Sage ERP MAS 90 and 200

Version 4.5 Pre-Release Guide

April 2011

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OVERVIEW

The Sage ERP MAS 90 and 200 4.5 release will focus on providing compelling value to existing customers, being more competitive in the marketplace, and providing a smooth upgrade transition. Substantial value will be 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 will be 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 will be 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 will be 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 will be 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 will be included in the 4.5 release.

Sage ERP MAS Intelligence will be enhanced in 4.5 to include Reporting Tree capabilities and additional sample reports. With 4.5, Intelligence will be compatible with the Sage ERP MAS 200 SQL product.

Current Sage ERP MAS 90 and 200 Extended Enterprise Suite customers will be provided with the equivalent 4.5 system on user-based pricing, and they will be 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 will be available, although each customer will be 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 will be able to 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.
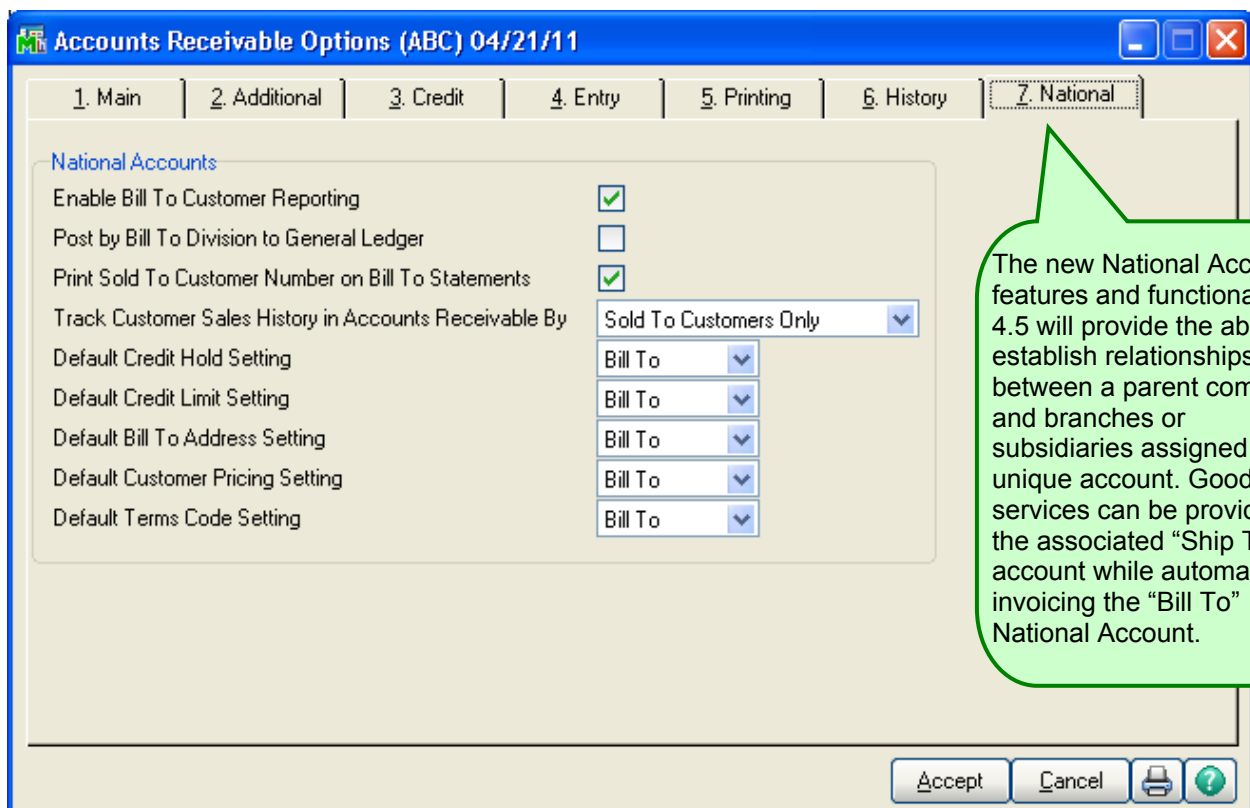
AVAILABILITY

Sage ERP MAS 90 and 200 4.5 Beta is currently targeting the month of August. General Availability and a new Early Adopter program for customers will follow closely in late summer 2011. The physical auto-shipments to Business Partners and Customers are expected to begin in the autumn timeframe, late in calendar 2011. *Additional details on the Early Adopter program will be communicated soon.*

NEW FUNCTIONALITY IN ACCOUNTS RECEIVABLE

NATIONAL ACCOUNT MANAGEMENT

New features in 4.5 will enable the creation of National Accounts in Accounts Receivable. This type of customer account will provide 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 will enable 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 will give a distributor the ability to ship their goods to one customer, and invoice the National Account, rather than bill the "Sold To" customer account.

