

Sage 100 ERP

Sage 100 ERP 2013

Initial Pre-Release Guide

June 2012



sage

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This Pre-Release guide is intended for use as a “preview” of new functionality in a coming release and represents the current view of the Sage 100 ERP 2013 product direction. The information is subject to change at any time without notice.

RELEASE HIGHLIGHTS

Enhancements will be across the product in Accounts Payable, Bank Reconciliation, Inventory Management, Paperless Office, Sage CRM, and enhanced Credit Card Processing through Sage Exchange:

- Simplify the process of matching invoices from vendors by using expanded Accounts Payable Invoice Numbers
- Conveniently utilize public email servers such as Google mail, Yahoo and AT&T with Paperless Office
- Increased flexibility of Credit Card processing through Sage Exchange including card-swipe capabilities, charges for repetitive invoices and Accounts Receivable invoices, mobile payments and more
- Efficiently designate customers and vendors as Inactive without losing historical information
- Align Multiple ERP companies to a single CRM database
- Quick Order Entry screens enable Sage 100 ERP quotes and orders to be processed in the familiar Sage CRM environment without installing Sage 100 ERP on the workstation or mobile device
- Streamline access to on-hand details and pricing information from the Inventory Maintenance screen

RELEASE OVERVIEW

The Sage 100 ERP 2013 release (formerly Sage ERP MAS 90 and 200 5.0) will focus on providing compelling value to existing customers, generate interest in the marketplace with new connected services and add-on solutions, and continuing to offer more deployment and pricing options. Substantial value will be provided to existing customers by addressing their top enhancement requests, Auto Updates for easy application of Sage 100 ERP Product Updates, enhanced Credit Card Processing using Sage Exchange, and more.

The main features and functionality enhancements in Sage 100 ERP 2013 will be in Accounts Payable, Bank Reconciliation, Inventory Management, Paperless Office, Sage CRM, and enhanced Credit Card Processing through Sage Exchange. Accounts Payable

Invoice Numbers will be expanded, customers and vendors will be able to be designated as Inactive, Paperless Office will be able to utilize public email servers, and enhancements will be made to the Inventory Maintenance screen. Multiple ERP companies will be able to be aligned to a single CRM database, and Quick Order Entry screens will enable Sage 100 ERP quotes and orders to be processed in the familiar Sage CRM environment. These customer-requested features and functionality were obtained through various feedback and evaluation methods, including the Sage customer enhancement request website and user surveys.

Both new and existing customers will find immediate benefit to their business operations from the enhancements in Sage 100 ERP 2013. We strongly encourage customers running older versions of Sage 100 ERP to schedule their 2013 upgrades shortly following the release, so they can begin utilizing the enhancements and the business benefits outlined in this document. For the most current support information, please refer to the Supported Versions document posted on the Partner Portal (partners.Sagenorthamerica.com).

Additional information on Sage 100 ERP 2013 enhancements will be available in an updated version of this Pre-Release Guide.

SAGE 100 ERP

Sage 100 ERP (formerly Sage ERP MAS 90 and 200) is an innovative, flexible solution for growing businesses which offers modern architecture, robust features, ease of use, and powerful customization. The user-centered design allows customers to easily build the system they need from a broad suite of modules including financial, business intelligence, human resources, customer relationship management (CRM), eBusiness, manufacturing and distribution. Specific requirements can be met and business rules enforced by adapting and changing the system using innovative codeless customization, which also survives upgrades and keeps total cost of ownership low. Sage 100 ERP offers product line stability and the benefit of years of customer input from tens of thousands of installations, and an established ecosystem of expert Business Partners.

SAGE 100 ERP 2013 AVAILABILITY

The main delivery method for Sage 100 ERP 2013 will be electronic download, with the ability to order physical media for an additional fee. Sage 100 ERP 2013 Beta is targeted to begin in October 2012. General Availability for new sales and for Early Adopter customer participants is expected to follow closely in November 2012. The Sage 100 ERP 2013 Auto-Delivery download availability for current customers is expected in the December timeframe.

NEW FUNCTIONALITY IN ACCOUNTS PAYABLE

New Accounts Payable features in the 2013 release will provide customers with the ability to use the same invoice number as their vendor's, inactivate vendors while retaining all their information in the system, and easily view cleared checks in Vendor Maintenance.

EXPANDED INVOICE NUMBER

The Invoice Number field will be expanded in the 2013 release to accommodate up to 20 characters so that the entire invoice number of a vendor can be entered, exactly as they appear, minimizing the need to truncate. This will simplify the process of matching invoices from vendors, and virtually eliminate errors, by simply using the same invoice number in the Sage 100 ERP system as the vendor's invoice number.

In order to keep the portrait format of some reports and listings, such as Aged Invoice Report and Trial Balance, they will be slightly modified to display the full 20 character AP Vendor Invoice number. Journals and Journal Comments that contain references to the Vendor No, Invoice Number, and Comment Detail will use additional rows in order to accommodate the longer field length.

A/P Invoice Data Entry (ABC) 4/2/2012

Vendor No: 01-AIRWAY
 Name: Airway Property
 Invoice No: 04022012-12345678901

1. Header | 2. Lines

Invoice Date: 4/2/2012
 Invoice Amount: 500.00
 Subject to Discount: 500.00
 Prepaid Invoice:

Terms Code: 03 NET END OF MONTH
 Invoice Due Date: 4/30/2012
 Discount Due Date:
 Discount Amount: 0.00

Hold Payment: ☐ Separate Check: ☐
 Comment:
 1099 Payment Form: None Box:

Accept Cancel Delete

Accounts Payable Invoice Register

Journal Posting Date: 4/2/2012
 Register Number: AP-000015

ABC Distribution and Service Corp (ABC)

