


SAGE – SAGE 100 2017, SAGE 100C, SAGE 100 PAYROLL 2.0, SAGE SUMMIT

Martin & Assoc.
March Madness Lunch & Learn



AGENDA

- Review What's New in Sage 2017
- Discuss the difference between Sage 100c vs. 100
- Sneak at Sage 100 Payroll 2.0
- Benefits of attending Sage Summit 2017



WHAT'S NEW IN SAGE 100 2017 GLOBAL ENHANCEMENTS

- Enhanced Auto-Complete (available in 100c only)
- Full Text Search (available in 100c only)
- Search For Empty Fields In Lookups
- Commodity Codes For Level 3 Credit Card Transactions
- Prior & Next Buttons For Calendar Window
- Resizable Memo Maintenance Window
- Ability To Suppress "Remove Forms" Message
- Cancel Button Added To Report Processing Screens
- New Help Menu Options



WHAT'S NEW IN SAGE 100 2017 ACCOUNTS RECEIVABLE & SALES ORDER ENHANCEMENTS

ACH Cash Receipts

- You can now accept ACH Payments in the following tasks:
 - A/R Invoice Data Entry
 - Cash Receipts Entry
 - Repetitive Invoice Entry
 - Sales Order Entry
 - S/O Invoice Data Entry
- Requires Sage Payment Solutions account that is setup for ACH payments
- New options added to Company Maintenance, Payment Type Maintenance, Cash Receipts Entry, etc.
- Changes were made in Customer Maintenance, A/R Invoice Data Entry, Repetitive Invoice Entry, etc.



WHAT'S NEW IN SAGE 100 2017
BANK RECONCILIATION ENHANCEMENTS

- Ability to keep Bank Reconciliation Report Window Open
 - Keep Window Open After Print
 - Keep Window Open After Preview
- Improved Excel Export for Report
 - Minimum Font Size 8 Points
 - Empty Columns & Rows Minimized




WHAT'S NEW IN SAGE 100 2017
SAGE INTELLIGENCE

- New Sage Intelligence report utility tool
- Ability to quickly generate report layouts and formats
- New “Manage Layouts” option available



SAGE 100 VS. SAGE 100C

- Licensing Differences
 - Sage 100c introduced annual subscription based pricing for the product
 - Sage 100 involved the purchase of a perpetual license. Then yearly maintenance and support as a percentage of the original fee what charged.
 - All new Sage 100 sales will use the Sage 100c annual subscription licensing
- Functionality
 - Sage 100c was given and updated look and feel with a modernized user interface.
 - Sage 100c will be the platform of choice for the majority of future features and functionality moving forward



SAGE 100 VS. SAGE 100C

New Sage 100 Launcher

Feature	100	100c	Feature	100	100c
New Microsoft Office-style ribbon	✓	✓	Collapsible, resizable panes	✓	✓
Modernized menu and sub-menu	✓	✓	Persistent web content area	✓	✓
Quick-click menu tray	✓	✓	Right-click tabs to launch web content in stand-alone browser	✓	✓
Hover over web link to reveal source	✓	✓	Add and Edit existing web content links	X	✓
Change the launcher theme skin	X	✓	Toggle navigation pane and status bar	X	✓
Sort module, menu, and menu item lists	X	✓	Menu displays only tasks the user is authorized to access.	X	✓
Drag and drop desktop icons onto launcher	✓	✓	Custom theme settings (fonts, colors, backgrounds, button options)	X	✓
Application scaling	✓	✓	Business Insights Dashboard	✓	✓

sage



SAGE 100 VS. SAGE 100C

- Sage 100c Road Ahead:
 - All of the features planned for Sage 100 plus:
 - Multi-bin Warehousing (CY 2017)
 - Inactivate Warehouses (CY 2017)
 - Job Cost to framework (CY 2017)
 - Payroll to framework (CY 2017)
 - eInvoicing (CY 2017)
 - AP Automation (CY 2017)
 - Work Order to framework (CY 2018)
 - Timecard to framework (CY 2018)
 - Office 365 Mobile Access (CY 2018)
 - Paperless Office w/Office 365 (CY 2018)
 - Auto Payments Setup (CY 2018)



SAGE 100 PAYROLL 2.0

- Employee Maintenance
- Tax Table Maintenance
- Sage Payroll Agent – new tax calc process
- Other Miscellaneous items
 - Earnings & Deduction Codes/Descriptions
 - Benefits
 - History/Period End Processing



SAGE SUMMIT 2017

- Atlanta, May 10-11 Georgia World Congress Center.
- Key Notes from Sage CEO, Stephen Kelly, and other Sage Executives
- Learn about new trends and innovations effecting the Sage products
- Over 150 ISVs (Independent Software Vendors) to extend your Sage product.
- Many product sessions to choose from



Sage 100 Payroll 2.0

Sage has been working to update Sage 100 Payroll. It is being called Sage 100 Payroll 2.0 and is expected to be released with Sage 100 2018. More information can be found at <http://martinandassoc.com/sage-100-payroll-2-0/>. Below are some screen shots of the new Payroll screens.

