

# Sage ERP MAS 90 and 200

## Product Roadmap

Collaborate. Innovate. Evolve.

July 2010



# Disclaimer

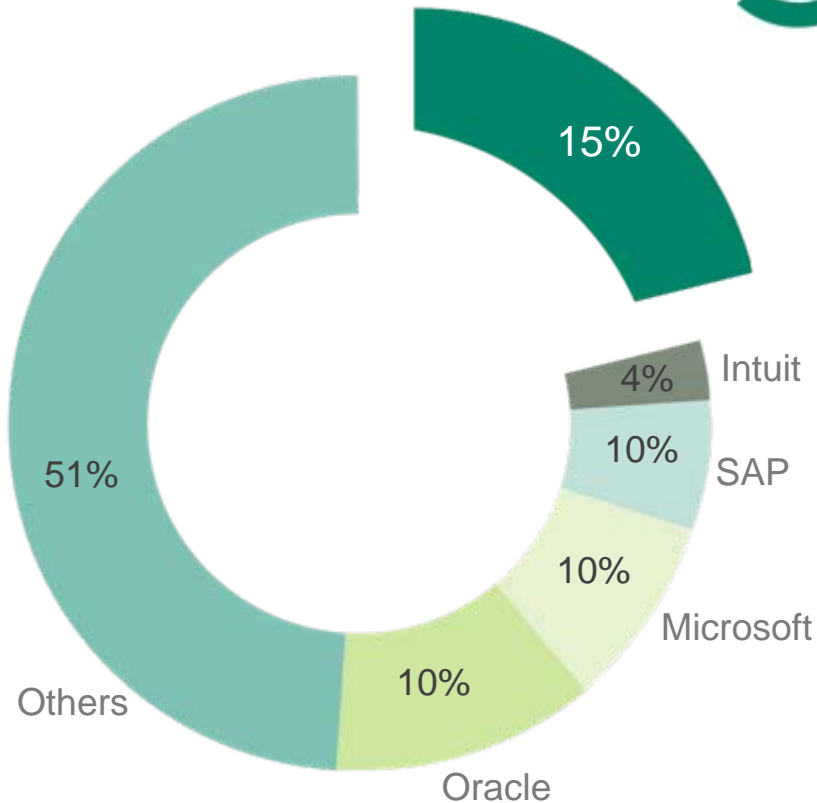
*This roadmap is intended for use as a guideline and for information purposes only, and represents Sage's current view of its product direction.*

*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 - #1 Worldwide for SMB

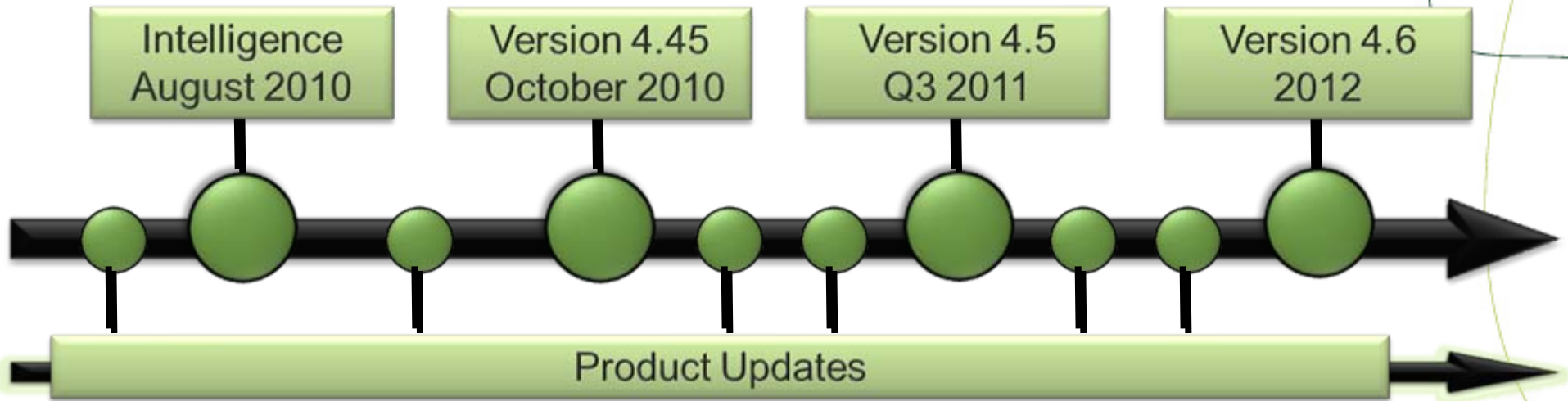


- Business Management Solutions are our Core Business
- 14,500 Employees Worldwide
- 5.7M Customers Worldwide
- 2.9M Customers North America
- 40,000 Support Calls per Day
- 1,500 Customer Purchases a Day

