

# Sage 300 ERP 2014

Get more done.

sage





# Get more done by connecting your business, providing a better customer experience, and increasing revenue.

## New web and mobile functionality: driving better customer experiences and increasing revenue

For 2014, Sage 300 ERP offers more ways than ever to connect everyone involved in your business, from your customers to your vendors to your in-house departments. Your customers expect more from their experiences with your company—Sage 300 ERP 2014 will help your team deliver on those expectations from anywhere business takes them. The new web and mobile connections, now available through Sage Billing and Payment, Sage Mobile Sales, Sage CRM, and Sage Mobile Service, power opportunities to generate more sales, increase revenue, and provide a better customer experience.

## New business intelligence and analytics: make better decisions and grow with confidence.

When you are able to quickly identify the optimum field service technician, be more productive, and transform raw business data into useful information, you can grow with confidence. Useful information, or business intelligence is critical because it helps you react quickly to challenges, build on successes, and discover new ideas, insights, and innovations. In Sage 300 ERP 2014 you can connect to useful information with the Sage Intelligence Profitability Dashboard and Sage Inventory Advisor. Using the Profitability Dashboard makes it easy for you to identify customer, product, and salesperson profitability in variable time frames. Using Sage Inventory Advisor, you can classify and evaluate hundreds of thousands of separate items and analyze historic sales data to accurately forecast future demand. Most importantly, Sage Inventory Advisor recommends safety stock levels that help ensure you don't run out of the items you need to satisfy demand or tie up working capital by stocking overages of slow-moving and seasonal items. When you have what your customers want, in stock when they want it, you deliver a great customer experience.

## Multiple currencies and languages

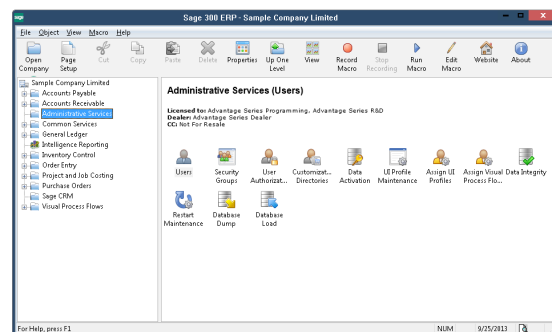
For companies in the services, financial, distribution, or manufacturing sectors, Sage 300 ERP 2014 connects you globally by allowing you to do business in multiple languages and currencies—as always!

## 2014 connections

- Do more to connect on the road with **Sage Mobile Sales, Sage CRM, and Sage Mobile Service.**
- Control, automate, and analyze your data with **Sage Intelligence**, now accessible through the Sage 300 ERP menu.
- Optimize inventory management with **Sage Inventory Advisor.**
- Enable electronic invoicing, receipts, and online payments with **Sage Billing and Payment.**

## User experience enhancements

- A fresh **user interface** makes data entry and **visual process flows** more intuitive.
- Maximize return on investment with **improved user license management capabilities** to free up user licenses.
- Be more productive with the fresh look of **modernized user interface** and more **intuitive data entry screens.**
- Quickly identify profitability with the **Sage Intelligence Profitability Dashboard.**



# Sage 300 ERP 2014

## What's new in Sage 300 ERP 2014

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### Sage 300 ERP 2014 connects and mobilizes your sales team.

Your sales team doesn't have to be bound by the four walls of your business—they can carry the interactive, real-time functionality of **Sage Mobile Sales** on their iPads, or **Sage CRM**, and **Sage Mobile Service** on their smartphones wherever business takes them.

#### Sage 300 ERP 2014 helps you provide a better customer experience, from sales call to fulfillment, by:

- Knowing your customers more thoroughly through social media integrations.
- Presenting your entire product line to customers with a visual catalog on an iPad.
- Empowering customers to send out receipts following a payment received on the mobile solutions.
- Taking photos and collecting customer signatures on service work using a smartphone.