S Employee Maintenance (PR2) 3/14/2017

Employee No. 13-0000001
Last Name Driver
First Name Joseph Middle Name Daniel Suffix
1. Main 2. Additional 3. Benefits 4. Taxes 5. Pay Defaults 6. Earnings 7. Deductions 8. Pay History

Alternate Employee Check Name
Labor Code 0000003 Driver
Pay Cycle Weekly
Pay Method Hourly
Exempt From Overtime
Autopay Hours 40.00 Cycle Hrs
Multiple Automatic Earnings Codes Auto Earnings...
Summarize Pay Details on Check Stub

	Pay Rate	Date Changed	Change Comment
1	20.000	1/3/2017	
2	.000		
3	.000		
4	.000		
5	.000		
6	.000		
7	.000		
8	.000		
9	.000		

Accept Cancel Delete

S Employee Maintenance (PR2) 3/14/2017

Employee No. 13-0000001

Last Name Driver First Name Joseph Middle Name Daniel Suffix

1. Main 2. Additional 3. Benefits 4. Taxes 5. Pay Defaults 6. Earnings 7. Deductions 8. Pay History

Default Tax Profile OHIO LOCAL

	Default	Tax Group	Tax Group Description	Tax Exempt	Filing Status	Workers Comp	Pers Exemptions	Dep Exemptions	Tax Calc Override	Override Amt	Override %	W2 Consent	1095C Con
1	<input checked="" type="checkbox"/>	FEDERAL	United States	<input type="checkbox"/>	S				None	.00	.00	<input type="checkbox"/>	<input type="checkbox"/>
2	<input type="checkbox"/>	IN	Indiana	<input type="checkbox"/>					None	.00	.00	<input type="checkbox"/>	<input type="checkbox"/>
3	<input type="checkbox"/>	IN-ALLCO	Allen CO, Indiana	<input type="checkbox"/>					None	.00	.00	<input type="checkbox"/>	<input type="checkbox"/>
4	<input type="checkbox"/>	IN-STJCO	St. Joseph CO, Indiana	<input type="checkbox"/>					None	.00	.00	<input type="checkbox"/>	<input type="checkbox"/>
5	<input type="checkbox"/>	MI	Michigan	<input type="checkbox"/>					None	.00	.00	<input type="checkbox"/>	<input type="checkbox"/>
6	<input checked="" type="checkbox"/>	OH	Ohio	<input type="checkbox"/>					None	.00	.00	<input type="checkbox"/>	<input type="checkbox"/>

Tax Locations

Residence OH OH-HAMCO-WYOSD Wyoming 3122 SD, Ohio

Work OH OH-HAMCO-EVEVI Evendale VI, Ohio

Accept Cancel Delete

S Tax Profile Maintenance (PR2) 3/14/2017

Profile OHIO LOCAL

Description ohio local

Apply... Copy From...

