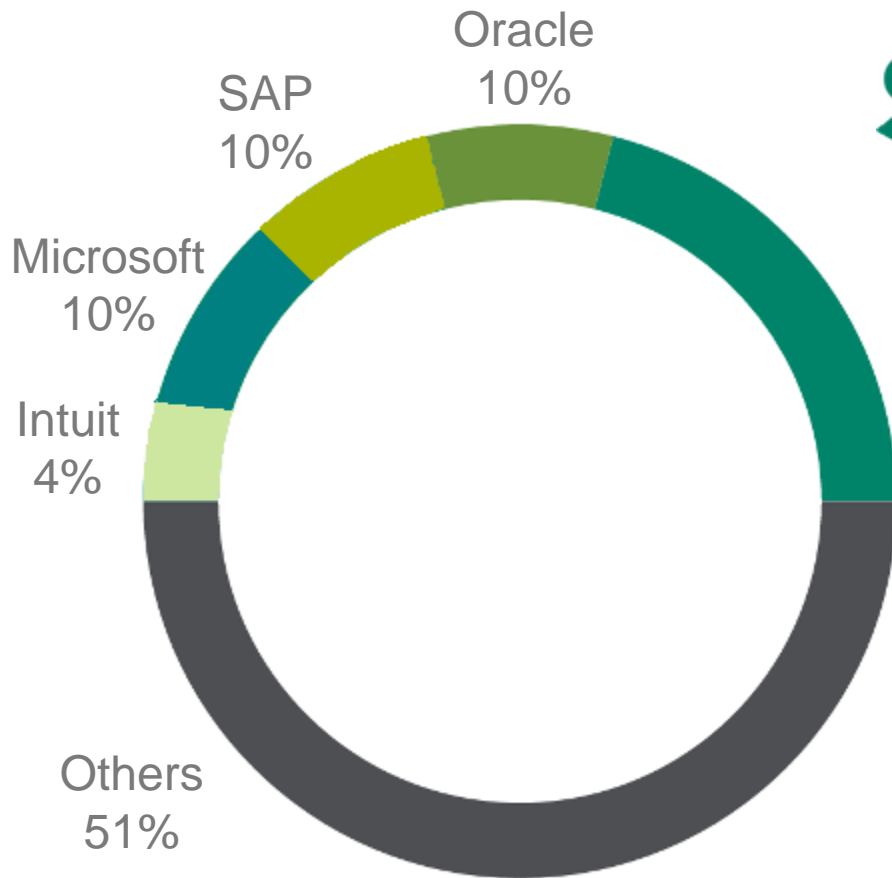




# **Sage MAS 500 ERP Product Roadmap**

**January 2010**

# Sage - #1 Worldwide for SMB



**sage 15%**

- 14,500 Employees Worldwide
- 5.7M Customers Worldwide
- 2.9M Customers North America
- 40,000 Support Calls per Day
- 1,500 Customer Purchases per Day

Source: IDC, December 2009, Worldwide ERP applications vendor shares, based on ERP revenue small business; <1000 employees

# Sage MAS 500 Product Strategy



- Provide “value for maintenance”
  - Implement top customer requested enhancements
  - Regular Product Updates
  - Financial Reporting solution (FRx alternative)
- Focus on Quality and Upgrades
  - Better education/certification of resellers and consultants
  - Focus on enhancements to advanced manufacturing/distribution
  - Reduce impact of upgrades on customizations



# How We Decide: Source Data

- Customer Inputs
  - Support Cases (Breadth and Impact)
  - Feature and Enhancement Suggestions  
([www.sagemas.com/MAS\\_500\\_feedback](http://www.sagemas.com/MAS_500_feedback))
  - In-Product Survey
  - Customer Email Survey
  - Customer Contact (Site Visits, Interviews and Conferences)
  - Customer Advisory Board (CAB)
- Other Sources
  - Business Partners (Advisory Council and Conferences)
  - Sage R&D (technology direction)



