

Sage MAS ERP

# Sage MAS 90 and 200 Product Roadmap

ERP that works the way you do

March 2010

*Blytheco*<sup>LLC</sup>

**Sage Software**  
Partner of theYear

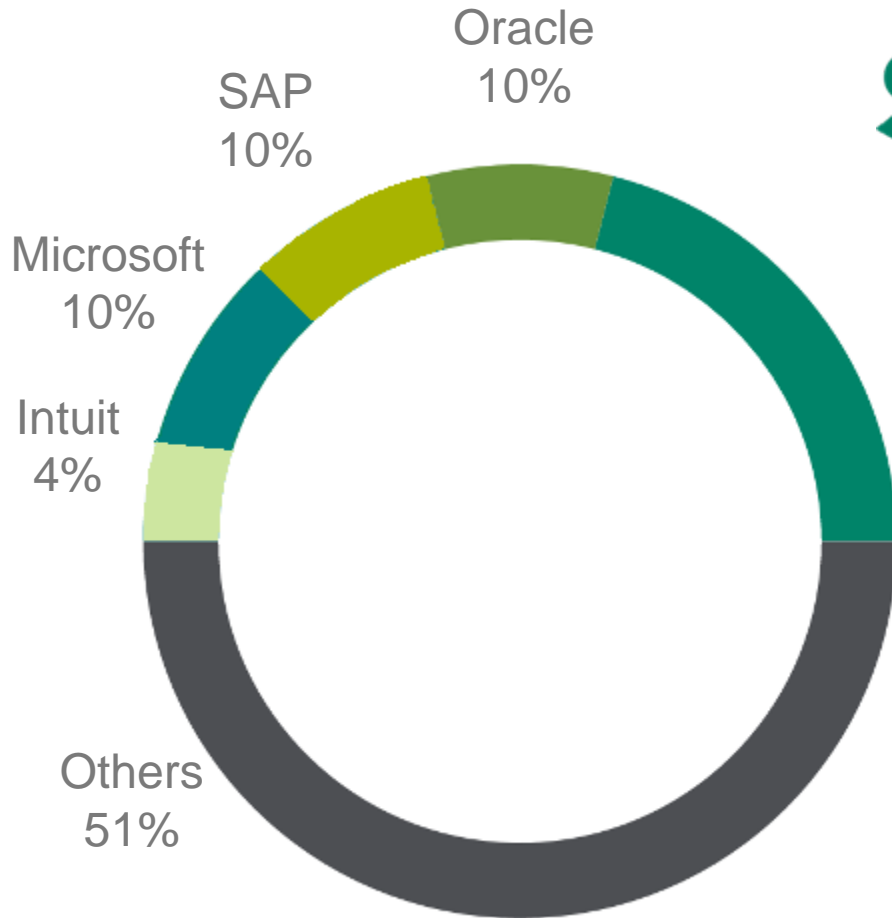
[www.blytheco.com](http://www.blytheco.com)  
1.800.425.9843

sage

# 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

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# Sage MAS 90 and 200 Product Strategy



- Provide more “Value for Maintenance”
  - Incorporate features and functionality of most popular Extended Solution titles
  - Implement Top Requested Customer Enhancements
  - Provide ongoing product updates with additional features and minimal disruption
- New and Improved Capabilities
  - Additional SageCRM Options for Sage MAS 90 and 200
  - Financial and Analytic Reporting Solution (FRx Alternative)
  - Microsoft SQL Server Support

# How We Decide: Source Data



- Customer Inputs



- In-Product Survey
- Feature and Enhancement Suggestions  
[www.sagemas.com/MAS\\_90\\_200\\_feedback](http://www.sagemas.com/MAS_90_200_feedback)
- Customer Contact (Site Visits, Interviews and Conferences)
- Customer Email Survey
- Customer Advisory Board (CAB)
- Support Cases (Breadth and Impact)

- Other Sources

- Business Partners (Advisory Council and Conferences)
- Sage R&D (technology direction)



