Sage 500 ERP

Release Guide

Sage 500 ERP 2013

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Overview

Delivering Value in Sage 500 ERP 2013

The 2013 release of Sage 500 ERP is driven by the desire to deliver ongoing value and maintain compatibility with current market needs. The new features and enhancements in this release are designed to help increase productivity, simplify processes, and help reduce costs.

Business needs addressed in this release:

- Accounting and Finance
- Credit Card Processing
- Sales and Pricing
- Manufacturing
- Ease of Customization
- Ease of Use in Day-to-Day Operations

Sage 500 ERP

Sage 500 ERP (formerly Sage ERP MAS 500) is an integrated suite of robust and proven business applications, with an open design that helps mid -sized and larger businesses adapt their management solution to their business needs.

Sage 500 ERP 2013 Availability

Sage 500 ERP 2013 will be available for download November 28, 2012.

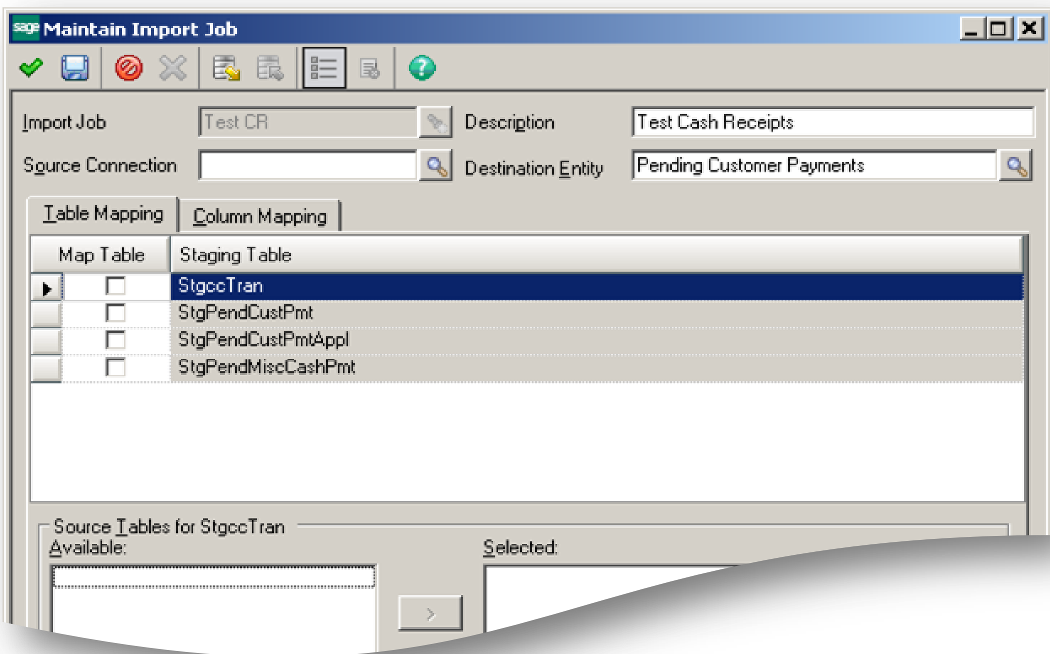
Accounting and Finance

Sage 500 ERP delivers a strong suite of tightly integrated, GAAP compliant, Accounting and Financial modules, easily customizable to the way you do business. Many of the new customer requested enhancements included in Sage 500 ERP 2013 promote ease of use and elevate performance by simplifying processes for finance professionals.

Managing Cash Receipts

The timely, efficient, and accurate processing of cash receipts can help improve cash flow and reduce risk. With Sage 500 ERP 2013, it's never been easier to manage cash receipts. New functionality allows for the import of pending cash receipts and the ability to track miscellaneous cash receipts within Accounts Receivable.

Import Cash Receipts

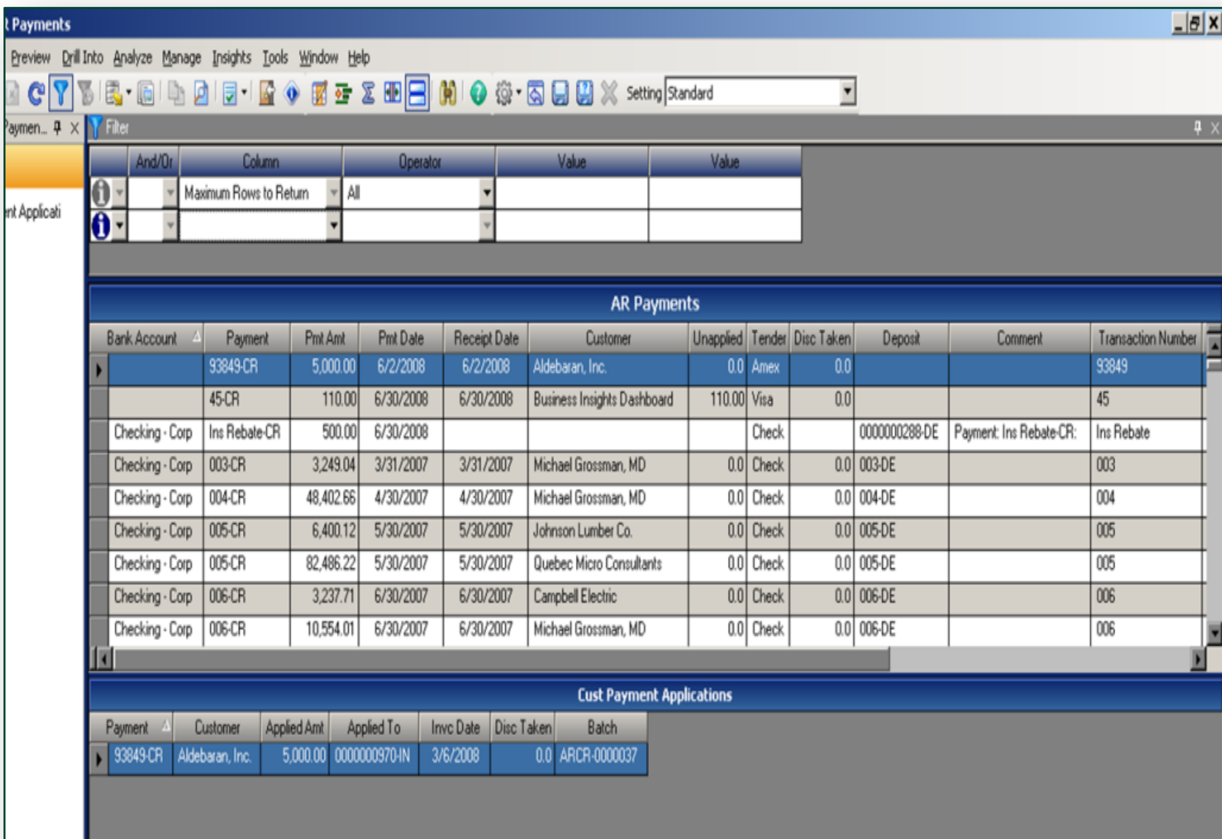


The need to import pending cash receipts originates largely with the change in the way business is done today. The increased use of electronic funds transfers, lock boxes, third-party webpages, and alternative collection methods means that manual entry and application of customer checks against invoices is often no longer sufficient. To address this need, a new import entity has been added to the “Maintain Import Job” task in Data Import Manager.

Track Miscellaneous Cash Receipts

Miscellaneous Cash Receipts are not always easily tracked and can cause issues to arise in accounts receivable and cash management when it comes time to perform reconciliations.

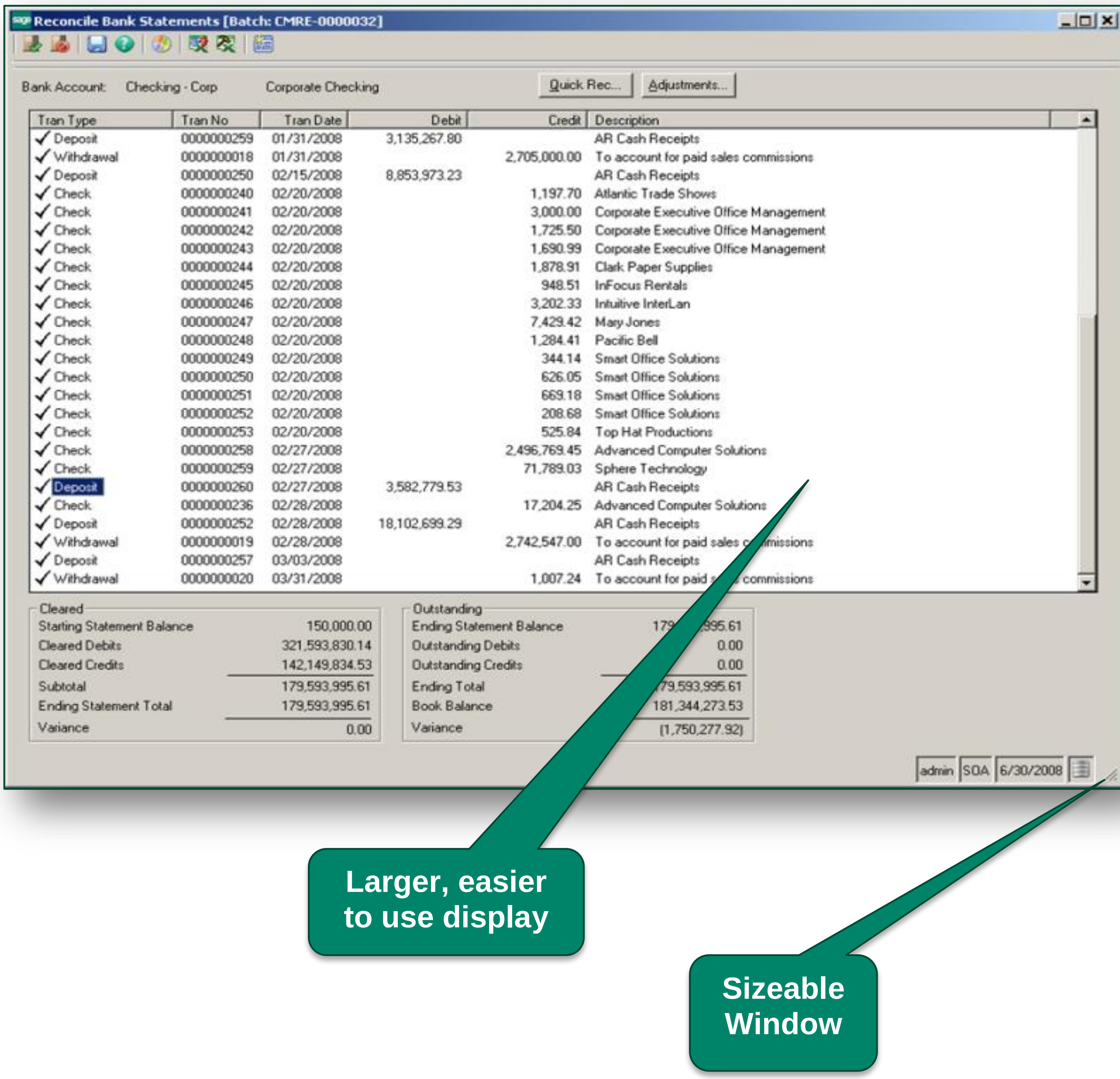
Sage 500 ERP 2013 now includes enhancements to standard reports and views that include miscellaneous cash receipts, saving time and increasing visibility.



Cash Management and Bank Reconciliations

Bank Reconciliation can be tedious and time-consuming. A fixed-size screen with a limited display and a register that does not allow an opportunity to review or correct mistakes can make this task even more challenging.

Sage 500 ERP 2013 improves the experience with a resizable Bank Reconciliation screen and the ability to reprint the register as many times as needed.

