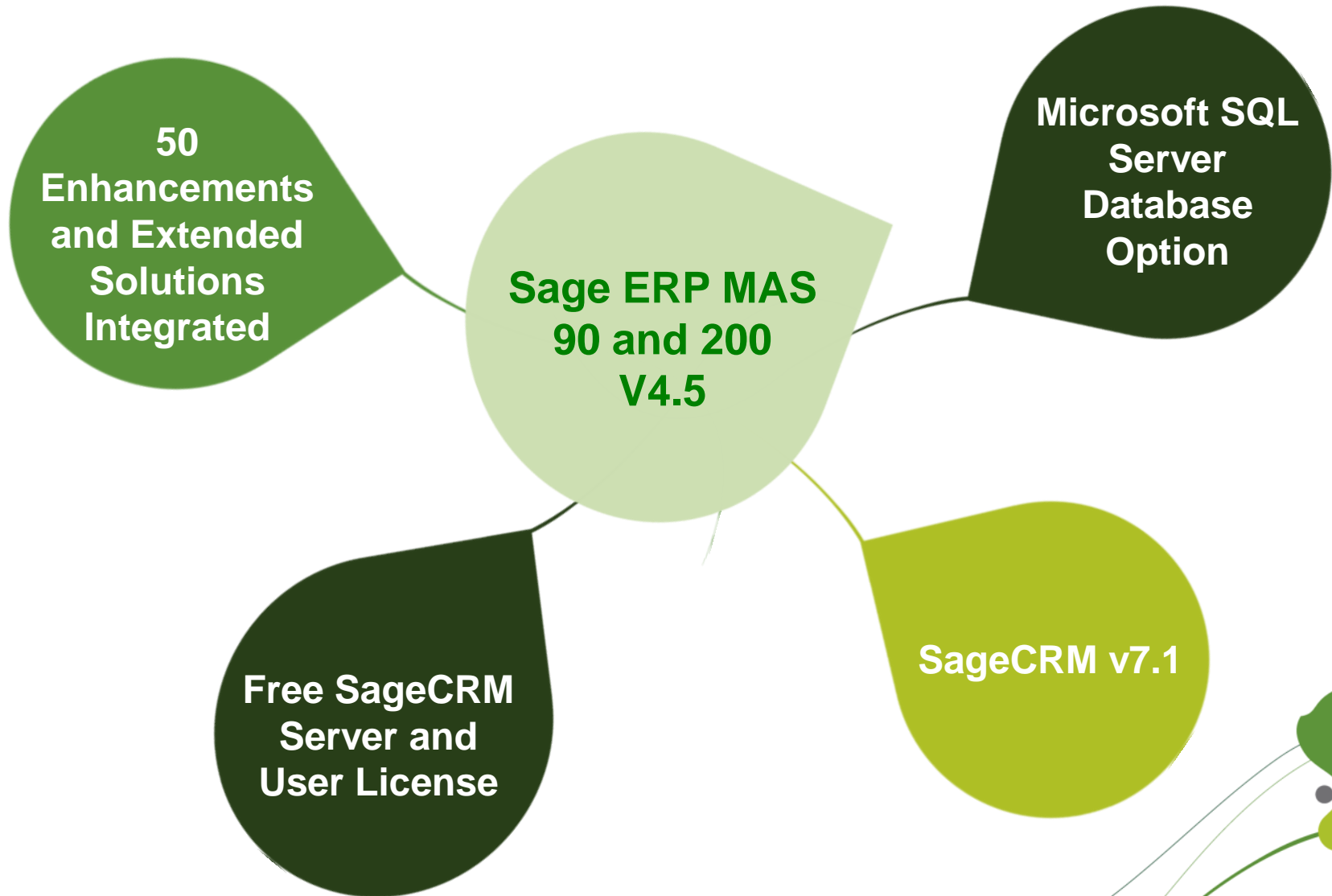
Sage ERP

Sage ERP MAS 90 and 200 Version 4.5

Available Now!

sage

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

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

Apply... Taxes...

