Sage 100 ERP 2014
Prerelease guide

November 2013

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Sage 100 ERP 2014 Prerelease guide

This release guide is intended for use as an overview of new functionality in a release and is not intended to be a comprehensive list of all changes, and represents the current view of the Sage 100 ERP 2014 product directions. The information is subject to change at any time without notice.

1.0 Sage 100 ERP 2014 release

1.1 Overview

Sage 100 ERP 2014 (formerly Sage ERP MAS 90 and 200) is the foundation for connecting your business to provide a better customer experience, increase revenue, and make better business decisions. Sage 100 ERP 2014 connects your company to the cloud, giving your business access to web and mobile capabilities to confidently run your business. Sales and services people have access to customer information and while in the field are able to invoice customers and collect payments. Procurement has deep visibility into inventory to properly manage stock levels. Invoicing is done electronically, and only exceptions are handled manually. Executives have analytics on all parts of the business, connecting everything with Sage 100 ERP 2014.

Sage Billing and Payment helps you to provide a better customer experience, letting your customers pay you 24/7 online. Sage Mobile Sales gives your sales teams an interactive catalog, allowing them to improve customer experience and increase revenue. Sage Mobile Service keeps your servicepersons updated with the latest work order and customer information, helping your customers stay satisfied through completion. Improved integration with Sage CRM helps take your sales teams mobile and improves quota attainment. Sage Inventory Advisor helps you to make the best decisions on inventory, making sure to increase your customers' satisfaction by carrying optimum inventory levels and preventing items from going out of stock. You're able to make better decisions using Sage Intelligence and the profitability dashboard, helping you stay up to date on the latest customer, product, and salesperson profitability.

It is strongly recommended that you upgrade to Sage 100 ERP 2014 shortly after the release is available if you are running an older version. For the most current supported version and retirement information, please refer to the Supported Versions document posted on the Sage Customer Portal.

1.2 Sage 100 ERP 2014 availability

The Sage 100 ERP 2014 Auto-Delivery download for business partners and customers on Sage Business Care is expected in the February–March 2014 timeframe.

2.0 New functionality

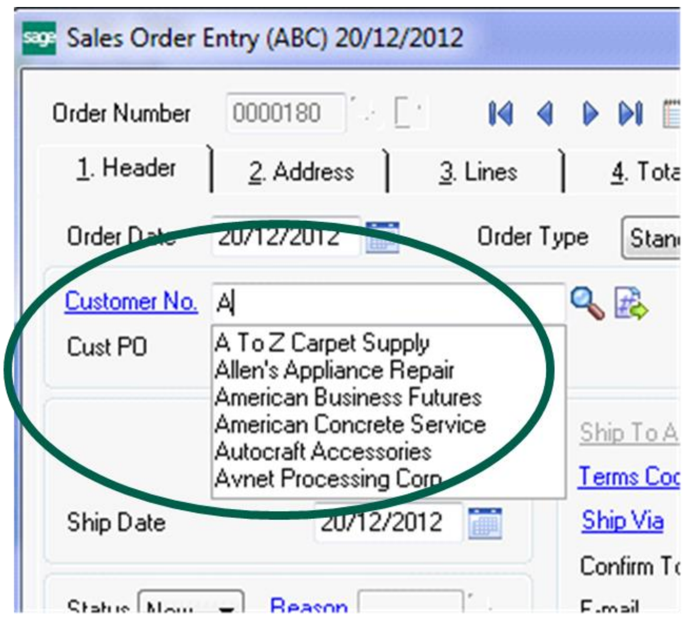
2.1 Global enhancements

Sage 100 ERP 2014 includes several user experience enhancements that help users to be more productive. Enhancements include the ability to use Autocomplete to find customers, vendors, and items faster, keep custom report windows open, and use the search grid window easier.

2.1.1 Autocomplete

An Autocomplete feature has been added for customer number, vendor number, and item code entry fields. You can now locate records by entering the customer name, vendor name, or item description in the respective field. As you type, a list of records matching your entry appears, and you can select a record from the list.

For example, if you have vendors named American Business Futures, American Concrete Service, and Autocraft Accessories, when you type “a” in the vendor number field, all three vendors will appear in an alphabetized list, and you can select the one that you want.



You can still select records by entering the customer number, vendor number, and item code.

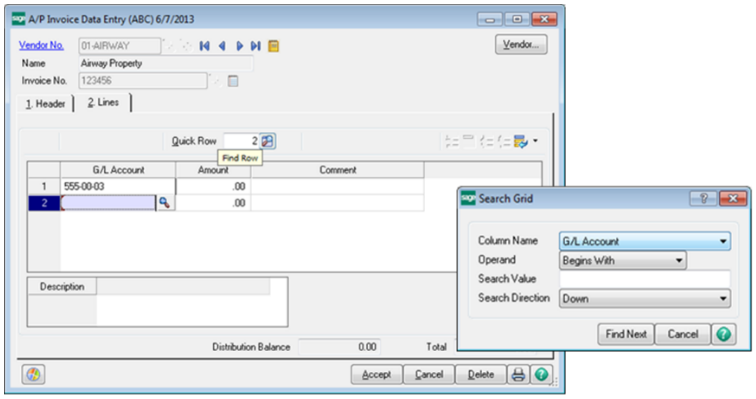
2.1.2 Custom reports

Custom reports now provides the ability to allow a user to keep the custom report window open after print or preview. This allows users to save time when printing or previewing numerous custom reports.

2.1.3 Default column name in search grid window

To make searching easier when using the Search Grid window, the default value in the Column Name field of the Search Grid is now the column name of the first column in the grid.

For example, in A/P Invoice Data Entry, when you click the Find Row button to open the Search Grid window, G/L Account is now the default value in the Column Name field.