# Sage MAS 500 Product Roadmap

**V7.3**  
**Nov 2009**

**Product**  
**Updates**

**V7.4**  
**Q2 2011**

**Product**  
**Updates**

**V7.5**  
**Q4 2012**

- 4 – 5 per cycle
- Every 3 – 4 months
- Bug Fixes
- Enhancements

- 4 – 5 per cycle
- Every 3 – 4 months
- Bug Fixes
- Enhancements

*Timeline by Calendar Quarters. 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.*

# 7.3 – Product Updates

- Product Update 1 (Dec. 2009)
  - Windows 7 support and logo certification
  - Year end tax updates
  - Fail Safe Registration: Change expiration behavior to permit continued usage without re-registering
  - General maintenance
- Product Update 2 (Feb. 2010)
  - Warn of Duplicate PO# in Sales Order Entry
  - Data Import Manager documentation and templates
  - General maintenance
- Product Update 3 (May 2010)
  - Smart Updates: Bypass update of components that are already current
  - New Security Event – Change Sales Order to Quote
  - General maintenance



## Continuous Incremental Value



# 7.3 – Product Updates

## Future Enhancements

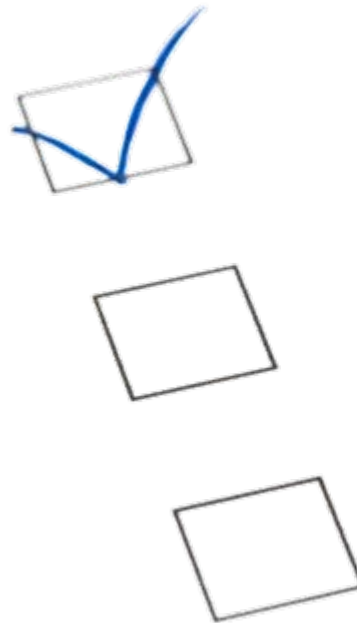
- **Smart Updates**
  - Automatic updates to client
  - Warn of risk to specific customized components
- **Copy Sales Orders and Quotes to New Customer**
- **Sub-ledger Option to Warn or Fail when Post Date is outside of Current Period**
- **Expand Security Events**
  - Delete Sales Order, Purchase Order
  - Enter/edit Surcharge Amount on Transfer Orders
- **Fail-Safe Registration**
  - Simplify or remove existing server-side component
  - Resolve SQL Server permissions

Continuous Incremental Value



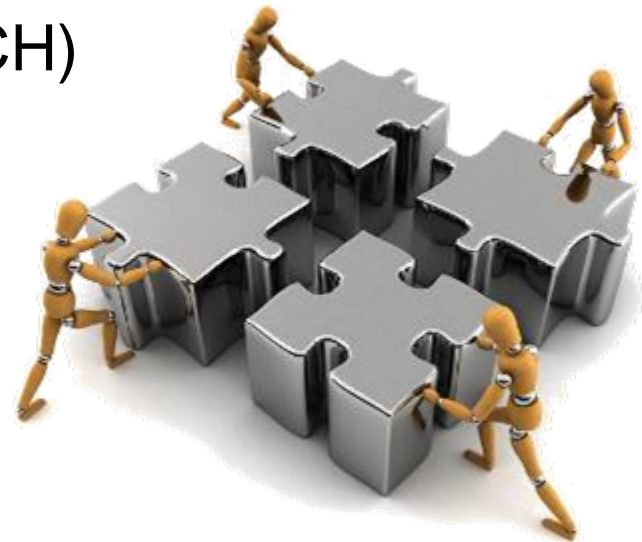
# Sage MAS 500 7.4 Themes

- Productivity Enhancements
- Manufacturing and Distribution
- Unit of Measure
- Financial Reporting
- Platform and Performance



# 7.4 - Productivity Enhancements

- Track Overpayment of Invoices
- Customer Refunds
- Support Negative Line Items
  - Sales Order
  - Purchase Order
- Automated Clearing House (ACH) Extensions
  - ACH Addendum
  - ACH Remittance Advice



## 7.4 - Manufacturing and Distribution

- Allow change of preferred vendor for replenishment
- Use transaction date as post date for manufacturing transactions
- Complete work orders without issuing material
- Backflushing setup hours option (always, once, never)
- Enable progress reversals
- Improve Landed Cost