Deduction Type Employer Contribution

Calculation Method Percentage of Gross

Standard Amount/Rate

Standard Limit

W2 - Box 12 Code

Automatically Apply Deduction

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 765-00-04 Miscellaneous expense

Contribution Expense Account 665-01-00 Miscellaneous expense

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 Error:

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

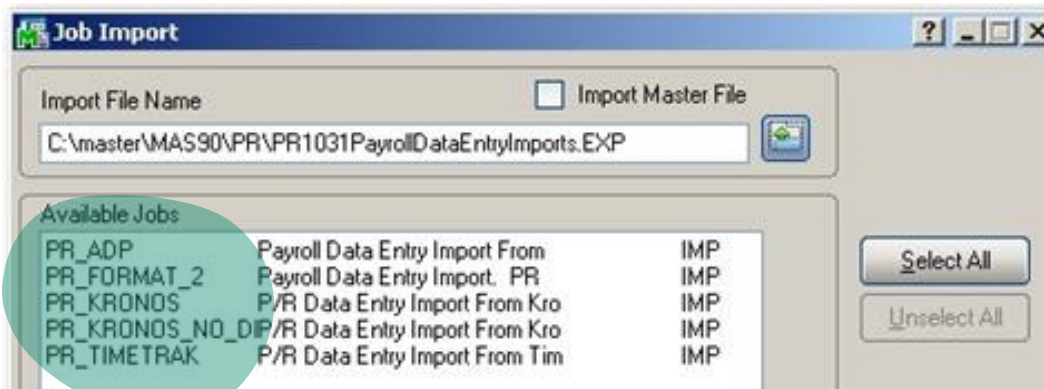
Select a specific earnings type to be used for calculations

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 – Payroll Enhancements


- Enhanced benefit accrual

Define different Benefit Code Schedules for Hours Worked and manage benefit accruals based on hours worked, supporting salaried employees, union employees, and part time employees

The screenshot shows the 'Benefit Schedule Maintenance' window with three columns of settings. The first column is for a schedule with code 'A' and description '1-5 Years of Service'. The second and third columns represent other benefit schedules. The 'Min Hrs/Check' and 'Max Hrs/Check' fields are highlighted in green in the original image.

Field	Column 1 (A)	Column 2	Column 3
Schedule Code	A		
Description	1-5 Years of Service		
Accrual Method	Hourly	Hourly	Fixed
Hours/Year	80.00	40.00	16.00
Carryover Allow.	40.00	.00	.00
Accrue on Paid Hrs. Only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check Entry No.	123456789	123456789	
Deduct. Period	12345	12345	
Rate Method	Fixed Benefit	Fixed Benefit	Fixed Benefit
Accrual Rate	0.0384620	0.0192310	0.0038460
Delay Period	0	0	0
Eligibility Wait	0	0	0
Eligibility Hours	0	0	0
Min Hrs/Check	32.00	20.00	.00
Max Hrs/Check	.00	.00	.00

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

Sales Order Entry (ABC) 5/2/2011

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

Print Order... Print Pick... Recalc Price Accept Cancel Delete

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

Sales Order Options (ABC) 5/2/2011

1. Main | 2. Entry | 3. Line Entry | 4. Forms | 5. Printing | 6. Quick Print | 7. History | 8. Job Cost

Use Alternate Warehouse for Out-of-Stock Items

Use Item Default Warehouse

Check for Available Quantity

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

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

Accept Cancel

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

Sales Order Options (ABC) 5/2/2011

1. Main | 2. Entry | 3. Line Entry | 4. Forms | 5. Printing | 6. Quick Print | 7. History

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 Def...

Default Special Items to D...

Warranty

Warranty Calculation Ba...

Recalc Expiration if Ship...

Price Level by Customer

Enable Default Price Level by Custom...

Base New Price Level Records On

Lot/Serial Distribution in Sales Order Entry

Enable Lot/Serial Distribution

Require Lines to be Fully Distributed

Accept Cancel [Printer Icon] [Help Icon]

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' dialog box with the following settings:

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	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

Use Alternate Warehouse for Out-of-Stock Items
Use Item Default Warehouse
Check for Available Quantity

Allow Discount Rate by Detail L...
Default Special Items to Drop Ship

Display Unit Cost
Display Profit Margin Percent
Profit Margin Percent to Display Warning

Warranty
Warranty Calculation Based On
Recalc Expiration if Ship/Invoice Date Changed

Price Level by Customer
Enable Default Price Level by Customer
Base New Price Level Records On

Lot/Serial Distribution in Sales Order Entry
Enable Lot/Serial Distribution
Require Lines to be Fully Distributed

Purchase Control
Enable Purchase Control of Items
Select Items Based On
Control Purchases Based On

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 2 D

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 ?