Source: IDC, January 2010, Worldwide ERP applications vendor shares, based on ERP revenue small business; <500 employees



# Sage ERP MAS 90 and 200 Roadmap



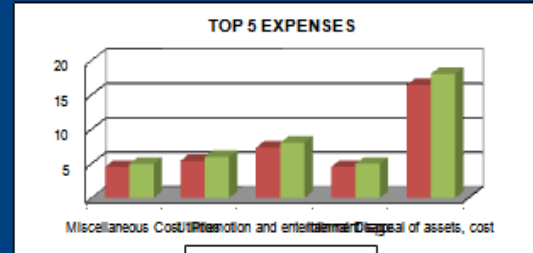
# Sage ERP MAS Intelligence

## DASHBOARD - SAMPLE COMPANY INC.

Period: January 2011 to August 2011

Profit & Loss	Actual Aug-11	Budget Aug-11	Variance	Actual YTD	Budget YTD	Variance
Sales	25,097	(22,000)	47,097	63,597	(22,000)	85,597
Cost of Sales	5,505	5,200	(305)	5,505	5,200	(305)
<b>Gross Profit</b>	<b>19,593</b>	<b>(27,200)</b>	<b>46,793</b>	<b>58,093</b>	<b>(27,200)</b>	<b>85,293</b>
Expenses	-	-	-	-	-	-
<b>Net Income before tax</b>	<b>19,593</b>	<b>(27,200)</b>	<b>46,793</b>	<b>58,093</b>	<b>(27,200)</b>	<b>85,293</b>

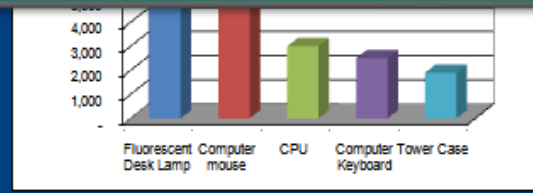
Top 5 Expenses	Actual Aug-11	Budget Aug-11	Variance	Actual YTD	Budget YTD	Variance
Miscellaneous Cost	1,500	1,650	150	4,500	4,950	450
Utilities	1,800	1,980	180	5,400	5,940	540
Promotion and entertainment	2,430	2,673	243	7,290		
Internal Usage	1,503	1,653	150	4,509		
Disposal of assets, cost	5,468	6,015	547	16,404		
	<b>12,701</b>	<b>13,971</b>	<b>1,270</b>	<b>38,103</b>		



Top 5 Customers	YTD	%	Customer Groups
Astral Construction Co Ltd.	6,900	35.7%	Wholesale Sales Group
Mr. Ronald Black	5,990	31.0%	Retail Sales Group
J & Y Builders Ltd.	2,850	14.8%	
ACME Plumbing	2,675	13.8%	
The Courtyard	900	4.7%	
	<b>19,315</b>	<b>100.0%</b>	

Top 5 Items	YTD	%	Item Groups	Quantity	Avg Price
Fluorescent Desk Lamp	5,990	32.1%	Computer Equipment		
Computer mouse	5,275	28.3%	Accessories		
CPU	3,000	16.1%			
Computer Keyboard	2,500	13.4%			
Tower Case	1,900	10.2%			
	<b>18,665</b>	<b>100.0%</b>			

Bottom 5 Items	YTD	%	Item Groups	Quantity	Avg Price
13W Mini Fluorescent Bult	14	5.0%	Accessories	22	13
Bulletin Board	53	18.8%	Computer Equipment	121	46
Desk Calendar Pad	64	22.7%		-	-
Halogen Desk Light	151	53.5%		-	-
	<b>282</b>	<b>100.0%</b>			



**Envision More**  
 Manage Financial Reports and analyze data in a familiar Excel environment



# Sage ERP MAS Intelligence

- Target Release Date: August 2010
- Sage's replacement for FRx
- Based on the familiar Microsoft Excel platform
- Includes
  - 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