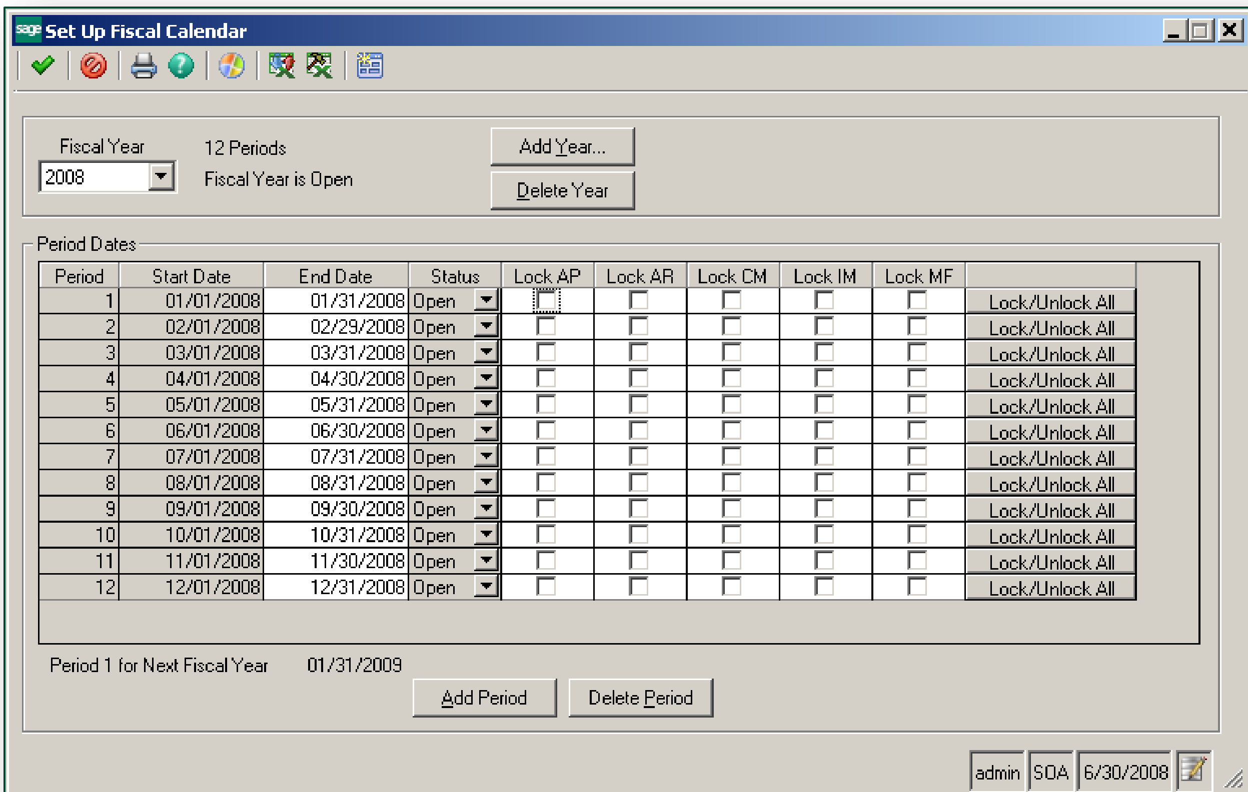


Period End Closing

Period end closings are time sensitive and time consuming. Production of timely financial reports is critical to good business management - and in some cases ongoing funding.

Invariably there seems to be at least one trailing transaction that needs to post after the period end closing is complete, which is unacceptable when financial reports have already been submitted to external entities. In order to control postings of this type, Sage 500ERP 2013 includes options to lock down postings to sub-ledgers individually in preparation for period end closing. With the proper permissions this lock can also be over-ridden.

In “Set Up Fiscal Calendar”, there is now the options to lock or unlock postings to individual sub-ledgers by fiscal year and period.



As a result of these improvements, the efficiencies of the Accounting and Finance function are increased, and administrative costs are reduced.

Credit Card Processing

The ability to accept and process credit card transactions is vital to today's business operations. Sage 500 ERP has included these capabilities for some time, but there are some significant changes in the 2013 release with the introduction of Sage Exchange for credit card processing. These changes can be found in:

- Sage Exchange Portal.
- Sage Exchange Vault.
- New Payment Entry Options.

Sage Exchange is cloud-based technology that provides the integration between Sage 500 ERP and the Sage Payments Gateway. It consists of two key elements: the Sage Exchange Portal and the Sage Exchange Vault.

Sage Exchange Portal

Sage Exchange Portal provides a user-configurable dashboard and flexibility to view payments information on the web through a tablet or desktop. The dashboard can be customized 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, and easily make connections using tablets or mobile phones. Plus, you gain 24/7 access to the Sage Payment Solutions customer support database right at your fingertips.

Sage Exchange Vault

Earlier versions of Sage 500 ERP included the option to store sensitive credit card information locally in an encrypted state or store that information in the “vault” with the processor. With the release of Sage 500 ERP 2013, storing credit card information can reduce fraud exposure by only storing sensitive cardholder data in the secure, cloud-based Sage Exchange Vault.

For added cardholder security, Sage 500 ERP 2013 will also allow a one-time use credit card for a payment transaction without saving credit card information. Users migrating from previous versions of the software will be able to easily move customers’ credit card information from their current location into the secure Sage Exchange Vault. The migration process will be streamlined for existing Sage Payment Solutions users.

The Sage Exchange technology will include connection to a secure vault for storing all sensitive credit card information outside of Sage 500 ERP, as well as for processing credit card transactions. The 2013 release will no longer be subject to the lengthy PA-DSS audit process, which ties up valuable Sage development resources.

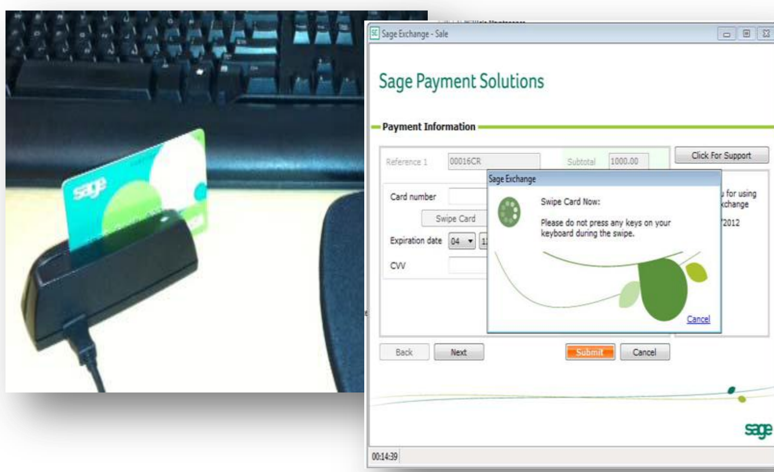
Additional Payment Entry Options

The adoptions of Sage Exchange in the 2013 release introduces a number of additional payment entry options to make payment processing easier and faster including:

- Card Swipe Capabilities.
- Mobile Payments.

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 USB card swipe device attached to the desktop terminal.



New card swipe capabilities have been truly integrated so that payments processing is built into the normal Sage 500 ERP workflow, which can replace the disconnected card swipe systems that many companies still use today.

Sage Mobile Payments

Sage Exchange allows payments to be collected anytime, anywhere, by smart phone. Ideal for cash sales, Sage Mobile Payments immediately captures the cash transaction information and sends it to Sage Ex-change, for secure transfer to Sage 500 ERP 2013.

Companies that provide services and collect fees in a mobile environment, such as mobile repair services, will find these features especially helpful.

Sales and Pricing

Sales and pricing are an integral part of business operations. Sage 500 ERP 2013 includes enhancements that improve the pricing of items, processing of orders, accuracy of tax calculations, and the assignment and tracking of freight charges. New features in this area include:

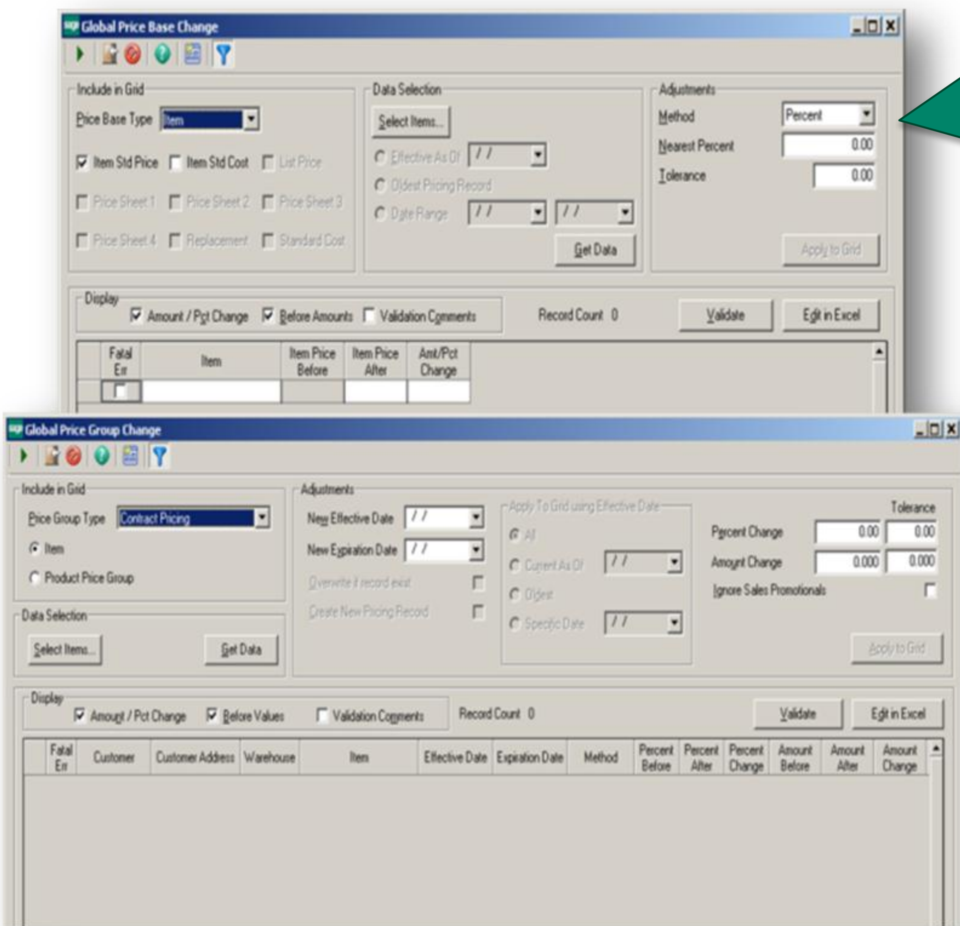
- Global Price Changes.
- Copy Sales Order/Quote to New Customer.
- Longitude/Latitude Support for Sage Sales Tax.
- Sage 500 ERP Shipping by SmartLinc.

Global Price Changes

Sage 500 ERP provides a number of pricing options including Inventory, Item, and Price Sheets, plus a variety of price group types such as Contract Pricing, Inventory Pricing, National Account Pricing, Product Price Groups, and Promotional Pricing.