# Sage MAS 90 and 200 Product Roadmap



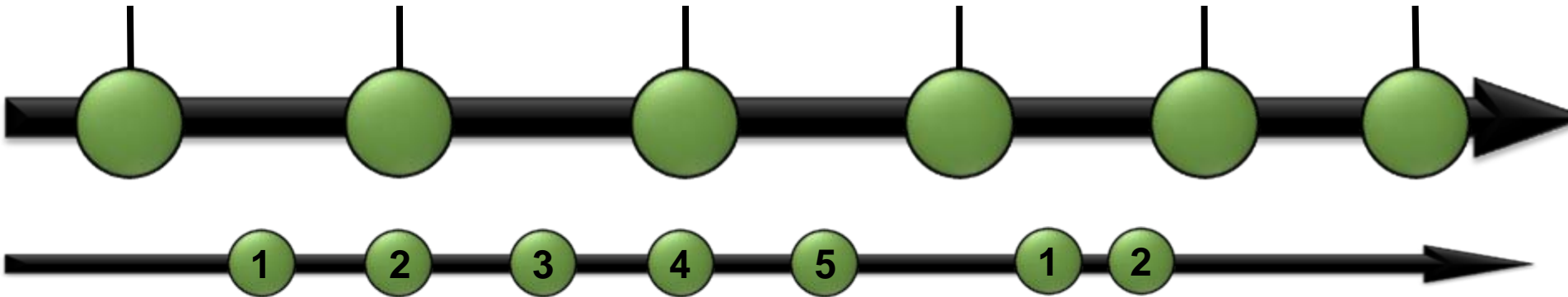
**v4.4 &  
EES v1.4  
Q1 2010**

**Intelligence  
July 2010**

**SQL v4.45  
Q4 2010**

**v4.5  
Q3 2011**

**Payroll for SQL v4.6  
Q2 2012 Q3 2012**



**Product Updates for v4.4  
March, June, Sept, Dec 2010  
March 2011**

**Product Updates for v4.5  
Q4 2011, Q1 2012**

*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.*

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# Sage MAS 90 and 200 4.4 Product Update 1



- Targeting March 2010
- Increase Efficiency in Accounts Payable & Accounts Receivable
  - Enter cash receipts by invoice number (AR 1200\*)
  - Ability to search by additional fields (AR 1027\*)
  - Enter wire transfers in Accounts Payable Manual Check Entry
- Improve Accuracy with Streamlined Sales Order Processes
  - Prevent accidental re-use of a customer Purchase Order number in history (SO 1096\*)
  - Control which items customers may purchase (SO 1271\*)
  - Print a picking sheet with backorder line items
  - Prevent accidental printing of picking sheets twice
  - Quick print a picking sheet from sales order (SO 1035\*)
- Boost Productivity in Payroll and Job Cost
  - Automatic application of multiple earnings codes per employee during a payroll run (PR 1018\*)
  - Prevent accidental posting of costs to a closed job (JC 1046\*)
- Capturing Timely User Feedback: In product Survey
- Credit Card Processing Industry Security Compliance: Targeting PA-DSS Certification

\* *The main features and functionality of these Extended Solutions titles will be incorporated.*

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# Sage MAS 90 and 200 4.4 Product Update 2



- Targeting June 2010
- Save Time with efficient Bank Reconciliation
  - Improve bank reconciliation usability
  - Electronically reconcile your BR transactions between your software and bank (BR 1005\*)
  - Utilize Positive Pay to verify check information (amount, payee, etc.) prior to the company's financial institution's payment, which helps protect companies against check fraud (BR 1004\*)
- Electronic Payments
  - ACH Electronic Payments (AP 1063\*)
  - Paperless Office: AP Checks & Deposit (AP 1095\*)



\* The main features and functionality of these Extended Solutions titles will be incorporated.

# Sage MAS 90 and 200 4.4 Product Update 3



- Targeting September 2010
- The main features and functionality of the following Extended Solutions titles will be incorporated:
  - Customers with National Accounts (AR 1068)
  - Price Level By Customer/Product Line (SO 1005)

# Sage MAS 90 and 200 4.4 Product Update 4



- Targeting December 2010
- The main features and functionality of the following Extended Solutions titles will be incorporated:
  - Contract Pricing By Valid Date (IM 1069)
  - Additional Pricing Tiers for Item Pricing (IM 1097)
  - Customer Discount Rate by Line Item (SO 1069)
  - Item Pricing By Total Quantity (SO 1173)

# Sage MAS 90 and 200 4.4 Product Update 5



- Targeting March 2011
- The main features and functionality of the following Extended Solutions titles will be incorporated:
  - Distribution Table For Invoice Entry (AP 1043)
  - Additional Check Printing Sort Option (AP 1077)
  - Multiple Company Aged Invoice Report (AP 1101)
  - Multiple Company Bank Reconciliation (BR 1002)
  - Security For Inventory Inquiry (IM 1111)
  - 'Inactive' Item Designation (IM 1244 )
  - Background Color by Company Code (LM 1028)
  - Enhanced Faxing for Paperless Office (LM 1033)
  - Enhanced Batch Processing (SO 1100)
  - Back Orders Allowed By Customer (SO 1269)