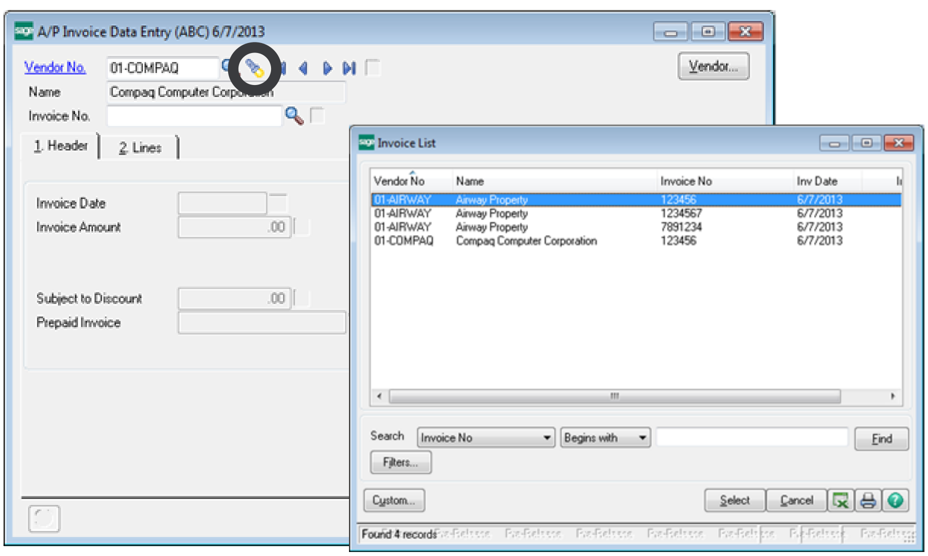


2.2 Accounts Payable enhancements

New Accounts Payable functionality in the 2014 release provides the ability to see invoices in Invoice Data Entry and Repetitive Invoice Entry with a new invoice list button.

2.2.1 Invoice list button in Invoice Data Entry

Invoices in Invoice Data Entry can now be found easier with a new flashlight that allows users to search invoices.



2.2.2 Repetitive Invoice list button in Repetitive Invoice Entry

A new flashlight in Repetitive Invoice Entry allows users to search repetitive invoices easier.

2.3 Accounts Receivable enhancements

New Accounts Receivable functionality in the 2014 release will provide the ability to see invoices in Repetitive Invoice Entry with a new invoice list button.

2.3.1 Repetitive Invoice list button in Repetitive Invoice Entry

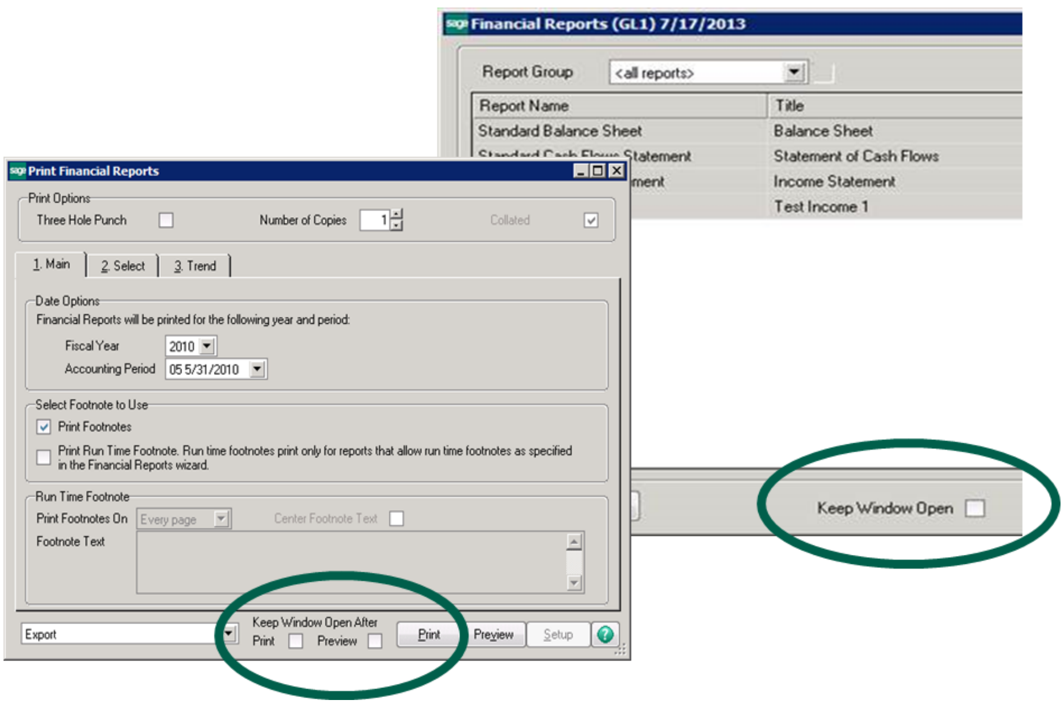
Repetitive invoices in Repetitive Invoice Entry can now be found easier with a new flashlight that allows users to search repetitive invoices. Users no longer have to select a customer before selecting a repetitive invoice in Repetitive Invoice Entry.

2.4 General Ledger enhancements

New General Ledger functionality in the 2014 release will provide the ability to keep the Print Financials Reports window open after print and print preview.