The flexibility in these pricing options provides a highly customizable pricing structure. With potentially complex pricing structures, it can be both time consuming and difficult to perform updates when cost factors or other parameters necessitate a global pricing change. The 2013 release addresses this issue with the introduction of new tasks in the Inventory Management application:

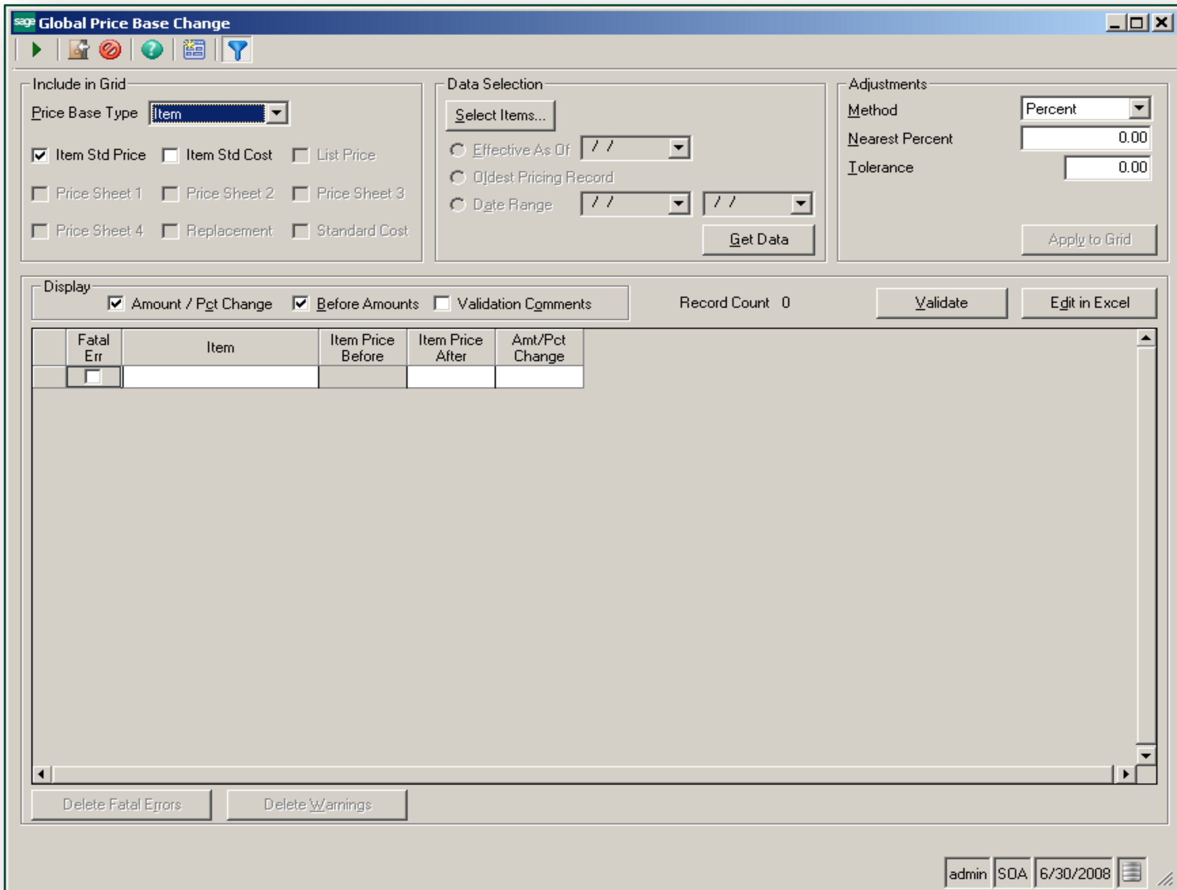
- Global Price Base Change
- Global Price Group Change
- Business Insights Explorer Views



Change pricing based on Price Base or Price Group with multiple controls for type of change to apply.

Global Price Base Change

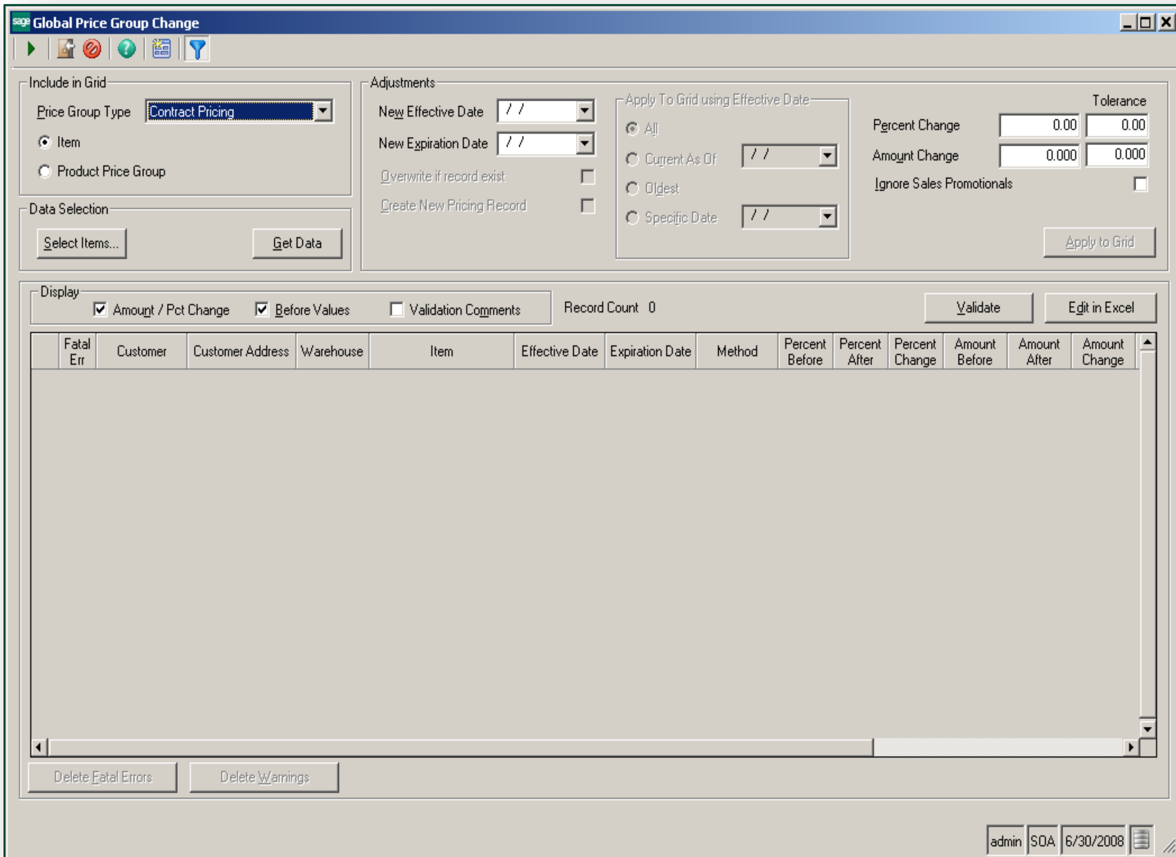
The Global Price Base Change task allows customers to select which items they wish to update based on the Price Base Type and Data Selection criteria.



1. Changes may be applied to the Item Standard Price, Item Standard Cost, List Price, Price Sheet, Replacement Cost, and/or Standard Cost.
2. Candidate entries (records) are displayed in the grid at the bottom of the screen.
3. The adjustment method, amount or percent, and tolerance, can then be set and applied to the records in the grid.
4. Once the application is complete, the results can be reviewed for accuracy, validated, and/or edited in Excel.
5. Entries with Warnings are flagged for review or update prior to committing changes; entries with Fatal Errors are flagged for review and resolve. No change will be updated to entries with Fatal Errors.
6. Buttons at the bottom of the screen allow the quick deletion of entries with either Fatal Errors or Warnings.

Global Price Group Change

The Global Price Group Change task allows changes by Price Group Type as selected by Item or Product Price Group and its specific pricing strategies.

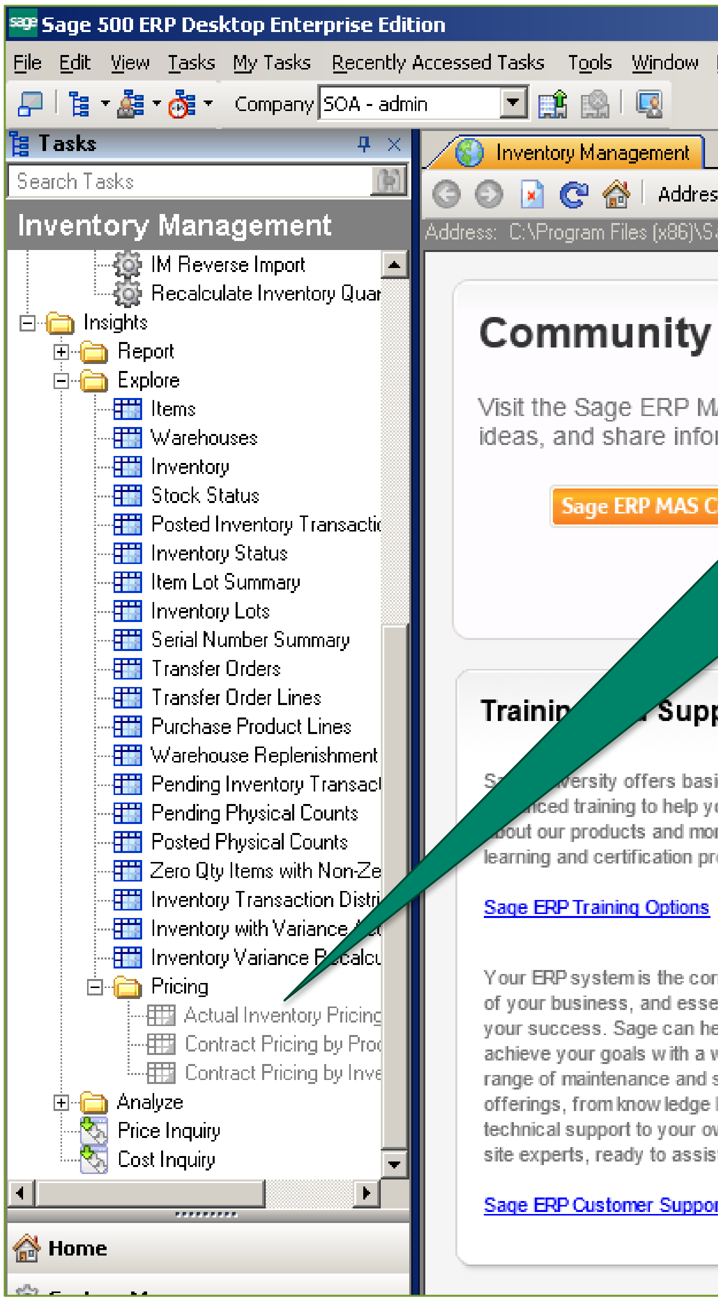


1. Adjustments may include an Effective Date and an Expiration Date.
2. In some cases, adjustments may be applied to the grid using an effective date as well.
3. Candidate entries (records) are displayed in the grid at the bottom of the screen. Columns associated with the records vary based on the Price Group Type selected.
4. Once adjustments are applied to the grid, the results can be reviewed for accuracy, validated, and/or edited in Excel.
5. Entries with Warnings are flagged for review or update prior to committing changes; entries with Fatal Errors are flagged for review and resolve. No change will be updated to entries with Fatal Errors.
6. Buttons at the bottom of the screen allow the quick deletion of entries with either Fatal Errors or Warnings.

Business Insights Explorer Views

In addition to the change utilities in the 2013 release of Sage 500 ERP, three new views under the Insights menu specific to pricing are included.

Pricing details can be easily viewed prior to making any changes from the new Pricing subfolder in Inventory Management Insight.