# Sage MAS Intelligence

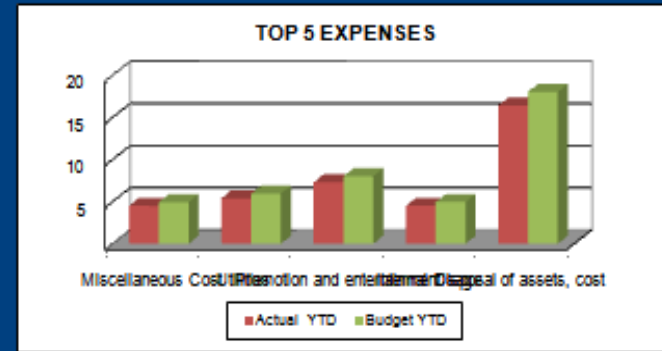
- Targeting July 2010
- New advanced analytics and financial reporting as an alternative to FRx
  - FRx supported by Microsoft until Dec 31, 2012
  - Sage MAS 90 and 200 will maintain backward compatibility with FRx
- Complex reporting and analysis in a familiar Microsoft Excel interface
- Sage MAS Intelligence and Single User License Bundled (Free)
  - FRx users can trade in add on FRx licenses for equivalent Intelligence licenses

# DASHBOARD - SAMPLE COMPANY INC.

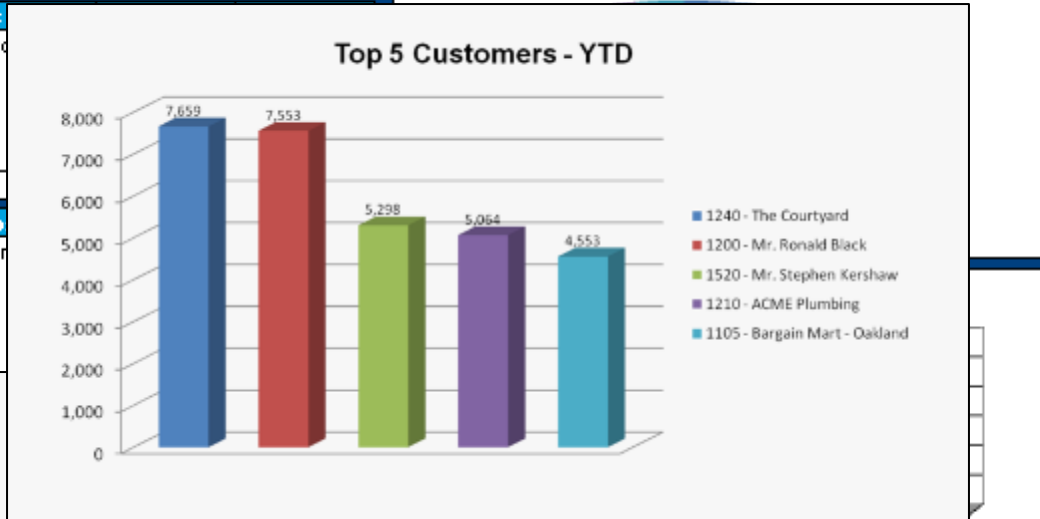
Period: **January 2011 to August 2011**

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>

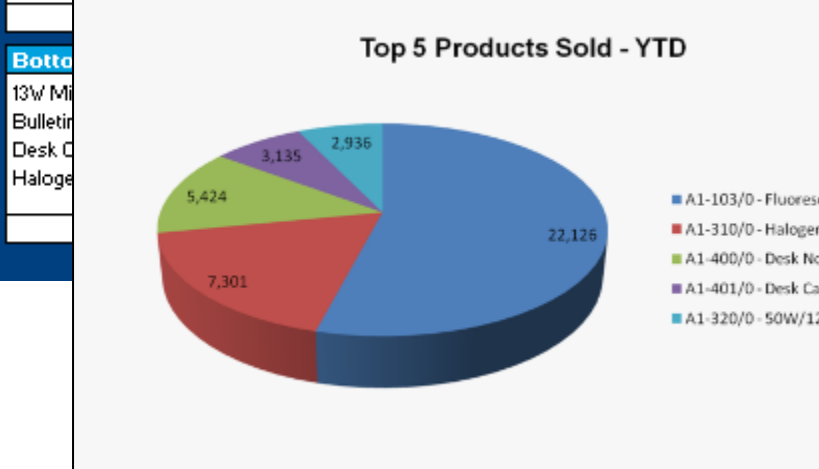
Top 5 Expenses	Actual Aug-11	Budget Aug-11	Variance	Actual YTD	Budget YTD	Variance
Miscellaneous Cost	1,500	1,650	150	4,500	4,950	450
Utilities	1,800	1,980	180	5,400	5,940	540
Promotion and entertainment	2,430	2,673	243	7,290	8,019	729
Internal Usage	1,503	1,653	150	4,509	4,960	451
Disposal of assets, 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%	



-	-	-	-
-	-	-	-

Your Data Pulled Directly Into a Familiar Excel Environment

guideline only



# Sage MAS 200 4.45 SQL

- Targeting Calendar Q4 2010
- Microsoft SQL Server database support for Sage MAS 200
- Bundled Microsoft SQL Database License available through Sage
- Business Framework modules only at initial release
- Initially for new customers
- Sage MAS 200 SQL 3.7X and ProvideX customers will have the opportunity to upgrade with 4.5