Division Number: 01 TRADE ACCOUNTS PAYABLE

Vendor Number	Invoice Number	Invoice Date	Due Date	Discount	Invoice Amount	Discount	Distribution Amount
AIRWAY	Airway Property	4/2/2012	4/30/2012		500.00	0.00	500.00
ALLCLIM	987654321-APRIL	4/2/2012	4/12/2012		100.00	0.00	100.00
Division 01 Total:					600.00	0.00	600.00
Report Total:					600.00	0.00	600.00

Separate Check: No
 Separate Check: No
 Prepaid Amount: 0.00
 Prepaid Amount: 0.00

INACTIVE VENDOR

New features in 2013 will allow Vendors to be inactivated, and to allow creation of “reason codes” to reference why that action was taken. When this functionality is used, all historical transactions will be maintained until an authorized user chooses to permanently delete those records. Full details of the action taken will be in the audit log, and only authorized users can make a payment to a vendor with an inactive status to avoid payment mistakes. In 2013, Inactive Vendors will be able to be hidden from view, or to be excluded from listings and forms for faster lookups and data entry.

Vendor No. 01-AIRWAY
Name Airway Property

1. Main | 2. Additional | 3. Statistics | 4. Summary | 5. History | 6. Invoices | 7. Transactions | 8. Checks | 9. P/Os

Comment
Vendor Status: **Active** (dropdown menu open showing: Active, Inactive, Temporary)
Inactive Reason
Data Entry: 555-00-03
G/L Account: Rent
Separate Check: ☐

Use P/O Receipt of Invoice Entry for this Vendor ☐
Primary Purchase Address
1099 Form
Vendor Type: None
Default Form: None
Taxpayer ID No.
Default Box No.
Misc Box 9 ☐ 1099 History...

Printing
Sort: AIRWAY
Batch Fax: ☐

Accept Cancel Delete

In Vendor Maintenance, set Vendor Status to Inactive to restrict transactions, and prevent inadvertent data entries while maintaining historical transaction information.

	Code	Description
1	OUTOB	Out of Business
2	MERGE	Merged with another company
3	INACT	No activity in a year
4	CHP11	Chapter 11
5	DISP	Dispute over payments
6	DISP1	Dispute over invoices
7		

Accept Cancel

Create Reason Codes using the Inactive Reason Code Maintenance table. These Reason Codes will be able to be assigned when either customers or vendors are designated as Inactive.

CLEARED CHECK INFORMATION CONVENIENTLY AVAILABLE

In response to Sage 100 ERP customer requests, the 2013 release will include the option to display and access all relevant bank information in convenient places, as well as the option to show the cleared check information in Bank Reconciliation, in Accounts Payable Vendor Maintenance without having to access the Bank Reconciliation module. Cleared checks will also be displayed in the Invoices, Transactions and Check Tabs in Vendor Maintenance.

Accounts Payable Options (ABC) 5/4/2012

1. Main | 2. Additional | 3. Entry | 4. Printing | 5. History | 6. ACH

Accounts Payable Divisions ☒

Aging Categories to Use for Invoices Days

Aging Categories
30 Days 45 Days 60 Days 90 Days

Display
Default Invoice Display Descending Invoice Date
Display Invoices with Zero Balance ☒
Display Cleared Checks in Vendor Maintenance ☐

Fiscal Period
Current Fiscal Year 2010
Current Period 05

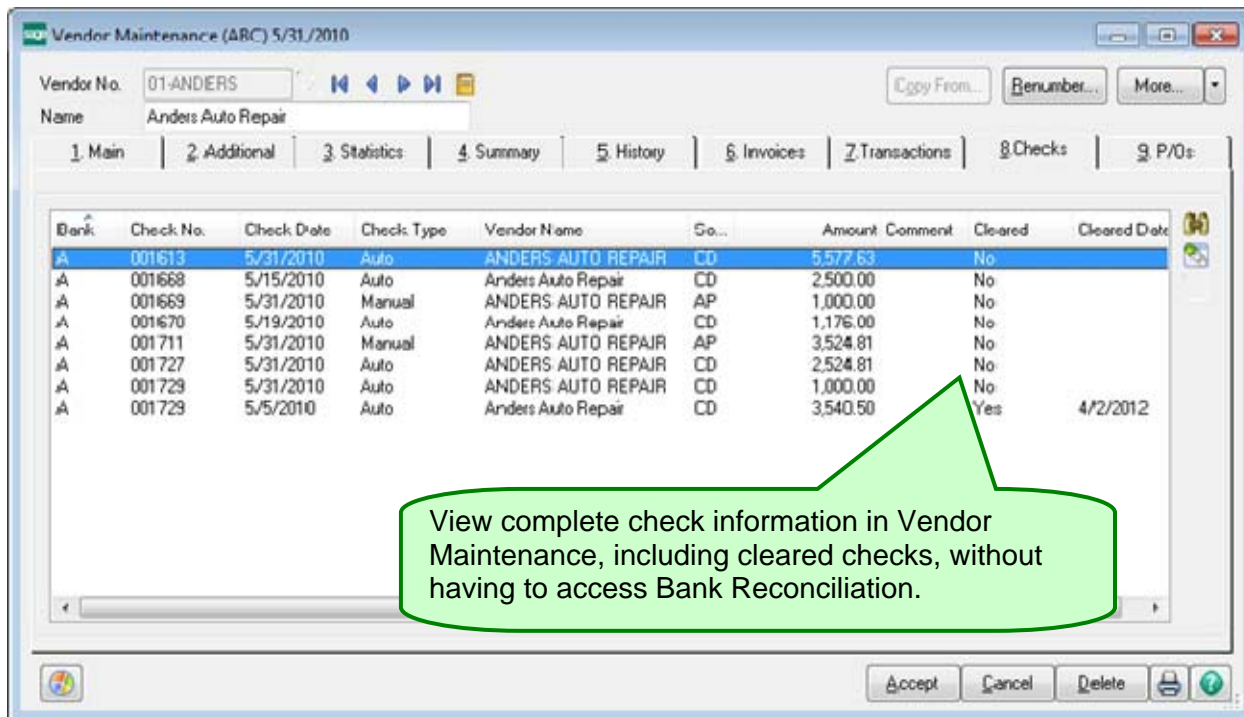
1099 Reporting ☒
Default 1099 Calendar Year 2010

Integrate with
General Ledger ☒
Bank Reconciliation ☒
Job Cost ☐

Sales Tax Reporting

Accept Cancel [Printer Icon] [Help Icon]

In Accounts Payable Options, activate Display Cleared Checks in Vendor Maintenance.