2.4.1 Keep Financial Reports window open

Financial Reports now has the ability to allow a user to keep the custom report window open after print or preview. This allows users to save time when printing numerous Financial Reports



2.5 Sage Intelligence

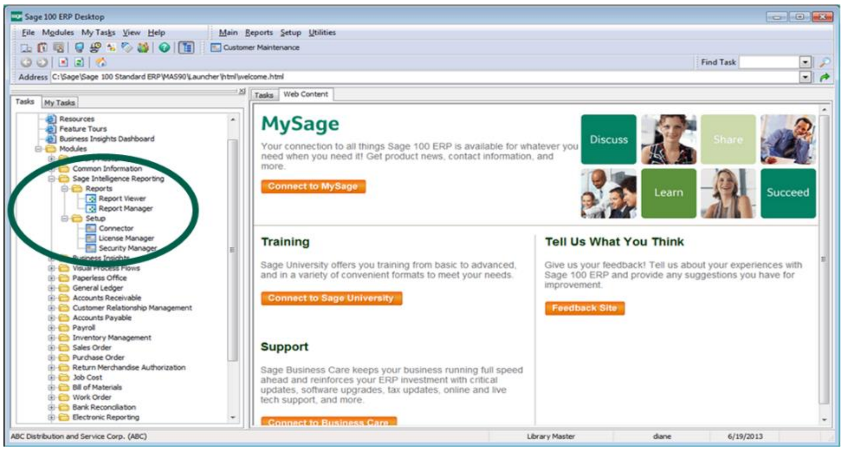
New Sage Intelligence enhancements enable Sage Intelligence to be installed during Sage 100 ERP 2014 installation. Users will be able to access Sage Intelligence within the Sage 100 ERP 2014 Module Menus and can now use Excel 2013.

2.5.1 Installation

Sage Intelligence is now installed during the Sage 100 ERP installation, making installation a simpler process.

2.5.2 Access within Sage 100 ERP

Users can now access Sage Intelligence through the Module Menus toolbar and the Tasks tab in Sage 100 ERP.



2.5.3 Excel 2013 64-bit support

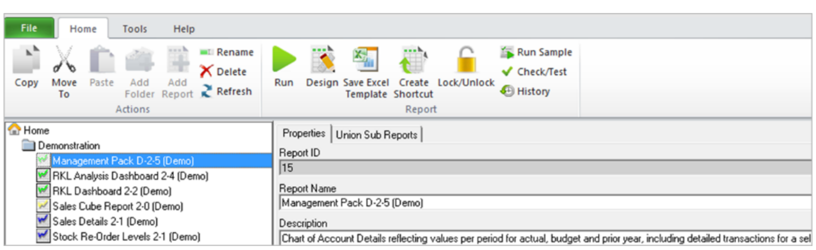
You can now take full advantage of the latest Microsoft Excel technology with Sage Intelligence. Sage Intelligence is now compatible with the 32-bit and 64-bit versions of Excel 2007, 2010, and 2013.

2.5.4 User interface and usability improvements

Sage Intelligence has been updated to improve user experience and allow for easier use. These improvements include the following:

User interface

- The Report Manager menu has been reorganized to highlight the more commonly used parts and make it easier to use. Commonly used items can now be found on the Home and Help tabs in Excel and the less common items can be found in the File and Tools tabs.



- The Connector menu has been reorganized to highlight the more commonly used parts and make it easier to use. Commonly used items can now be found on the Home and Help tabs in Excel and the less common items can be found in the File and Tools tabs.

- Locked report messages have been updated to be more user friendly.

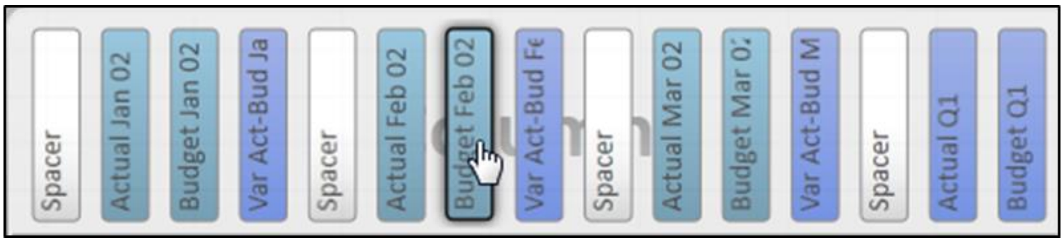
Report Designer

- The Report Designer Add-in has been updated to allow users better control over the reporting layouts. Reports can be broken into reusable pieces that allow users to create new reports quickly and easily by using the existing report pieces.

- Users are now able to maximize the Report Designer window to fully utilize monitor space.

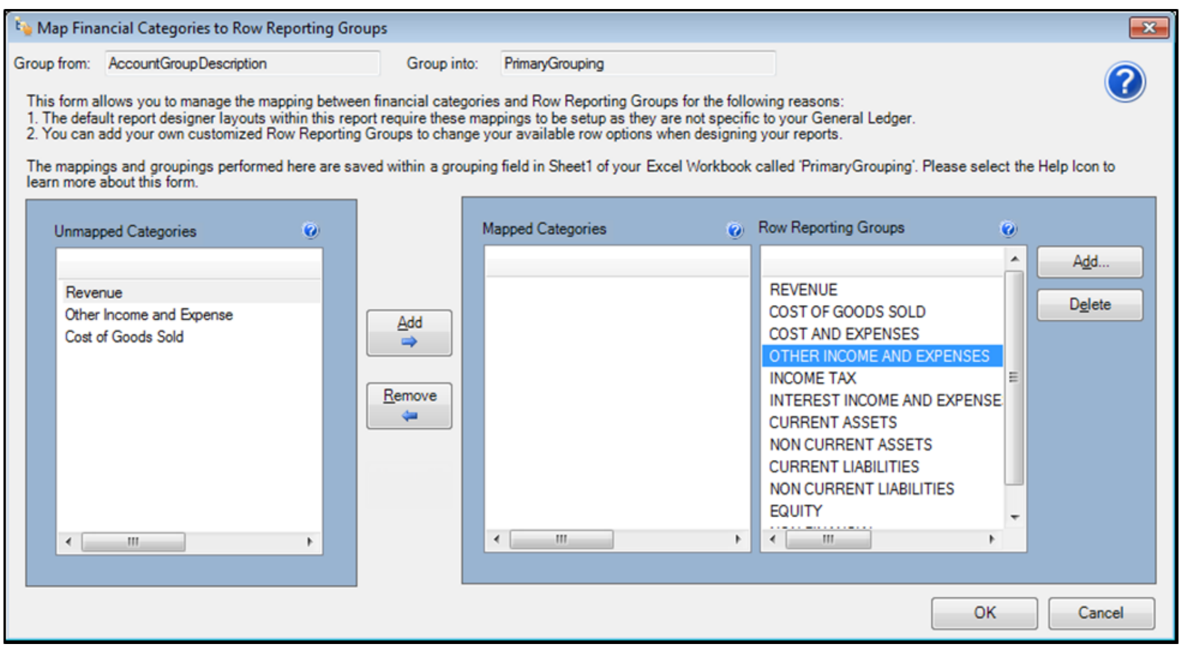
- It is now easier to rearrange rows and columns in the Report Designer Add-in as well as find items through larger font size and alphabetical listing, helping users to create reports more easily.