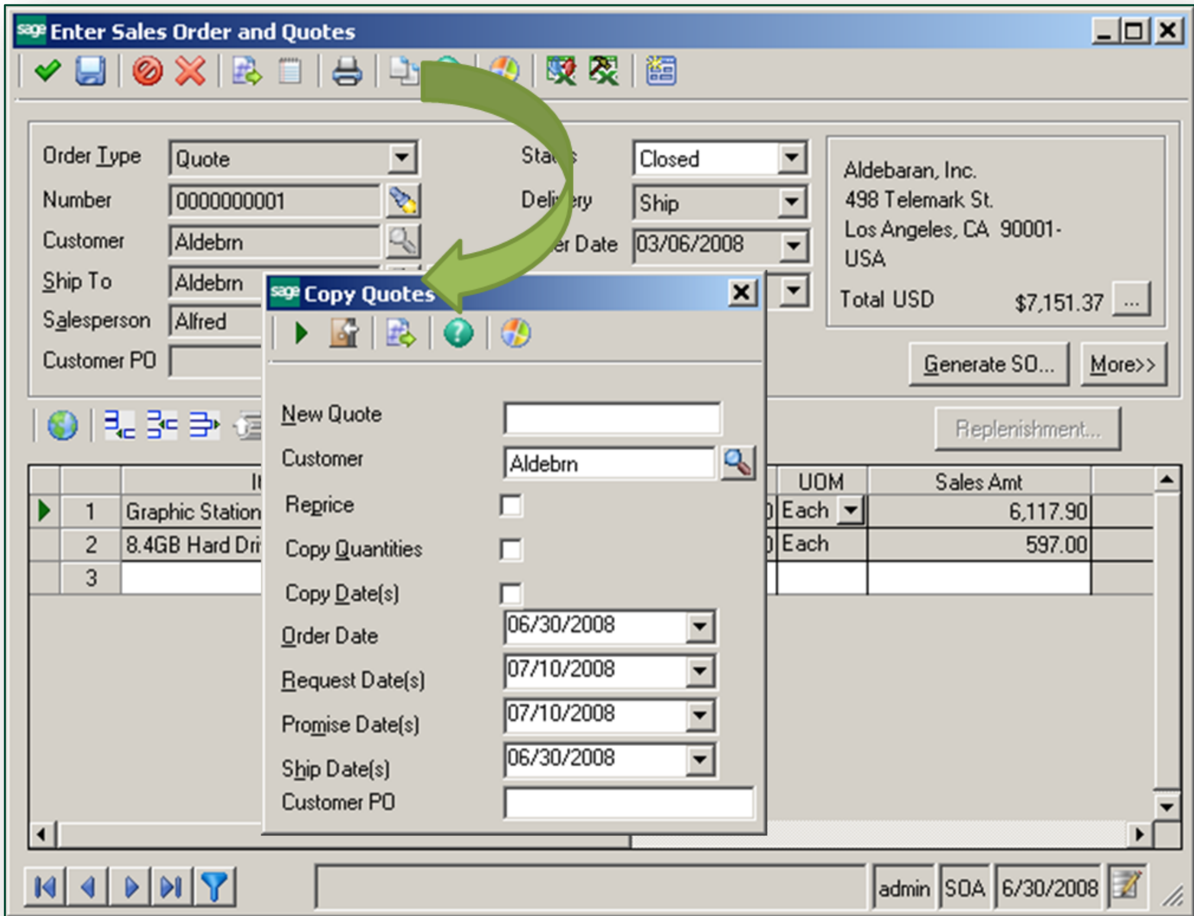
Three views provide insights to:

- **Actual Inventory Pricing.**
- **Contract Pricing by Product Pricing Group.**
- **Contract Pricing by Inventory Item.**

Copy Sales Order/Quote to New Customer

The ability to copy an existing Sales Order or Quote has long been an advantage in Sage 500 ERP. Copies included items and quantities ordered, as well as customer information used to arrive at pricing and discount information.

Now included in this feature is the ability to modify customer information on the copied order to expand the usefulness of the "template."



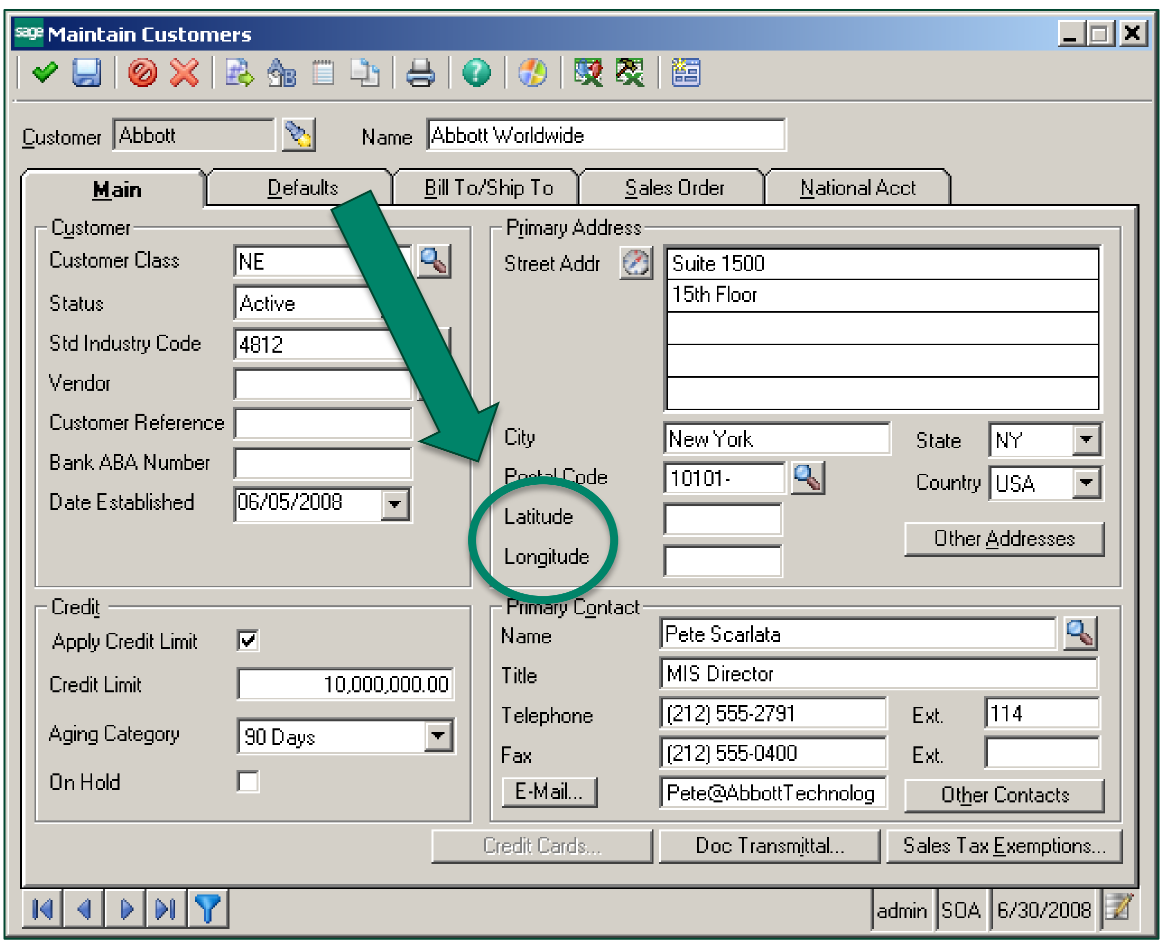
Sage 500 ERP 2013 offers copy enhancements that allow for assignment of a new customer with the option to re-price the order based on the changes, copy quantities, copy the dates, manually assign new dates, and/or include a new Customer Purchase Order number.

Longitude/Latitude Support for Sage Sales Tax

Sales Tax compliance is an ongoing concern for many businesses. In today's global marketplace, it is critical to be aware of and adhere to local tax regulations, no matter where the sale originates or the delivery occurs.

At the same time, determining the correct nexus or jurisdiction may be increasingly difficult as municipalities grow, shrink, are annexed, or split off. In areas where the housing market or industrial development is ahead of the street address or ZIP code updates, it may even be difficult to determine the correct address information to determine the nexus.

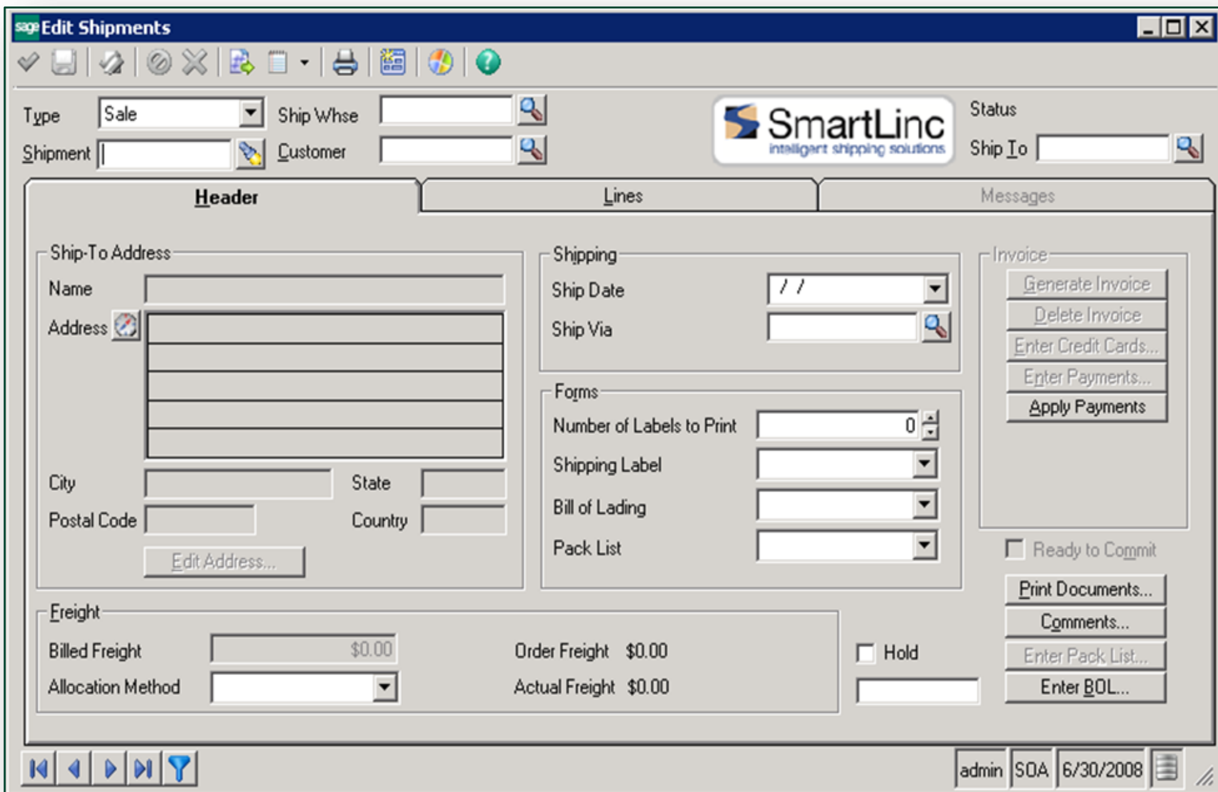
For these reasons, Sage Sales Tax has begun to offer the ability to determine sales tax nexus based on the longitude and latitude of the delivery site. To accommodate this new ability, longitude and latitude fields have been added to the customer information screens in Sage 500 ERP 2013.



