## Sage ERP MAS 90, 200, and 200 SQL

Version 4.5 Release Guide

October 2011



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## OVERVIEW

The Sage ERP MAS 90 and 200 4.5 release focuses on providing compelling value to existing customers, being more competitive in the marketplace, and providing a smooth upgrade transition. Substantial value is provided to existing customers by addressing their top enhancement requests, including the ability to add SageCRM licenses to Sage ERP MAS 90, 200, and 200 SQL. To encourage adoption, all Sage ERP MAS 90 and 200 customers are eligible to receive a free SageCRM Server license and one free SageCRM user license when upgrading to 4.5. The Business Framework will allow the flexibility to provide current and new customers to choose ProvideX or Microsoft SQL Server. A migration process is provided to assist Business Partners with upgrading Sage ERP MAS 200 for SQL 3.7x customers to Sage ERP MAS 200 SQL 4.5.

The main features and functionality enhancements in Sage ERP MAS 90 and 200 4.5 are in Accounts Receivable, Payroll, Purchase Order, and Sales Order. These customer-requested features and functionality were obtained through various feedback and evaluation methods, including the Sage customer enhancement request website and user surveys. Many of the new features that have been incorporated are similar to the main features and functionality of 14 select Extended Solutions titles. Also, all 36 enhancements that have been provided through the Product Updates for 4.4 are included in the 4.5 release.

Sage ERP MAS Intelligence has been enhanced in 4.5 to include Reporting Tree capabilities and enhanced report distribution. With 4.5, Intelligence is also compatible with the Sage ERP MAS 200 SQL product.

Current Sage ERP MAS 90 and 200 Extended Enterprise Suite customers are provided with the equivalent 4.5 system on user-based pricing, and they have been merged into the core product line with equivalent Sage ERP MAS 90 and 200 licenses and separate SageCRM licenses. Both named and concurrent SageCRM licenses are available, although each customer is required to choose one type of licensing. It is not possible to mix the two types of licenses in one system. Customers on Business Care plans can stay current with the SageCRM product release schedule.

Both new and existing customers will find immediate benefit to their business operations from the tremendous enhancements in Sage ERP MAS 90 and 200 4.5. Sage will continue to listen to our customers and partners and provide the functionality that is most important to them. In 2012 in addition to customer-requested enhancements, Sage ERP MAS 90 and 200 Version 5.0 will focus on web-enabling the product to improve usability and allow customers more mobile access and additional web-based integrations. We strongly encourage customers running older versions of Sage ERP MAS 90 and 200 to plan to upgrade to the most current release and begin taking advantage of all the benefits outlined in this document.

## SAGE ERP MAS 90, 200, AND 200 SQL 4.5 COMPELLING VALUE. MORE FLEXIBILITY. INSPIRED BY YOU!

### RELEASE HIGHLIGHTS - TOP TEN REASONS TO UPGRADE TO 4.5



- Use National Account Management features and functionality to streamline your branch and corporate customer billing, and sales order processing while keeping unique accounts
- Efficiently handle increasing complexities of Payroll processing with new methods of deduction calculations, benefits accruals, and recalculations
- Beat the competition with flexible pricing set by combinations of totals, items, groups, and by customers
- Allocate products by lot and serial numbers, reserve limited-quantity products for loyal customers or to match previous shipments
- Improve cash flow with streamlined Purchase Orders created from Sales Orders
- Flexibly track and bill for work-in-progress using enhanced Job Cost processing
- Reward your Sales teams with automatic Split Commissions
- Choose to migrate to Sage ERP MAS 200 SQL for more efficiency, scalability and flexibility
- Utilize one FREE SageCRM 7.1 user and server license to communicate more effectively, collaborate better internally, and compete in today's marketplace
- Establish Reporting Tree structures in Sage ERP MAS Intelligence, ranging from simple to sophisticated hierarchies, and use the new distribution features to automatically provide information to key team members

## **AVAILABILITY**

Sage ERP MAS 90, 200, and 200 SQL 4.5 Beta was held during the month of August. General Availability and a new Early Adopter program for customers followed closely in early September 2011. The Auto-Delivery mailing and 4.5 download availability to Sage ERP MAS 90 and 200 Business Partners and the installed base customers are expected to begin the last week of October 2011.

## **New Functionality in Accounts Receivable**

### NATIONAL ACCOUNT MANAGEMENT

New features in 4.5 enable the creation of National Accounts in Accounts Receivable. This type of customer account provides the ability to establish relationships between the one National Account, typically a parent company, with multiple customer accounts, such as branches and subsidiaries. National Accounts enables invoicing of the larger company for goods and services provided to multiple locations, each with their own unique customer accounts. For example, these new features and functionality gives a distributor the ability to ship their goods to one customer, and invoice the National Account, rather than bill the "Sold To" customer account.

Accounts Receivable Options (ABC) 8/22/2011	
<u>1</u> . Main <u>2</u> . Additional <u>3</u> . Credit <u>4</u> . E	ntry <u>5</u> . Printing <u>6</u> . History <u>7</u> . National
National Accounts Enable Bill To Customer Reporting Post by Bill To Division to General Ledger Print Sold To Customer Number on Bill To Statements Track Customer Sales History in Accounts Receivable By Default Credit Hold Setting Default Credit Limit Setting Default Credit Limit Setting Default Bill To Address Setting Default Customer Pricing Setting Default Terms Code Setting	Sold To Customers Only Bill To and Sold To Customers Bill To Customers Only Bill To Customers Only Bill To Customers Only Bill To To To Customers Only Bill To To To To To Customers Only Bill To To To To To To To
	Accept Cancel 🖶 🕢

🔚 Customer Ma	intenance (ABC) 8/22/2011	
Customer No.	1-PARENT	🕨 More 💌
Name G	HI Parent Company	** NEW **
<u>1</u> . Main	<u>2.</u> Additional <u>3.</u> Statistics <u>4.</u> Summary	<u>5</u> . History <u>6</u> . Invoices <u>7</u> . Transactions <u>5</u> 6/Os
Address ZIP Code City Country Residential Add <u>Salesperson</u> Telephone Fax	99999 Anytown State CA USA 🔍 United States of America	I terms Code       00 No Terms         Primary Contact       Ship Code         Primary Ship To       From Customer         Maintenance       conveniently access         Tax Schedule       CA         California       California         Credit Hold       Image: Conveniently access         Credit Hold       Image: Conveniently access         Credit Limit       300,000
E-mail Address URL Address		Accept Cancel Delete
Custor Bill T Cred	o Customer o Customer No	arent Company GHI Parent Company
Sold	To Customers	In Bill To/Sold To
	Sold To Customer No. Name 01-BRANCH Branch 4	Credit Hold       Credit Limit       Default Addres         Bill To       Bill To       Bill To         Bill To       Bill To       Bill To
		and Default Address are set to use the Parent company
		Accept Cancel Delete 🕢

🖟 Bill To Customer Maintenance (A	BC) 8/22/2011				
Bill To Customer No. 01-PARENT				Defaults	
Name GHI Parent Corr	pany				
Bill To Customer's Credit					
Credit Limit 300,000	.00				
Sold To Customers					
Sold To Customer No.	Name	Credit Hold	Credit Limit	t Default Addres	
1 01-BRANCH	Branch 4	Bill To	Bill To	Bill To 🛃 🗸	
2				In Bill To Custom	er
				Maintenance, Lin	
				the branch to the	
				Parent company,	
				view account	
				details, and confi	
				or change setting	IS
•				4	
			~		
		Accept	Cancel		
👫 Default Values for Bill To	Customer Mainten	ance	?	×	
				From the Default button,	
Credit Hold	Bill To 👻			conveniently set default	
Credit Limit	Bill To 🔻			values to be used for the	
Default Address	Bill To ▼			Sold To accounts	
Customer Pricing	Bill To 🔻				
Terms Code	Bill To 🔻				
	<u></u> K	<u>C</u> ar	icel 🕜		

Invoice Number 0100057-IN		Lustomer	Credit
Customer No. 01-BRANCH	🔍 🛃 🥅 Branch 4 Bill To 01-PARENT	٩	
Invoice Date 8/22/2011 Due Date 8/22/2011 Discount Date 8/22/2011 Net Invoice Amt .00	Ship Method Salesperson 0100 Q	Terms	When entering an invoice, the National Account informational automatically populate the necessary fields you've previously
Sales Tax Schedule DEFAULT 🔍 Default Tax Schedule	Print Invoice 🔽 Fax	Batch Fax	established
	E-mail		

### **ENHANCEMENTS TO PAYROLL**

New key Payroll features and functionality were added in 4.5, to offer more flexibility, streamline the data entry process, and provide more consistent and accurate calculations for deductions. The new 4.5 Payroll functionality includes five additional deduction calculation methods for processing payroll, the ability to automatically perform deduction recalculations and set deductions based on earnings type, provide enhanced Visual Integrator importing of common time management software formats into Payroll Data Entry, and the ability to establish a minimum number of hours worked for benefit accruals.