## 7.4 - Unit of Measure

- Improve accuracy of unit of measure conversions
- Allow reporting in alternate units of measure



## 7.4 - Financial Reporting

- FRx supported by Microsoft until Dec 31, 2012
- Sage MAS 500 will maintain backward compatibility with FRx in version 7.4
- New product – Business Insights Intelligence – will provide advanced financial reporting as an alternative to FRx

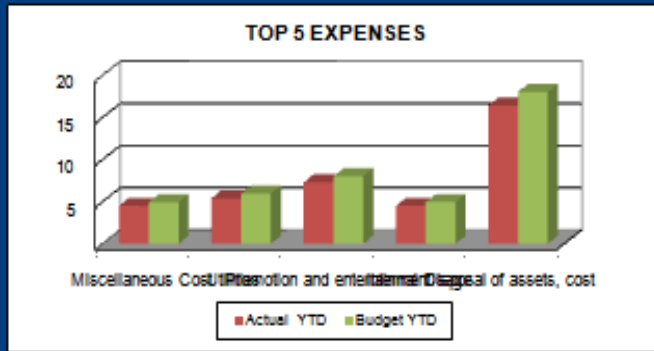


# DASHBOARD - SAMPLE COMPANY INC.

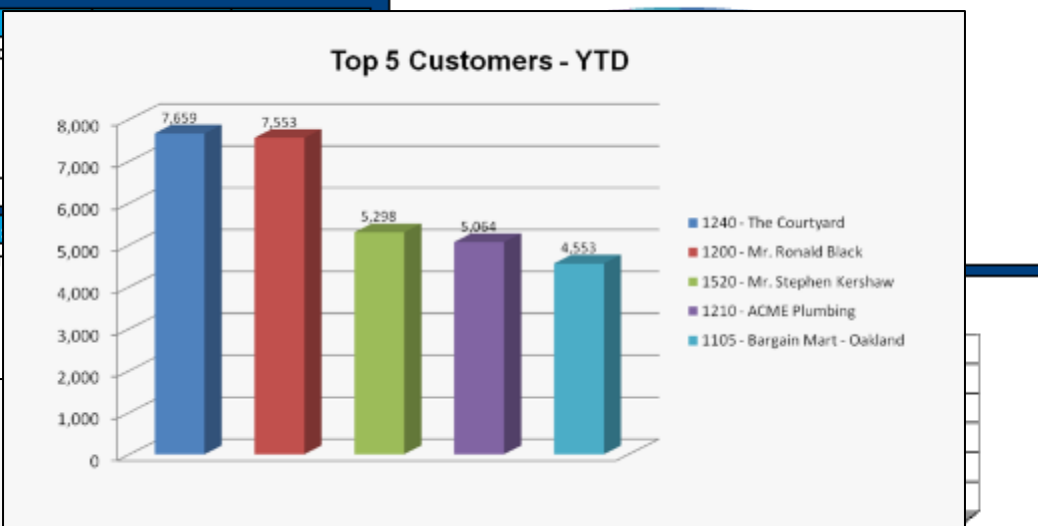
Period: **January 2011 to August 2011**

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	8,019	729
Internal Usage	1,503	1,653	150	4,509	4,960	451
Disposal of assets, cost	5,468	6,015	547	16,404	18,044	1,640
	<b>12,701</b>	<b>13,971</b>	<b>1,270</b>	<b>38,103</b>	<b>41,913</b>	<b>3,810</b>