# Sage ERP MAS Intelligence

- **Modules and Licenses**

- Sage MAS Intelligence **Viewer** provides basic editing capabilities and drill-down functionality on existing reports
- Sage MAS Intelligence **Report Manager** enables users to easily create and modify reports and set user permissions
- Sage MAS Intelligence **Designer** allows for easy drag-and-drop creation of reports and analysis of what-if scenarios
- Sage MAS Intelligence **Connector** allows users to consolidate data from multiple companies and multiple databases

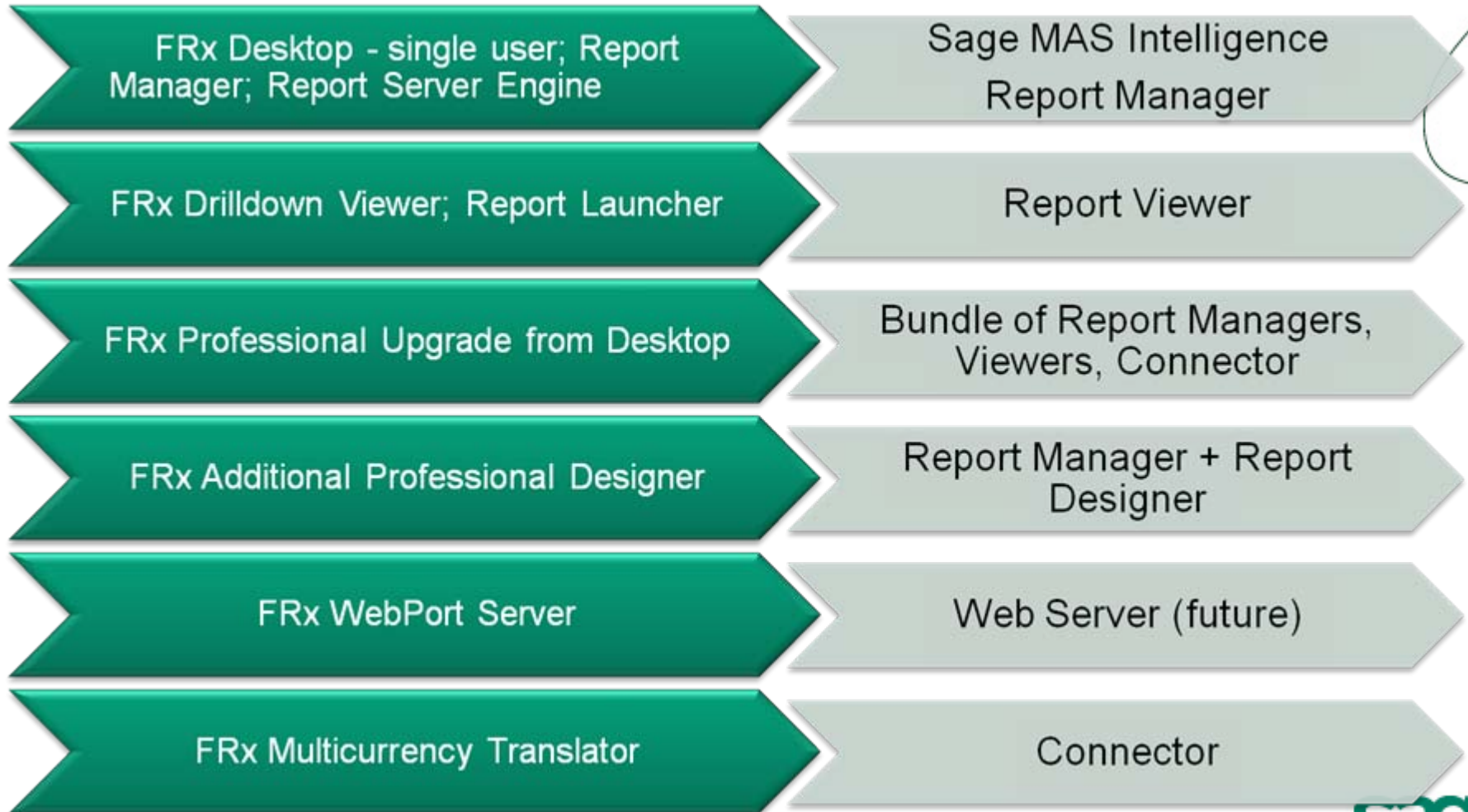


# FRx Replacement Plan

- Microsoft announced retirement of FRx in 2011
- Sage will maintain compatibility with FRx up to at least V4.5
- Each on-plan Sage MAS customer will receive one free Report Manager license to replace FRx
- Customers who have purchased additional FRx Licenses and Modules will receive the module and license mix that is most comparable to what they are currently using