- The ability to insert rows or column into a specific location in a layout gives users more control and speed in designing reports.



- The Report Designer now resizes the columns in Excel to fit the text, helping to save users time formatting reports.

- When using the mapping capabilities in report designer, users are able to add and delete row reporting groups, helping to speed up and simply the mapping process.

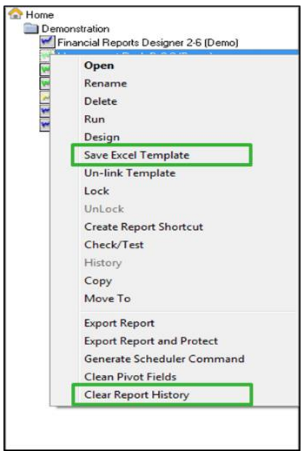


Report Manager

- Column width is automatically resized so users are able to see the full text of the report name within Report Manager.

- Users are able to have better control over containers through the ability to rename a duplicate container when importing.

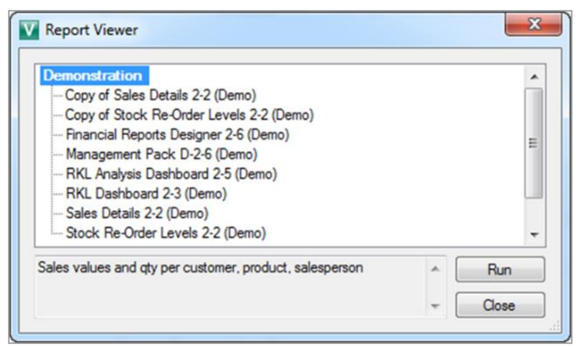
- Right-click menus have been simplified and reworded to help users more quickly and easily select what they need.



Report Viewer

- The Report Viewer window stays open after running report making it easy for users to run multiple reports.

- Report Viewer will now display all visible reports at the smallest window sizing to ensure users can see all available reports.



2.5.5 Sage Intelligence Reporting Bundle

The Sage Intelligence Reporting Bundle is a new way to purchase Sage Intelligence and is delivered under a subscription license with no long-term contract. Customers are licensed to use the service as long as their monthly dues are current and they remain on an active software support plan.

Rights to use the service include:

- Unlimited number of Sage Intelligence Manager and Viewer licenses
- Report Designer and Connector licenses
- Initial term contract of four months, monthly subscription thereafter

Sage Intelligence can still be licensed through individual parts. Customers that have already purchased Sage Intelligence cannot switch to the Reporting Bundle.

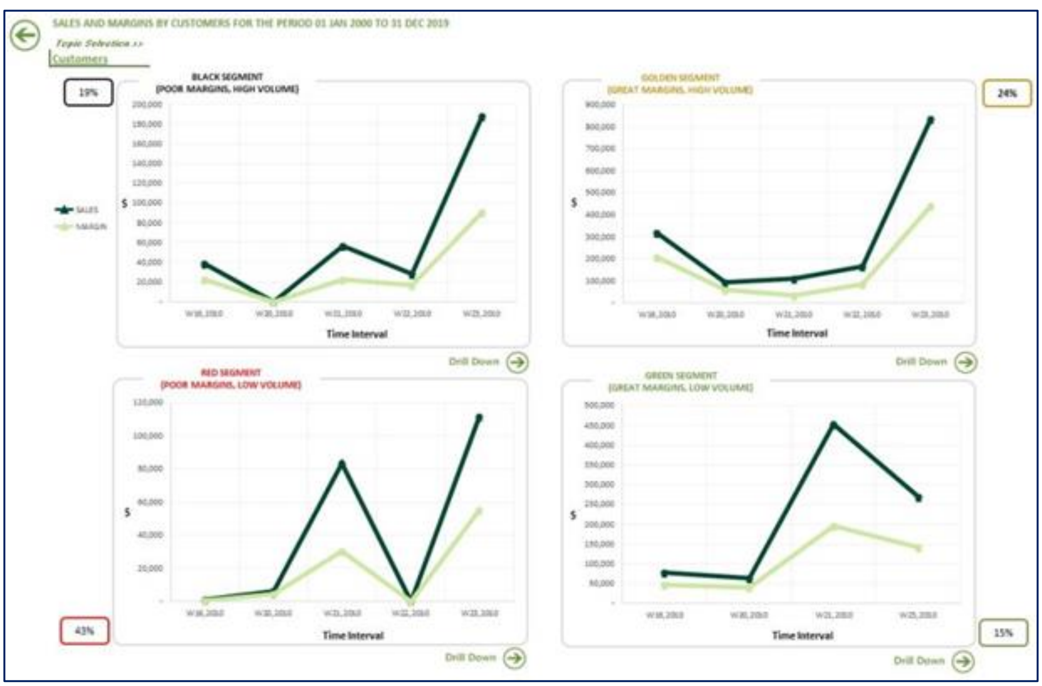
2.5.6 Sage Intelligence profitability dashboard

The profitability dashboard enables Sage 100 ERP users to quickly identify the profitability of customers, products, and salespersons based on weekly, monthly, quarterly, or annual segments.