### Additional Deduction Calculation Methods

Five new calculation methods are available for Payroll deductions in 4.5 – Based on Paid Hours, Based on Pay Rate, Based on Regular plus Overtime hours, Percentage of Total Hours and Percentage of Deduction Method. These additional calculation methods are often used for union deductions and dues.

- 1) **Based on Paid Hours** will provide a calculation for the total hours worked multiplied by the pay rate multiplier you choose.
- 2) **Based on Pay Rate** will calculate the selected pay rate multiplied by the number that is entered.
- 3) **Based on Regular plus Overtime Hours** will automatically provide a calculation based on the sum of regular and overtime hours multiplied by the pay rate.
- 4) **Percentage of Total Hours** will be calculated based on the total hours worked, regardless of regular or overtime, multiplied by the percentage you establish.

5) **Percentage of Deduction Method** will be calculated during tax calculation such as Percentage of Net Wages and is only available for Employer Contributions.

R Deduction Code Maintena	nce		
Deduction Code 05 🔍	Description Savings	Earn	ings
Calculation Method B Standard Amount/Plate P Standard Limit B W2 - Box 12 Code E B B B B B B B B B B B B B B B B B B B	ased on Total Hrs Worked ased on Total Hrs Worked vercentage of Gross ased on Reg Hrs Worked ased on Total Hrs Worked recentage of Net Wages qual to Earnings Code(s) ased on Reg + 0T Hrs ased on Paid Hrs vercentage of Total Hrs ased on Pay Rate vercentage of Deduction	Apply Iax Equal to Earnings Code Frequency or Deduction V Every Pay Period V Pay Period 1 V Pay Period V Pay Period 2 V Pay Period V Pay Period 3	
Deduction Accrual Account Contribution Expense Account	765-00-04 665-01-00 <u>A</u> ccept	Image: Second state state       Image: Second	
		ALL ABC 8/2	22/2011

Five new Payroll options are available in Sage ERP MAS 90 and 200 4.5 to offer more flexibility, streamline the data entry process, and provide more consistent and accurate calculations for deductions.

Deduction Code Maintenar	nce Description Savings		? - I ×	Deduction
	mployer Contribution	Apply Equal to Earnings Frequency of Ded Every Paul Pay Period 1 Pay Period 2 Pay Period 3	method is select additional field is allow the selecte entered.	ed, an displayed to
Deduction Accrual Account Contribution Expense Account	765-00-04 665-01-00 <u>М</u> оге <u>А</u> ссерt	Image: Second state     Image: Second state       Image: Second state     Image: Second state       Image: Second state     Image: Second state       Image: Second state     Image: Second state		
		FQC	ABC 9/30/2010	

Page 10

Deduction Code Y1	🔦 Description Pay Ra	ate 1	If Based on Pay Rate is
Deduction Type Calculation Method Standard Amount/Rate Standard Limit W2 - Box 12 Code	Standard Deduction Based on Pay Rate 1.5000 .00	Eq Fre	selected, an additional drop down box is displayed to allow the selected rate to be chosen.
Pay Rate to Use Automatically Apply Deduc	Pay Rate 1 Pay Rate 1 Pay Rate 2 tion to Earnings Code		Pay Period 2 🔽 Pay Period 5
Deduction Accrual Accour Contribution Expense Acco		<b>୍କ</b> ୍	Cash on hand
		cept <u>C</u> a	ancel Delete
nter Employee Pay Rate to	Use		FQC ABC 9/27/2010

### **DEDUCTION RECALCULATION IN PAYROLL ENTRY**

In Payroll Data Entry, workflow has been improved to automate the deductions based on changes in the earnings line. You are able to automatically recalculate the deduction while still in data entry, instead of deleting the information and then reentering. This will save valuable data entry time when running employee payroll, particularly with the various payroll complexities that businesses face today.

👫 Payroll Options					? _ [	×
<u>1</u> . Main	2. Additional	<u>3</u> . Integrate	4. Forms	1	5. Direct Deposit	
Accrual Benefit Description Accrual Report Display Optio Round Benefit Hours/Days t Reset Employee Benefit Limi	o Whole Numbers	Hours F	Take Automatic Dedu Print Data Entry Audit Method to Recalc De Recalc Deductions in	Report in De ductions All	etail	
Line E/D Cd ST Loc E/D Desc	Dept Labor Description	Job No. Cost Cod		Hours	Amount	
REGULAR 2 E 02	01 0000002 Journeyman 01 0000002	I	ALL 25.000 ALL	24.00	600.00	
0 vertime 3 E 03 Doubletime	Journeyman 01 0000002 Journeyman		37.500 ALL 50.000	2.00	75.00 .00	
Ins el <u>R</u> ecalc Deductio	ins		Remaining	) to Goal:	900.00	-

### **DEDUCTION CALCULATION BASED ON EARNINGS TYPE**

This new Payroll feature 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". This allows an employer to calculate benefits such as a Pension Plan and 401K contributions based only on regular, sick and vacation earnings.

R Deduction Code Mainter	nance		
Deduction Code 06	Description 401k Plan		arnings
Deduction Type	Pension Plan 👻	Apply	Lawes
Calculation Method	Percentage of Gross	Equal to Earnings Code	
Standard Amount/Rate	5.000%		
Standard Limit	10,000.00	Frequency of Deduction	A new <b>Earnings</b> button is
W2 - Box 12 Code	D	📝 Every Pay Period	available in 4.5 to allow the selection of specific types to be
Reset Balance at Year End		📝 Pay Period 1 📝 Paj	used for calculations
		🔽 Pay Period 2 🔽 Paj	y Period 5
Automatically Apply Deductio	n to Earnings Code 🛛 🔍	🔽 Pay Period 3	
Deduction Accrual Account	665-01-00	🔍 Miscellaneous expens	e
Contribution Expense Accourt	nt		
	Accept	<u>Cancel</u> elete	80
Enter Description for this Dedu	ction Code	ALL ABC	8/22/2011

🚮 Calculation Based on Earnings	Types		? <b>×</b>
Based on Earnings Types			
All	<b>V</b>		
Regular	<b>V</b>	Benefit	<b>V</b>
Overtime	<b>V</b>	Miscellaneous	<b>V</b>
Vacation Pay	<b>V</b>	Excluded from Tip Calculation	
Sick Pay	<b>V</b>	Fringe	<b>V</b>
		<u> </u>	ncel

### PAYROLL DATA ENTRY IMPORTING

Visual Integrator is enhanced in 4.5 to support importing a few of the more common labor management and time tracking systems into Payroll Data Entry. This enhancement will be particularly helpful when performing multiple data imports for regular, vacation, and sick time. File layouts and sample imports are included for the five most popular data import formats: Fixed Field, ADP, TimeBank/Kronos and TimeTrack.

Sample imports are included for:

- Format 2 Fixed Field Format
- Format 3 ADP Format
- Format 8 "TimeBank" or Kronos Connect Format with department number + employee number imported
- Format 8 "TimeBank" or Kronos Connect Format with only employee number imported
- Format M Fixed Field Format for Timetrack v8.0

mport File Name	Import Master File	
C:\master\MAS90\PR\PR1031PayrolDa	taEntryImports.EXP	
Available Jobs		=
PR_ADP Payroll Data Entry I PR_FORMAT_2 Payroll Data Entry I PR_KRONOS P/R Data Entry Imp PR_KRONOS_NO_DIP/R Data Entry Imp	mport. PR IMP ort From Kro IMP ort From Kro IMP	<u>Select All</u> Unselect All
PR_TIMETRAK P/R Data Entry Imp	ort From Tim IMP	

### ENHANCED BENEFIT ACCRUAL

New features and functionality have been added to benefit accrual processing in 4.5 that provides the ability to manage accruals based on hours worked, which can be used to support salaried employees, union employees, and part time employees. This new functionality uses the code assigned to an employee, compares the Minimum Hours Required for Benefit Accrual with the hours worked. If the conditions set are not achieved, then the accruals will not occur.