The new National Accounts features and functionality in 4.5 will provide the ability to establish relationships between a parent company and branches or subsidiaries assigned a unique account. Goods and services can be provided to the associated "Ship To" account while automatically invoicing the "Bill To" National Account.
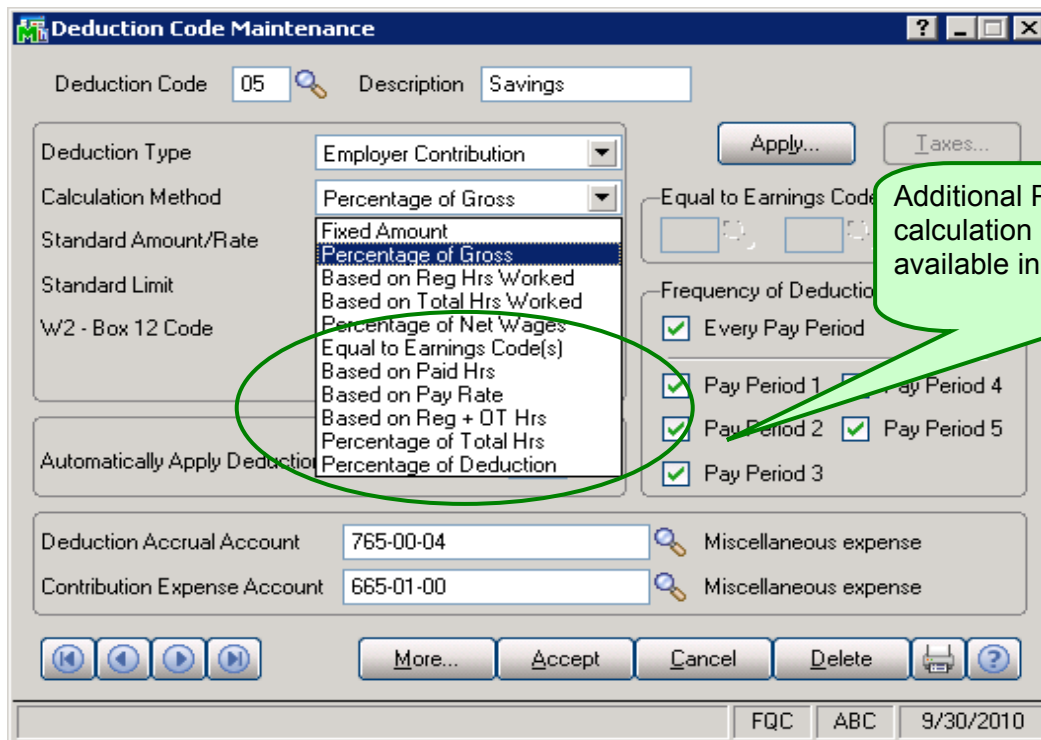
ENHANCEMENTS TO PAYROLL

New key Payroll features and functionality will be 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 will include 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 will be 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.

Five new Payroll options will be 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.

If Percentage of Deduction method is selected, an additional field will be displayed to allow the selected code to be entered.

If Based on Pay Rate is selected, an additional drop down box will be displayed to allow the selected rate to be chosen.

DEDUCTION RECALCULATION IN PAYROLL ENTRY

In Payroll Data Entry, workflow will be improved to automate the deductions based on changes in the earnings line. You will be 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.
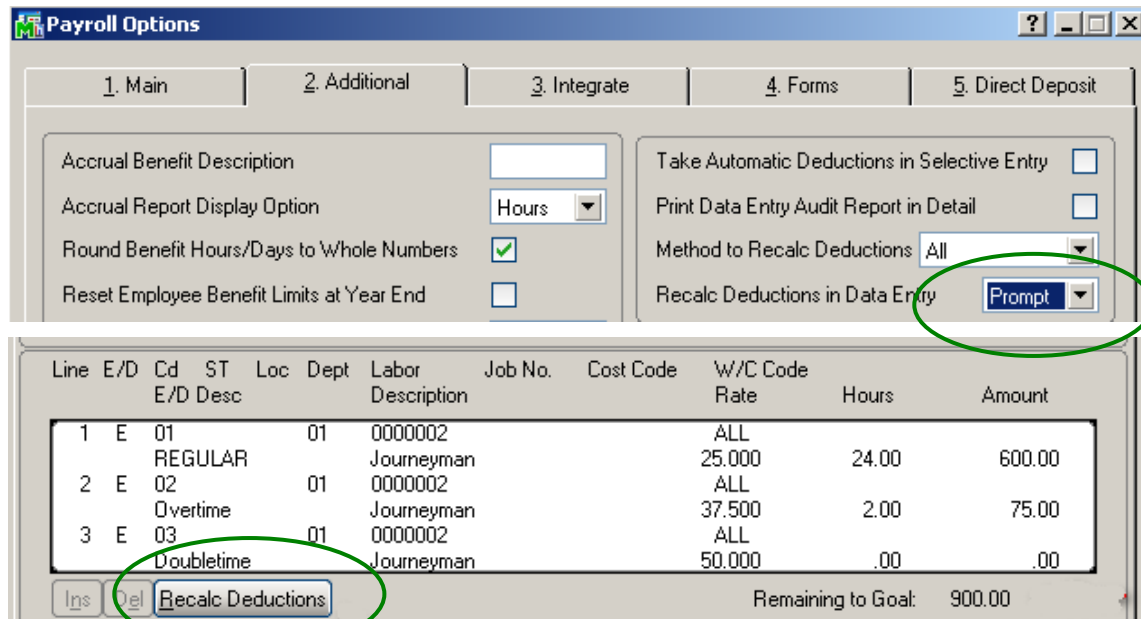
DEDUCTION CALCULATION BASED ON EARNINGS TYPE