The profitability dashboard allows companies to:

- Meet customer demand by identifying and focusing on high volume products.
- Quickly identify top performing salespeople.
- Make decisions quicker using meaningful graphics.

The Sage Intelligence profitability dashboard will be available as a report to import into Sage Intelligence. Customers that have purchased additional Sage Intelligence licenses and are current on their Sage Business Care or on the monthly Sage Intelligence bundle will be able to access this report.



2.6 Sage CRM

Significant development work was done with the Sage 100 ERP 2014 release that focused on compatibility with Sage CRM 7.2 B. The integration with Sage 100 ERP has been rewritten to take advantage of the new Sage CRM client-side scripting logic and API.

In addition to providing a more stable integration, these changes allow customers to more easily integrate their own customizations with the Sage 100 ERP customizations for a more seamless workflow.

Sage CRM is a solution that integrates seamlessly with Sage 100 ERP to help companies grow and succeed by:

- Increasing sales effectiveness and revenue.
- Developing, tracking, and optimizing marketing activities.
- Providing complete visibility to business KPIs to improve decision making.
- Accelerating responsiveness to customers and enhancing customer experience.
- Better understanding customers' needs and uncovering new opportunities.
- Promoting collaboration and increasing communication and engagement across functional teams and customers.
- Reducing costs through automated workflow processes.
- Raising their competitive advantage.
- Replacing and combining traditional tools such as Excel and custom applications in a single solution.

Sage CRM also features the latest in mobility and social trends including popular business and social media tools such as Twitter®, LinkedIn®, Facebook®, and Yammer®.

In addition to the many benefits Sage CRM offers, the integration of Sage CRM with Sage 100 ERP adds the following:

- Up-to-date and consistent data across the entire business
- Increased efficiency by eliminating duplication of efforts (single point of data entry) and ensuring data consistency
- Improved organization management with a complete business view across all units (KPIs, AR, AP, customer service, and so on)

- Better decision making and timely response through a combined view of all customer financial and nonfinancial information

- Automatic maintenance and updates of customer data

- Supports end-to-end strategy of bringing together all information and creating a single and complete customercentric view

2.6.1 Sage CRM Sales Tracker

Sage CRM Sales Tracker for Windows 8 gives users access to their Sage CRM company, person, and opportunity records from their Windows 8 Tablet device. Users can even build a watch list of opportunities key to their pipeline. Sage CRM Sales Tracker can also be accessed through a Windows 8 PC.

2.6.2 Sage CRM Sales Lite

Sage CRM Sales Lite is built for sales users on the road who need up to date information on their phone, even when out of coverage. Sage CRM Sales Lite gives users mobile access to their Sage CRM data, tasks, and appointments and integrates with their iPhone allowing users to track and log outbound calls, email, and SMS activities.

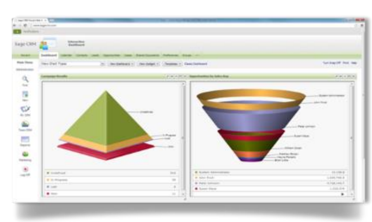
Sage CRM Sales Tracker on a Windows 8 tablet and Sage CRM Lite on an iPhone

2.6.3 Sage CRM for Facebook

Sage CRM for Facebook is another addition to the social media capabilities in Sage CRM, which include LinkedIn and Twitter as well. Using Sage CRM for Facebook, users can gain valuable insights about customers and prospects.

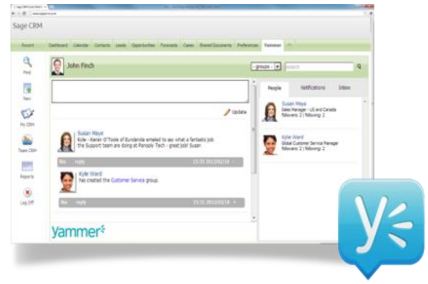
2.6.4 Smarter reporting

Reporting in Sage CRM 7.2b now includes improved user-based reporting security, report cloning, and the alphabetization of reports, allowing companies to get a better control over their reporting.



2.6.5 Businesswide collaboration

Sage CRM Collaboration powered by Yammer brings business collaboration for individual users and teams of users allowing them to collaborate with Yammer Groups and Yammer Topics, helping to drive collaboration and knowledge exchange between employees.



2.7 Payroll

Payroll has been updated to keep up to date with the latest changes in payroll requirements.

2.7.1 Additional Box 12 codes on W-2s

In order to keep up with the growing use and number of W-2 Box 12 codes, the ability to select up to 16 different Box 12 codes has been added to help with filing an employee’s tax return.

2.7.2 Accounts Payable 1099 changes

In order to keep up with governmental changes to the 1099 form, there are changes to the 1099-MISC, 1099-INT, and 1099-DIV that include the additional 1099-MISC boxes 11 and 12 and the new format changes to the printing of 1099-INT form.

2.7.3 Puerto Rico–W-2s and SDI

For companies with employees in Puerto Rico, Federal eFiling and Reporting will include the W-2 mappings for Puerto Rico, allowing your company and employees to properly file. State Disability Insurance setup for Puerto Rico will allow your organization to properly report SDI taxes.