#### Sage 300 ERP 2014 helps you increase sales, up-sells, and cross-sells by:

- Accessing customer information, including past sales activity and more, out in the field.
  - Suggesting and capturing sales of add-on, accessory, or substitution items through a visual catalog on your iPad.
  - Providing and confirming sales quotes, placing orders, and taking payments with an iPad.
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- **Sage CRM Sales Tracker** for Windows 8 gives users access to their Sage CRM company, person, and opportunity records from their Windows 8 Tablet device. Users can even build a watch list of opportunities key to their pipeline. Sage CRM Sales Tracker can also be accessed through a Windows 8 PC.
  - **Sage CRM Sales Lite** is built for sales teams on the road who need up-to-date information on their phone, even when out of coverage. Using an iPhone app, Sage CRM Sales Lite gives users mobile access to their Sage CRM data, tasks, and appointments and allows them to track and log outbound calls, email, and SMS activities.
  - **Sage CRM for Facebook** is a further addition to the social media capabilities in Sage CRM, which already includes LinkedIn and Twitter. With Sage CRM for Facebook, users can discover valuable insights about customers and prospects.
  - **Sage CRM Collaboration** by Yammer brings business collaboration and knowledge exchange to individual users and teams of users by connecting them with Yammer Groups and Yammer Topics.
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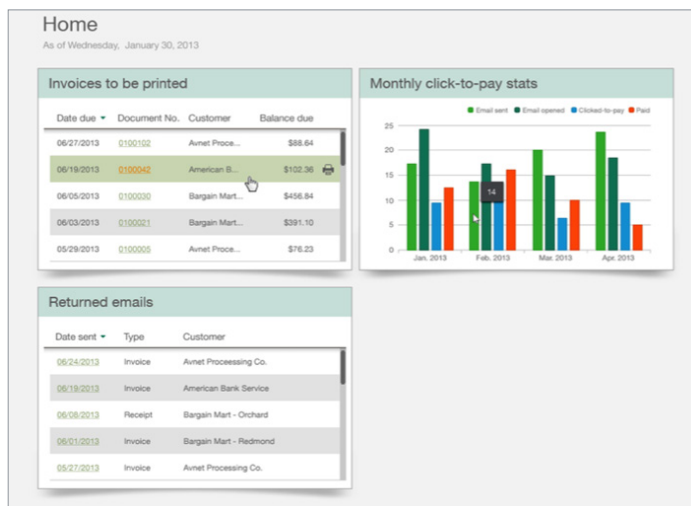
## What's new in Sage 300 ERP 2014



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

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

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



And, like Sage ERP solutions, Sage Billing and Payment includes customizable invoices—giving businesses a twenty-first century presence at an affordable price. But best of all, because it's all in the cloud, companies are always using the latest version, and their employees don't have to be "chained to their desks" to get work done thanks to web browser accessibility on desktop, laptop, and mobile devices.



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

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

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



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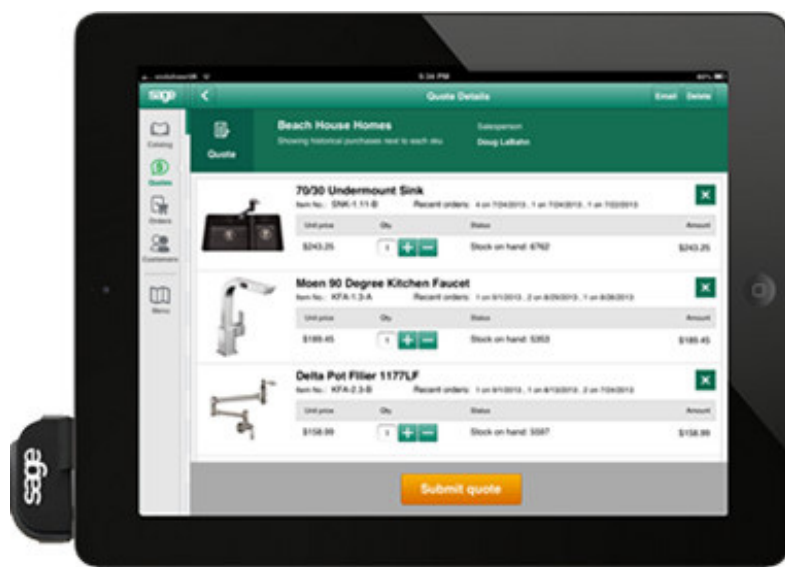
**Sage Mobile Sales** provides sales reps and managers with the ability to take an order, collect payment, and enter it directly into the ERP anytime and anywhere through an iPad. Sage Mobile Sales is a solution for companies that are looking to:

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

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

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

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



### Sage 300 ERP 2014 connects you to the information you need for better decision making.

The **Sage Intelligence Reporting Bundle** is a new way to purchase Sage Intelligence through a subscription license with no long-term contract. The subscription license allows you to use the service as long as your monthly dues are current and you remain on an active software support plan. Rights to use the service include an unlimited number of Sage Intelligence Report Manager and Viewer licenses, Report Designer to help you easily create and edit your financial reports, and Connector to allow you to access information from multiple sources and consolidate data from multiple companies. The subscription license begins with a term contract of four months, then a monthly subscription thereafter.

**Note:** Sage Intelligence can still be licensed through individual users and modules. Customers that have already purchased Sage Intelligence cannot switch to the Sage ERP Intelligence Reporting Bundle.

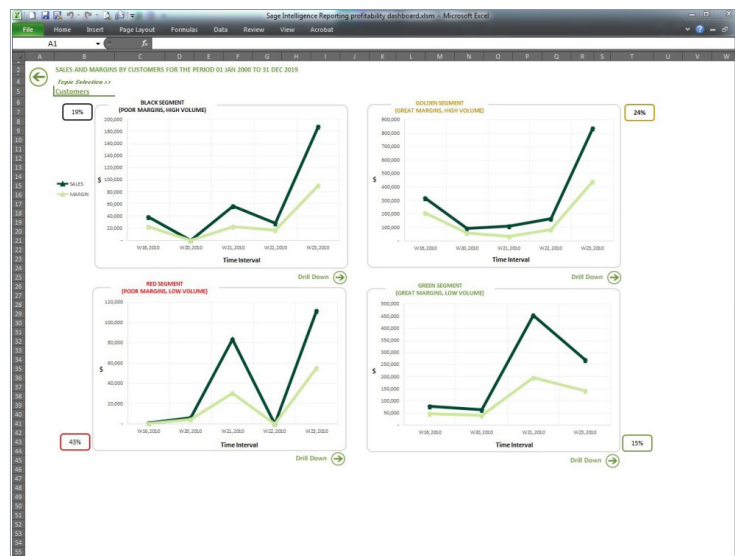
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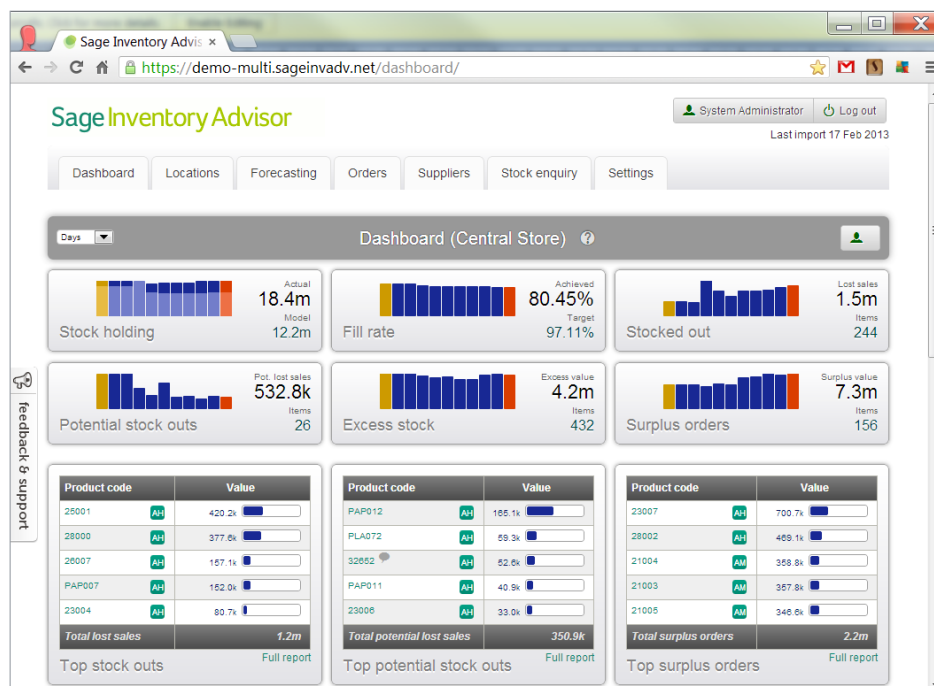
The **Sage Intelligence Profitability Dashboard** enables you to quickly identify the profitability of customers, products, and salespersons based upon weekly, monthly, quarterly, or annual time frames. This helps your company:

- Meet customer demand by focusing on high-volume products.
- Quickly pinpoint top-performing salespeople and trend lines.
- View meaningful graphics for faster decision making.

The Sage Intelligence Profitability Dashboard will be available as a report to import into Sage Intelligence. If you have purchased Sage Intelligence and are currently on a Sage Business Care plan or if you are subscribed to the monthly Sage Intelligence Reporting Bundle, you will be able to access and use this report.



**Sage Inventory Advisor** is a web-based solution that goes beyond merely tracking what inventory you have on hand and sending alerts when you run low. It helps your inventory management team strike the optimal balance between being ready for demand and avoiding stock overages. Sage Inventory Advisor analyzes Sage 300 ERP data to provide improved stock forecasting, better vendor management, and recommendations for optimal replenishment. It allows you to adjust safety stock levels based on risk tolerance levels and changing conditions on the ground.



Sage Inventory Advisor brings these benefits to companies needing to manage inventory:

- Reductions in costly inventory overages to free up working capital
- Reductions in stock-outs to improve fill rates
- Improved speed and accuracy of demand planning and forecasting

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

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### Value-added functionality at your fingertips with user experience enhancements.

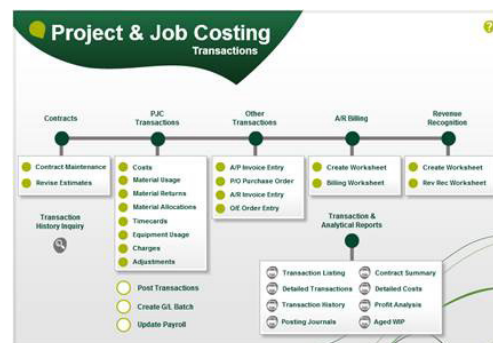
As always, the user experience enhancements designed into Sage 300 ERP 2014 will boost the productivity of your team.

### The Sage Data Cloud

Connects your company's Sage 300 ERP 2014 system to the cloud, allowing you take advantage of new solutions and integrations. The new cloud, mobile, and connected services outlined throughout this brochure will quickly and easily connect to your system through the Sage Data Cloud, included as part of your Sage Business Care with a free connector and unlimited data storage. You'll be prepared for the future with the Sage Data Cloud.

### Improved Visual Process Flows

Build on an already popular and valuable feature to make them a source of even greater productivity. Sage Visual Process Flows are interactive workflow diagrams that graphically display the steps required to complete common tasks. They boost productivity by helping all employees follow procedures in a well-organized way, and by bringing new employees up to speed more readily. Sage 300 ERP 2014 provides even easier to understand procedural roadmaps and links to every important cross-purpose in each process. That means less time wasted and fewer mistakes made.



## Sage 300 ERP 2014 helps you get more done by connecting your business, providing a better customer experience, and increasing revenue

### Endorsed solutions

Sage 300 ERP 2014 works seamlessly with a range of software and system services on offer from our partner solution providers. These add-ons expand the functionality of Sage 300 ERP 2014 even further. For the latest information on the integrations currently available for Sage 300 ERP 2014, please refer to the Compatibility Guide. You can find it at the [Sage Customer Portal](#).

### Sage 300 ERP 2014 offers flexible ways to purchase

So you can customize your solution your way. For instance, you can deploy Sage 300 ERP 2014 using perpetual or monthly subscription licensing, per user, or by different bundles that include the tools you need. An online version of the solution is also available. For more information on these options, contact your Sage representative or Sage partner.

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