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:

Finance Charge

Computation:

Aging Category:

Exclude Existing:

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 paths
 - 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



Learn more about Version 4.5



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





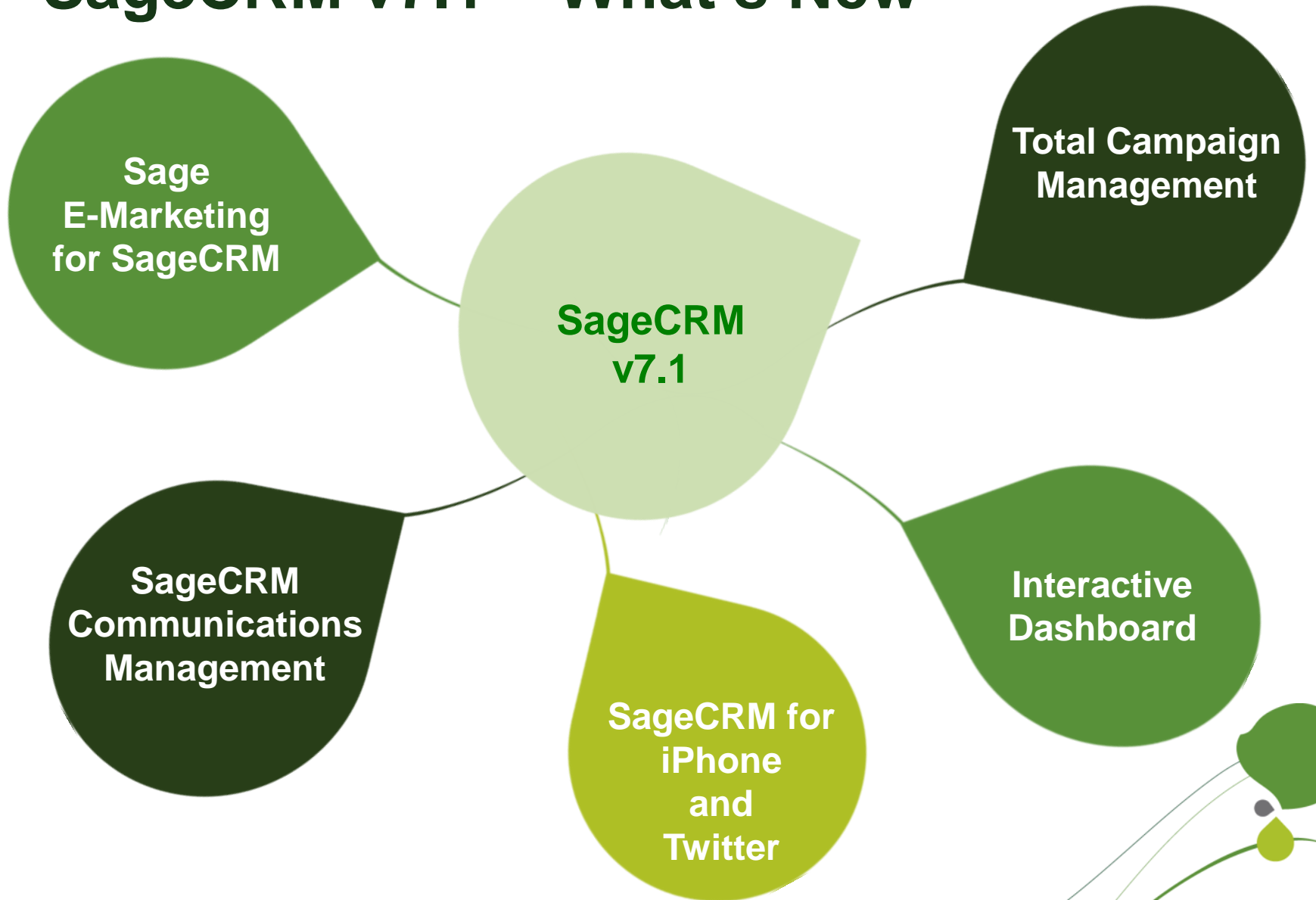
Sage ERP

SageCRM Version 7.1

Integrated with Sage ERP MAS 90 and 200 v4.5



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

The screenshot displays the Sage eMarketing interface. The top section, 'E-marketing Results Summary', shows a table with columns: Subject, Submitted, Sent, Unsent, Bounced, and Unique Opens. The subject is 'Company group campaign wa' and the Unique Opens count is 10. Below this is the 'E-marketing Results Analysis' section, which includes a 'Select Report' dropdown and several report options: Opens & Clicks, Unique Opens By Time, Unique Opens By E-mail, Opens By E-mail, Opens By Time, Unique Clicks By Link, Unique Clicks By E-mail, Clicks By Link, Unopened, Bounced, and Unsent. The 'Unique Opens By Time' report is expanded, showing a table with columns: Local Time, E-mail Address, First Name, Last Name, and Opens. The data rows are as follows:

Local Time *	E-mail Address	First Name	Last Name	Opens
29/01/2011 13:47	tmtnsi@gmail.com	F	qatest3	1
29/01/2011 13:49	qatest1@sage.com	E	qatest1	2
29/01/2011 13:50	trust.mtnsi@sage.com	B	qatest2	1
29/01/2011 13:47	tmtnsi@gmail.com	F	qatest3	1
29/01/2011 13:49	qatest1@sage.com	E	qatest1	2
29/01/2011 13:50	trust.mtnsi@sage.com	B	qatest2	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 1 (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

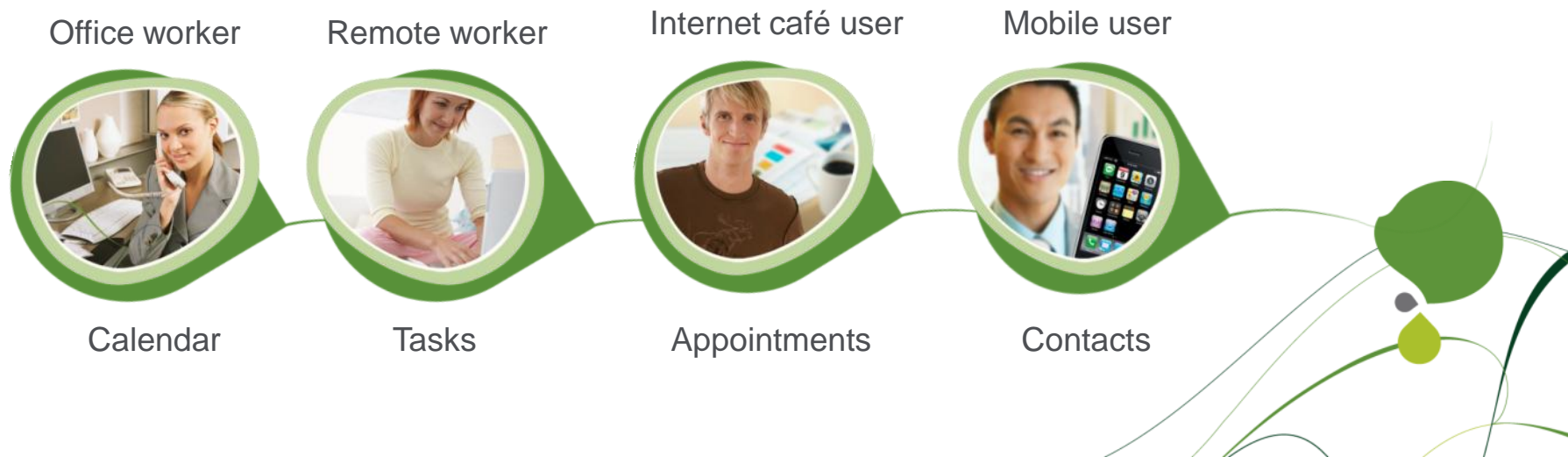
Contacts from previous E-mail stages, matching Response

From Stage

Notification:
 Send on days stage is executed

SageCRM Communications Management

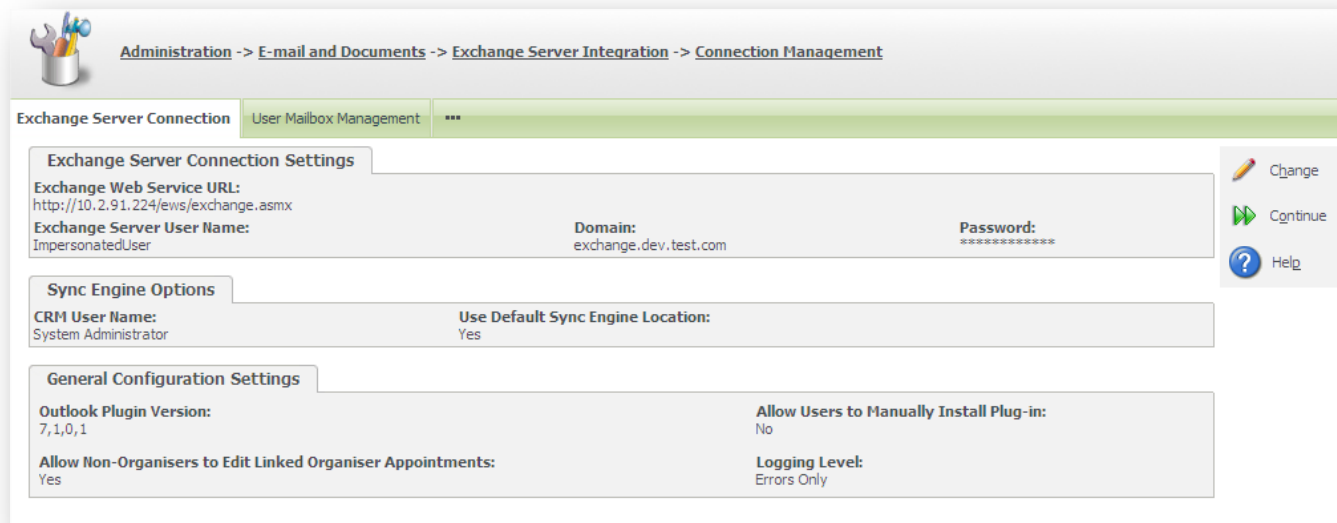
- Point-and-click integration with MS Exchange for seamless calendar and communications management regardless of device or location
 - MS Exchange integration with easy point-and-click deployment
 - Server to Server Sync
- Unify all customer interactions and communication history