NEW FUNCTIONALITY IN ACCOUNTS RECEIVABLE

New Accounts Receivable features in the 2013 release will provide the ability to inactivate customers while retaining their information in the system.

INACTIVE CUSTOMER

New features in 2013 will allow Customers to be inactivated, and to create "reason codes" to reference why that action was taken. When a customer is inactivated, that account will be restricted from use in all data entries, except for receiving payments. For collections and other activities, when a customer is identified as inactive they will be able to be easily identified and targeted for collections communications, mailing labels and statement printing. Historical information for Inactive Customers will be retained and available for view and print, and for sales comparisons. To avoid unnecessary clutter, especially during data entry, Inactive Customers can be excluded from lookups by selecting an option in Company Maintenance. As with the Inactive Vendor, full details of the action taken will be included in the audit log.

Customer Maintenance (ABC) 4/2/2012

Customer No. 01-MAVRK
Name Maverick Papers

1. Main | 2. Additional | 3. Statistics | 4. Summary | 5. History | 6. Invoices | 7. Transactions | 8. S/Os

Comment
Open Item Customer ☒ Internet Enabled ☐

Customer Status **Inactive** [Inactive Reason](#) DISP1 Dispute over invoices

Data Entry
Price Level
Dflt Pymt Type **CHECK** CHECK
Discount Rate .000 %
Fin Charge Rate 500%
[Item Code](#)

Print Dun Message ☒
Batch Fax ☐
Primary Credit Card Information
Card ID
Payment Type
Cardholder Name
Last Four Digits
Expiration Date [Credit Cards...](#)

[Accept](#) [Cancel](#) [Delete](#)

Callout 1: Inactivate customers in Customer Maintenance to restrict transactions, and prevent inadvertent data entries while maintaining historical transaction information.

Callout 2: Assign reason codes when taking the action to inactivate customers.

NEW FUNCTIONALITY IN INVENTORY MANAGEMENT

Several Inventory Maintenance Screen enhancements will be made in the 2013 release in Inventory Management.

ADDITIONAL INFORMATION IN ITEM MAINTENANCE

Additional item details will be available in the 2013 release on the main tab in Item Maintenance. Customer service personnel will be able to easily see on-hand quantities, and pricing directly from one screen. From this screen it will also be possible to click on each of the items and drill into details, such as view the details for the on hand quantities in all warehouses.

Item Maintenance (ABC) 4/2/2012

Item Code: 1001-HON-H252
Description: HON 2 DRAWER LETTER FILE W/D LK

1. Main | 2. Additional | 3. Quantity | 4. History | 5. Transactions | 6. Orders

Product Line: WF&A WORKSTATION FURN & ACCESS
Product Type: Finished Good
Valuation: FIFO
Procurement: Buy

Weight: 35
Volume: 0.0000
Inventory Cycle: B

Unit of Measure: Standard: EACH, Purchases: EACH, Sales: EACH

Price Code: STD STANDARD QUANTITY PRIC
Default Warehouse: 000 CENTRAL WAREHOUSE
Primary Vendor: 01-CONT
Warranty Code: 30 DAY

Sales: Retail Price: 84.000, Standard Price: 84.000, Last Sold: 5/1/2010
Purchases: Standard Cost: 34.250, Average Cost: 34.250, Last Receipt: 5/1/2010

Quantities:

Whse	Description	On Hand	On PO	On SO	On Bk Ord	Committed	Available	In Shipping	On F
000	CENTRAL...	2,675.00	1.00	.00	.00	.00	2,675.00	.00	
001	EAST WA...	992.00	.00	3.00	.00	3.00	989.00	.00	
002	WEST WA...	1,519.00	.00	12.00	10.00	22.00	1,497.00	.00	
098	SCRAP W...	1.00	.00	.00	.00	.00	1.00	.00	