2.7.4 Massachusetts Employer Medical Assistance Contribution

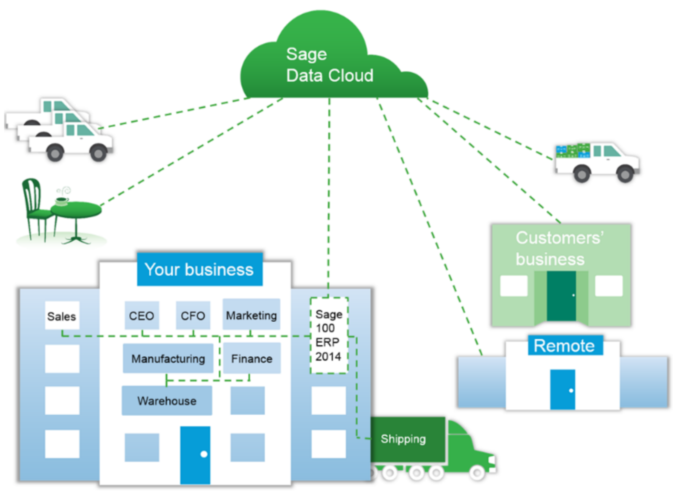
Employer Medical Assistance Contribution (MAC) fields have been added to P/R Tax Table Maintenance. The fields appear when Massachusetts is entered in the State field. You can enter a rate for the Employer MAC, but the accrual account, limit, and limit type fields display what you have entered for the unemployment tax and can only be viewed.

The Employer MAC amount is included with the unemployment tax on the Employer’s Expense Summary, but it is separated into its own column on the Quarterly Tax Report.

3.0 Cloud, mobile, and connected services

3.1 Sage Data Cloud

The Sage Data Cloud allows your company to tie your on-premises Sage 100 ERP system to the cloud, allowing you take advantage of new solutions and integrations to help your business improve customer service, increase sales, and make better business decisions. New cloud, mobile, and connected services will quickly and easily connect to your system through the Sage Data Cloud, included in business care with a free connector and unlimited data storage. You'll be prepared for the future with the Sage Data Cloud and cloud, mobile, and connected services from Sage.



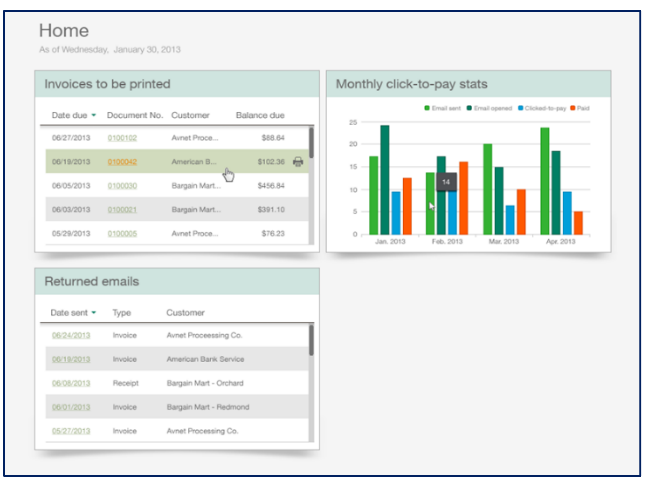
3.2 Sage Billing and Payment

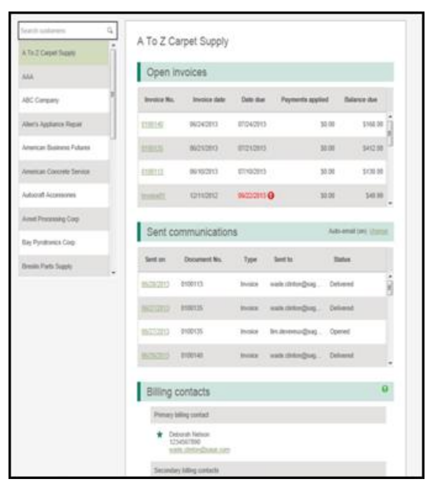
Sage Billing and Payment is an ideal solution for any company that sends out invoices to receive payments. This affordable, quick to implement, cloud-based solution can help companies:

- Improve customer service.
- Reduce Days Sales Outstanding (DSO).
- Reduce invoicing expense.
- Reduce invoicing time.
- Reduce redundant data entry.

Sage Billing and Payment makes the tedious invoicing and reconciliation process easier thanks to the ability to electronically send bills and receive payments. When a customer receives an invoice, he is able to click to pay the invoice, automatically entering the cash receipt into his batch. It helps companies gain critical visibility into receivables thanks to real-time invoice stats like sent, opened, and paid—all of which help ensure companies stay on top of outstanding customer balances. And with invoice data dynamically transmitted to their Sage ERP Accounts Receivable module, manual data import/export is eliminated.

In addition, the Online Portal,[1] a 24/7 self-service site, will empower customers to access their invoices, make payments, and view payment history online whenever it's convenient for them. And, like Sage ERP solutions, Sage Billing and Payment is customizable—invoices, receipts, and the portal itself—giving businesses a twenty-first century presence at an affordable price. But best of all, because it's all in the cloud, companies are always using the latest version, and their employees don't have to be "chained to their desks" to get work done thanks to web browser accessibility on desktop, laptop, and mobile devices.





1 The full Online Portal for Sage Billing and Payment is expected to be live spring 2014. Customers can make online payments using the click-to-pay feature in the current release.