🔚 Benefit Schedule	e Maintenance				
Schedule Code	B 🔍 Descri	ption Over 5 Ye	ars of Service		App <u>l</u> y
Vacation		Sick Leave		Personal	
Accrual Method	Hourly -	Accrual Method	Hourly -	Accrual Method	Fixed -
Hours/Year	120.00	Hours/Year	40.00	Hours/Year	8.00
Carryover Allow.	40.00	Carryover Allow.	.00	Carryover Allow.	.00
Accrue on Paid H	rs. Only 📃	Accrue on Paid H	rs. Only 📃	Accrue on Paid H	rs. Only
Check Entry No.	123456789	Check Entry No.	123456789	Check Entry No.	123456789
Deduct. Period	12345	Deduct, Period	12345	Deduct. Period	12345
Rate Method	Fixed Benefit 🔷	Rate Method	Fixed Benefit 🔹	Rate Method	Fixed Benefit 👻
Accrual Rate	00.0576920	Accrual Rate	00.0192310	Accrual Rate	00.0038460
Delay Period	0	Delay Period	0	Delay Period	0
Eligibility Wait	0	Eligibility Wait	0	Eligibility Wait	0
Eligibility Hours	0	Eligibility Hours	0	Eligibility Hours	0
Min Hrs/Check	32.00	Min Hrs/Check	40,00	Min Hrs/Check	.00
Max Hrs/Check	.00	Max Hrs/Check	.00	Max Hrs/Check	.00
			Accept	<u>C</u> ancel <u>D</u>	elete 👌 🕢
Enter the minimum nu	mber of hours worked I	before benefits will a	ccrue	ALL	ABC 8/22/2011

## AUTOMATICALLY CREATE PURCHASE ORDERS FROM SALES ORDERS

New 4.5 functionality will automatically create a Purchase Order from a Sales Order, allowing customers to save time and reduce data entry errors. Information will flow through to a Purchase Order without having to reenter the information, removing secondary data entry mistakes. For companies who operate on a business model where they don't place an order from their suppliers for particular items until they make a sale, this will be a big time savings. They will be able to preset the conditions they want to use for the creation of Purchase Orders directly from the Sales Orders process to flow efficiently by entering the selection criteria.

🖌 P/O Auto Generate from Sales Orders	
Sales Order Types to Generate From	
All Types: 🗌 Standard 🗹 Back Orders 🔍 Quotes 🗌 Master 🗌 Repeating 🗌	
Sales Order Statuses to Generate From Procurement Types to Generate	
All Statuses 🗹 Open 🗹 New 🗹 Hold 🗹 🛛 🗸 upes 🗹 Make 🗹 Buy 🗹 Subcontract 🗹	
Product Types to Generate	
All Types 🗹 Finished Goods 🗹 Raw Materials 🗹 🗸 continued 🗹 Kits 🗹	
Item Types to Generate	
All Types 🗌 Inventory 🗹 Special 🗌 Miscellaneous 🗋	
Include Drop Ship Lines Yes Summarize Drop Ship Line Or	
Base Order Quantity On Sales Order Quantity 🖌 Use Back Ordered Quantity 🔽	
Update Unit Cost With Costing Hierarchy 🔽 Update Unit Cost with S/O Unit Co	
Summarize Multiple Items by Line	
Include Expired Sales Orders	
Comments to Generate Preset the condition	ons vou
Include S/O Comment Lines None 🗸 Include Sales Orde want to use for the	-
Format P/0 Header Comment With None Purchase Orders	directly
from Sales Orders	-
Select Field Operand Value information will eff	iciently flow
Sales Order Number	aving to
Sales Order Number	ase Order.
<pre>clustomer Date </pre>	
Clear Default Settings Proceed Cancel	

## **NEW FEATURES AND FUNCTIONALITY IN SALES ORDER**

The Sales Order module is enhanced in 4.5 with features and functionality in six main areas. Pricing is available to be set by product line, by customer, and for total item quantities. At Sales Order entry, distribution can be set by lot and serial number. Commission splits can be established by customer, and by using a rate table to match salesperson, customer and item. Additional functionality is also added for Sales Order integration with Job Cost.

### PRICE LEVEL BY CUSTOMER AND PRODUCT LINE

This 4.5 enhancement allows a company to set default price levels for each of their customers by product line. This allows them to make it easier to incent or reward their customers with special discount pricing at the product line level, providing greater buying power for customers who purchase a large quantity of many items across a product portfolio, and not just for a large quantity of a specific product. Because discounts can be pre-set for each customer by price code or by ship-to code, order entry staff will not be burdened with having to remember, or refer to additional documentation, to determine the correct pricing discounts for customers. Especially helpful for companies with a large inventory and wide variety of items, combined with hundreds of customers, this flexibility will reward those customers and enable the company to more effectively challenge competitive pricing pressures.

Z Sales Order Options	
1. Main <u>2</u> . Entry <u>3</u> . Line Entry <u>4</u> . For	rms <u>5</u> . Printing <u>6</u> . Quick Print <u>7</u> . History
Use Alternate Warehouse for Out-of-Stock Items Use Item Default Warehouse A new feature in 4.5 allows you to enable and establish default price levels for specific customers. An unlimited number of customers and item combinations are possible. Purchase Control Enable Purchase Control of Items Select Items Based On Control Purchases Based On	Default Special Items to Drop Ship       Image: Cost Code During Data Entry         Warranty       Image: Cost Code During Data Entry         Warranty       Image: Cost Code During Data Entry         Warranty       Image: Cost Code During Data Entry         Image: Cost Code During Data Entry       Image: Cost Code During Data Entry         Image: Cost Code During Data Entry       Image: Cost Code During Data Entry         Image: Cost Code During Data Entry       Image: Cost Code During Data Entry         Image: Cost Code During Data Entry       Image: Cost Code During Data Entry         Image: Cost Code During Data Entry       Image: Cost Code During Data Entry         Image: Cost Code During Data Entry       Image: Cost Code During Data Entry         Image: Cost Code During Data Entry       Image: Cost Code During Data Entry         Image: Cost Code During Data Entry       Image: Cost Code During Data Entry         Image: Cost Code During Data Entry       Image: Cost Code Data Entry         Image: Cost Code During Data Entry       Image: Cost Code Data Entry         Image: Cost Code Data Entry       Image: Cost Code Data Entry         Image: Cost Code Data Entry       Image: Cost Code Data Entry         Image: Cost Code Data Entry       Image: Cost Code Data Entry         Image: Cost Code Data Entry       Image: Cost Code Data Entry         Image: Cost Code Data
	Accept Cancel 🚑 🕢

### **PRICING FLEXIBILITY FOR TOTAL ITEM QUANTITIES**

Pricing flexibility was enhanced in 4.5 to include the ability to establish unit pricing based on the grouping of items and how item totals are calculated. Totals and associated pricing are able to be specified by the total of products in a product line, or the total for specific groups of products in a product category, or by the total sum quantity on the order. This flexibility is especially useful for manufacturers and distributors of products who offer many different colors and sizes of the same items.

For example, a company with multiple retail store outlets wants to run a special on widgets and widget accessories. They stock the widgets in four different sizes and 10 colors. Accessories fall into six different product groups and number in the hundreds. In 4.5, they will be able to discount the entire widget Product Line by 10%, select two of the accessory Item Categories for a 20% discount, and choose to discount the Total Order by an additional 5% if the total items ordered reach three or more.