# FRx Replacement Plan



# Product Updates

**Accounts Payable Options**

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

Enable ACH Electronic Payments	<input checked="" type="checkbox"/>	Allow Partial Allocation of Payment Amount	<input type="checkbox"/>
Print Vendor Remittance Advice	<input checked="" type="checkbox"/>	Reset Pre-Note When Renumbering the Vendor	<input type="checkbox"/>
Next Vendor Remittance Advice Number	<input type="text" value="00001"/>	Years to Retain Electronic Payment History	<input type="text" value="2"/>

ACH Electronic Payments Folder

Accept Cancel

## Value for Maintenance

Product Updates deliver both fixes and product enhancements every 3-6 months as an ongoing valuable benefit of maintenance & support plans



# Product Updates

- In addition to defect fixes, the scheduled product updates will incorporate enhancements, including the main functionality of selected Extended Solutions titles

PU 2 July 2010	PU 3 Sept 2010	PU 4 Dec 2010	PU 5 March 2011
<ul style="list-style-type: none"><li>• AP-1063 - ACH Electronic Payment for A/P</li><li>• BR-1004 - 'Positive Pay' Export</li><li>• AP-1095 - Paperless Office: A/P Checks &amp; Direct Deposit Stubs</li><li>• BR-1005 - Bank Reconciliation Import</li><li>• Bank reconciliation usability improvements</li></ul>	<ul style="list-style-type: none"><li>• Improve bank reconciliation usability by posting transactions to GL</li></ul>	<ul style="list-style-type: none"><li>• Year-end Payroll updates including W2 form changes to support the HIRE act</li><li>• Q1-2011 Tax Table Update</li></ul>	<ul style="list-style-type: none"><li>• IM-1244 – 'Inactive' Item Designation</li><li>• IM-1111 - Security for Inventory Inquiry</li><li>• IM-1119 - 'Physical Count' Entry by Ticket Number</li><li>• LM-1028 - Background Color by Company Code</li><li>• AP-1101 - Multiple Company Aged Invoice Report</li><li>• AP-1043 - Distribution Table for Invoice Entry</li><li>• AP-1077 - Additional Check Printing Sort Option</li></ul>

# Product Update 2 for Version 4.4

- **Bank Reconciliation Improvements**

- Automatically reconcile check information downloaded from your financial institution (BR-1005 )
- Enforce Tighter Controls over Bank Reconciliation Adjusting Entries by controlling who is allowed to enter modifications to the Current Balance
- Enter Checks, Deposits, and Adjustments On-the-Fly through a quick link button that brings you directly into Check or Deposit and Adjustment Entry for that bank
- Conveniently Use Recalculate Outstanding Entries Totals Utility to recalculate the totals of all outstanding check, deposit, and adjustment entries that have not been marked as cleared.
- Positive Pay Export (BR-1004) helps deter check fraud by allowing your financial institution to monitor against suspicious check activity using a file you create and submit for comparison and verification
- Positive Pay Export Wizard to create the proper export file format specified by your financial institution
- Expanded Comment Field to 2048 characters to allow you to add information to track why the adjustment was made.



# Product Update 2 for V4.4 cont'd

- **Accounts Payable – ACH Electronic Payments (AP-1063)**
  - Increase your efficiencies, improve your cash management, reduce operating costs and lessen the risk of lost or stolen checks by paying vendors electronically using an ACH file created from the Accounts Payable module.
- **Paperless Office — Accounts Payable Checks, Extended Stubs, and Electronic Payment Remittance Advices (AP-1095)**
  - Process, send and retain electronic copies of Accounts Payable checks and extended stubs, and remittance advices created for ACH Electronic Payments in PDF format. A
- **Product Update Pre-Installation Scan Feature**
  - Utilize the Product Update Pre-Installation Scan to ensure data integrity during the installation process of Sage ERP MAS 90 and 200 4.4 Product Updates.