Sage 500 ERP Shipping by SmartLinc

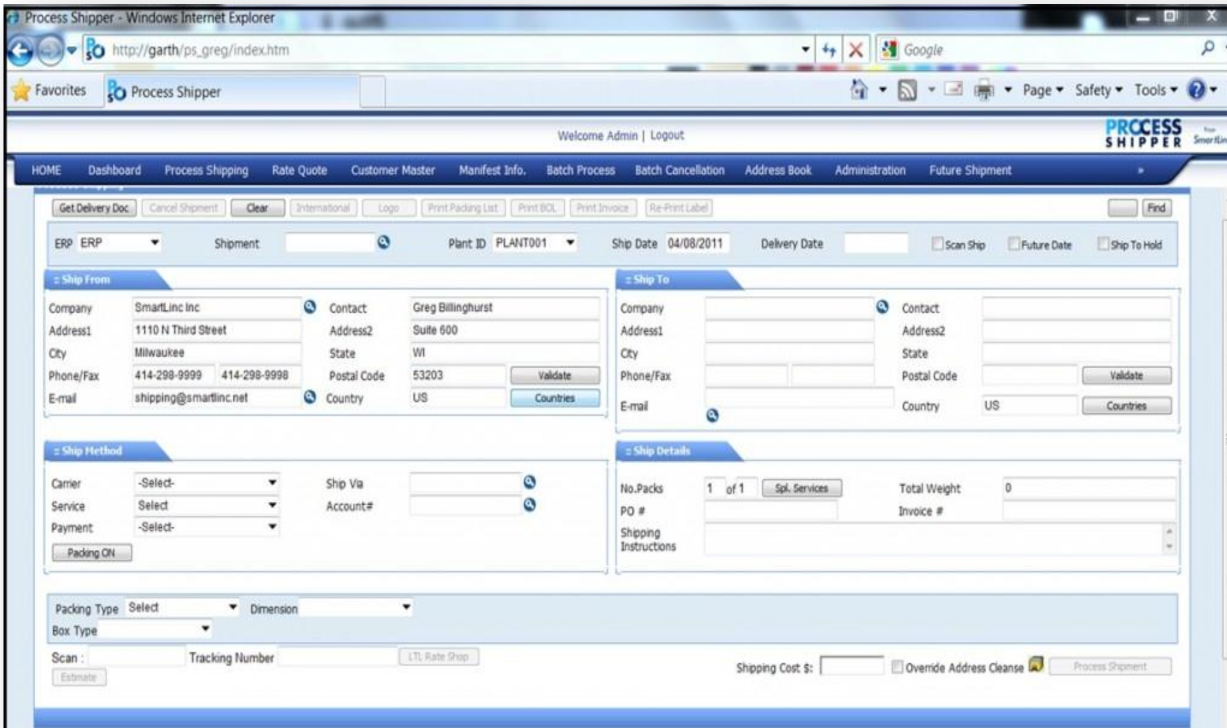
Globalization of the economy means that businesses of all sizes need the ability to efficiently process and track shipments through multiple carriers. Sage 500 ERP 2013 includes Sage 500 ERP Shipping by SmartLinc, a web-based, fully scalable shipping system that can be deployed at a single location or multiple locations.

Sage Shipping can be loaded on a central server and then mapped to local workstations, as needed, to accommodate shipping demands. Whether the business ships only a few packages per day or thousands, Sage Shipping can process shipments with the speed and accuracy businesses expect and demand from a “state-of-the-art-system”.



Sage Shipping is available in a number of deployment options with varying features to meet the needs of each individual business and supports 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 500 ERP, with the option to add package tracking information to the sales order line or item level or email notifications including the date, the carrier, tracking numbers, and an embedded link to the carrier’s website sent directly to the recipient.

Sage Shipping can be accessed and used from within Sage 500 ERP for individual shipments using the standard workflow, or for high-volume customers the Sage Shipping terminal can be accessed directly from the server or web. In the second scenario, there is an option to auto update a group of shipments to Sage 500 ERP either as a one-time update, or at intervals throughout the workday.



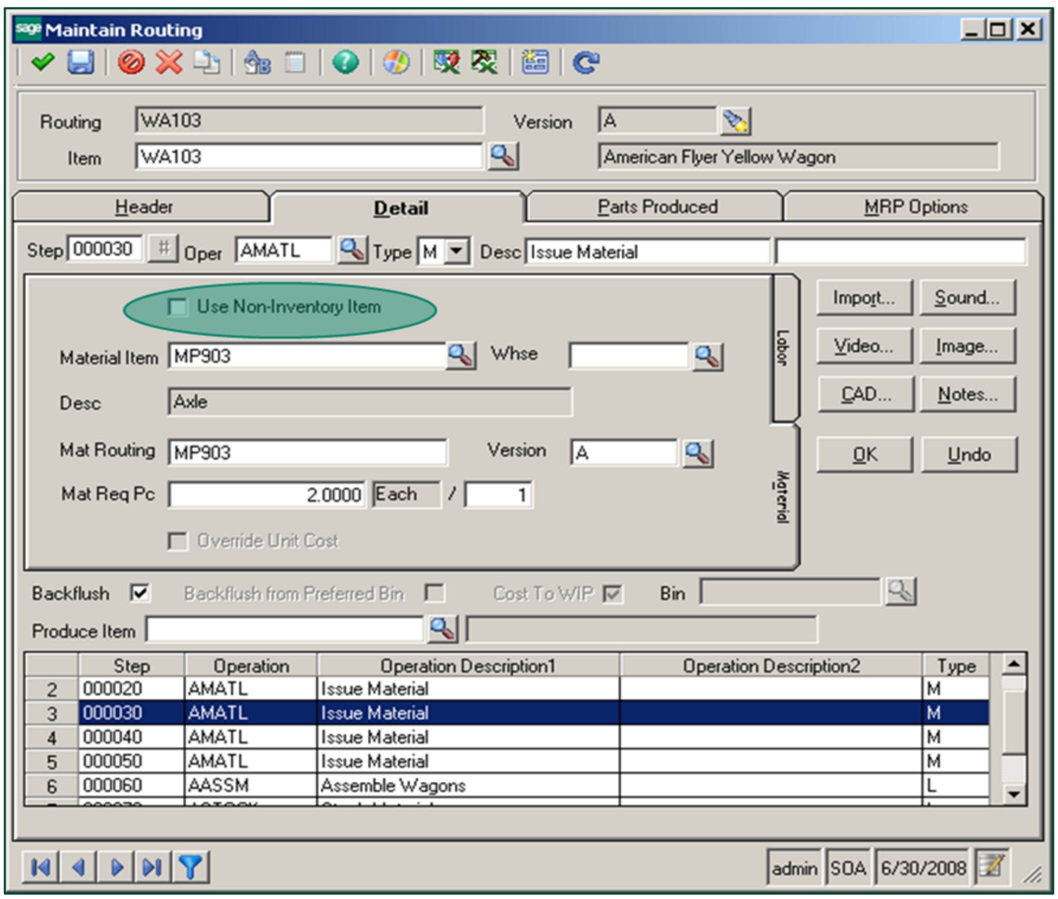
Manufacturing

In the tradition of recent releases, Sage 500 ERP 2013 includes enhancements specific to manufacturing operations. These improvements include the following functionality:

- Use of non-inventory items in manufacturing routings and bills of material
- Ability to backflush setup hours
- Delete or cancel work orders

Non-Inventory Items in Manufacturing

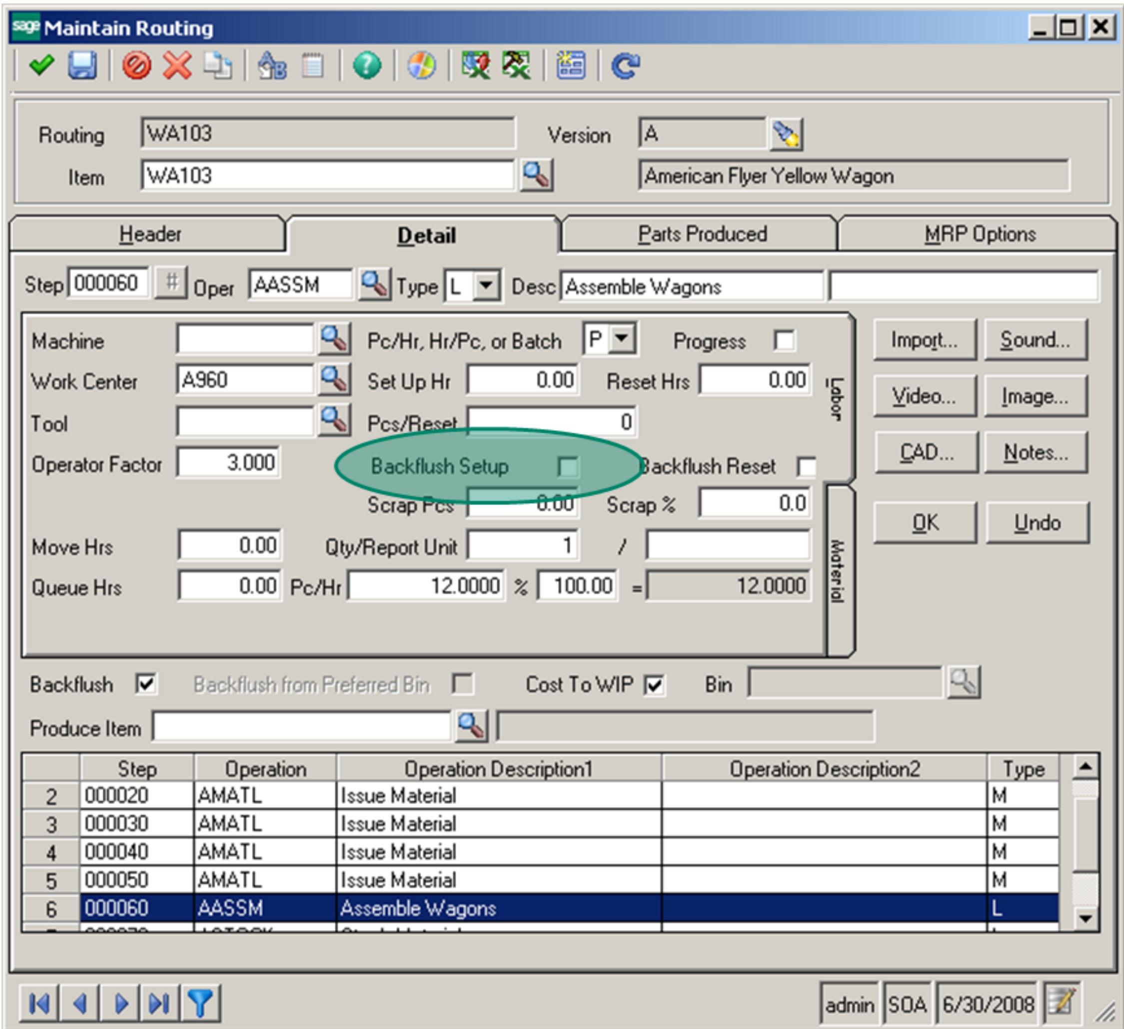
Traditionally bills of material and routings in Sage 500 ERP have been limited to inventory items with associated quantities, units of measure, and costs. The 2013 release includes this expanded capability.



Non-inventory items can be included on material issue steps, outside processing steps, and other steps in either a routing or work order. Costs can be overridden at the time of setup and are added to WIP.