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

A new **Earnings** button will be available in 4.5 to allow the selection of specific types to be used for calculations.
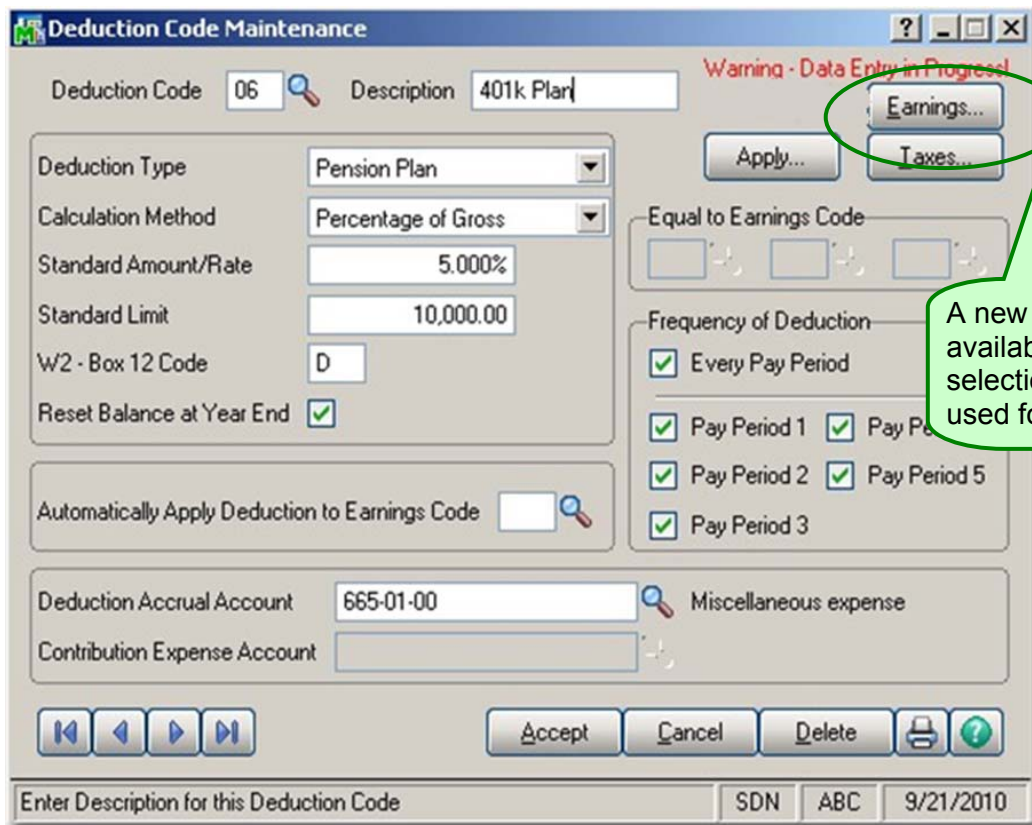
PAYROLL DATA ENTRY IMPORTING

Visual Integrator will be 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 will be included for the five most popular data import formats: Fixed Field, ADP, TimeBank/Kronos and TimeTrack.

Sample imports will be included for:

- o Format 2 – Fixed Field Format

- o Format 3 – ADP Format

- o Format 8 – "TimeBank" or Kronos Connect Format with department number + employee number imported

- o Format 8 – "TimeBank" or Kronos Connect Format with only employee number imported

- o Format M – Fixed Field Format for Timetrack v8.0
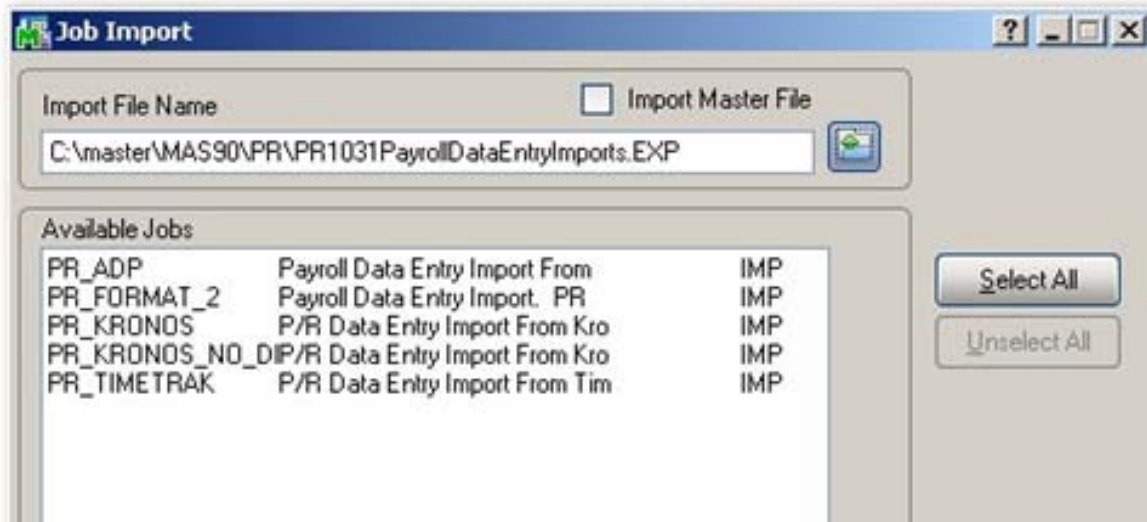
ENHANCED BENEFIT ACCRUAL

New features and functionality will be added to benefit accrual processing in 4.5 that will provide 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 will use the code assigned to an employee, compare the Minimum Hours Required for Benefit Accrual with the hours worked. If the conditions set are not achieved, then the accruals will not occur.
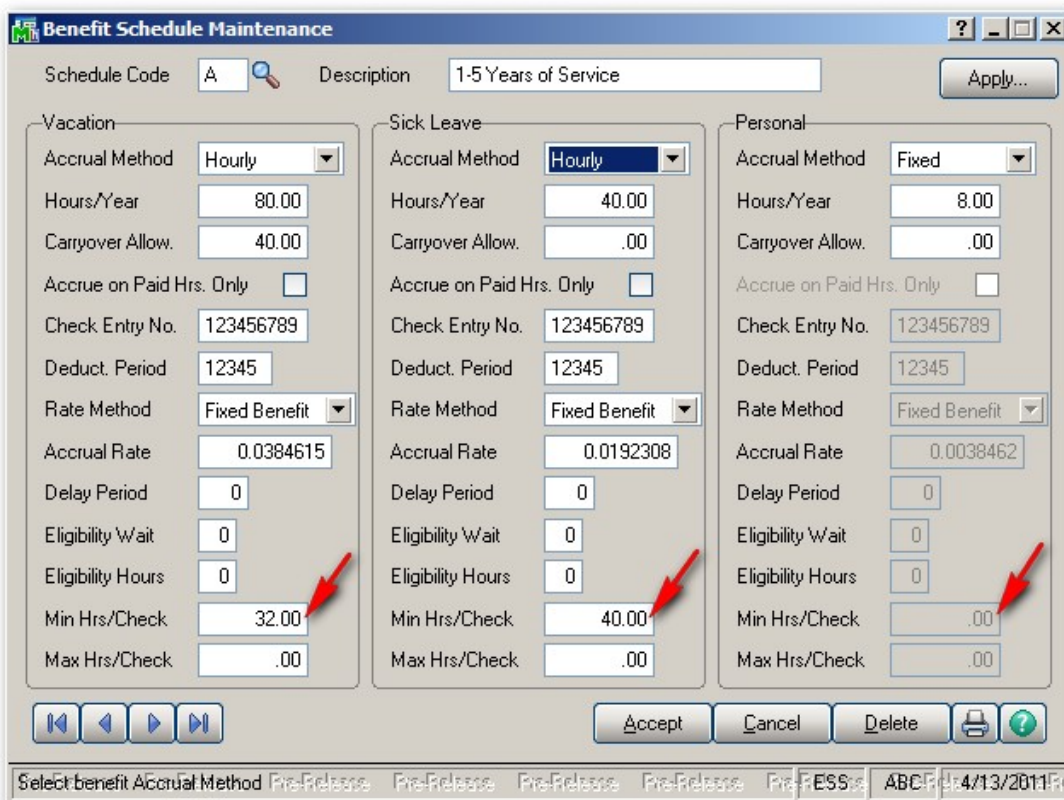
AUTOMATICALLY CREATE PURCHASE ORDERS FROM SALES ORDERS