R Sales Order Options (ABC) 8/22/2011	
<u>1</u> . Main <u>2</u> . Entry <u>3</u> . Line Entry <u>4</u> . Forms	5. Printing <u>6</u> . Quick Print <u>7</u> . History <u>8</u> . Job Cost
Use Alternate Warehouse for Out-of-Stock Items	Allow Discount Rate by Detail Line
	Default Special Items to Drop Ship
Check for Available Quantity	
	Warranty
	Warranty Calculation Based On Ship Date
Display Unit Cost	Recalc Expiration if Ship/Invoice Date Changed
Display Profit Margin Percent   Profit Margin Percent to Display Warning   10	Price Level by Customer
Profit Margin Percent to Display Warning 10	Enable Default Price Level by Customer
Purchase Control	Base New Price Level Records On Price Code 👻
Enable Purchase Control of Items	Lot/Serial Distribution in Sales Order Entry
Select Items Based On Customer	Enable Lot/Serial Distribution
Control Purchases Based On Items Not Allowed 👻	Require Lines to be Fully Distributed
Item Pricing by Total Quantity	
Enable Based On None	An additional set of features are
Unit of Measure for All Lines Item Category - COLOR	available in 4.5 to enable more
Apply Item Pricing / Item Category - SIZE Item Category - STYLE	flexible pricing: by Total
Item Category - CATALOGUE REF#	Quantity, by Item Category, and
None Product Line	for quantity by Product Line.
	Accept Cancel

### ENHANCED SALES ORDER INTEGRATION WITH JOB COST

Enhancements in the interaction between Sales Order and Job Cost will provide customers more flexibility in how they process and track work-in-progress. Additional Sales Order options will efficiently post invoice costs to Job Estimates, post drop ship costs using Job Cost, and automatically mark the job as complete when the invoice is generated. Information will automatically flow through the system to relieve inventory. Sales Kits can be updated using various methods, depending on how the customer wants to display a kit and its components, such as on the Job Transaction Detail Report. New fields in Customer Maintenance allow customers to establish Default Cost Codes and Defaults Cost Types. For easier reference, a new field displays the job number and the description of the job on the Accounts Receivable Invoice History Inquiry screen. These new options will allow customers to more efficiently enter multiple invoices for the same job, shipping work-in-progress multiple times against the same invoice.

Rales Order Options (EEC) 8/22/2011	
<u>1</u> . Main <u>2</u> . Entry <u>3</u> . Line Entry <u>4</u> . Forms	5. Printing 6. Quick Print 7. History 8. Job Cost
Post Invoice Costs to Job Cost       Image: Cost of the cost o	Sales Order and Invoice Entry Require Job Number Allow Jobs to be Created Automatically Validate Customer for Job Sales Order and Invoice Line Entry Require Cost Code Valid Cost Types (LMOBE) Use Sales Order Accounts for COGS Use Sales Order Accounts for Sales Revenue
	Accept Cancel 🖶 🕢

				opy From. Ren	umber More	
	Taylor Dunn Inc.					
1. Main	2. Additional 3. Statistics	4. Summary	5. History 6	Invoices ] 7. Tran	isactions <u>8</u> . S/D	s ]
			Printing			
Comment			Sort			
Open Item Co	ustomer 🗹		Customer Type			Customer
Temporary C	ustomer		Statement Cycle	м		laintenance, use
			Print Dun Messag	e 🗹		ew fields to
Data Entry-			Batch Fax			stablish Default
Price Level			Primary Credit Card	Information		ost Code and
Dflt Pymt Typ	CHECK • CH	IECK.	CC Number			efault Cost Type
Discount Rat			CC Pymt Type			
Fin Charge R	late 1.500%		[ me			
Item Code		0	Expiration Date		Credit Cards	
	- 1 400 010 COS				Congran courds	
	Construction of the second	iderground Work -				
Default Cost	Type Labor					
<b>A</b>	J.			. I c	Low (0)	
1			8	ccept <u>C</u> ancel	Delete	
	History Inquiry (EEC) 5/27	10011			_ 0	
voice No. 00		Source S/		5172010	rrent Ta <u>x</u> Detai	
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### DISTRIBUTE BY LOT AND SERIAL NUMBER

New functionally in Sales Order allows a company to select specific lot and serial numbers in order entry when creating a Sales Order. In addition to using lot and serial numbers to be tracked for potential recall of their products, this enhancement allows companies to reserve limited-quantity lots or serial numbers for their best customers, as well as to match the product previously shipped to a customer. If, for example, a granite supplier sells different types, colors and grains to be used in home construction, and allows their customers to choose a specific large piece to be used for a remodeling project, that item can be reserved for that specific customer. The selected lot and/or serial numbers can be printed on the sales orders and picking sheets for more reliable processing and communication.

R Sales Order Options (ABC) 8/22/2011	
<u>1</u> . Main <u>2</u> . Entry <u>3</u> . Line Entry <u>4</u> . Forms	<u>5</u> . Printing <u>6</u> . Quick Print <u>7</u> . History <u>8</u> . 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
Display Unit CostImage: Cost and the costDisplay Profit Margin PercentImage: Cost and the cost a	Warranty Calculation Based On Ship Date   Recalc Expiration if Ship/Invoice Date Changed  Price Level by Customer Enable Default Price Level by Customer
Purchase Control       Enable Purchase Control of Items       Select Items Based On       Control Purchases Based On   Items Not Allowed	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
Apply Item Pricing / Item Category - COLOR Item Category - SIZE Item Category - STYLE Item Category - CATALOC None Product Line Sales Order En enhancement a reserve specific numbers for pa These new feat also allow for m	Lot and Serial ution option during

### MAINTAIN SPLIT COMMISSIONS BY CUSTOMER

This 4.5 enhancement allows businesses to establish and maintain default Split Commissions between multiple salespeople by customer. So if you have an inside and outside sales representative, you will be able to set commissions so that each salesperson will receive the established share of the commission for that sale. After the default split commissions has been set up for a customer, this commission split will default automatically, rather than having to enter this

information each time a Sales Order or single-step invoice is created for that customer. The new default split commission customer settings provides the same functionality that exists today, for a primary salesperson plus up to four additional salespeople.

Customer Sp	it Com	nission Mainte	nance	? 💌
Customer No.	01-ABF			
Name	Americ	an Business Fut		
Primary Salesp	erson	01-0100	Jim Kentley	
Percent of Con	mission	75.000%		
Additional Sale	spersons			
Salesperson	_			Percent of Commission
01-0300	Susar	n Maye		25.000%
01-0200 🍳	🖕 Shelly	Westland		25.000%
0				.000%
				.000%
				<u>OK</u> <u>C</u> ancel

### **C**OMMISSION RATE TABLE BY SALESPERSON, CUSTOMER, ITEM

This Sales Order enhancement will allow the user to setup salesperson commission rates by combinations of salesperson, customer, item and effective date using a new maintenance program. For companies with different pricing tiers for specific customers, a large number of items, and with multi-tier commissions, these new commission rate tables will provide an established and automatic method for ensuring their salespeople are paid correctly. Commission rates in the new maintenance program will be used for calculating line item commissions for inventory items on the sales order invoice, and will override any commission rates setup for items in Item Maintenance, or the commission rate entered for the invoice.