# Sage MAS 90 and 200 4.5



- Targeting Calendar Q3 2011
- The main features and functionality of the following Extended Solutions titles will be incorporated:
  - Retain Paid Invoices for over 25 years (AP 1076)
  - Purchase Orders Created From Sales Orders (PO 1020)
  - 35 Option Categories (BM 1042)
  - Invoice Creation In SO From PO Receipts (PO 1086)
  - Bill Option Description and Price On SO Forms (SO 1092)
  - 'On Demand' Sales Order Fill Report (SO 1099)
  - Lot/Serial Distribution Entry From Sales Order (SO 1175)
  - Auto Generate Purchase Orders from S/O Entry (SO 1489)
  - Work Order Integration with 35 Option Categories (WO 1032)

# Sage MAS 90 and 200 4.5

## *Cont.*



- Simplify the 'Reversal' process for everyday transactions
  - Example: Reduce the number of steps required for a check reversal
- Improved Customer and Supplier Communications
  - Improve process to complete a backordered purchase order
- Expanded Web Services
  - Inventory Management (Create, Read, Update and Delete)

# Sage MAS 90 and 200 4.5

## Cont.



- Additional CRM licensing options and improved Integration
  - All Sage MAS 90 and 200 customers will be provided 1 Free CRM User with 4.5
  - Sage MAS 90 and 200 will continue to be available through two licensing options
    - Current build your own system (a la carte) module pricing model
    - Current Extended Enterprise Suite (Suite based) user pricing model
  - CRM only user option for either pricing model
  - Multi ERP companies mapped to a single CRM database
  - SageCRM 7.0 support
- Sage MAS 200 SQL migration support for 3.x and 4.x customers

# Sage MAS 90 and 200 4.5 Product Update 1



- Targeting Q4 2011
- The main features and functionality of the following Extended Solutions titles will be incorporated:
  - Invoice History Edit (AR 1070)
  - 'Physical Count' Entry By Ticket Number (IM 1119)
  - Item Sales History (SO 1023)
  - Ship To/Ship Via by Line Item (SO 1067)
  - Sliding Scale Commissions By Items (SO 1095)
  - Commission Rate Table by Salesperson/Customer/Item (SO 1354)
  - Maintain Split Commissions by Customer (SO 1417)

# Sage MAS 90 and 200 4.5 Product Update 2



- Targeting Q1 2012
- The main features and functionality of the following Extended Solutions titles will be incorporated:
  - Vendor Name on Job Cost Transaction Report (JC 1005)
  - Full Item Descriptions (JC 1009)
  - Deduction Calculation Based On Earnings Type (PR 1015)
  - Payroll Data Entry Import Utility (PR 1031)
  - Prevailing Wage Rate by Labor Code (PR 1042)
  - Tax And Deduction Liability Check Generation (PR 1064)
  - Additional Deduction Calculation Methods (PR 1067)
  - Enhanced Benefit Accrual (PR 1091)
  - Deduction Recalculation in Payroll Entry (PR 1116)
  - Enhanced Sales Order Integration with Job Cost (SO 1530)

# Sage MAS 200 SQL Payroll



- Payroll module compatible with Sage MAS 200 SQL
  - Features such as Employee Self Service and Direct Deposit
  - *Additional details to be announced at a future date*



# Sage MAS 90 and 200 4.6



- Targeting Calendar Q3 2012
- The main features and functionality of the following Extended Solutions titles will be incorporated:
  - Expanded Numeric Mask for Price/Cost/Quantity (AR 1056)
  - Expanded Mask For Quantity/Cost (BM 1005)
  - Expanded Numeric Mask For Price/Cost/Quantity (IM 1114)

# 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>

# Key Concepts and Terms



- Extended Solutions
  - Over 1,000 titles of highly specialized features and functionality developed for specific customers to add to their Sage MAS 90 or 200 system
  - Main features and functionality of select titles have been identified to incorporate into the core product
  - <http://www.sagesoftware.com/mas90/extendedsolutions/>
- Product Update
  - A release in between major releases that delivers both maintenance functionality and product enhancements
  - Download available every 3-6 months as a valuable benefit of maintenance & support plans

# Key Concepts and Terms



- Payment Application Data Security Standard (PA-DSS)
  - Worldwide information security standard assembled by the Payment Card Industry (PCI)
  - Created to help organizations prevent credit card fraud through increased controls around data
  - For software developers and integrators of payment applications that store, process or transmit cardholder data as part of authorization or settlement when these applications are sold, distributed or licensed to third parties
  - Most major card brands (i.e. MasterCard and Visa) will require merchants that use payment applications to be PCI certified by July 1, 2010

# 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)



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