3.3 Sage Mobile Sales

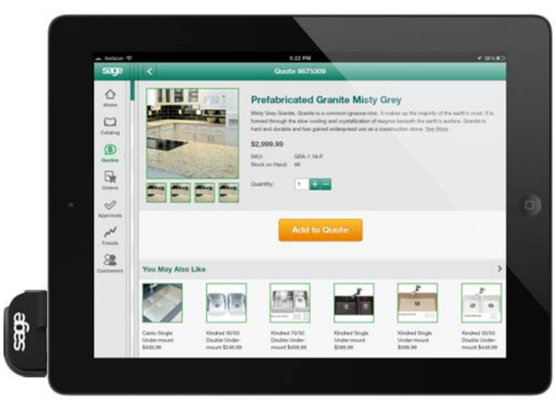
Sage Mobile Sales provides sales reps and managers with the ability to take an order, collect payment, and enter it directly into the ERP anytime and anywhere through an iPad. Sage Mobile Sales is a solution for companies that are looking to:

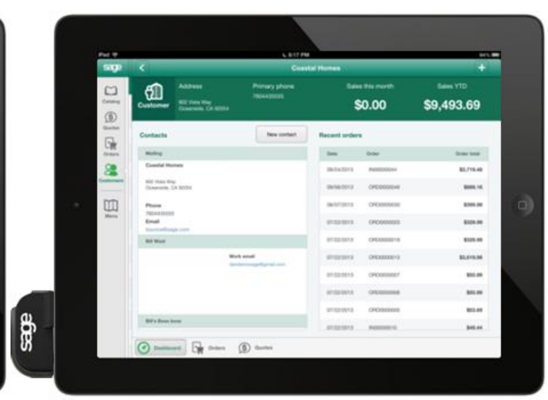
- Increase revenue—close bigger deals per field salesperson.
- Get paid faster—process orders and collect payment onsite.
- Get anytime, anywhere access to customer purchase history and inventory information.
- Present their entire product portfolio to customers on an iPad using a smart online catalog and eliminate the need for printed catalog.
- Build a quote while with a customer, email it, or convert it to an order.
- Confidently commit to fulfilling orders with real-time visibility into product availability.
- Streamline order processing—eliminate the error-prone multiple steps required when taking orders in the field on paper and later having to enter them into an ERP.

Sage Mobile Sales enables sales reps to intelligently take customer orders and enter them directly into the ERP system anytime, anywhere. The tablet app increases sales revenue by providing the rep with all of the information needed to close a customer sale, including customer order history, available stock, and an online catalog, while reducing the need for the use of paper order forms and double entry.

A tablet and cloud-based solution, Sage Mobile Sales provides mid-market manufacturers, distributors, and retailers with a mobile solution that helps them increase sales while reducing costs.

To improve the Sage ERP customer invoicing cycle for sales made on account, Sage Mobile Sales works with Sage Billing and Payment and the powerful click-to-pay feature. Sage Billing and Payment used with Sage Mobile Sales will reduce invoicing expense, reduce invoicing time, reduce DSO (days sales outstanding), and improve customer service.





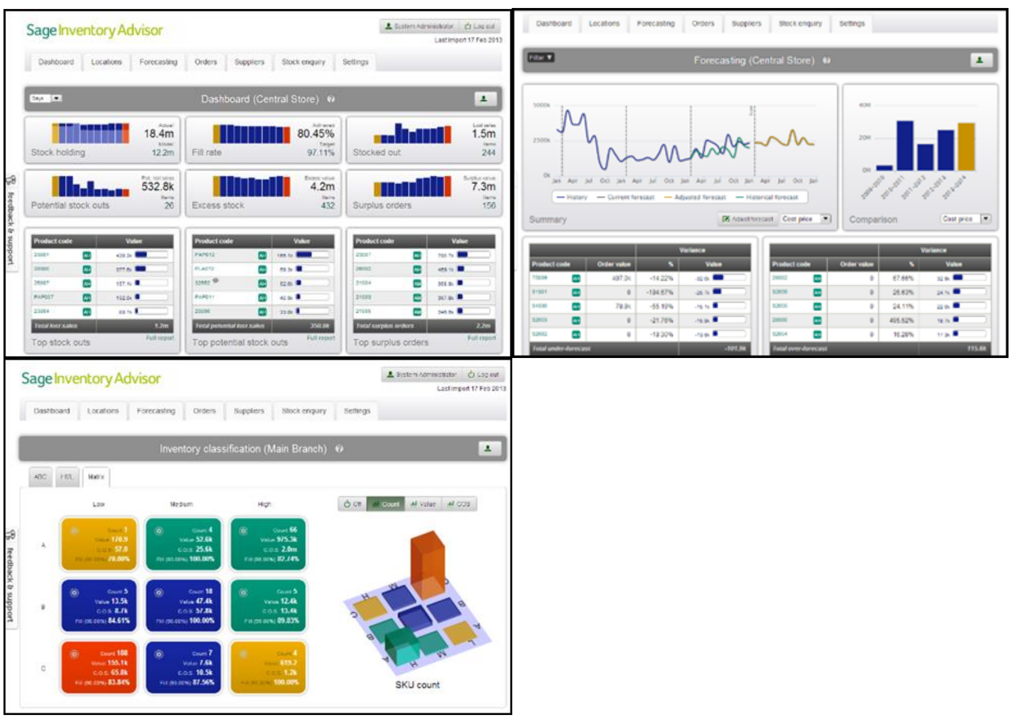
3.4 Sage Inventory Advisor

Sage Inventory Advisor is a solution for mid-market companies that are looking to:

- Reduce excess inventory.
- Reduce working capital.
- Reduce stock-outs.
- Improve fill rates.
- Improve forecasting.
- Reduce time spent on forecasting.

Sage Inventory Advisor analyzes Sage 100 ERP data to provide improved stock forecasting, planning capabilities and suggests optimal replenishment recommendations.