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 navigation 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 action 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	Domain: exchange.dev.test.com	Password: *****
Exchange Server User Name: ImpersonatedUser		

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

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

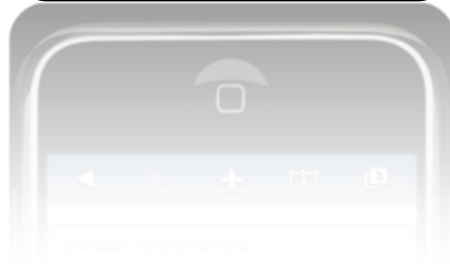
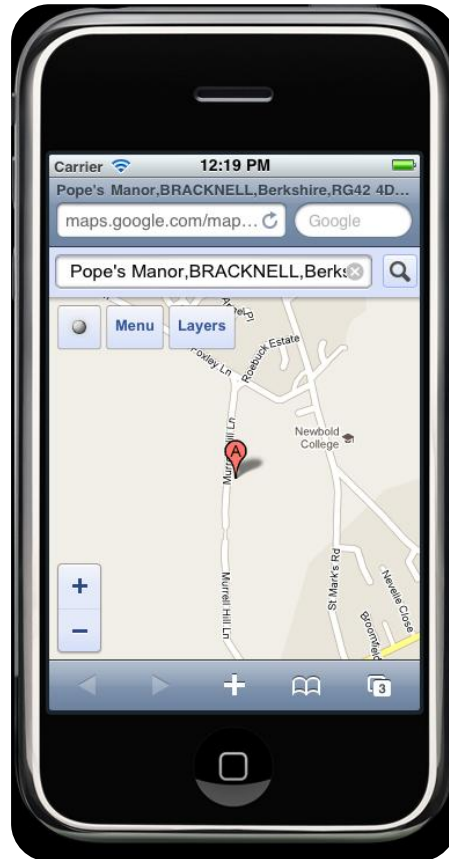
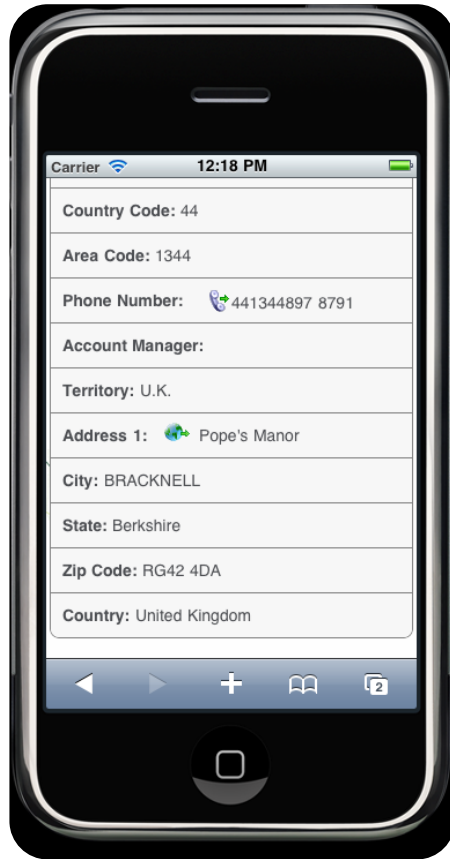
The screenshot displays the SageCRM Marketing interface. At the top, there is a 'Marketing' header with a logo. Below it, a navigation bar includes 'Campaign Summary', 'Communications', 'Report', and 'Shared Documents'. The main content area is titled 'Campaign: Cold Calling Campaign' and contains the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