For a live tour of new features visit

[www.youtube.com/user/SageUERPLearning](http://www.youtube.com/user/SageUERPLearning)



# Sage ERP MAS 200 Version 4.45



## Scalable Database Platform

Combining SQL Server's high performance database platform that's reliable, scalable, and easy to manage with Sage ERP MAS 200's ease of use, simplicity, and maturity



# Sage ERP MAS 200 Version 4.45

- Target Release Date: October 2010
- V4.45 for new customers only
- Microsoft SQL Server 2008 database support for Sage MAS 200
  - Efficient and Scalable
  - Database Security
  - Scheduling Capabilities
  - Maintenance Capabilities
  - Multiple Backup Options
  - Rich Indexing Capabilities
  - Data Visibility
  - Advanced Reporting Options



# Sage ERP MAS 200 Version 4.45

- Available Modules in V4.45
  - Accounting & Financials
    - GL, AP, AR, BR, Paperless Office
  - Business Intelligence & Reporting
    - BID, BIE, Crystal Reports
    - GL Financial Reports
  - Distribution & Manufacturing
    - IM, SO, PO, Bill of Materials, Credit Card Processing by Sage Payment Solutions, BarCode, StarShip, RMA
  - Integration and Data Import
    - Visual Integrator
    - Business Objects
    - eBusiness Web Services
  - Sage Abra SQL Payroll Integration
  - Sage MAS Intelligence – availability date TBD



# Sage ERP MAS 200 Version 4.45

- Modules **not** available for SQL V4.45
  - Modules not in the New Business Framework
    - Payroll
    - Job Cost
    - Work Order
    - eBusiness Manager
  - Business Insights Reporter
  - FRx
  - F9
  - Starship Parcel
  - SageCRM Integration
  - Fixed Assets



# Differences Between Sage MAS 200 SQL Editions

## V3.x SQL

Legacy Modules

De-Normalized Schema

Link List Indexing

No Data Dictionary

No Base Class (fix at each occurrence)

## New V4.45 SQL

New Business Framework Modules

Normalized Schema

Keyed Indexing

Data Dictionary (Meta data driven)

Base Class (Change Once Fix Plenty)

## V4.45 Benefit

Dual grid entry, right click, personalization's, memos, hyperlinks, etc.

Data stored and processed more efficiently

Search faster and more efficiently

Enforce business rules

Master fixes optimize changes



# Differences Between Sage MAS 200 SQL Editions

## V3.x SQL

Record Structure  
(Concatenated Columns)

ODBC connection to SQL  
Server

Report optimization via SQL  
Server Stored Procedures

Limited usage of SQL Server  
Temp Tables and TempDB

## New V4.45 SQL

Record Structure (No  
Concatenated Columns)

OLDB / ADO connection to  
SQL Server

All optimizations are done at  
Application Server. No SQL  
Server Stored Procedures

Taking advantage of SQL  
Server Temp Tables and  
TempDB

## V4.45 Benefit

Well defined columns and  
fields

Native connection

Maintain single code base

Leverage data manipulation  
and report generation



# Pricing

- Modules are the same price as Sage ERP MAS 200 pricing
  - Minimum 5 User Licenses
- Separate SQL Server License required
  - SQL Server Licenses available from Sage
    - Client Access License (CAL) per user - \$175
    - Per Processor License (Server) for unlimited usage - \$5,000
  - Or customers can use existing SQL licenses or purchase from a Microsoft SQL Server reseller



# Specifications

- Supported Platforms
  - Server
    - MS SQL Server 2008 (32 & 64 bit)
    - MS Windows Server 2008 (32 & 64 bit)
  - Client
    - Windows XP
    - Windows Vista
    - Windows 7 (32 & 64 bit)
- Recommended Minimum System Configuration for Combined Sage MAS 200 Server and SQL Server
  - Operating System: Windows Server 2008 64-bit
  - Processor : Intel or AMD 64-bit Capable
  - Memory: 4 GB + 200MB per concurrent user



# Sage ERP MAS 200 Version 4.45

- Important Dates
  - Beta
    - Started July 8
    - [www.sagemas.com/beta](http://www.sagemas.com/beta)
  - Controlled Release
    - On Target for August



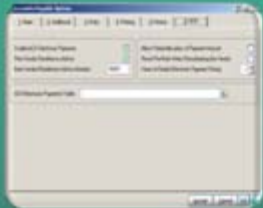
# SAGE ERP MAS 90 AND 200 V4.5

*Grow Your Business in a New Way*



## Accelerate Growth

- Extended Enterprise Suite “merged” with Sage ERP MAS 90 and 200 to improve sales performance and customer service with integrated SageCRM



## Increase Productivity

- 14 Extended Solution Titles will be incorporated to improve Payroll, Sales Order, Accounts Receivable and Purchase Order functionality



## Improve Scalability

- Upgrade to SQL Server’s high performance database platform for efficiency, scalability, and flexibility