Tax Locations

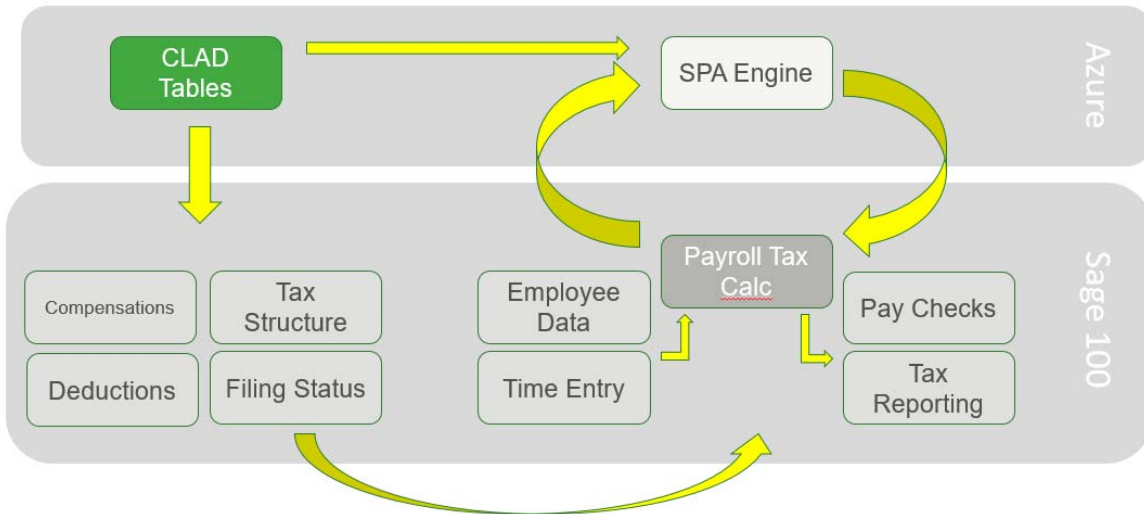
Tax Location Code	Location Type
OH-HAMCO-EVEVI	Work
OH-HAMCO-WYOSD	Residence

Tax Group Details

- OHIO LOCAL
 - FEDERAL
 - Tip Income Federal Social Security Tax Employer Liability
 - Federal Regular Income Tax Withholding
 - Federal Supplemental Income Tax Withholding
 - Federal Regular Medicare Tax Employer Liability
 - Federal Regular Medicare Tax Withholding
 - Federal Regular Social Security Tax Employer Liability
 - Federal Regular Social Security Tax Withholding
 - Tip Income Federal Social Security Tax Withholding
 - Federal Unemployment Tax Employer Liability
 - Tip Income Federal Medicare Tax Withholding
 - Tip Income Federal Medicare Tax Employer Liability
 - OH
 - Ohio Regular IT Withholding
 - Ohio Supplemental IT Withholding
 - Ohio Unemployment Insurance Tax Employer Liability
 - Ohio Disabled Workers Relief Fund Employer Liability
 - Ohio Regular IT Withholding (NR)
 - Ohio Supplemental IT Withholding (NR)
 - OH-HAMCO-EVEVI
 - Evendale VI Regular IT Withholding
 - OH-HAMCO-WYOSD
 - Wyoming 3122 SD Regular IT Withholding

Accept Cancel Delete

Sage 100 Payroll Integration with SPA



S Employee Maintenance (PR2) 3/14/2017

Employee No. 00-BAB **** Inactive **** More...

Last Name Bowers With a Whole Lot of Other Stuff A

First Name Beth Elizabeth Beth Middle Name BORG MIDDLE NAME Suffix HR

1. Main 2. Additional 3. Benefits 4. Taxes 5. Pay Defaults 6. Earnings 7. Deductions 8. Pay History

Date	Check No	Gross Wages	Federal Taxes	State Taxes	Local Taxes	Deductions	Net Pay	Regular Hrs	Overtime Hrs
3/11/2017	000001	400.00	.00	.00	.00	.00	270.98	40.00	.00
3/11/2017	000001	800.00	138.32	34.00	14.00	.00	613.68	40.00	.00
3/11/2017	000002	400.00	.00	.00	.00	.00	400.00	40.00	.00
3/11/2017	000003	400.00	.00	.00	.00	.00	400.00	40.00	.00

Employee Totals

Gross Wages	Federal Taxes	State Taxes	Local Taxes	Deductions	Net Pay	Regular Hrs	Overtime Hrs
2,000.00	138.32	34.00	14.00	.00	1,684.66	160.00	.00

Accept Cancel Delete

S Earnings Code Maintenance (PR2) 3/14/2017

Earnings Code: 000006

Description: Tips Differential

Earnings Type: Exempt Tips

Method of Entry: Fixed Amount

Employee Pay Rate: Not Available

Fixed Amount: .000

Pay Rate Multiplier: 1.000

Subject to Workers' Comp.

Apply to Box 14 on W-2

Exclude from ALE Report

Time Off Types to Accrue

All Time Off

Vacation Sick Personal

Post Expense by Dept.

Expense Account: [Search]

Tax Rule: -800039 Regular Wages

Accept Cancel Delete [Print] [Help]

S Payroll Options

1. Main 2. Additional 3. Time Off 4. Entry 5. Direct Deposit 6. History

Employee Changes to Track: Changes

Track Additions in Detail

Track Changes to Employee Pay Rates

Years to Retain Payroll History: 4

Years to Retain eFiling Check History: 4

Accept Cancel [Print] [Help]