🚮 Line Item Com	mission Maintenance		? _ 🗆 🗙
Salesperson No. Name	Jim Kentley		
Customer No.	01-ABF	🔍 American Busi	
Item Code	1001-HON-H252	🧠 HOI	N 2 DRAWER LETTER F
Effective Date	05/31/2010 🛅		When Commission Type is Percent, the
-Item Commission-			commission rate will display.
Commission Meth	od Percent of Gross Pro	ofit	5
Commission Rate	10.000%		
Base Commission	100.00		
Commission Type	Percent 💌		
Commission Rate	20.000%		
		Accept Cancel	
👫 Line Item Comm	ission Maintenance		
	iission Maintenance 01-0100 🔍 🇞 🕅 🍕	• •	?_□×
Salesperson No.			
Salesperson No. ( Name	01-0100 🔍 🇞 📢 🔌		
Salesperson No. ( Name s Customer No. (	01-0100 🔍 🇞 🚺 🔌 lim Kentley	American Business	
Salesperson No. ( Name J Customer No. ( Item Code 1	01-0100 🔍 🇞 📢 🔌 lim Kentley 01-ABF	American Business	Futures RAWER LETTER F
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Salesperson No. ( Name Customer No. ( Item Code Effective Date	01-0100 🔍 🇞 🕪 4 lim Kentley 01-ABF 1001-HON-H252 05/31/2010 🛅	American Business	Futures RAWER LETTER F When Commission Type is Amount, the
Salesperson No. ( Name S Customer No. ( Item Code Effective Date ( Item Commission	01-0100 🔍 🇞 🕪 4 lim Kentley 01-ABF 1001-HON-H252 05/31/2010 🛅	American Business	Futures RAWER LETTER F When Commission Type is Amount, the
Salesperson No. ( Name . Customer No. ( Item Code . Effective Date ( Item Commission .	01-0100 <b>Q &gt; I 4</b> lim Kentley 01-ABF 1001-HON-H252 05/31/2010 <b>1</b> d Percent of Gross Profit	American Business	Futures RAWER LETTER F When Commission Type is Amount, the
Salesperson No. ( Name Sustomer No. ( Item Code Street Commission Commission Method Commission Rate	01-0100 🔍 🇞 📢 🍕 lim Kentley 01-ABF 1001-HON-H252 05/31/2010 🛅 d Percent of Gross Profit 10.000%	American Business	Futures RAWER LETTER F When Commission Type is Amount, the
Salesperson No. ( Name Sustomer No. ( Item Code Street Commission Commission Method Commission Rate	01-0100 🔍 🇞 📢 🍕 lim Kentley 01-ABF 1001-HON-H252 05/31/2010 🛅 d Percent of Gross Profit 10.000%	American Business	Futures RAWER LETTER F When Commission Type is Amount, the
Salesperson No. ( Name S Customer No. ( Item Code S Effective Date ( Item Commission Method Commission Method Commission Rate Base Commission	D1-0100 Iim Kentley D1-ABF 1001-HON-H252 D5/31/2010 d Percent of Gross Profit 100.00% 100.00	American Business	Futures RAWER LETTER F When Commission Type is Amount, the

### USAGE AND COST OF OWNERSHIP RESEARCH

New features and functionality in 4.5 will assist us in driving the direction of the product to reduce the customers' total cost of ownership (TCO). The Product Enhancement Program gathers important system and use information such as the platform and operating system information, usage of the system and most frequently used tasks. This information provides a framework for future usability and cost of ownership improvements. The information gathered will not include any confidential or company specific data. No user action is required and periodic uploads of data to Sage are seamless to the user. During installation the wizard alerts the administrator to the presence of the tool and affords an opt-out opportunity.

## FEATURES AND FUNCTIONALITY ADDED VIA PRODUCT UPDATES SINCE 4.4

Included in the 4.5 release are more than 35 enhancements that have been added to the product since the introduction of 4.4. The additional features and functionality span across Accounts Receivable, Accounts Payable, Bank Reconciliation, Credit Card Security, Inventory Management, Job Cost, Library Master, Paperless Office, Payroll, Pre-Scan Utility, Purchase Order, and Sales Order. For more details, please see the What's New in Product Update 1, 2, 3, and 5 documents posted on the Partner Marketing Resource Center (PMRC). Product Update 4 was limited to year end updates and did not contain new features and functionality.

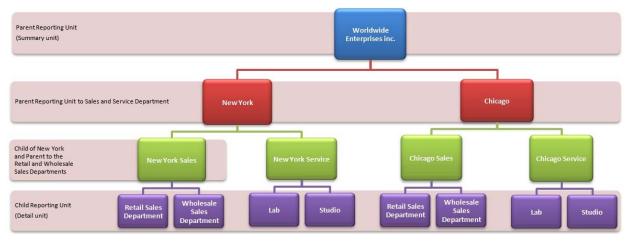
## SAGE ERP MAS INTELLIGENCE FOR 4.5

New features and functionalities included in Sage ERP MAS Intelligence for 4.5 include the ability to attach Reporting Trees to Report Designer layouts. The new trees will expand the options that companies can use for different reporting structures. A new 90 day trial period is included for Report Designer so customers can experience the benefits of expanded importing and exporting capabilities, and creating scheduler commands. Also included in 4.5 is more flexibility on how reports or any Excel workbooks are distributed, to include distribution via email, publishing to a public server, and FTP publishing.

### **REPORTING TREES**

The new Sage ERP MAS Intelligence 4.5 Reporting Tree structure allows the customer to generate reports that automatically follow their internal company structure, with the flexibility to accommodate anything from a simple to a very sophisticated hierarchy. Using Reporting Units, reports are able to be set up to represent the company's hierarchies, and then easily generated at a Detailed or Summary level. These Reporting Units can be departments by GL accounts, or higher level groups in the company, established by building as many parent and child relationships as is necessary. Sage ERP MAS Intelligence will provide the ability to set up hundreds of Tree Units for those companies who have very complex corporate hierarchies, as well as meeting the needs of flatter and more simple organizations who will require much fewer tree units. Once established, as business needs change, the Reporting Trees will be able to be easily added to, changed, renamed, and copied, without requiring a change to financial data.

The example below shows Worldwide Enterprises (the Summary Reporting Unit), a company with locations in New York and Chicago, Sales and Services in each location, and their departments (detailed units).



The Manage Reporting Trees screen will allow users to easily build, modify, add, rename and duplicate existing trees.

File	Hom	e Inser	t P	age Layout	Form	iulas	Data	Review	Vi	ew	Add-Ins	BI To	ols	Team
Launch	Refresh Data	Change W Period Ar	nalyzer	Happing F Tool	Trees	Quick Generat			Send Now	Sele Instruc	ect N	Manage tructions tion		ibution tings
	<b>lanage</b> T <mark>ast Divis</mark> Retail Divi West Divis	ision sion e Division		×es						Add Edit Delete Renam Duplicat				

porting Tree Units							
Worldwide ABC		Company Filter	Name	Account	Filter Rule	Distribution	
<ul> <li>→ ▼ Florida</li> <li>→ ▼ Jacksonville</li> <li>→ ▼ East Dept</li> <li>→ ▼ West Dept</li> <li>→ ▼ Miami</li> </ul>			▼ Florida				
			<ul> <li>Jacksonville</li> </ul>				
		@A.NY	▼ East Dept	???-00-01	3		
East Department		@ANY	✓ West Dept	???-00-02			
₩est Department Texas 			➡ Miami				
	•	@ANY	<ul> <li>East Department</li> </ul>	???-01-01			
- 🔻 South Department		@A.NY	▼ West Department	??? -01 -02			
East Department			▼ Texas				
Houstin			▼ Austin				
		@A.NY	<ul> <li>South Department</li> </ul>	???-02-03			
		CANV	East Danastment	222 02 01			
porting Tree Unit Preview Data Company		Account	lumber		Account Description		
ABC Distribution and Service Corp.		400-01-01			Distribution sales - Ea	st	
ABC Distribution and Service Corp.		450-01-01			Purchases - East		
ABC Distribution and Service Corp.		600-01-01			Driver payroll - East		
ABC Distribution and Service Corp.		605-01-01			Clerical salaries - East		
ABC Distribution and Service Corp.		607-01-01			Sick pay - East		
ABC Distribution and Service Corp.		608-01-01			Holiday pay - East		
ABC Distribution and Service Corp.		609-01-01			Vacation pay - East		
ABC Distribution and Service Corp.		610-01-01			Payroll taxes - East		
ABC Distribution and Service Corp.		620-01-01			Depreciation expense	- East	
ABC Distribution and Service Corp.		625-01-01			Equipment maintenan	ce - East	

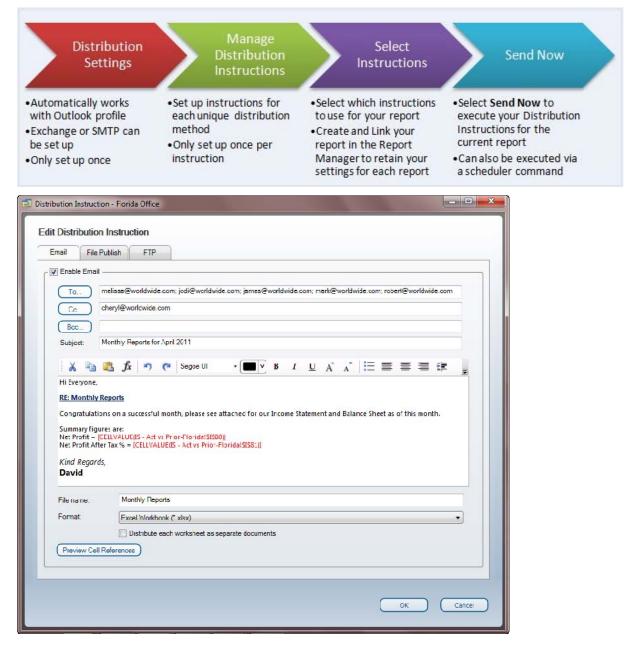
The Worldwide ABC example below shows the parent child relationship of the company's US locations.