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

Below the campaign details, there is a section for 'Administration -> Advanced Customization -> Workflow'. This section shows a workflow diagram for 'Workflow: WaveItem Workflow'. The diagram starts with a 'Start' node, followed by 'NewWaveItem', 'In Progress', and then a branching point. The branches lead to 'Do Mass Mail Merge', 'Activate', 'Schedule Telesales', 'Create Call List', and 'Create File for External Use'. Each of these branches leads to a 'Complete' node, which then leads to 'Delete Activities'. The workflow diagram is presented in a table-like format with columns for 'Available Rules' and 'Available States' (Start, In Progress, Complete, Active, Cancelled).

On the right side of the interface, there is a vertical toolbar with various icons and labels: Change, Delete, Response Setup, Continue, Clone Campaign, Show Wave Activities, Show Analysis, Help, and Cancel Activities (Campaign).

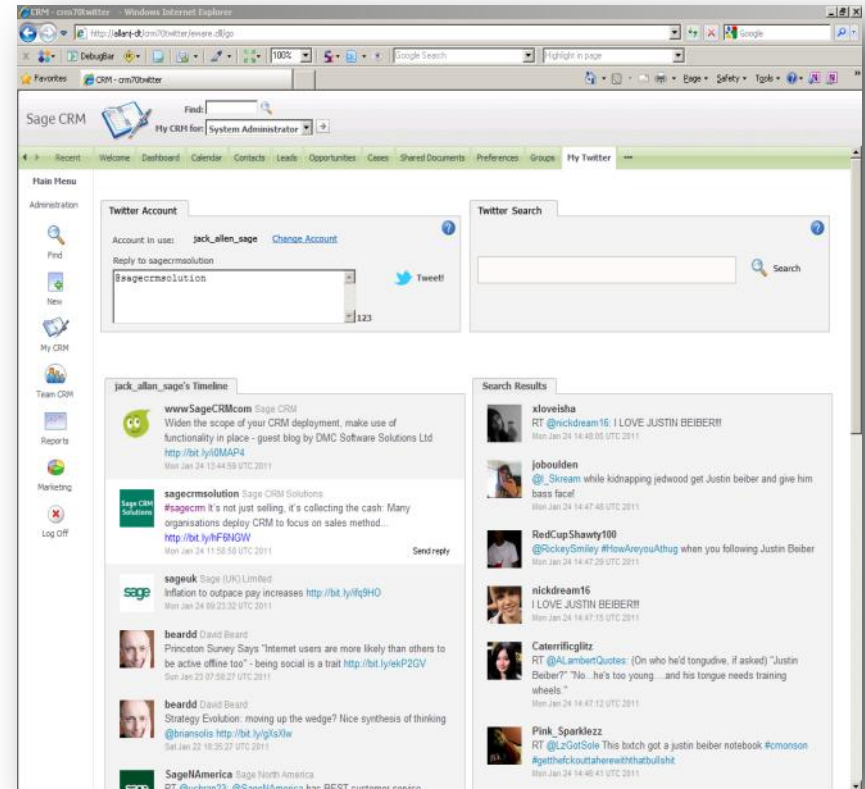
SageCRM for iPhone



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: Burlanda
Phone: 1 617 227-1336
E-mail: info@eurolandia.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

Company Comms

Date / Time	Person	Action	Subject	Status
28/12/2010 19:00	Kieran O.T...	Meeting		Pending
08/09/2011 19:00	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 Clar...	Complete

Company Opportunities

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

Company Cases

Status	Refid	Priority	Descripti...	Assigne...	Stage
Closed	5-1	Normal	Default s...	Kylie Ward	Confirmed
In Progre...	5-2	Normal	User Inte...	Kylie Ward	Investiga...
In Progre...	5-10031	Normal	Error on L...	Graham...	Legged
In Progre...	5-10033	Normal	Navigato...	Graham...	Waiting
In Progre...	5-10034	Normal	Taba not...	Graham...	Investiga...