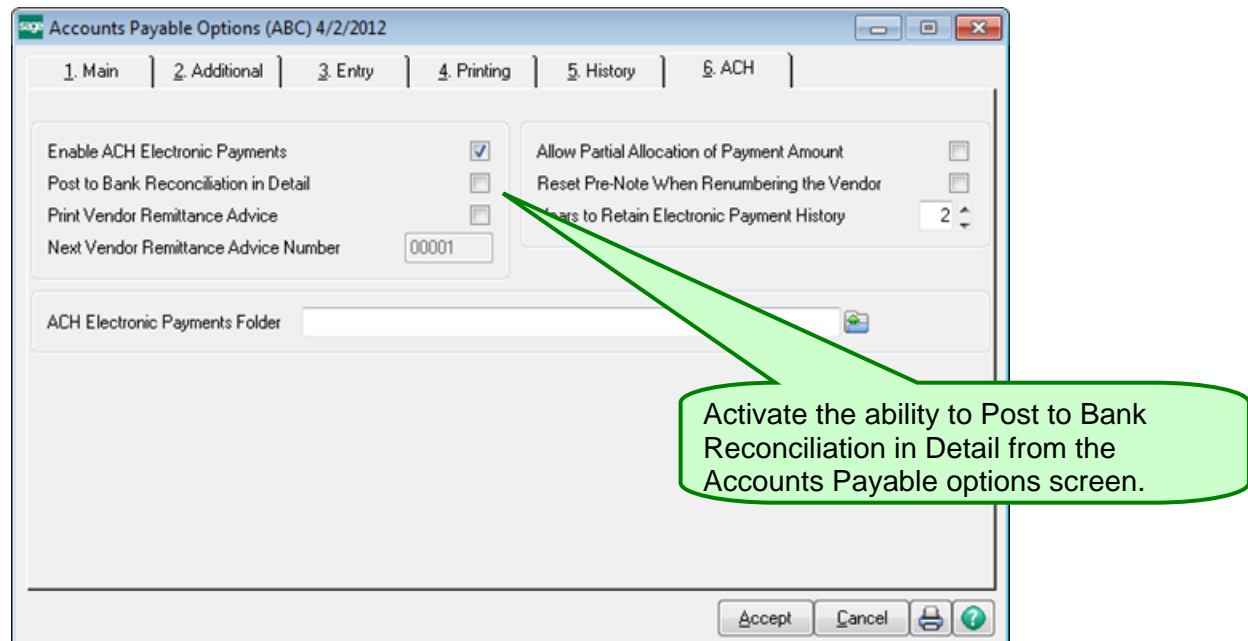
Accept Cancel Delete

For efficient access, additional details will be available on the main tab in Item maintenance such as on-hand quantities and pricing information.

View additional information on the highlighted item using the quantity recap button.

BANK RECONCILIATION ACH ELECTRONIC PAYMENTS ENHANCEMENTS

ACH electronic payments detail enhancements will be made to Bank Reconciliation in the 2013 release. When this option is selected, separate ACH details for each vendor will be posted to show unique vendor ACH electronic check numbers, and dollar amounts. This option will be activated with and without vendor remittance, and no deposit or check entry is necessary.



PAPERLESS OFFICE ENHANCEMENTS

The power of Paperless Office features will be available on public mail servers in Sage 100 ERP 2013. This includes Transport Layer Security (TLS) and Secure Sockets Layer (SSL) mail services such as Google mail, Yahoo, AT&T, and Hotmail. This enhancement will allow use of SMTP authentication, so users will no longer need to maintain their own email server, and can use other options such as Google Apps. Communication between the client and server will be encrypted, protecting sensitive company information, and ensuring you are talking to the actual server.

SAGE CRM ENHANCEMENTS

New Sage CRM integration and workflow enhancements will enable the integration of all ERP companies into one CRM database, and provide upgrade-safe Sage CRM customizations. In Sage 100 ERP 2013, tasks launched from Sage CRM will not require the use of a Sage 100 ERP user license.

MULTI-COMPANY SAGE CRM

The Sage 100 ERP 2013 release will include Sage CRM integration enhancements enabling multiple ERP companies to be mapped to a single Sage CRM system. Sage 100 ERP customers who have created and are operating more than one company or division will be able to integrate these companies or divisions to one single Sage CRM instance. This will allow customers using Sage CRM to get a single consolidated view of all their customer facing activities and salespeople will be able to more efficiently move between all their customers, regardless of the associated Sage 100 ERP company using customer numbers or database identification.

SAGE CRM QUICK ORDER ENTRY

New quick order entry screens will be an option for Sage 100 Advanced and Premium ERP 2013 which can be used in addition to the standard order entry screens.

Quick order entry screens will enable the processing of Sage 100 ERP quotes and orders in the familiar Sage CRM environment without having to launch a Sales Order screen.

Item Code	Description	Ordered	Back Ordered	Unit Price	Discount Percent	Extension	Warehouse
1 1001-HON-H252	HON 2 DRAWER LETTER FLE	1.00	.00	84.000	0.00	84.00	001
2 /C	Default Item Code /C	.00	.00	.000		.00	
3 /SPEC	SPECIAL RUSH HANDLING	.00	.00	.000		15.00	

UPGRADE SAFE SAGE CRM CUSTOMIZATIONS

Enhancements in Sage CRM 7.1 SP2, provided with Sage 100 ERP 2013, will include safeguards to preserve the Sage CRM customizations when installing a CRM patch or service pack. If the Sage CRM SDK or in-product customization tool components are utilized to develop the Sage CRM customizations, they will not have to be reapplied following an update. This will streamline implementation of patches and service packs, and make them much easier to apply.