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.

NEW FEATURES AND FUNCTIONALITY IN SALES ORDER

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

PRICE LEVEL BY CUSTOMER AND PRODUCT LINE

This 4.5 enhancement will allow a company to set default price levels for each of their customers by product line. This will allow 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 will be able to 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.
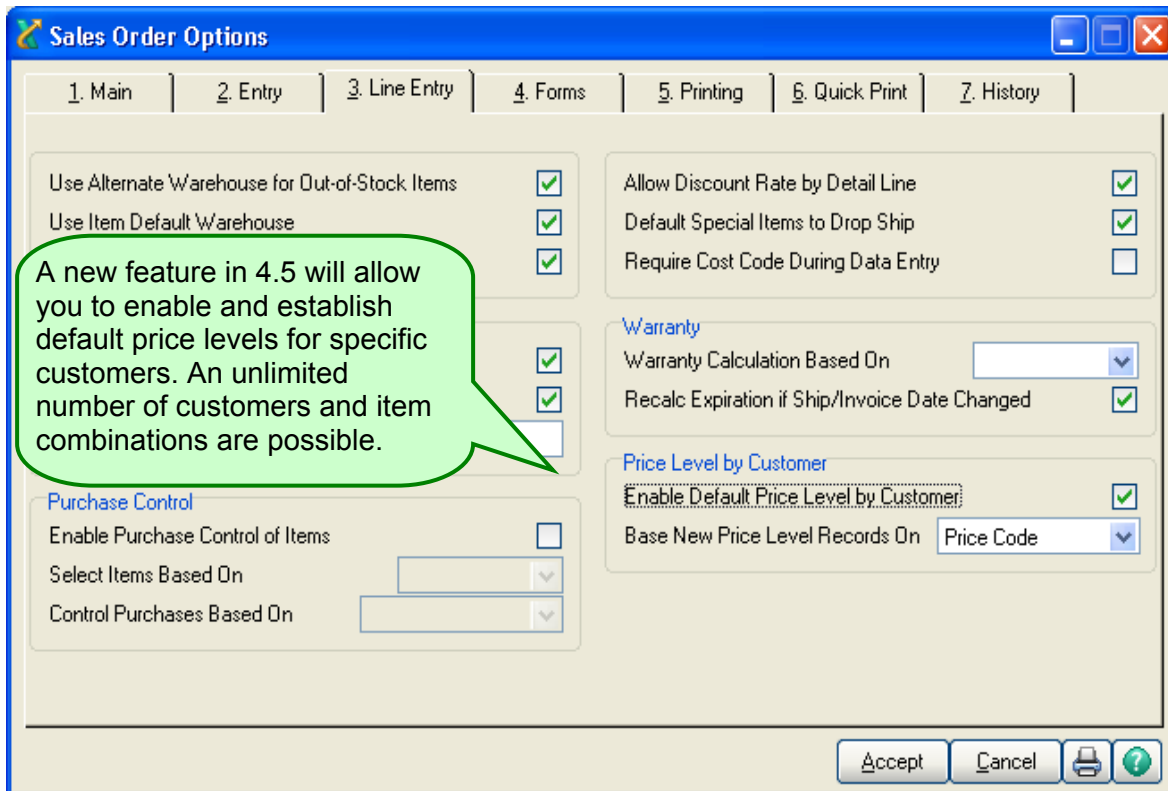
PRICING FLEXIBILITY FOR TOTAL ITEM QUANTITIES

Pricing flexibility will be 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 will be 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 will be 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.