Company Projects

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

New Actions

Case Oppo All New

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



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



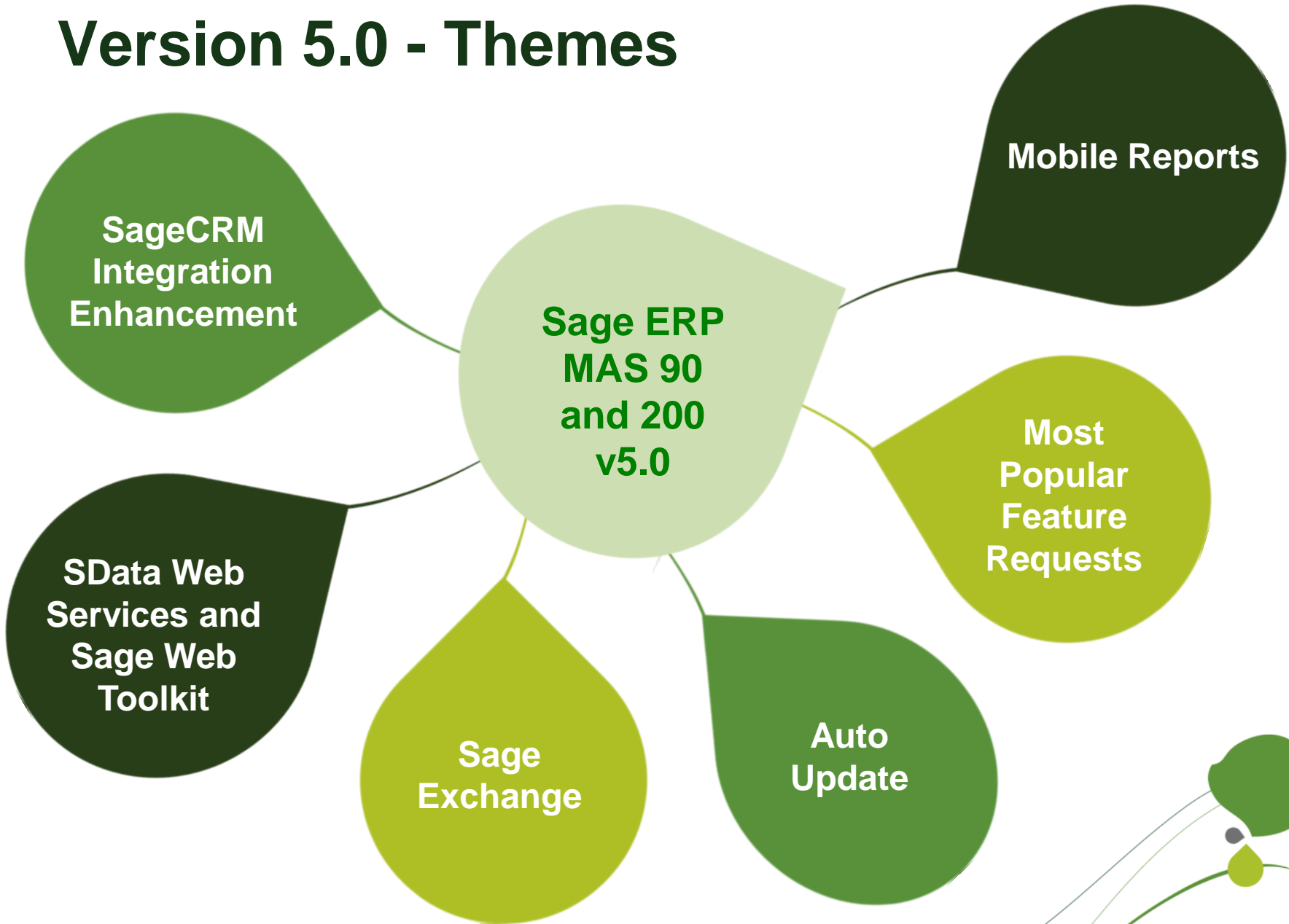


Sage ERP

Sage ERP MAS 90 and 200 Version 5.0



Version 5.0 - Themes



Sage ERP Web Technology Stack

Extending ERP with Sage Web Technology

SData web services

Sage Web Toolkit

Auto-Update

Customizer

Sage Advisor

Sage Portal

Sage Exchange

Web provisioning infrastructure

Enables the creation of

Mobile Apps

Web Apps

Web Screens

Application Integrations

Mash-ups

Snapshots

Providing to customers

Workflow enhancements

Usability enhancements

Self service

Integrated end-to-end solutions

Connected services

Deployment options

Embedded business intelligence

Ubiquitous access

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

A Sage
Connected
Service

- Sage Exchange payment platform provides a versatile PA-DSS certified environment to facilitate 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



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

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		

Key Information

M&S expires on: 09/01/2011

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

View available updates

sage

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

sage

Updates

Schedule when to check for updates

Version 5.0 – Auto Update

Configuration

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
UK 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
- Under consideration
 - Accounts payable invoice number expansion
 - Inactivate customers
 - Inactivate vendors
 - Show check cleared in Vendor Maintenance