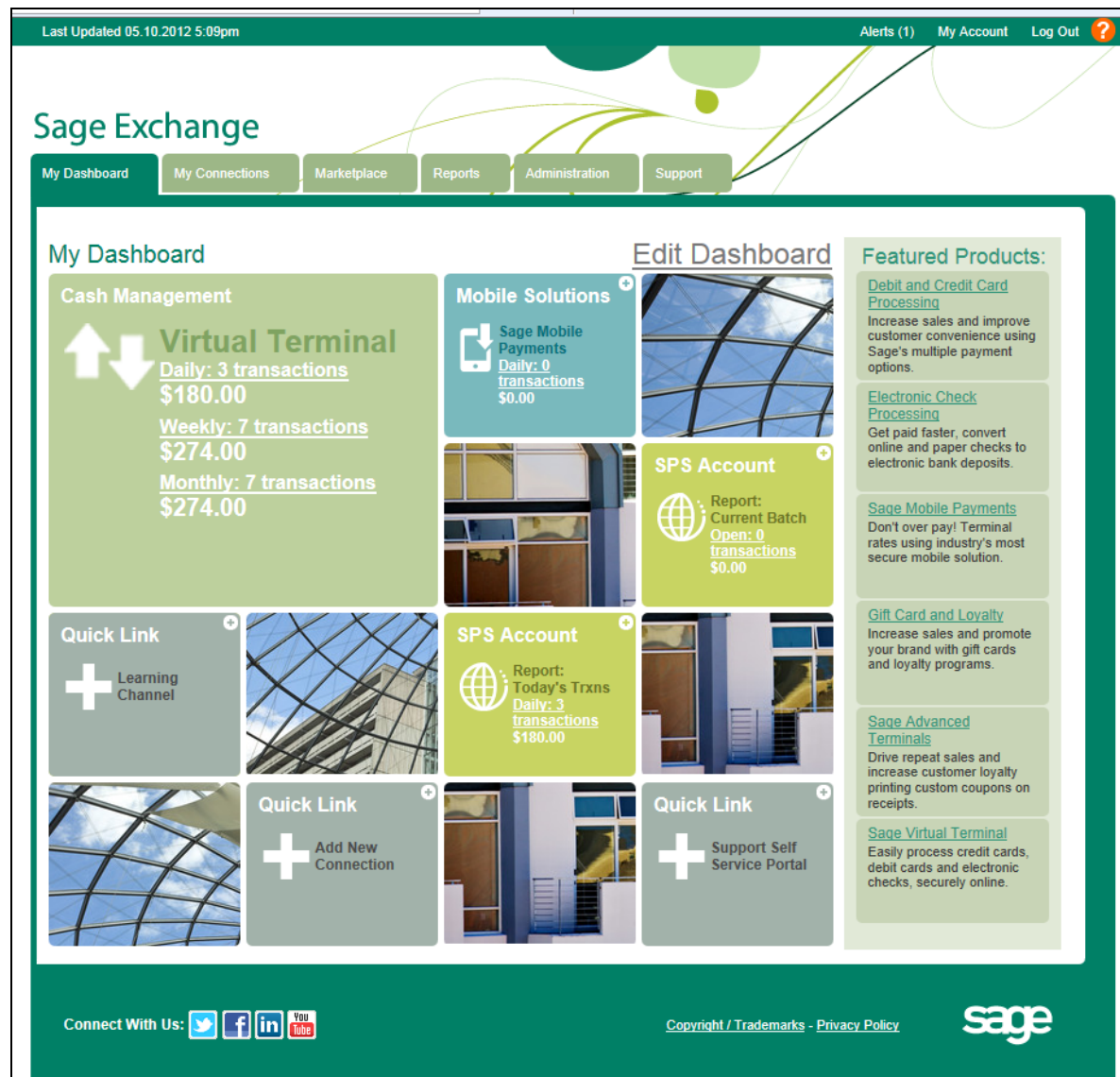
CREDIT CARD PROCESSING ENHANCEMENTS

Credit Card Processing in Sage 100 ERP 2013 will utilize Sage Exchange to provide many enhancements and increased flexibility including card-swipe capabilities, charges for repetitive invoices and Accounts Receivable invoices, mobile payments, improved cash flow management and forecasting, and will provide a consolidated view of payment activity. Sage Exchange Support is automatically included when establishing a merchant account with Sage Payment Solutions.

Sage Exchange is the cloud-based technology that provides the integration between Sage 100 ERP and the Sage Payments Gateway. It consists of three key elements, the Sage Exchange Vault, the Sage Exchange portal, and third party developer tools which enable Sage Development Partners to connect to Sage Exchange. The Sage Exchange technology will include connection to a secure vault for storing all sensitive credit card information outside of Sage 100 ERP, as well as for processing credit card transactions. Therefore the 2013 release will no longer be subject to the lengthy PA-DSS audit process which ties up valuable Sage development resources.

SAGE EXCHANGE

The Sage Exchange portal will provide a user-configurable dashboard and flexibility to view payments information on the web via a tablet or desktop, in the manner each customer would prefer. Customize My Dashboard to gain access to the information that is important to you. Use the predefined tabs to assign access to Sage Exchange portal for your employees, create customized coupons for use with specific credit card terminals, and easily make connections using tablets or mobile phones. Plus 24/7 access to the Sage Payment Solutions customer support database right at your fingertips.



SAGE EXCHANGE VAULT

Reduce fraud exposure by storing sensitive cardholder data in the secure, cloud-based Sage Exchange Vault. For added cardholder security, Sage 100 ERP 2013 will also allow a one-time use credit card for a payment transaction without saving credit card information. Customers migrating from previous versions of the software will be able to easily move their customers' credit card information from their current location into the secure Sage Exchange Vault. The process will be streamlined for customers who are already using Sage Payment Solutions.

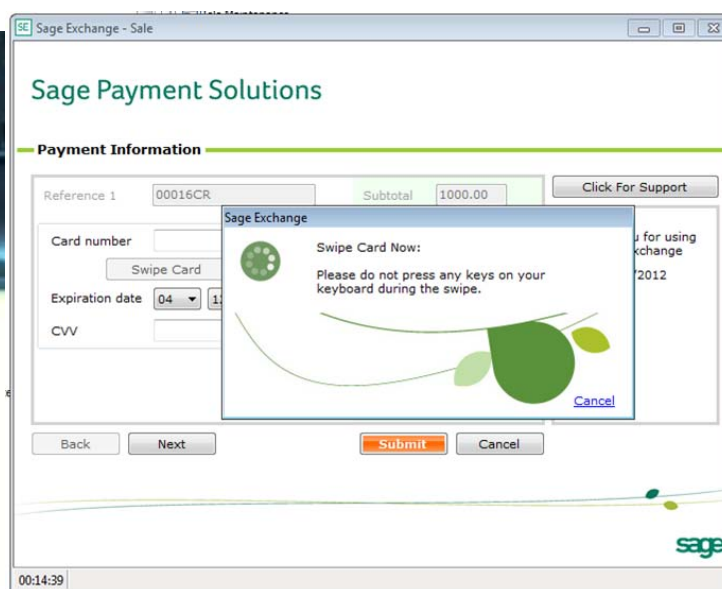
CREDIT CARD ENHANCEMENTS

Sage 100 ERP 2013 will provide the ability to accept payments by credit card for services rendered at the time of Accounts Receivable invoice creation for the invoice total, without requiring the use of Sales Order. This streamlines acceptance of credit cards by companies that sell services, such as landscape architects and business consultants. At the time of Sales Order creation, each unique business will be able to define the pre-authorization amount they want to

use, whether it's a portion of the transaction, an amount over the transaction amount, or the entire amount owed. It will also be easier to provide customers with confirmation of payment receipt by including the payment amount on the Sales Order invoice. New functionality in Sage 100 ERP 2013 will enable the ability to apply credit card payments for recurring invoices, for businesses that bill repetitively for services such as membership dues or service fees.