Y Select Reporting Tree Units	
Worldwide ABC     Forida     Forida     Fast Department     West Department     Fast Department     West Department     Fast Department     F	
ОК	Cancel

### **REPORT DISTRIBUTION ENHANCEMENTS**

Sage ERP MAS Intelligence 4.5 includes increased flexibility to distribute Intelligence Reports and Excel workbooks, including sending reports to a file, publishing to an FTP site, or send via email in a variety of standard formats. Customers can choose the reports they want to distribute, how they want to send them, and the recipients. Report Distribution in 4.5 improves workflow and speeds up business processes by automating report delivery and distribution.

4.5 Intelligence features includes the ability to establish unique settings for each email format, choosing from PDF, HTML and XLSX, and to create custom criteria for report distribution. Customers can send a report to different destinations, establish a regular distribution to managers and executives, or use an existing outlook profile and address book. Flexible options include the ability to add pertinent information to the report when it's distributed via the chosen electronic method, including the powerful ability to include a specific cell into the body of the email.



Using the File Publish tab, a customer will be able to easily distribute reports to locations within their company's network in PDF, HTML and XLSX.

Email File	Publish FTP	
Folder.	C./Users/Michael/Desktop	Browse
File name:	Monthly Report	
Format:	PDF (*.pdf)	•

Using the FTP tab, a customer will be able to easily distribute reports to FTP locations in PDF, HTML and XLSX.

	blish FTP
/ Enable FTP —	
Server Information	n
Remote server:	e.g. ftp.servername.com/ftpiolder
Port number:	0
Logon Information	
User name:	
Password:	
File Details	
File name:	
Format:	Excel Workbook (*.xlsx)
	Distribute each worksheet as separate documents

4.5 Intelligence provides the ability to establish convenient, fully unattended report distribution. Once the required Distribution Instructions are setup and linked to worksheets within a report, users will be able to flag the linked distribution instructions to be automatically sent whenever the report is run by a Scheduler Command within Report Manager.

File Home Insert Page Layout	Formulas Data R	eview View	Add-Ins	BITools	Team
Launch Refresh Change What If Mapping F Data Period Analyzer Tool Report Designe	Trees Generate * Edit	Send Now I	Select A Manastructions Instructions	ructions Se	ibution ttings
V3 • ( <i>f</i> *			Select Distributi		15
G H ABC Distribution and Servic	e Corp.	К	Select which D Instruction(s) n specify which y current workb each Distributi	nust be used worksheets w ook must be s	ithin the ent via
3 INCOME STATEMENT 4 for Period Ending Period 12	, 2010		BI Generato Press F1 for	r add-in help,	
Select Distribution Instructions					×
Please select the distribution instruct worksheets must be sent via each d ensure that this workbook is saved Available instructions	istribution instruction. In or	der for these the 'Create	selections to t	be saved, tion.	
Jacksonville Branch Miami - East Department Miami - West Department Miami Division Executive Commitee	Florida Office		Note IS – Actual Bu IS – Actual vs IS – Actual vs	Budget	
Send all selected distribution instruction automatically scheduled using a schedu		(	ок	Cance	-

### **CONVERSION UTILITY ASSISTANT**

With Microsoft's permission, Sage is developing a utility that will decrypt proprietary FRx files. The Conversion Utility Assistant will allow consultants or users familiar with FRx to recreate similar reports in Intelligence more quickly, and reduce the effort in migrating FRx reports over to Intelligence.

## **BUSINESS PARTNER CERTIFICATION FOR 4.5**

The certification for 4.5 includes classes to provide all necessary information so that Sage Business Partners can provide customers with flexibility in their choice of Sage ERP MAS 90, 200 or 200 SQL. Certification for 4.5 has also been simplified — we will no longer require separate certification for Sage ERP MAS 90 and 200, Sage ERP MAS 200 SQL, and Extended Enterprise Suite. Version 4.5 certification includes all the new features and functionality in 4.5, installing SageCRM, configuring the SageCRM and MAS integration, understanding the integration points, and effectively using the features. The sessions also include installing and implementing Sage ERP MAS 200 SQL 4.5, and upgrading 3.x SQL customers to 4.5.

For more details on Certification and re-certification, please refer to the <u>Sage Partner University</u> product certifications section, or the Sage ERP MAS 90 and 200 4.5 Business Partner Frequently Asked Questions document.

# FREE SAGECRM 7.1 SERVER LICENSE AND ONE SAGECRM USER LICENSE

4.5 is compatible with SageCRM 7.1, and Sage ERP MAS 90, 200, and 200 SQL on-plan customers are eligible to receive a free SageCRM Server license and free single-user license, including Small Business Edition when upgrading to 4.5. Current Sage ERP MAS 90 and 200 Extended Enterprise Suite customers are also eligible to receive a free SageCRM user license which will be added to their existing user count when upgrading to 4.5. SageCRM v7.1 delivers the tools companies need to communicate more effectively, collaborate better internally and compete in today's marketplace. SQL Express will be allowed to be used to try the free SageCRM user license, but is not compatible or supported with SageCRM when customers are running live data. Both named and concurrent SageCRM licenses will be available in 4.5. For more information on pricing and licensing please refer to the pricing section of this document, or the Sage ERP MAS 90, 200, and 200 SQL Price List.

The new eMarketing module for SageCRM delivers all the power of e-marketing software directly through SageCRM for end-to-end e-marketing campaign management. It enables users to execute high-quality, targeted email marketing and create drip marketing campaigns quickly and easily, automatically delivering email communications to the right people at the right time for maximum impact. Open, click and bounce rates will be automatically tracked, enabling marketers to calculate accurate ROI and deliver hot leads to the sales team. Users will benefit from a simple 3-step wizard to create new e-marketing campaigns with ease and a choice of over 90 templates to get started immediately. Follow-up call lists can then be based on e-marketing responses, closing the loop between email and telesales.

New E-marketing Campaign	Step 3 of 3			
Wave Activity				ave
Wave Activity Name: Viewsletter - Dec 2010 Details:		Start:	Type: E-marketing E-mail End:	C Prev
Email nevaletter to prospects i them to subscribe online.	witing	14/12/2010 Activity Budget: € 500.00	13/12/2020 (11) Actual Cost: €	Resp Source Medge Hedge
E-marketing E-mail				
Subject: Click to Win				
Send As:	tana 🔍 🗸 👻			
Send As: Group (Recipients): Template: 777, Jenoite 727, Jenoite	encup Get Address er - 12 December - Colum Text er 01 2 December - Colum Text er 02	E-mail Frank Company - Business E-mail: Comp. Einsläddres Frank Templat	u/Edit	
Send As Group (Recipients): Template 222, Jensiel 222, Jensiel 222, Jensiel 222, Jensiel	Total	C. Ves Templat	u/Edit	

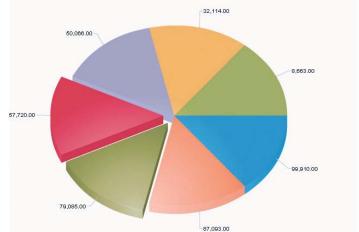
SageCRM v7.1 total campaign management functionality comes with full campaign workflow so organizations can map campaigns to their business processes for consistent execution. It enables marketing users to execute multi-channel marketing campaigns and then clone those campaigns that have worked the best for easy re-use. This drives marketing-wide collaboration by enabling marketing users to share best practice within teams and re-create campaigns quickly and easily.

SageCRM v7.1 delivers a seamless calendar management experience thanks to real-time synchronization between SageCRM and Microsoft Exchange, enabling users to access up-to-date appointments, tasks and contacts within SageCRM on their smartphone, laptop or desktop PC for maximum ease-of use and productivity.