Backflush Setup Hours

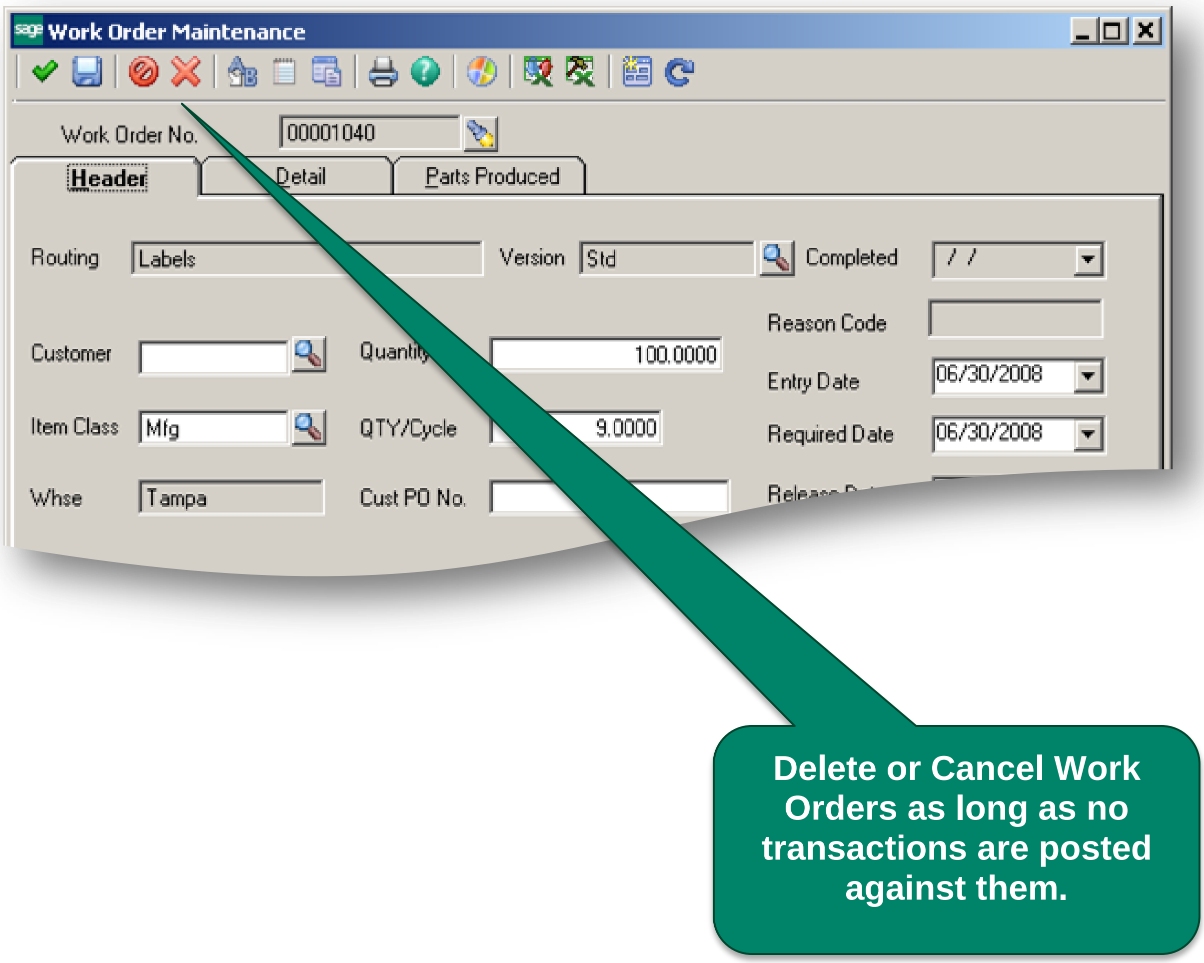
Setup hours may occur at various times throughout a shift. In most cases this occurs at the beginning of a shift, but this is not always the case. Changing settings or tooling on a machine or workstation may be required as a new work order is processed for a different intermediate or finished good.



Accounting for these hours accurately can mean the difference between a true profit position and an inflated profit assumption. Sage 500 ERP 2013, makes it easier to remember to include these costs by allowing backflush for these hours. You can designate setup hours to backflush always, never, or manually.

Delete or Cancel Work Orders

No matter how careful employees are, mistakes can happen. When a Work Order is created in error, it's there forever. Not so as of Sage 500 ERP 2013. Now if a Work Order is created in error, as long as no transactions have been posted against it, the entry can be canceled or deleted, thereby freeing up database space and reducing the number of entries in lookups.



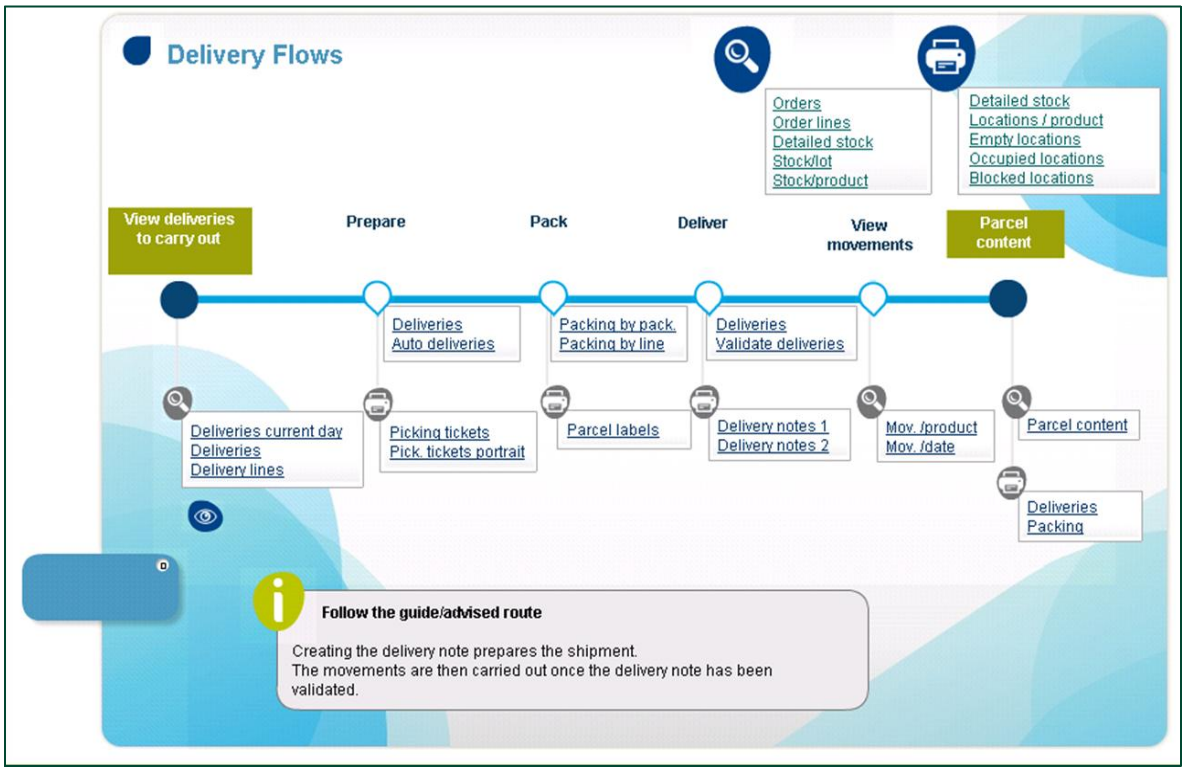
Ease of Use

Due to the depth of functionality, ERP software can be complex. Sage 500 ERP continues to enhance ease of use with each release in an effort to maximize productivity and reduce the effort expended on routine tasks. The 2013 release includes a number of features and enhancements designed for this purpose, including:

- Visual Process Workflows
- Multiple email recipients for document transmittals
- Keyword replacement during document transmittals
- Consistent posting across all modules

Visual Process Workflows

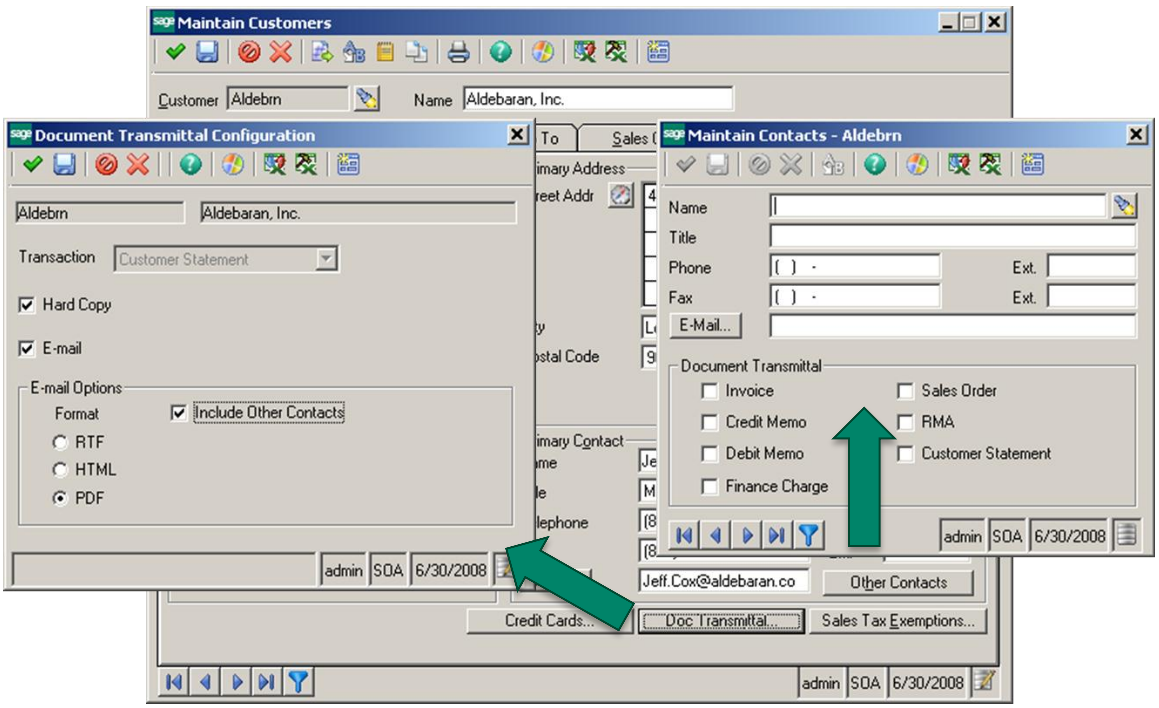
With Visual Process Workflows, Sage 500 ERP 2013 introduces a new tool in the arsenal of self-help assets.



These interactive HTML pages not only demonstrate the steps of a process in visual terms, but also include links to the various tasks along the way. They can serve as both a self-help tool and a launching page for the steps in the process. The 2013 release includes a number of key processes, as well as an easy to use tool that allows users to design workflows as desired.

Multiple Email Recipients for Document Transmittals

More and more companies are “going green” and taking advantage of paperless document transmittals for invoices, debit or credit memos, statements, and other traditional paper records.