CARD SWIPE CAPABILITIES

Sage Exchange will reduce merchant transaction fees when cards are present and speed the entry process when swiping credit cards using a Sage Payments recognized card swipe device attached to the terminal. Our new card swipe capabilities have been truly integrated so that payments processing is built into the normal Sage 100 ERP workflow, which can replace the disconnected card swipe capabilities many companies use.



SAGE MOBILE PAYMENTS

Sage Exchange will enable the delivery of many new payments features and functionality in the 2013 release, and future Product Updates. For Sage 100 ERP 2013, Sage Exchange will allow payments to be collected anytime, anywhere, via smart phone. Ideal for cash sales, Sage Mobile Payments will immediately capture the cash transaction information and send it to Sage Exchange, for secure transfer to Sage 100 ERP 2013 Accounts Receivable Cash Receipts Entry.. Companies that provide services and collect fees in a mobile environment, such as mobile pet grooming, will find these features especially helpful.



Sage Mobile Payments will enable the collection of payments anytime anywhere via smartphones and tablets to improve cash flow and securely send information to Sage 100 ERP via Sage Exchange.

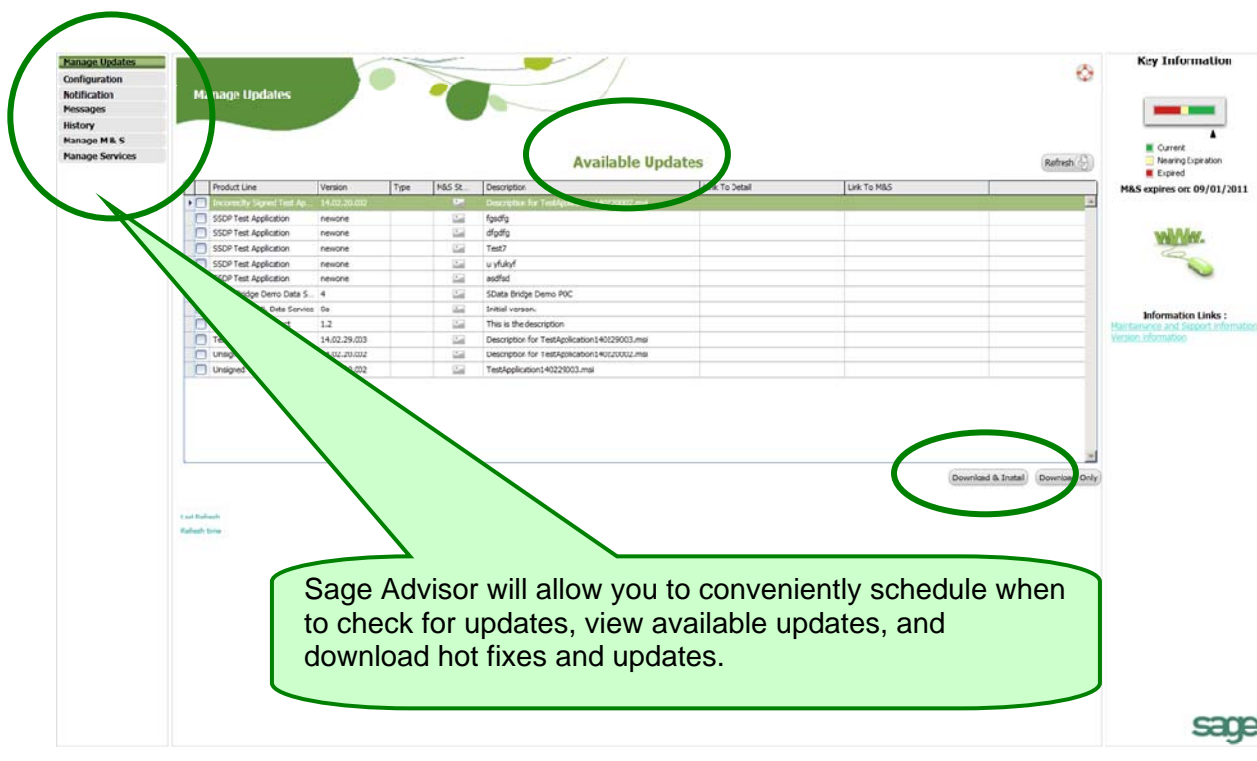
SAGE MOBILE INVOICE QUERY, PAY AND POST

The new mobile functionality which will be introduced with the Sage 100 ERP 2013 release is planned to be enhanced in a Product Update, benefiting companies with a mobile sales force that also collects payments on outstanding invoices. The software will include the ability to identify an existing Sage 100 ERP customer from the mobile device, view the customer's open invoices, and select one or more of the open invoices to pay. With a Sage Mobile card swipe device connected to the smartphone, the salesperson can swipe the customer's credit card and present the touch screen of the mobile device to the customer for signature approval of the charges. The credit card receipt can optionally be emailed directly to the customer from Sage Exchange. And, not only will the payment go directly into the merchant's bank account just like any other credit card transaction, but it will also create a cash receipts batch within Sage 100 ERP to complete the financial transaction.

SAGE ADVISOR UPDATE ENHANCEMENTS

Sage 100 ERP 2013 will provide several enhancements and updates to Sage Advisor capabilities, and enable self-service management of Product Updates and new software releases. This new website will include download installation components for manual

installations, current information on maintenance and support entitlement and expiration dates, and the ability to schedule an Automatic Check for Updates.



Additional Sage Advisor details will be available in an updated version of this Pre-Release Guide.