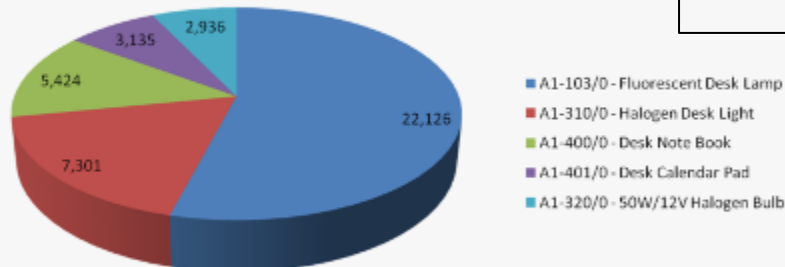


Top 5 Customers	YTD	%	Customer Groups
Astral Construction Co Ltd.	6,900	35.7%	Wholesale Sales Gr
Mr. Ronald Black	5,990	31.0%	Retail Sales Group
J & Y Builders Ltd.	2,850	14.8%	
ACME Plumbing	2,675	13.8%	
The Courtyard	900	4.7%	
	<b>19,315</b>	<b>100.0%</b>	



Top 5 Items	YTD	%	Item Group
Fluorescent Desk Lamp	5,990	32.1%	Computer Equipmen
Computer mouse	5,275	28.3%	Accessories
CPU	3,000	16.1%	
Computer Keyboard	2,500	13.4%	
Tower Case	1,900	10.2%	

**Top 5 Products Sold - YTD**



Bottom  
13'w Mi  
Bulletin  
Desk C  
Haloge

-	-	-	-
Fluorescent Desk Lamp	Computer mouse	CPU	Computer Tower Case Keyboard

Your Data Pulled Directly Into a Familiar Excel Environment

guideline only.

# 7.4 - Business Insights Intelligence



- Complex Reporting Made Easy
  - Reporting and analysis in a familiar Microsoft Excel interface
- Advanced Financial Reporting
- Quick Access to Business Critical Information
  - Application and Single-User License Bundled (Free) with Version 7.4



## 7.4 – Platform and Performance

- Crystal 2008 (v12)
- Microsoft Office 2010
- Improve Business Insights Explorer performance
- Update third-party controls
- Visual Studio 2010 and .Net Framework 4.x
- Operating System and SQL Server Service Packs



sage

# Sage MAS 500 7.5

- **Productivity Enhancements**
  - Track miscellaneous cash receipts' visibility in AR
  - GL renumber / merge utility
  - One-Step Invoicing
  - Allow RMA without returning to stock
  - Add customer “on-the-fly” in Sales Order
  - Expand availability of user-defined fields
  - Print preview for SO, PO and Invoice
- **Advanced Manufacturing Improvements**
  - Support use of non-inventory items
  - Allow reversal of remaining material for partially progressed
  - Enable backflushing for tracked warehouses and items
  - Batch entry of material issues
  - Add scrap factor to material step to allow for shrinkage
- **Improved Multicurrency Support**



# Changes to Delivery and Support

- Standardize on 12-18 month Release Cycle
- Emphasize Current Version
  - Support the current version plus 2 versions back
  - Refine Smart Updates
- Product Updates
  - Every 3-4 months
  - Cumulative product updates (no service packs)
  - Current version only
  - Deliver feature enhancements as well as bug fixes



# Version Retirement Schedule

Sage MAS 500 ERP	7.3	7.2	7.05	7.00	6.30
<b>Initial Release Date</b>	Nov-2009	May-2008	Nov-2006	Oct-2005	Sep-2003
<b>Year-end and Tax updates</b>	Yes	Yes	Dec-2010	Dec-2009	Dec-2009
<b>Phone Support</b>	Yes	Yes	With 7.4	Sep-2010	Sep-2010
<b>Product Updates (3 – 4 mos)</b>	Yes	Nov-2010	Oct-2009	Aug-2009	Aug-2009
<b>Hot-Fixes (exception basis)</b>	Yes	Yes	With 7.4	Sep-2010	Sep-2010
<b>Tech Tuesday Webinars</b>	Yes	Yes	With 7.4	Sep-2010	Sep-2010

Recent Milestones

Upcoming Changes



# Resources



- Sage University – online, live, recorded, and classroom training
  - <http://www.sageu.com/mas500>
- Sage MAS Community – Collaborate with other users
  - <http://community.sagemas.com>
- Tell Us What You Think – Enhancement Requests
  - [www.sagemas.com/MAS\\_500\\_feedback](http://www.sagemas.com/MAS_500_feedback)