An additional set of features will be available in 4.5 to enable more flexible pricing: by Total Quantity, by Item Category, and for quantity by Product Line.
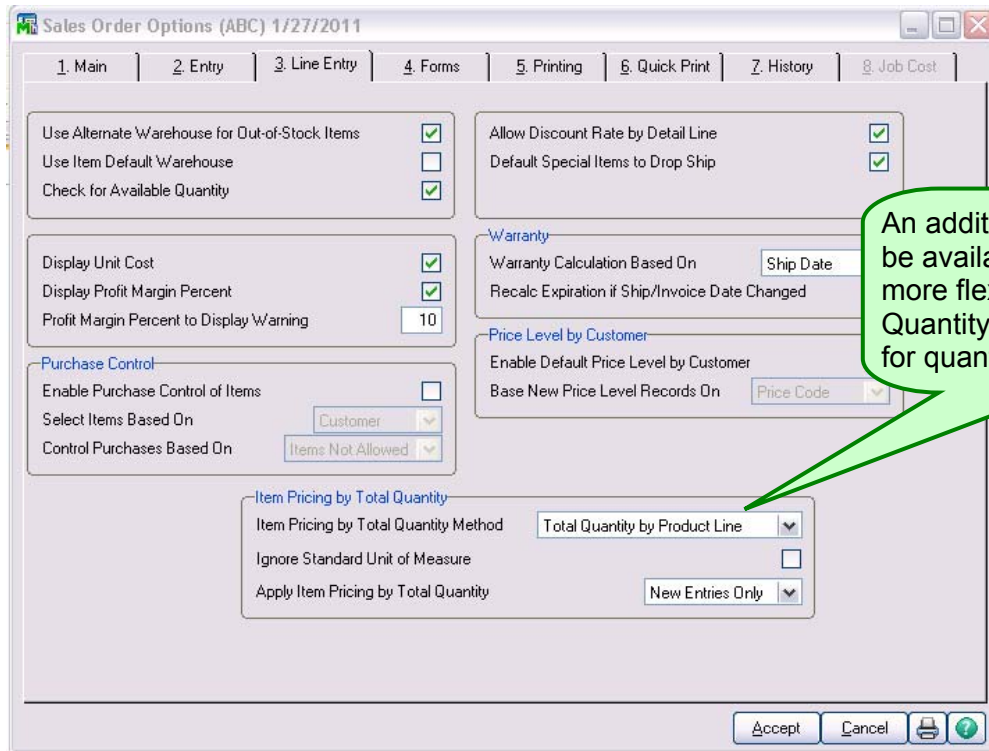
ENHANCED SALES ORDER INTEGRATION WITH JOB COST

In development, more details coming soon.

New job cost tab with associated options. *More details coming soon.*
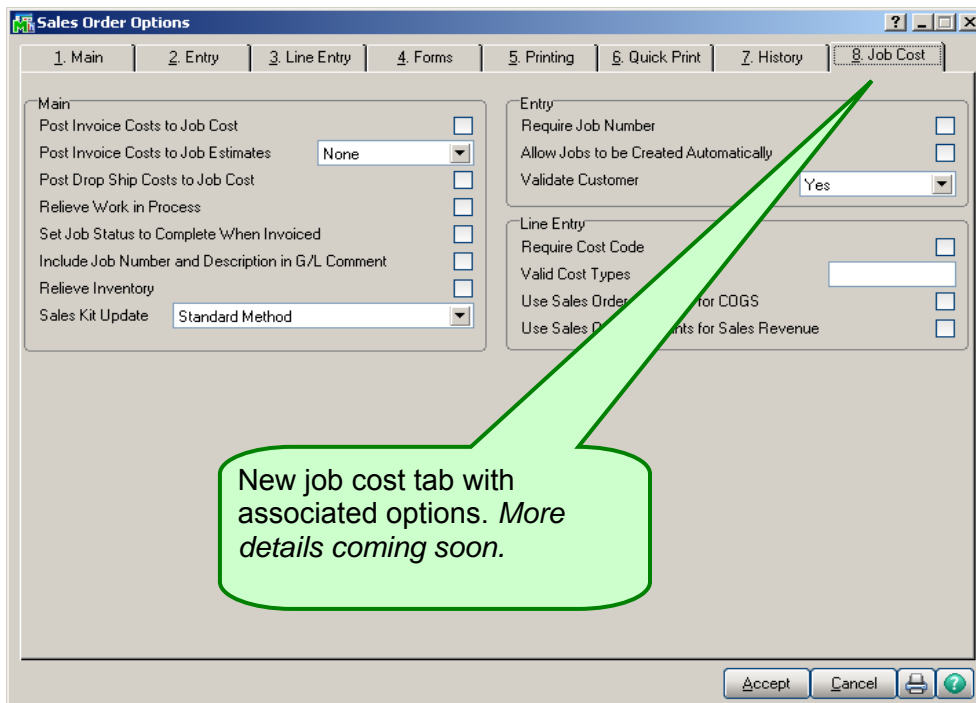
DISTRIBUTE BY LOT AND SERIAL NUMBER

New functionally in Sales Order will allow a company to select certain 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 will also allow 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 will be able to be printed on the sales orders and picking sheets for more reliable processing and communication.