SageCRM integration with Microsoft Exchange delivers ease-of-administration as well as a seamless integration experience. Exchange Server integration can be created and synchronization occurs rapidly. System administrators benefit from a single point of entry from where they can manage existing Exchange users and add new users. 7.1 is compatible with version 2007 and 2010 of Exchange.

Users are able to create graphical report charts quickly and easily with SageCRM v7.1. Providing ata-glance business insight, report charts and graphics are now more visually impactful, making it easy for management and users to see comparisons, patterns, and trends in their data.





Campaign Name	Campaign Name	Campaign Budget (€)	Actual Cost (€)	Revenue Generated
TimeNExpense Marketing Campaign	TimeNExpense Marketing Campaign	10,745.06	10,745.06	8,663.00
	TimeNExpense Marketing Campaign	10,745.06	10,745.06	32,114.00
	TimeNExpense Marketing Campaign	10,745.06	10,745.06	50,066.00
	TimeNExpense Marketing Campaign	10,745.06	10,745.06	57,720.00
	TimeNExpense Marketing Campaign	10,745.06	10,745.06	79,085.00
	TimeNExpense Marketing Campaign	10,745.06	10,745.06	87,093.00
	TimeNExpense Marketing Campaign	10,745.06	10,745.06	99,910.00

Current Sage ERP MAS 90 and 200 Extended Enterprise Suite customers will need to upgrade to SageCRM 7.0 before installing 7.1. SageCRM 7.0 is available for download from the Extended Enterprise Suite section on SSO, for those customers when upgrading to 4.5.

## AVAILABLE MODULES FOR SAGE ERP MAS 200 SQL 4.5

When Sage ERP MAS 200 SQL 4.45 was introduced in November 2010, it was available for new license sales only. As previously stated, with the 4.5 release current customers are able to choose to migrate to SQL. However, because not all Sage ERP MAS 90 and 200 modules are available for SQL, customers should work with their Business Partners to carefully evaluate their business needs before migrating to SQL and inactivating those modules. A process for migration will be provided to assist Business Partners in upgrading Sage ERP MAS 200 for SQL 3.7x customers to Sage ERP MAS 200 SQL 4.5. New for Sage ERP MAS 200 SQL 4.5 is the ability to add SageCRM, Sage ERP MAS Intelligence, and FAS Asset Accounting.

Sage SQL Runtime Edition licenses, Microsoft SQL Server 2008 R2 Standard Edition licenses, continue to be available from Sage in two licensing models – per user or per processor. Licenses are limited for use with Sage ERP and integrated third party or development partner solutions. Per user licensing is sold as client server access licenses (CAL) with a minimum purchase of 5 users. Per processor licenses may be more cost effective for customers with 20 or more users.

Modules and Sage solutions that will be available for Sage ERP MAS 200 SQL 4.5 are:

- Accounts Payable
- Accounts Receivable
- Bank Reconciliation
- Bar Code
- Bill of Materials
- Business Insights Dashboard
- Business Insights Explorer
- CompuPay Service
- Credit Card Processing
- Crystal Reports Designer
- Custom Office
- eBusiness Web Services
- Federal and State eFiling and Reporting
- General Ledger
- Inventory Management
- KnowledgeSync
- Paperless Office
- Purchase Order
- Return Merchandise Authorization
- SageCRM
- Sage ERP MAS Intelligence
- Sage FAS Asset Accounting
- Sage HRMS Payroll & HR
- Sales Order
- Sales Tax powered by AvaTax
- Visual Integrator

## PRICING FOR 4.5

New license sales of Sage ERP MAS 90, 200 or 200 SQL 4.5 includes the option of either traditional a-la-carte pricing or the user-based pricing model. User-based pricing is very similar to the Extended Enterprise Suite model, requires a minimum purchase of 5-users, and includes similar Sage ERP MAS modules. (See module list below.) One difference between the Extended Enterprise Suite pricing model and the new 4.5 user-based pricing is that Fixed Assets and SageCRM user licenses will be sold separately. The traditional a-la-carte pricing has not changed from what is currently available today. Once a pricing model is selected, customers will remain on that pricing model - no migrations will be allowed to a different pricing model. Existing Sage ERP MAS 90 and 200 customers (non-Extended Enterprise Suite) who are current on a Business Care Plan will remain on traditional a-la-carte pricing. As of December 1, 2011, the Sage ERP MAS 200 SQL 4.5 product will be priced at a premium of \$350 per user over the Sage ERP MAS 200 SQL 4.45 pricing, and M&S will be charged at the new list price. Any current 4.45 customers will be merged into the 4.5 traditional a-la-carte pricing model without incurring any fees. No product price changes have been made to the Sage ERP MAS 90 Small Business Edition and the Sage SQL Server Runtime edition of Microsoft SQL Server licenses.

Current Sage ERP MAS 90 and 200 Extended Enterprise Suite customers will remain as userbased pricing. They will be merged into the standard product when upgrading to 4.5 without incurring fees, with the same modules and number of users. As described in the SageCRM section earlier in this document, because all customers will receive one free SageCRM user

with 4.5, current Extended Enterprise Suite customers are also eligible to receive an incremental SageCRM user license when they upgrade to 4.5, which will be added to their account at no additional cost.

SageCRM offers two types of user licenses – Named and Concurrent. Both Named and Concurrent SageCRM user licenses will be available to be added to new and current Sage ERP MAS 90, 200 and 200 SQL systems. All customers on a current Business Care Plan upgrading to 4.5 are eligible to receive one free SageCRM server license, and one free SageCRM user license. On each system, SageCRM user licenses must be of the same type, so when adding licenses it is not possible to mix Named and Concurrent.

Platform migration pricing will be greatly simplified with the 4.5 release. Customers who want to move up from their current platform, such as from Sage ERP MAS 90 to Sage ERP MAS 200, or from Sage ERP MAS 200 to Sage ERP MAS 200 SQL will simply pay the price difference between their current platform and their new platform, with their Sage Business Care calculated based on their new platform.

User-Based Pricing will include the following modules:

- Accounts Payable
- o Accounts Receivable
- Bank Reconciliation
- Bill of Materials
- o Business Insights Dashboard, BI Explorer, BI Reporter
- Credit Card Processing by Sage Payment Solutions
- o Crystal Reports Designer
- Custom Office
- Federal and State eFiling and Reporting
- o General Ledger
- Inventory Management
- o Library Master
- Paperless Office
- o Purchase Order
- Return Merchandise Authorization
- o Sage ERP MAS Intelligence single user Report Manager
- Sales Order
- Visual Integrator

For more detailed information on 4.5 pricing see the Sage ERP MAS 90, 200, and 200 SQL Price List or refer to the Sage ERP MAS 90 and 200 4.5 Business Partner Frequently Asked Questions document.

## SAGE ERP MAS 90 SMALL BUSINESS EDITION BUSINESS CARE PLAN CHANGES

As a reminder, any new Sage ERP MAS 90 Small Business Edition sale will require a Silver plan subscription the first year. Prior to the 4.5 release, changes to the overall Business Care Plans changed the initial requirement from a six month Silver Plan to a one year Silver plan. The six-month plan option is no longer available.

## **CONNECTED SERVICES**

The following connected services offer Sage ERP MAS 90, 200, and 200 SQL 4.5 customers accessibility to current and accurate calculations, and visibility into critical data from almost anywhere and anytime.

### **BUSINESS CREDIT MONITORING SERVICES**

Experian provides business credit reports and monitoring services to Sage ERP MAS 90 or 200 customers. They can purchase easy-to-read Experian business credit reports, and sign up for Business Credit Monitoring and Alerts, which provides updates about the credit status of their key business relationships. Access is through their Web browser, so they don't have to worry about hardware or software requirements. Critical credit data is securely delivered through their email address. This service allows the monitoring of issues that indicate when a business may be headed for trouble, such as:

- Indications of a key supplier's plans to go out of business
- Alerts when a key account gets behind on payments
- Opportunity to review their own credit report for errors that can negatively affect their cash flow position

Additional information can be found at Experian Smart Business Reports for Sage ERP MAS.