# Sage ERP MAS 90 and 200 V4.5

The screenshot displays the Sage CRM web interface in Microsoft Internet Explorer. The main page shows an "Order Summary" for a customer named Artie Johnson. The order details include:

- Order Number: 0000174
- Delivery Date: 1/31/2007 00:00
- Status: Active
- Shipping Method: UPS BLUE

The "Line Items" table is as follows:

Line number	MAS Item Code	MAS Item Desc	MAS Unit of Measure	KIT
1	2551-3-50	DESK FILE 3 1/2" CAP 50	EACH	N
2	8953	UNIVERSAL 3 1/2" SSDD FLEX DSK	EACH	N

An "Sales Order Entry (ABC) 2/9/2007" dialog box is open, showing fields for Order Number (0000174), Order Date (1/31/2007), Order Type (Standard Order), and Customer (American Business Futures Inc.). It also includes shipping details like "Ship To Add" (American Business Futures) and "Ship Via" (UPS BLUE).

**Accelerate Growth**

An End-to-End Approach to Business Software with integrated ERP and SageCRM

# Sage ERP MAS 90 and 200 V4.5

- Sage MAS Extended Enterprise Suite (EES) and Sage ERP MAS 90 and 200 will be “merged” in V4.5
  - Licensing and functionality of both solutions will be made available as a single product, providing the following benefits to all users of Sage ERP MAS 90 or Sage ERP MAS 200:
    - Product delivery on a single DVD with a simplified installation
    - Per-user based pricing and traditional modular pricing
    - SageCRM user licenses available as “add-ons”
    - Free single SageCRM user license bundled with V4.5
    - Sage ERP MAS Fixed Assets bundled with per-user based pricing
    - A single support contract for ERP, SageCRM and Fixed Assets
  - SageCRM 7 support
  - Multiple ERP companies mapped to a single CRM database



# Sage ERP MAS 90 and 200 V4.5



## Increase Productivity

Integrated 14 Extended Solution titles to improve Payroll, Sales Order, Accounts Receivable and Purchase Order functionality



# Functionality Enhancements in V4.5

- The main features and functionality of these select Extended Solutions titles will be incorporated:

- 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

- 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-1489 - Auto Generate Purchase Orders from S/O Entry
- SO-1417 - Maintain Split Commissions by Customer
- SO-1354 - Commission Rate Table by Salesperson/Customer/Item

- Accounts Receivable

- AR -1068 - Customers with National Accounts

- Purchase Order

- PO-1020 - Purchase Orders Created From Sales Orders



# Sage ERP MAS 200 Version 4.5



## Scalable Database Platform

Combining SQL Server's high performance database platform that's reliable, scalable, and easy to manage with Sage ERP MAS 200's ease of use, simplicity, and maturity.



# Sage ERP MAS 200 SQL V4.5

- Direct upgrade path from V4.4 ProvideX to V4.5 SQL
- Additional Modules Available in V4.5
  - Sage MAS Intelligence
  - Starship Parcel
  - SageCRM Integration
  - Fixed Assets



# Beyond Version 4.5

- Regular Product Updates
- Top Customer Enhancement Requests from:

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



# Sage ERP MAS 90 and 200 V4.6

- Enhancements under consideration
  - Increase length of the AP invoice number field
  - Ability to inactivate customers and vendors
  - Multiple bin locations per warehouse
  - Receive one invoice against multiple POs
  - Make PO history work like SO history
  - Expand decimal precision
  - "Undo" mistakes (e.g. reverse check) in AP and PR
  - Expanded eBusiness Web Services - Create, Read, Update, and Delete for Inventory



# Product Retirement Schedule

<b>Product</b>	<b>Retirement</b>
<b>Sage MAS 90 and 200 version 3.71</b>	<b>Sept 30, 2010</b>
<b>Sage MAS 200 SQL Edition version 3.7x</b>	<b>June 1, 2011</b>
<b>Sage MAS 90 and 200 versions 4.0, 4.05, 4.1</b>	<b>Sept 30, 2011</b>



# Resources



- Sage University – online, live, recorded, and classroom training
  - <http://www.sageu.com/mas90/>
- Sage MAS Community – Collaborate with other users
  - <http://community.sagemas.com/sagemas/>
- Tell Us What You Think - Enhancement Requests
  - [www.sagemas.com/MAS\\_90\\_200\\_feedback](http://www.sagemas.com/MAS_90_200_feedback)
- Video of product enhancements
  - [www.youtube.com/user/SageUERPLearning](http://www.youtube.com/user/SageUERPLearning)