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

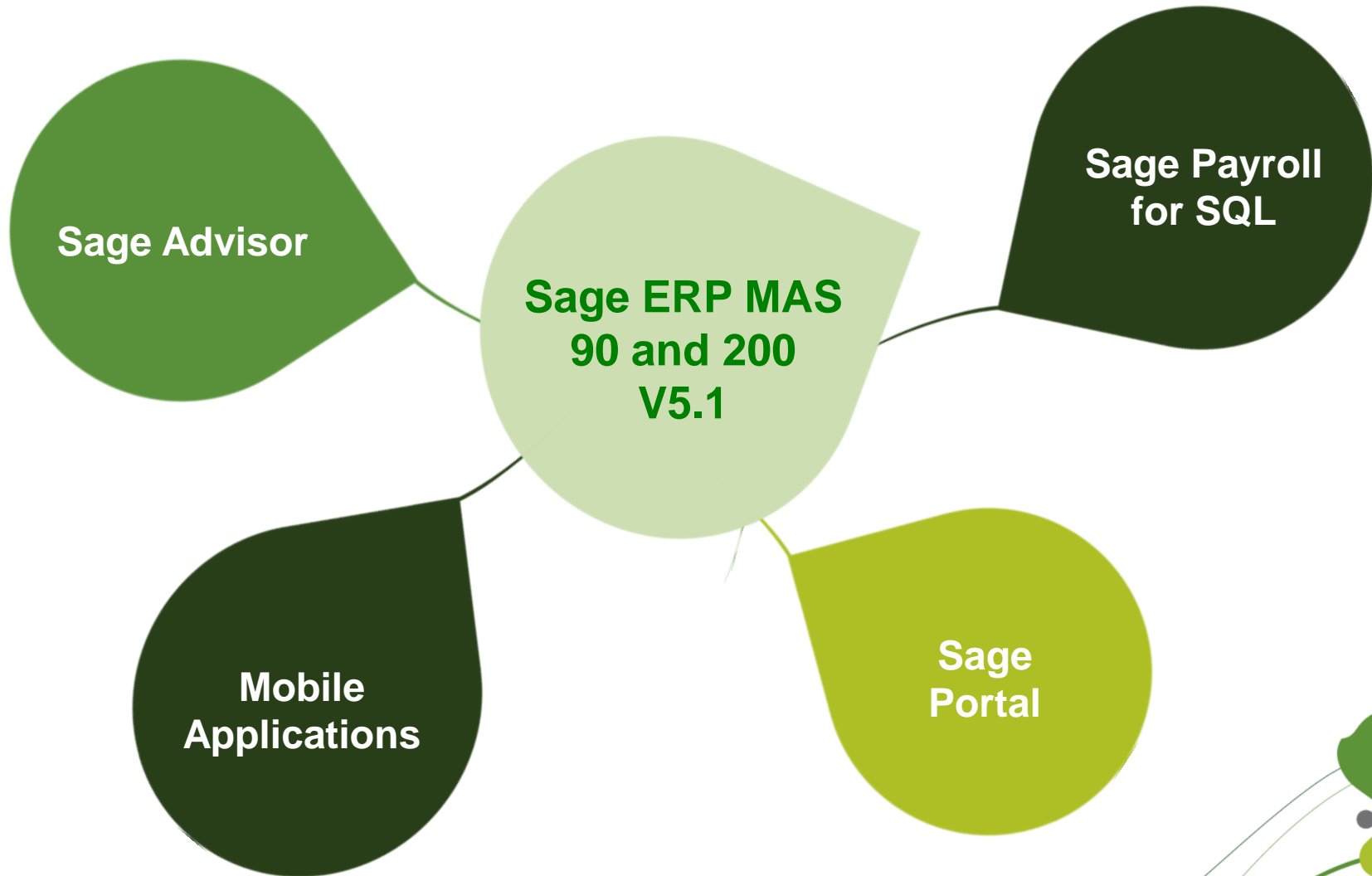


Version 5.0 – Mobile Reports

- Usability Studies Underway
 - Will drive requirements
- View Reports via Smartphone
 - iPhone, Droid, Blackberry
 - iPad
- Submit Report Request via Mobile Request
 - View only your reports
 - Saved Report Settings



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/
sw_attach/sso/SupportPolicy_MAS.pdf](http://infosource.sagesoftwareonline.com/sw_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