A web-based solution, Sage Inventory Advisor is affordable, fast to implement, and accessible on mobile devices through a web browser.

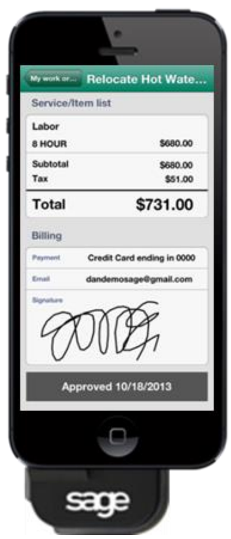


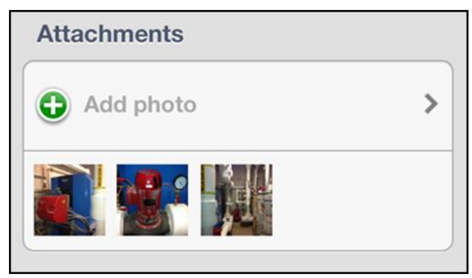
3.5 Sage Mobile Service

Empower your field technicians to deliver great customer service so you get more referrals and repeat business. Using Sage Mobile Service, your field technician will arrive on time, use his iPhone to pull up the customer's history and current repair order, take before and after photos, and even immediately process the customer's payment–all while onsite! Provide estimates and receipts through email, so you and your customers stay informed.

- Optimize schedules, routes, and assignments of jobs on the fly
- Modify work orders onsite to capture actual hours and additional work performed
- Get customer signoff and take photos onsite
- Have anytime, anywhere link to customer's Sage ERP information
- Get paid faster and increase your cash flow

Sage Mobile Service works with Sage Billing and Payment to provide electronic invoicing benefits.





4.0 Sage 100 ERP 2014 business partner certification

For the Sage 100 ERP 2014 release, a recertification will be required for all current Sage 100 ERP certified consultants. The recertification will include anytime learning courses and an assessment which will cover enhancements from both Sage 100 ERP 2013 and Sage 100 ERP 2014. Notifications will be sent out to currently certified consultants when the recertification package is available on: www.SageU.com.

5.0 Third-party considerations

5.1 SAP® Crystal Reports

SAP® Crystal Reports 2011 will continue to be bundled with Sage 100 ERP 2014 providing access to organizational data, report customizations, and report generation.

6.0 Technology and supported platforms update

6.1 Windows 8.1

Sage 100 ERP 2014 is compatible with Windows 8.1. Testing is currently under way for backward compatibility with all supported versions of Sage 100 ERP. Additional information will be published in an update to this prerelease guide. For the most current information on released products, the current supported platform matrix (SPM) is available on the Sage Customer and Partner Portals.

6.2 Virtual environments

If the Virtual Environment supports a Sage ERP-supported Windows operating system, then Sage currently supports running all supported Sage 100 ERP versions in that environment. However, Sage reserves the right to require any supported version of Sage 100 ERP be moved to a standard Windows OS should all troubleshooting efforts not provide a solution to an issue that research indicates is related to the network environment.

6.3 Microsoft SQL Server 2012 for Sage 100 Premium ERP

Sage 100 Premium ERP 2014 is expected to be compatible with Microsoft SQL Server 2012. Additional information will be published in an update to this prerelease guide. If customers purchased their Microsoft SQL Server licenses from Sage, they will receive the next release as a benefit of their Sage Business Care plan.

7.0 Development partner section

There are no new concerns Sage feels Development Partners should be made aware of for the Sage 100 ERP 2014 release. However, while the MySQL interface will remain in this release, developers using the MySQL interface should plan to migrate their code to the ODB or ADO interface for subsequent releases.

7.1 Table-driven conversion

To support frictionless upgrades, the Sage 100 ERP conversion process will continue to place the calls to conversion code in one table which can easily be read to determine if conversion is needed. A Development Studio utility for all conversion functionality is provided that utilizes a driving table to look at calls for any specific tables. A history table is added to read through the driving table and check the data's history file to determine if the conversion logic needs to be executed. As the conversion of each table is successfully completed, a record corresponding to the one in the driving table will be written to the history file.

8.0 Retirements

8.1 Electronic Reporting module and P/R and A/P Forms retirement

As previously announced, the Electronic Reporting module is retiring this year. The standard menu tasks for Accounts Payable Form 1099, Payroll Quarterly 941 Form, and Payroll W-2 Form printing, and the W-2 and 1099 file creation in the Electronic Reporting module, will not be available in Sage 100 ERP 2014. Customers will be able to utilize the plain paper printing capabilities of Federal and State eFiling and Reporting by Aatrix to manage their payroll forms and accounts payable forms.

8.1.1 Federal and State eFiling and Reporting by Aatrix

Federal and State eFiling and Reporting by Aatrix will be replacing the Electronic Reporting module. Federal and State eFiling and Reporting includes approximately 250 federal and state forms such as: W-2, W-3, 941, 1099, Unemployment, Withholding, and New Hire forms to facilitate filing payroll and accounts payable tax forms. Companies will be able to print and or eFile 250+ signature ready State and Federal tax forms from within the Sage 100 ERP integration to State and Federal eFiling and Reporting by Aatrix. Additional fees apply for eFiling services only.

- Save time, money and the environment by utilizing e-forms
- Eliminate manual resources to process and store preprinted forms
- Autogenerate a complete form that is ready to submit
- Ensure compliance with the latest forms–updated quarterly
- Access archives for historical filing information and copies

Additional information on Federal and State eFiling and Reporting powered by Aatrix.

9.0 Feedback

Business partners and customers have a voice in our roadmap and in features and functionality that will be incorporated into future Sage 100 ERP releases. Please use your voice on the feedback and request site www.Sage100ERP.com/Sage100ERPFeedback. 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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