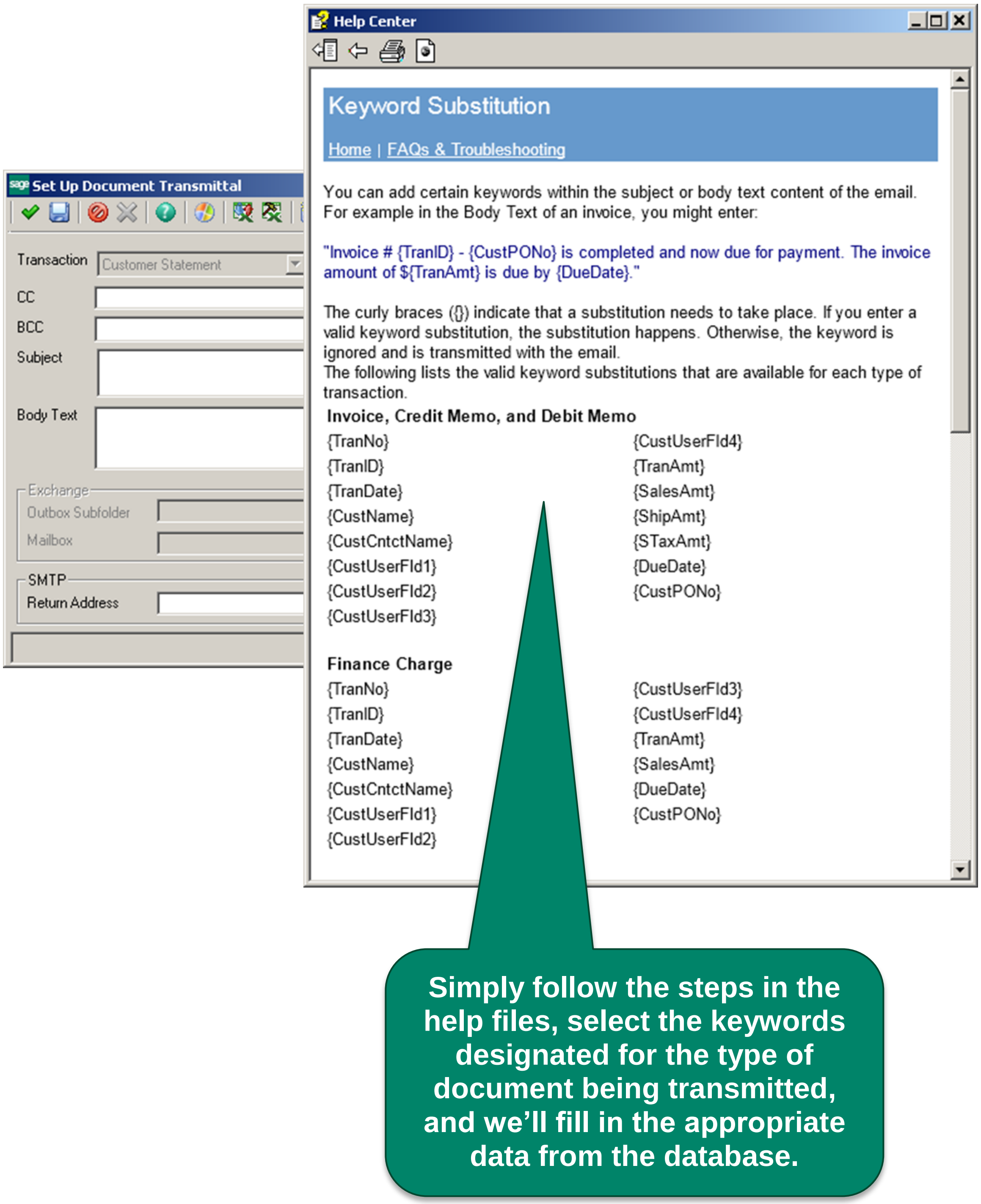


Sage 500 ERP has included this capability for some time to an individual recipient, but feedback suggests that often a single recipient is not sufficient, especially with larger organizations where multiple individuals need to review or approve transactions. In the 2013 release, the ability to distribute these documents to additional contacts is available.

It is now possible to designate by document, by contact, and which contacts are included in the distribution list - so that the right people get the information immediately. This means less paper, faster and easier distribution, and shorter turnaround times.

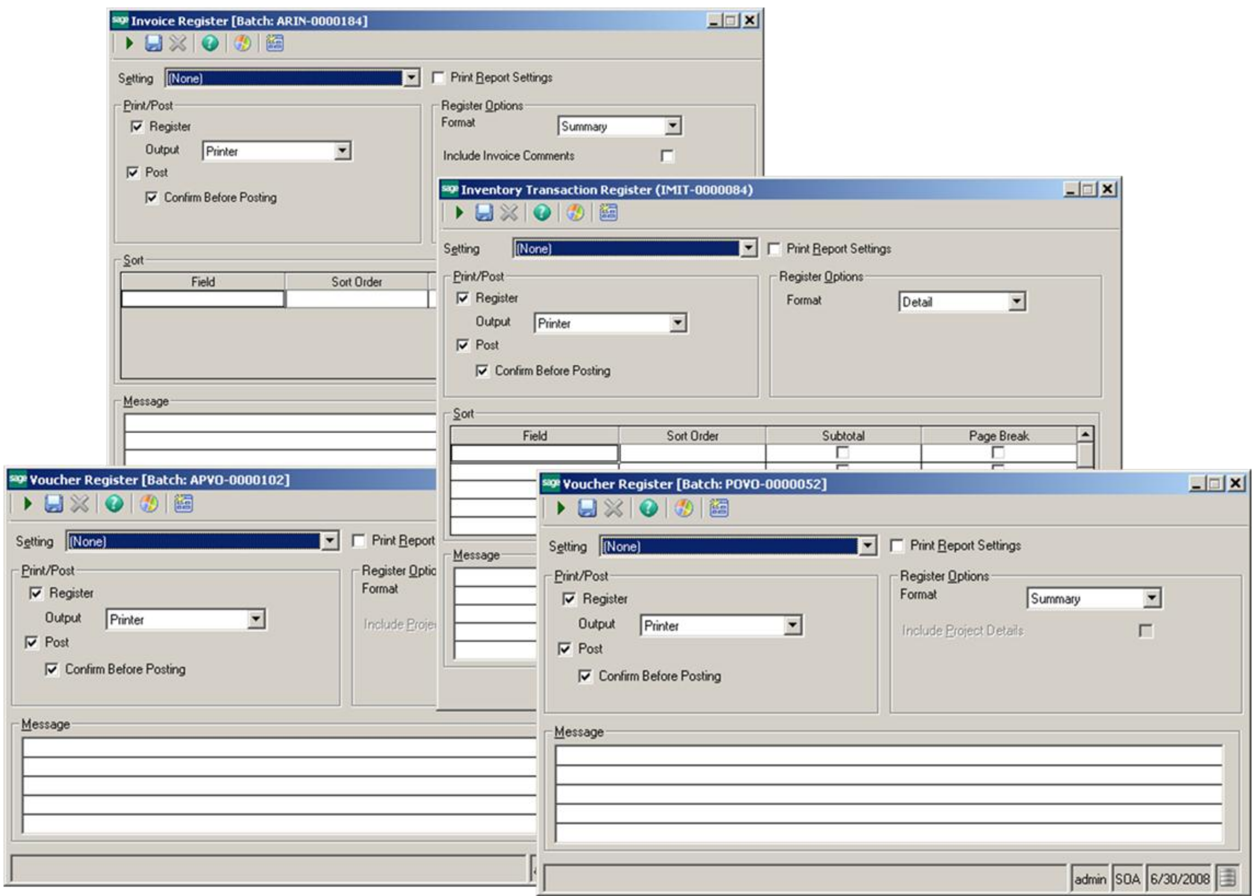
Keyword Replacement for Document Transmittals

The 2013 release delivers new functionality for document transmittals. In addition to increased flexibility in delivery options, the ability to customize the accompanying email with keyword replacement is now available.



Consistent Posting Across All Modules

Sage 500 ERP 2013 now includes a consistent layout for the posting interface across all the modules and posting functions, where standard batch posting takes place. This new enhancement can help increase productivity and reduce unnecessary confusion when completing the same type of activity across those modules.



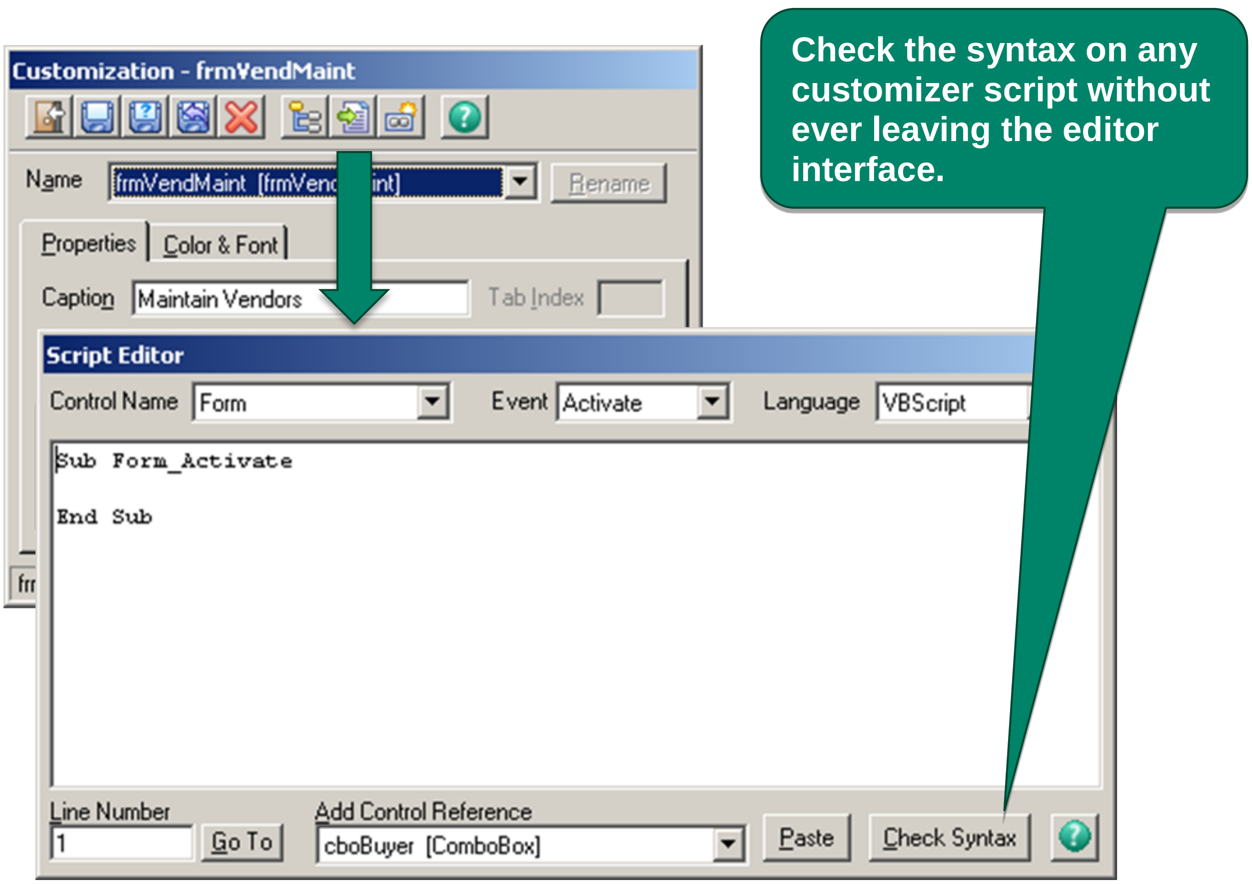
Ease of Customization

One of the primary strengths of Sage 500 ERP is the ability to customize the software to work the way each individual business works. In the past, an ongoing concern has been the need to reapply or reinstall customizations with each upgrade applied. The 2013 release includes enhancements that make it easier to customize the screens and workflows, and to have those customizations survive future upgrades - without the need to reapply or reinstall them. These enhancements include:

- New Check Syntax button
- Expanded Custom Control options
- Expanded Customizer to allow the addition of tabs to existing tab controls