Enable the new Lot and Serial Number Distribution option during Sales Order Entry. This enhancement allows companies to reserve specific lots and/or serial numbers for particular customers. These new features and functionality also allow for more specific tracking, and for potential product recalls.
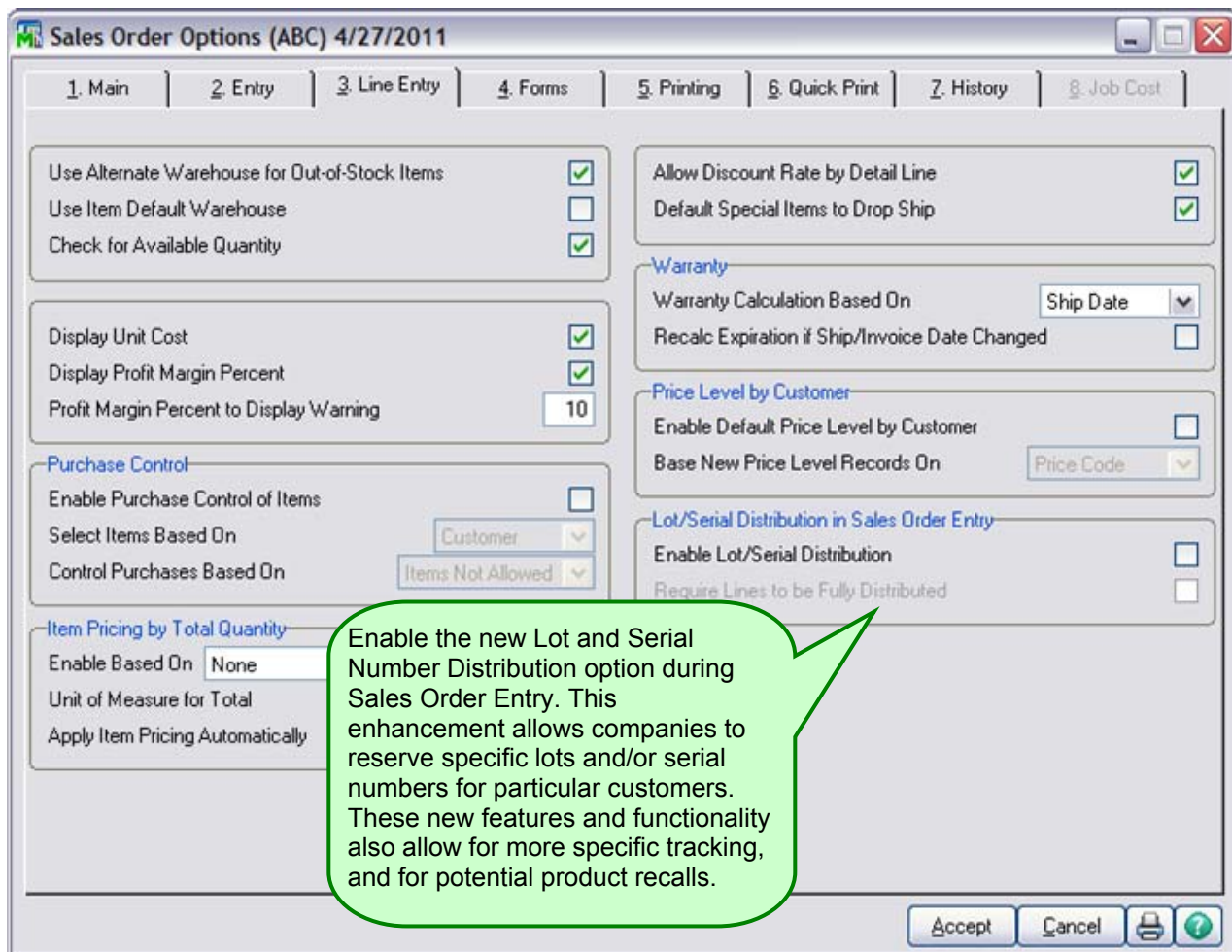
MAINTAIN SPLIT COMMISSIONS BY CUSTOMER

This 4.5 enhancement will allow users 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 will provide the same functionality that exists today, for a primary salesperson plus up to four additional salespeople.

COMMISSION 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.

When Commission Type is Percent, the commission rate will display.

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 will gather important system and use information such as the platform and operating system information, usage of the system and most frequently used tasks. This information will provide 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 will be required and periodic uploads of data to Sage are seamless to the user. During installation the wizard will alert 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 will be 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 will be 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 will be more flexibility on how reports or any Excel workbooks are distributed, to include distribution via email, publishing to a public server, and FTP publishing.
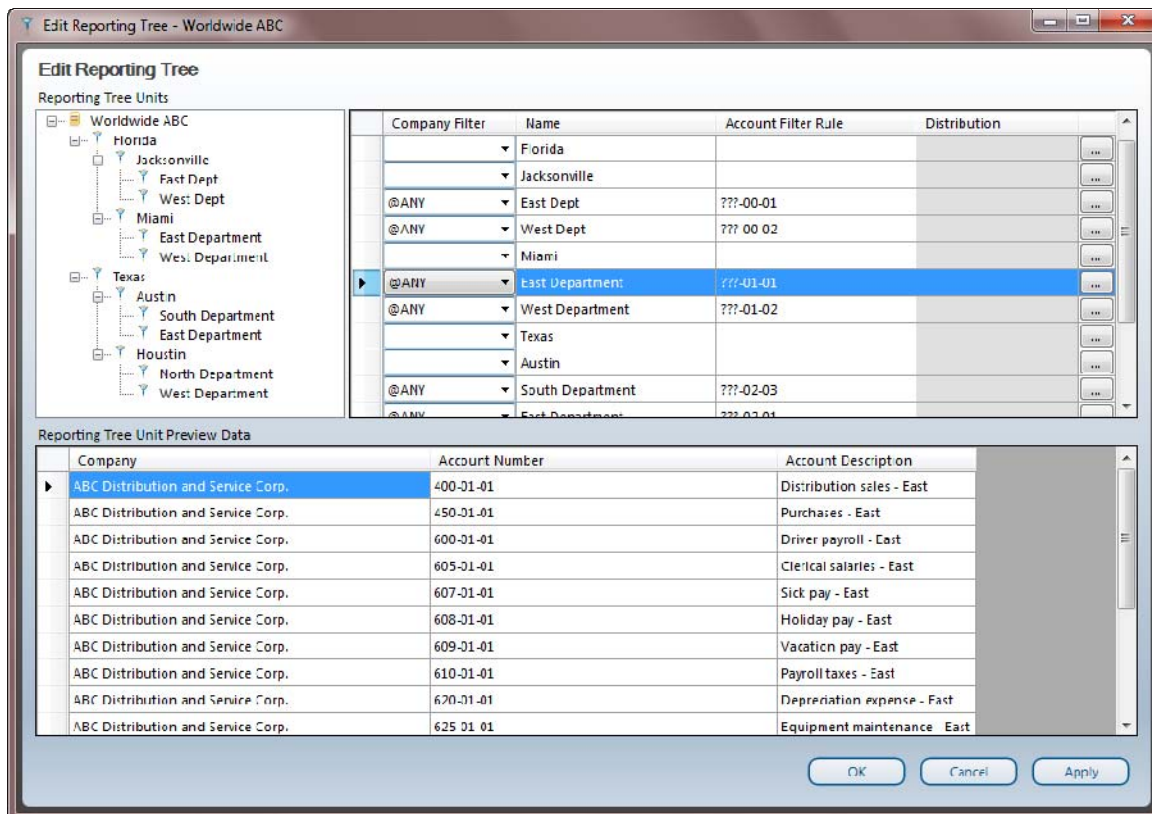
With Microsoft's permission, Sage is developing a utility that will decrypt proprietary FRx files. The conversion utility will allow consultants or users familiar with FRx to recreate similar reports in Intelligence more quickly, and reduce the effort in migrating FRx reports over to Intelligence.