SAGE 100 ERP INTELLIGENCE REPORTING ENHANCEMENTS

Several Intelligence Reporting enhancements are planned for the Sage 100 ERP 2013 release. Details will be provided in an updated version of this Pre-Release Guide.

SAGE 100 ERP 2013 BUSINESS PARTNER CERTIFICATION

The certification for Sage 100 ERP 2013 will include classes to provide all necessary information for Sage Business Partners to provide customers with flexibility in their choice of all editions, including Standard, Advanced, Premium, and Online. More details will be provided in an updated version of this Pre-Release Guide.

Separate certification is required for Sage HRMS products, including the new SQL product targeted for release in July.

Certification and re-certification details will be available on Sage Partner University in the product certifications section.

CONNECTED SERVICES UPDATES

The following Connected Services will provide Sage 100 ERP 2013 customers with additional specialized features and functionality such as up-to-date Federal and State forms and eFiling, accessibility to current and accurate calculations, and visibility into critical data from almost anywhere, anytime.

FEDERAL AND STATE eFILING AND REPORTING

The Sage 100 ERP integration to Federal and State eFiling and Reporting, powered by Aatrix, will be enhanced in the 2013 release to streamline the installation. **Please note that for Sage 100 ERP versions 4.3, 4.4, and 4.5 the 2012 Year-End Update will be required** in order for customers to continue using Federal and State eFiling and Reporting to eFile W-2s and 1099s to the appropriate state and federal agencies, print and mail the forms to their employees, or use the fee-based eFiling service.

Form ID	Form Description
8109-V_FORM	EFTPS Form 8109. Use this to make 940, 941, 943, 944, and 9
940_FORM	[Annual] Employer's Annual Federal Unemployment (FUTA) Tax I
941-X_FORM	Adjusted Employer's Quarterly Federal Tax Return or Claim for Re
941_FORM	[Quarterly] Employer's Quarterly Federal Tax Return. Use this to
943_FORM	[Annual] Employer's Annual Federal Tax Return for Agricultural E
944_FORM	[Annual] Employer's Annual Federal Tax Return. Use this to rep
945_FORM	[Annual] Annual Return of Federal Income Tax. Use this to repo
EW2_CONSENT	Use this to print an electronic W-2 consent for each of your emp
I-9_FORM	Employment Eligibility Verification. Use this to report employee in
W-11_FORM	Hiring Incentives to Restore Employment (HIRE) Act Employee A

As stated in the retirement section below, the in-product traditional Accounts Payable Form 1099, Payroll Quarterly 941 Form, and Payroll W2 Form printing using pre-printed forms and eFile preparation using the Electronic Reporting module will be retired with the Sage 100 ERP 2014 release. In the 2013 release, the traditional menu options will be hidden in a new installation, although the ability to unhide them will be provided.

Customers will be able to continue to print federal and state forms for no additional charge when an active Business Care plan exists. Or as Sage 100 ERP customers, they will also be able to continue to choose to electronically file for a low eFiling fee.

Please note: Filings for Tax Year 2013 are the last year we will maintain and support within the standard Accounts Payable, Payroll and Electronic Reporting modules. Filings for Tax Years 2014 and later will only be available with the Sage 100 ERP integration to Federal and State eFiling and Reporting, powered by Aatrix. The Payroll Tax Tables will continue to be maintained.

SAGE PAYMENT SOLUTIONS

Sage Payment Solutions will continue to be compatible with Sage 100 ERP 2013 providing a complete Credit Card Processing solution through Sage Exchange and utilizing Sage Payment Solutions merchant accounts.

Credit Card Processing provides a complete credit card processing solution for mail order, telephone order, and Internet businesses, including corporate and government purchasing cards. In addition to Account Receivable Cash Receipts Entry, Sales Order Entry, Sales Order Invoice Data Entry, and eBusiness Manager Order Entry in Sage 100 ERP 2013, data for credit card processing will also be available for manual entry in Accounts Receivable Invoice Data Entry and Repetitive Invoice Entry. A credit card will be able to be associated with a recurring invoice and processed upon conversion to a standard invoice in Accounts Receivable Invoice Entry. *Please refer to the Credit Card Enhancement section of this document for more details.*

SAGE 100 ERP SHIPPING BY SMARTLINC

Sage 100 ERP Shipping is a new web-based, fully scalable multi-carrier shipping solution that can be deployed at single or multiple locations, and is expected to be available for Sage 100 ERP in Spring of 2012. Compatible with Sage 100 ERP 2013, our shipping solution will support UPS, USPS, FedEx, DHL, LTL and Full Truck load carriers, company vehicles or regional carriers. Shipment charges and tracking numbers are automatically updated to Sage 100 ERP, and email notifications automatically sent with the date, the carrier, tracking number, and an automatic link to the carrier's website.

SAGE 100 ERP SALES TAX

Sage 100 ERP Sales Tax, Powered by AvaTax, will remain compatible with the 2013 release, simplifying the sales tax payments process 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.

SAGE COMMON SOLUTIONS

Sage will continue to provide solutions across the entire enterprise for Sage 100 ERP customers, including:

SAGE HRMS

Prior to the Sage 100 ERP 2013 release, a new version of Sage HRMS Payroll will be released that is compatible with Sage 100 Premium ERP, for Microsoft SQL Server. This product will be integrated with General Ledger, and includes unlimited direct deposit and ACH transaction functionality, as well as standard tax tables and electronic reporting for all states. Sage HRMS Payroll will be able to be installed independently without the HR functionality of HRMS.

Sage 100 Standard and Advanced ERP will remain compatible with the most recent release of Sage HRMS, version 10.1, with no new integration points. The current Sage 100 ERP Payroll module will continue to be offered for new sales and supported for Sage 100 Standard and Advanced ERP with Payroll Tax Table Updates (TTUs).

For customers wanting a robust HRMS solution they can continue to purchase any of the available Sage HRMS components including Employee Self Service, Talent Management, Benefits Management and more.