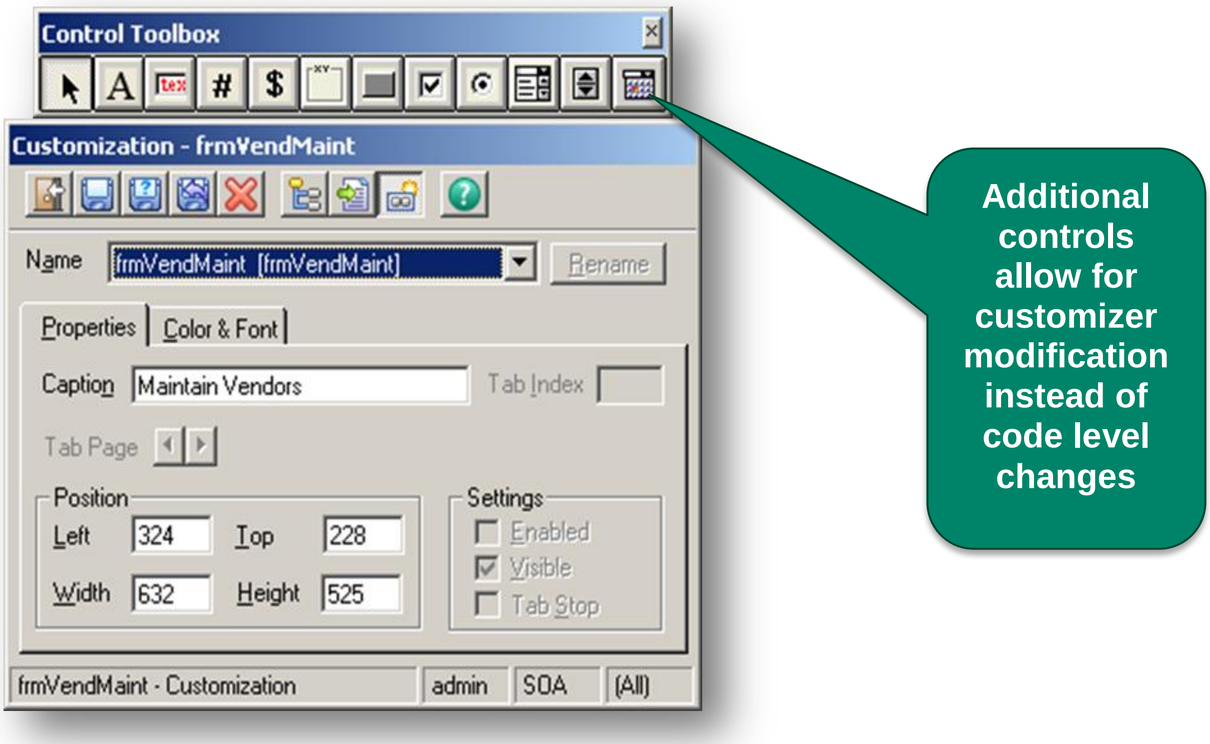
Check Syntax Button

The syntax on any script can be tricky and cause the entire customization to fail or error out. In Sage 500 ERP 2013, a “Check Syntax” button is now included on the script editor interface to allow verification of the syntax without having to leave the editor, making it easier and faster to create customizations.



Expanded Custom Controls

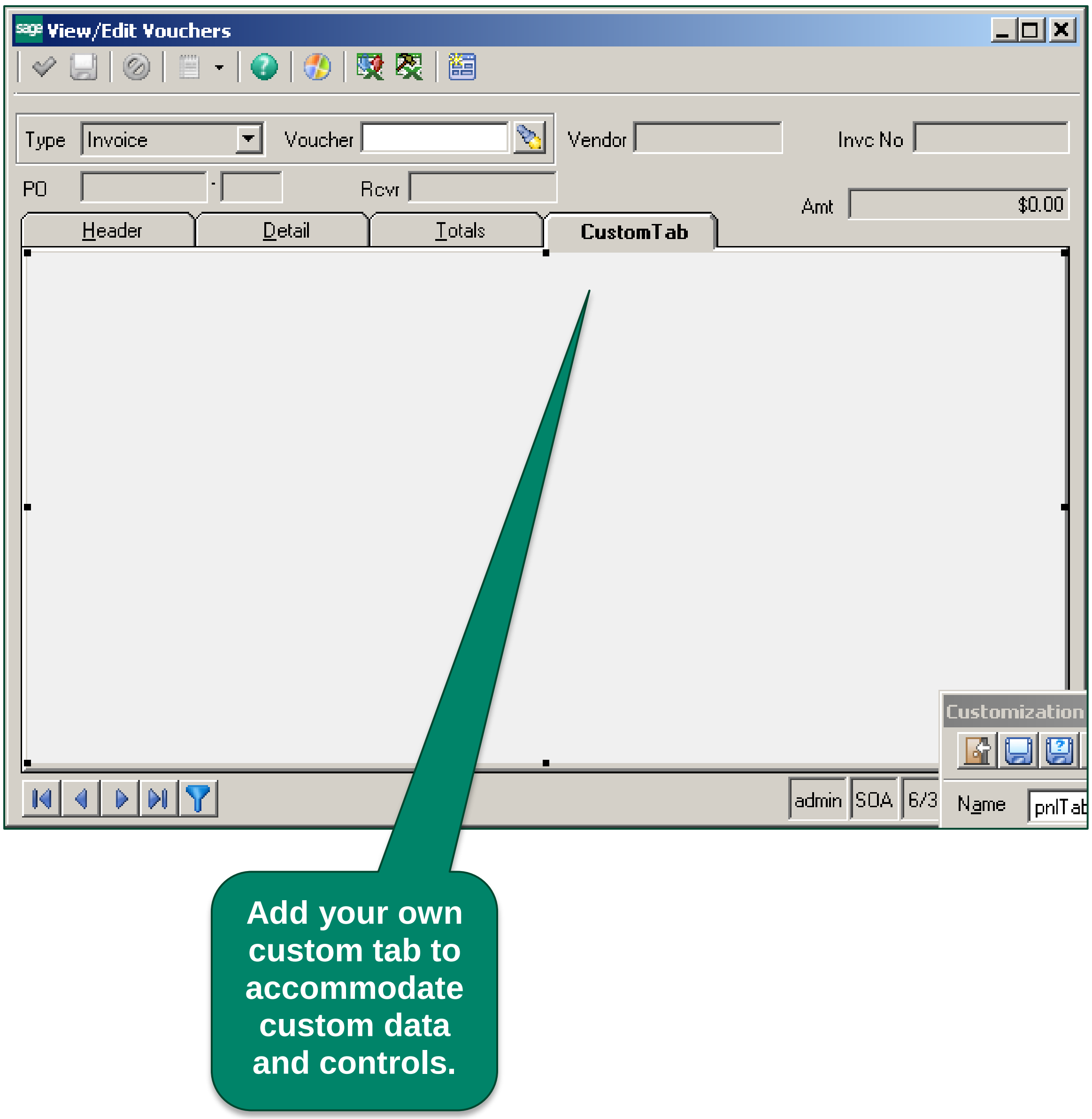
Existing controls may not always be the right fit for each unique business. The release of Sage 500 ERP 2013 includes additional "optional" behaviors to several of the most commonly modified controls.



By selecting the new "optional" behaviors in the customizer in place of the code-level modification, the customization will survive an upgrade, preserving your investment when it is time to move up to the next version of Sage 500 ERP.

Add Tabs to Existing Tab Controls

In some cases, the level of customization cannot be contained within the existing real estate on the interface. Previously, interfaces with existing tabs forced these customizations to a button that would launch an additional interface. As of the 2013 release, the ability to add a custom tab to existing tabs is now an option, providing more real estate for customizations more in line with the look and feel of the existing interface.



Sage Advisor Enhancements

Sage 500 ERP 2013 provides a number of enhancements to the Sage Advisor capabilities. Among these capabilities are the addition of some server-side statistical information, awareness and tracking of third-party add-ons existing on the installation, and notifications of pending updates available for download.

Connected Services Updates

Sage Payment Solutions

Sage Payment Solutions will remain compatible with Sage 500 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.

Sage 500 ERP Shipping by SmartLinc

Sage 500 ERP Shipping is a new web-based, fully scalable multicarrier shipping solution. It can be deployed at single or multiple locations, either as an on-premises solution or utilized directly from the web, depending on the volume and needs of the business. Now available, Sage 500 ERP Shipping by SmartLinc 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 500 ERP, and email notifications automatically sent with the date, the carrier, tracking number, and an automatic link to the carrier’s website.

Sage 500 ERP Sales Tax

Sage 500 ERP Sales Tax, by AvaTax, will remain compatible with the Sage 500 ERP 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 our Sage 500 ERP customers, including:

- Sage HRMS and Sage Payroll (New).
- Sage Source.
- Sage SalesLogix.
- Sage Budgeting and Planning (formerly Sage Active Planner).
- Sage Fixed Assets.
- Sage TimeSheet.

Sage HRMS and Sage Payroll

Prior to the Sage 500 ERP 2013 release, a new a stand-alone Microsoft SQL version of Sage HRMS Payroll was released for Sage 500 ERP customers who do not require HRMS capabilities.

This product will be integrated with General Ledger, includes unlimited direct deposit and ACH transaction functionality, as well as standard tax tables and electronic reporting for all states.

Sage 500 ERP will remain compatible with the most recent release of Sage HRMS, version 10.1, with no new integration points. Customers requiring a robust HRMS solution 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 that is available to Sage 500 ERP customers using Sage HRMS or Sage HRMS Payroll. Employees 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 Budgeting and Planning

Sage Budgeting and Planning will continue to be available for the Sage 500 ERP 2013 release, providing the ability to transform a budgeting nightmare into a collaborative budgeting and planning process, with an even easier integrated installation process. Empowering 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 500 ERP will continue to use ERPLink for the integration to Sage SalesLogix. We anticipate the ERPLink will be available in Q1 2013. Availability will be announced in the next Sage 500 Customer Newsletter.

Sage Fixed Assets

Sage 500 ERP 2013 continues to support the integration to Sage Fixed Assets with no change to integration points or features.

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 500 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 Project Accounting.

Third-Party Considerations

SAP Crystal Reports Version 2011

Sage 500 ERP 2013 introduces SAP Crystal Reports 2011 (Version 14 for Sage 300 ERP), in addition to Crystal Reports Version 11.0 R2. Technology changes in the SAP Crystal Reports tool between the newer version and Version 11.0 R2 add a level of complexity to the way reports are staged and printed using this tool.

Technology and Supported Platform Updates

Sage 500 ERP 2013 includes a number of technology and platform updates that allow customers to take advantage of the latest advancements. The following tables detail operating systems and platforms supported with this release:

Platform/ Operating System		Supported Versions
Microsoft SQL Server		SQL Server 2005, SQL Server 2008 and 2008 R2, SQL Server 2012
ERP Server Operating System		Windows Server 2003, Windows 2008 and 2008 R2, Windows Server 2012
Virtualization / Thin Client		
	Microsoft	Windows 8 Hyper-V, Windows 8 Terminal Server, Windows 2008 and 2008 R2 Hyper-V, Windows 2008 and 2008R2 Terminal Server, Windows 2008 RemoteApp,Windows 2008 Terminal Server, and Virtual PC
	Citrix	XenServer 5.0 or newer XenApp 4.5 or newer
	VMware	VMware Server ESXi 4.0 or newer, VMware Workstation 6.0 or newer
ERP Client Operating System		Windows 8, Windows 7, Windows Vista, Windows XP SP1
Web Server Operating System		Windows Server 8 IIS, Windows 2008 &2008 R2 IIS 7.0
Browser		Microsoft Internet Explorer 7.0 or newer
Microsoft Office		Office 2003, Office 2007, Office 2010

.Net Framework	Benefits	Usage
4.x	Increased performance and throughput	Desktop,Business Insights Explorer, Business Insights Analyzer, and Data Import Manager
3.5		Sage Exchange

Delivery Method

Delivery of Sage 500 ERP 2013 will be available by download only for both new sales and existing customers. DVD/CD hard media can be requested for a minimal shipping and fee. Please talk to your Sage Business Partner for more details.

Feedback and Disclaimers

Your Feedback Is Important

Customers and business partners have a voice in our roadmap and in features and functionality that will be incorporated into future Sage 500 ERP releases. Please use your voice on the feedback and request site: http://www.sage500erp.com/Sage500Feedback. 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.

Disclaimers

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