### CREDIT CARD PROCESSING POWERED BY SAGE PAYMENT SOLUTIONS

Credit Card Processing powered by Sage Payment Solutions will continue to be compatible with Sage ERP MAS 90 and 200 4.5 to provide a complete credit card processing solution. For new sales, this module will be distributed on the Sage ERP MAS 90 and 200 product DVDs; no special program download will be required. For upgrading customers, the credit card processing module will be included with the Sage ERP MAS 90 and 200 product download.

A complete payment processing solution, the Credit Card Processing powered by Sage Payment Solutions module gives Sage ERP MAS 90 and 200 customers the benefits of comprehensive business management coupled with the benefits of credit card processing—all from Sage. What's more, having all payment processing in-house with Sage Payment Solutions enables Sage to pass savings onto customers, resulting in a lower total cost of ownership.

Credit Card Processing powered by Sage Payment Solutions provides a complete credit card processing solution for mail order, telephone order, and Internet businesses, including corporate and government purchasing cards. Data can be entered through the Sales Order and Accounts Receivable modules and .store and .order e-Business Manager applets. Transactional information, such as authorization codes, is captured and stored for historical and reconciliation purposes.

### FEDERAL AND STATE EFILING AND REPORTING

Sage ERP MAS 90 and 200 Federal and State eFiling and Reporting will continue to be included in 4.5 to streamline tax reporting. With Sage ERP MAS 90 and 200 Federal and State eFiling and Reporting, customers can print and mail virtually all federal and state forms. Customers are able to automatically eFile W–2s and 1099s to the appropriate state and federal agencies, print and mail the forms to their employees, or they can choose to use the fee-based eFiling service. *W-2s and other Payroll forms are not available for Sage ERP MAS 200 SQL.* 

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### **PAYROLL SERVICES**

CompuPay will continue to provide payroll services for Sage ERP MAS 90, 200, and 200 SQL 4.5 customers, ranging from small start-up businesses to national corporations with several thousand employees.

### SALES TAX FOR SAGE, POWERED BY AVATAX

Sales Tax for Sage, Powered by AvaTax, makes paying sales tax simple for any business. This hosted, Web-based solution automatically performs address validation, sales tax jurisdiction research, and rate calculation—all on the fly within your accounting application, with no change to your existing workflow.

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## INTEGRATED SAGE SOLUTIONS

Sage will continue to provide solutions across the entire enterprise for Sage ERP MAS 90 and 200 customers, including:

### SAGE HRMS

4.5 will remain compliant with the most recent release of Sage HR, version 10.1, with no new integration points. For additional details, please contact your authorized Sage HRMS Business Partner.

### SAGE ACTIVE PLANNER

Sage Active Planner is now available for Sage ERP MAS 90 and 200 4.5 and 4.4, and will provide customers with the ability to transform a budgeting nightmare into a collaborative budgeting and planning process. Empowering the financial staff with more control, shorter planning cycles and time to focus on continuous performance improvement will help the company realize its strategic goals.

### SAGE MAS FIXED ASSETS

Sage ERP MAS 90 and 200 4.5 release will use Sage ERP MAS Fixed Assets 2011.1. The Fixed Asset module is not compatible with Sage ERP MAS 200 SQL 4.5 - to address Fixed Asset Accounting needs, FAS 500 is available. Sage FAS 500 includes a link to Sage ERP MAS 200 General Ledger.

### SAGE SALESLOGIX

Sage ERP MAS 90 and 200 4.5 will use DynaLink 7.1 for integration to Sage SalesLogix versions 7.5.3. *This option is not available for Sage ERP MAS 200 SQL 4.5.* 

## **THIRD PARTY CONSIDERATIONS**

### **BUSINESS ALERTS**

Business Alerts 5.1 will be compatible with 4.5, to utilize email for notification to individuals or a group of individuals whenever something significant happens in your Sage ERP MAS 90 and 200 system. Business Alerts can be used to automatically communicate shipment information to customers, keep staff informed of specific events, and track important business functions.

### **CRYSTAL REPORTS XI**

Crystal Reports provides access to your data and allows you to format it and deliver it as meaningful information inside and outside your organization. Crystal Reports XI will be used with 4.5.

## **RETIREMENTS AND SUSPENSIONS**

To help you plan customer upgrades, we want to give you advance notice that with the 4.5 release, several retirements are planned.

### ACT! LINK

The integration from ACT! to Sage ERP MAS 90 and 200 is retired as of the 4.5 release. It was previous suspended with our 4.4 release. At this time, Sage will continue to focus future development efforts on SageCRM for integrated Sage ERP MAS 90 and 200 and CRM functionality.

### EXTENDED ENTERPRISE SUITE TERMINOLOGY WILL NO LONGER BE USED

With the release of 4.5 and the merge of the standard and Sage ERP MAS 90 and 200 Extended Enterprise Suite products, the term Extended Enterprise Suite will no longer be used to market the benefits of using SageCRM with Sage ERP MAS 90 and 200, for the user-based pricing model, or the simplified installation process. Those benefits will be available for all three versions of Sage ERP MAS 90, 200 and 200 SQL 4.5.

### FRX FINANCIAL REPORTER

Prior to the 4.5 release, Microsoft® announced the retirement of FRx® so Sage started the process of evaluating alternative solutions. Sage ERP MAS Intelligence was identified as the ideal candidate to take customers from simple financial reporting to reporting and analyzing their entire ERP solution. In the fall of 2010, Intelligence launched to Sage ERP MAS customers. On January 31, 2011, Sage officially retired FRx. To help migrate customers over to Intelligence, current FRx users were giving the equivalent Intelligence license(s) and/or module(s). Over the coming year, Sage will work with customers and business partners to make sure customers are using the ideal financial reporting solution for their business. With Microsoft's permission, Sage is developing a utility that will decrypt proprietary FRx files. The conversion utility will allow consultants or users familiar with FRx to recreate similar reports in Intelligence more quickly, and reduce the effort in migrating FRx reports over to Intelligence.

We expect v4.5 to continue to be backwards compatible with existing FRx installations and reporting functionality.

### STARSHIP PARCEL AND STARSHIP FREIGHT

Prior to the 4.5 release, and as of April 1, 2011, our relationship with VTechnologies changed, and StarShip Parcel and StarShip Freight are no longer available from Sage. We are expecting to introduce a new shipping solution this year. Please check this section for updated information in the future.

### PC CHARGE CREDIT CARD PROCESSING

The 4.5 release is the last version that will be compatible with Credit Card Processing powered by PC Charge. We will support the solution until December 31, 2012. Credit Card Processing powered by Sage Payment Solutions will continue to be compatible with Sage ERP MAS 90 and 200 4.5 to provide a complete credit card processing solution.

### **REPORT MASTER**

With the 4.5 release, the Report Master will be fully retired. Report Master was partially retired with the 4.2 release and was no longer able to use source data from any modules updated to the new Business Framework.<sup>™</sup> Currently Report Master is only compatible for existing customers with Non-Framework modules which includes Job Cost, Payroll, and Work Order. We recommend using Sage MAS Intelligence or Crystal Reports for any reports that are needed.

### **EXTENDED SOLUTIONS**

All Extended Solutions titles are now officially retired with the release of 4.5. The main features and functionality of many Extended Solutions were incorporated into the core product in the last few Sage ERP MAS 90 and 200 releases and Product Updates. The last of the select Extended Solutions titles, shown below, are now retired with the 4.5 release.

- PR-1067 Additional Deduction Calculation Methods
- PR-1116 Deduction Recalculation in Payroll Entry
- PR-1015 Deduction Calculation Based on Earnings Type
- PR-1031 Payroll Date Entry Import Utility
- PR-1091 Enhanced Benefit Accrual
- 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
- AR-1068 Customers with National Accounts
- PO-1020 Purchase Orders created from Sales Orders
- SO-1489 Auto Generate Purchase Orders for S/O Entry

Business Partners and customers have a voice in our roadmap and in features and functionality that will be incorporated into future Sage ERP MAS 90 and 200 releases. Please use your voice on the new feedback and request site <u>www.sagemas.com/MAS 90 200 feedback</u>. Sign up, view ideas already submitted, suggest new ideas, collaborate on suggested enhancements, and—most importantly—vote on the ideas that you value. It takes just a few minutes to participate.

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6561 Irvine Center Drive Irvine, CA 92618-2301 800.854.3415 www.SageMAS.com

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