SAGE SOURCE

Sage Source is an easy-to-use, personalized web-based workspace which will be available first to Sage 100 Premium ERP customers using Sage HRMS Payroll. Any employee of a customer using Sage Source can install and add gadgets that suit their work lifestyle, such as weather, news, as well as vital business related information like company bulletin boards and pay stub history.

SAGE ACTIVE PLANNER

Sage Active Planner will continue to be available for the Sage 100 ERP 2013 release providing 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 SALESLOGIX

Sage 100 ERP 2013 will use DynaLink for the integration to Sage SalesLogix. *This option is not available for Sage 100 Premium ERP.*

SAGE TIMESHEET

For professional services organizations that need to track and bill projects based on a fixed time or material basis, Sage TimeSheet provides an integrated Sage 100 ERP solution that streamlines processes, automates task management, and increases the accuracy of project forecasting. This sophisticated timesheet and time tracking data collection software includes a seamless integration to Job Cost, Payroll, TimeCard, Accounts Payable, and Accounts Receivable. *This option is not available for Sage 100 Premium ERP.*

THIRD PARTY CONSIDERATIONS

CRYSTAL REPORTS VERSION 2011

Crystal Reports 2011 will be used with Sage 100 ERP 2013 to provide access to data formatting and delivery as meaningful information, both inside and outside your organization. Enhancements to the 2011 release include a .net runtime engine component, the ability to export directly to Excel .XLSX format, Adobe Flash integration, built-in bar code support and enhanced Report Designer features.

TECHNOLOGY AND SUPPORTED PLATFORM UPDATES

The Sage 100 ERP 2013 release includes several technology updates, a 64-bit ODBC driver, implementation of MSI, and compatibility for Sage 100 ERP Premium for Microsoft SQL Server 2012.

64-BIT ODBC DRIVER

The new 64-bit driver provides for integration and improved performance with 64-bit applications that access Sage 100 ERP data, including 64-bit Microsoft Office and Linked Server configurations.

MSI IMPLEMENTATION

The Sage 100 ERP 2013 release will utilize the MSI Windows Installer, an industry standard. MSI bundles applications into a single file, making it easier to install on user's computers, new user setup, utilize scriptable API, more flexibility and control of updates.

WINDOWS 8

Sage 100 ERP 2013 is expected to be compatible with Windows 8. Testing is currently underway for backward compatibility with all supported versions of Sage 100 ERP. Additional information will be published in an update to this pre-release guide. For the most current information on released products, the current supported compatibility product matrix (SPCM) is available on the Sage Customer and Partner Portals.

MICROSOFT SQL SERVER 2012 FOR SAGE 100 PREMIUM ERP

Sage 100 Premium ERP 2013 is expected to be compatible with Microsoft SQL Server 2012. Additional information will be published in an update to this pre-release 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. Testing is currently underway for backwards compatibility with 4.5.

DEVELOPMENT PARTNER SECTION

The DB2 and OCI database interfaces will be removed from the ProvideX executable in the Sage 100 ERP 2013 release. 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. A new Information record type and table will also be in the 2013 release to provide a list of all available records in one convenient location.

TABLE DRIVEN CONVERSION

To support frictionless upgrades, the Sage 100 ERP conversion process will be simplified in the 2013 release by placing the calls to conversion code in one table which can easily be read to determine if conversion is needed. A new Development Studio utility for all conversion functionality will be provided that will utilize a driving table to look at calls for any specific tables. Common conversion logic will be used, eliminating duplicated code and potential bugs. A history table will also be 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.

RETIREMENTS

To help plan customer upgrades, we want to give you advance notice that with the Sage 100 ERP 2013 release, several retirements are planned or will have already taken place.

CREDIT CARD PROCESSING POWERED BY PCCHARGE

The Credit Card Processing module powered by PCCharge Payment Server will retire as of December 31, 2012, and will not be compatible with the Sage 100 ERP 2013 release. Sage will no longer provide Customer Support for any versions of Credit Card Processing by PCCharge after December 31, 2012.

We strongly recommend that customers running on older releases switch to Sage Payment Solutions for their Credit Card Processing and obtain a Sage Payment Solutions merchant account prior to upgrading to Sage 100 ERP 2013. Without a Sage Payment Solutions merchant account, integrated credit card processing cannot occur.

FIXED ASSETS MODULE

The Sage 100 ERP Fixed Assets module (formerly Sage ERP MAS Fixed Assets module), with the maximum capacity of 1,500 assets has been retired and replaced with Sage Fixed Assets – Depreciation with Reporting, which can process 10,000 assets or more, depending on system configuration and usage. There is no change to the Fixed Assets Link, which will remain on the Sage 100 ERP menu. Customers will soon be informed about how to obtain their replacement product.

ACCOUNTS PAYABLE FORM 1099, PAYROLL FORM 941 AND FORM W2, AND ELECTRONIC REPORTING 1099 AND W2

Currently planned to be retired with the next release, Sage 100 ERP 2014, will be the traditional Accounts Payable Form 1099, Payroll Quarterly 941 Form, and Payroll W2 Form printing using pre-printed forms, and the W2 and 1099 file creation using the Electronic Reporting module, in favor of utilizing the plain paper printing capabilities provided in eFiling and Reporting powered by Aatrix. *(Please refer to the Federal and State eFiling and Reporting section for more details.)*

REPORT MASTER

Reminder - Report Master was officially retired with the 4.5 release. The Report Master reports will no longer be able to be migrated from an older release to the Sage 100 ERP 2013 release.

EXTENDED SOLUTIONS

Reminder - All Extended Solutions titles were officially retired as of the 4.5 release.

FRx

Reminder – FRx was retired by the manufacturer, Microsoft, and is no longer supported. Sage 100 ERP Business Intelligence is the current financial reporting and analysis solution for Sage ERP products.

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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