More details will soon be available on the new Intelligence features for 4.5.

BUSINESS PARTNER CERTIFICATION FOR 4.5

The certification for 4.5 will include 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 will also be 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 will include 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. It will also include installing and implementing Sage ERP MAS 200 SQL 4.5, and upgrading 3.x SQL customers to 4.5.

For more details, please refer to the Sage ERP MAS 90 and 200 4.5 Business Partner Frequently Asked Questions document. Certification and re-certification details will also be available on Sage Partner University product certifications section.

FREE SAGECRM 7.1 SERVER LICENSE AND ONE SAGECRM USER LICENSE

4.5 will be compatible with SageCRM 7.1, and each Sage ERP MAS 90 and 200 on-plan customer will be 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 will also be 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 will deliver 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.*

The new eMarketing module for SageCRM will deliver all the power of e-marketing software directly through SageCRM for end-to-end e-marketing campaign management. It will enable 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.
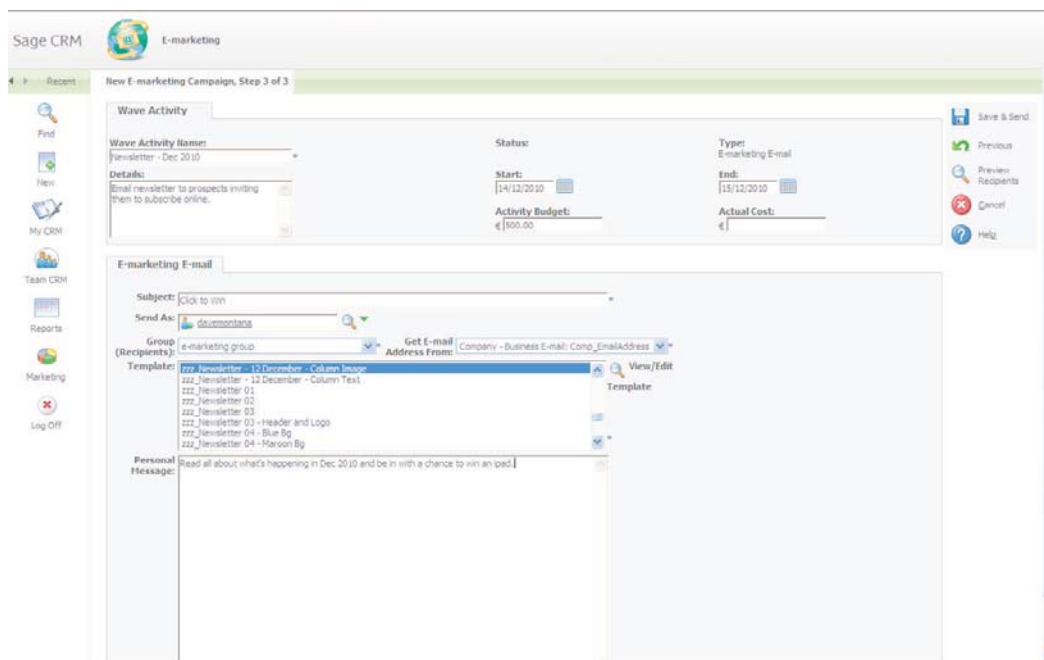
SageCRM v7.1 total campaign management functionality will come with full campaign workflow so organizations can map campaigns to their business processes for consistent execution. It will enable marketing users to execute multi-channel marketing campaigns and then clone those campaigns that have worked 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 will deliver 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 will be compatible with version 2007 and 2010 of Exchange.

Users will be able to create graphical report charts quickly and easily with SageCRM v7.1. Providing at-a-glance business insight, report charts and graphics will now be more visually impactful, making it easy for management and users to see comparisons, patterns, and trends in their data.
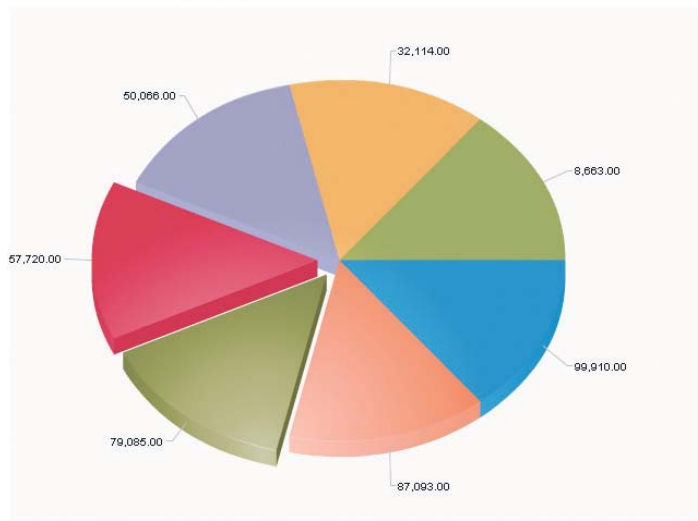
Campaign Name	Campaign Name	Campaign Budget (€)	Actual Cost (€)	Revenue Generated
TimeNExpense Marketing Campaign	TimeNExpense Marketing Campaign	10,745.06	10,745.06	8,663.00
	TimeNExpense Marketing Campaign	10,745.06	10,745.06	32,114.00
	TimeNExpense Marketing Campaign	10,745.06	10,745.06	50,066.00
	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 will be 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 will be able to choose to migrate to SQL. However, because not all Sage ERP MAS 90 and 200 modules will be 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 will be 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, will 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
- Abra Payroll & HR
- 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
- 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 will include the option of either traditional module-based pricing or the user-based pricing model. User-based pricing will be

very similar to the Extended Enterprise Suite model, will require a minimum purchase of 5-users, and will include 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 will be that Fixed Assets and SageCRM user licenses will be sold separately. The module-based traditional pricing will not change 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 module-based pricing. The SQL option for 4.5 will remain the same as the Sage ERP MAS 200 SQL 4.45 pricing, and any current 4.45 customers will be merged into the 4.5 standard pricing model without incurring any fees. No product price changes will be 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 user-based 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 will also be eligible to receive an incremental SageCRM user license 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 will be 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, 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:

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

For more detailed information on pricing and examples, please 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 will offer Sage ERP MAS 90 and 200 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 <u>Experian Smart Business Reports for Sage ERP MAS</u>.

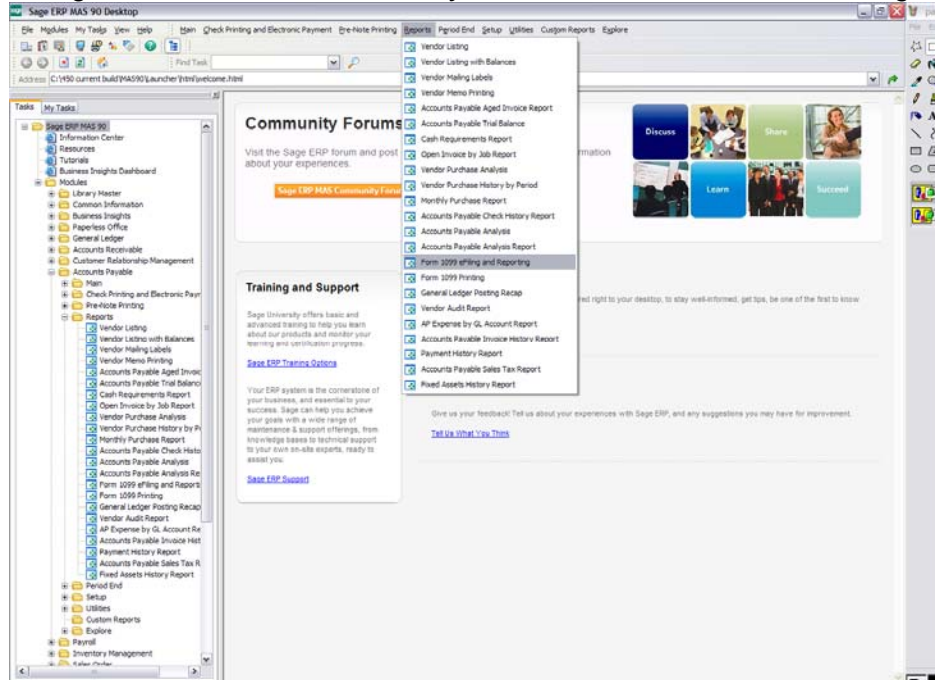## CREDIT CARD PROCESSING POWERED BY SAGE PAYMENT SOLUTIONS

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. This module will be distributed on the Sage ERP MAS 90 and 200 product DVDs; no special program download will be required.

A complete payment processing solution, 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 purchase 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.*

PAYROLL SERVICES

CompuPay will continue to provide payroll services for Sage ERP MAS 90 and 200 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.

INTEGRATED SAGE SOLUTIONS

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

SAGE ABRA HRMS

4.5 will remain compliant with the most recent release of Sage Abra HR, version 10.1, with no new integration points. For additional details, please contact your authorized Sage Abra 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. The Fixed Asset module will not be compatible with Sage ERP MAS 200 SQL 4.5, to address Fixed Asset Accounting needs, FAS 500 will be available. More details will be provided in a future version of this Pre-Release Guide.

SAGE SALESLOGIX

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

SAGE TIMESHEET – SAGE MAS 90 EDITION

For professional services organizations that need to track and bill projects based on a fixed time or material basis, Sage TimeSheet 2011 will provide an integrated 4.5 solution that streamlines processes, automates task management, and increases the accuracy of project forecasting. This sophisticated timesheet and time tracking data collection software will provide the ability to electronically assign jobs to employees and collect data on actual time spent and costs incurred on each task. Sage TimeSheet includes a seamless integration to Sage MAS Job Cost, Payroll, TimeCard, Accounts Payable, and Accounts Receivable.

Using an intuitive spreadsheet-style interface, this comprehensive solution for internal or remote workgroups of any size supports a diversity of business processes and approval levels, project structures and workflows. Automate time and expense tracking, billing and expense reimbursement, and create powerful web-based, summary, detail, or custom

reports. Transfer actuals and prorate values, do remote Time and Expense entry and project management, transfer expense items to Accounts Receivable for billing, and restrict the job selection lists according to the selected employee. *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.

CREDIT CARD PROCESSING POWERED BY PCCHARGE

Credit Card Processing module powered by PCCharge Payment Server will be compatible with Sage ERP MAS 90 and 200 4.5, and will continue to be an open architecture system designed to integrate credit card transaction processing into an existing Sage ERP MAS 90 or 200 system. In addition, for convenient cost-saving one stop support and processing, Sage Payment Solutions provides a merchant account for this credit card module. Simply set-up the merchant account and inform the customer's existing processor that they intend to use Sage Payment Solutions for processing. There is no need to change banks or bank accounts.

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.

REPORT MASTER

To help you plan customer upgrades, we want to give you advance notice that 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.™   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 will be officially retired as of the 4.5 release. 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, will be retired with the 4.5 release, as their main features and functionality will be incorporated into the base product.

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 www.sagemas.com/MAS_90_200_feedback. 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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