Sage 300 ERP 2014
Release guide

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Sage 300 ERP 2014 Release guide

1.0 Sage 300 ERP 2014 release

1.1 Overview

Sage 300 ERP 2014 (formerly Sage ERP Accpac) allows service companies, distributors, and manufacturers to be able to get more done by enabling their teams and connecting their business. From the field service and sales teams to back-end accounting teams, they have better collaboration and visibility into their operations and are able to deliver a better customer experience. The fresh look of the modernized user interface and more intuitive data entry screens enables teams to increase productivity. The improved user license management capabilities combined with the productivity improvements maximizes return on investment by Sage 300 ERP customers. Dispatchers can provide excellent customer service by scheduling the optimum tech and assure their customers that the tech will arrive on time to do the repairs or installation. The field service technicians can get work order assignments on their smartphone, see customer information, record work done, and process payments all while onsite and without having to call into the office. Invoices can be personalized with promotions and other messages, and the receivables teams can manage exceptions that happen in the invoicing process. Field information flows through the Sage Data Cloud and into the Sage 300 ERP 2014 system. Executives can access analytics on all pieces of their business, allowing them to see what has happened with detail and make the best decisions for the future. Sage 300 ERP 2014 is the foundation that ties a business's operations together, allowing companies to provide a better customer experience, increase revenue, and make better business decisions.

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

It is strongly recommended that you upgrade to Sage 300 ERP 2014 shortly after the release, especially if you are running an older version. For the most current information, please log on to the Sage Customer Portal.

1.2 Sage 300 ERP 2014 availability

The Sage 300 ERP 2014 autodelivery download for business partners and customers current on Sage Business Care is scheduled for March 2014.

2.0 New functionality

2.1 Global enhancements

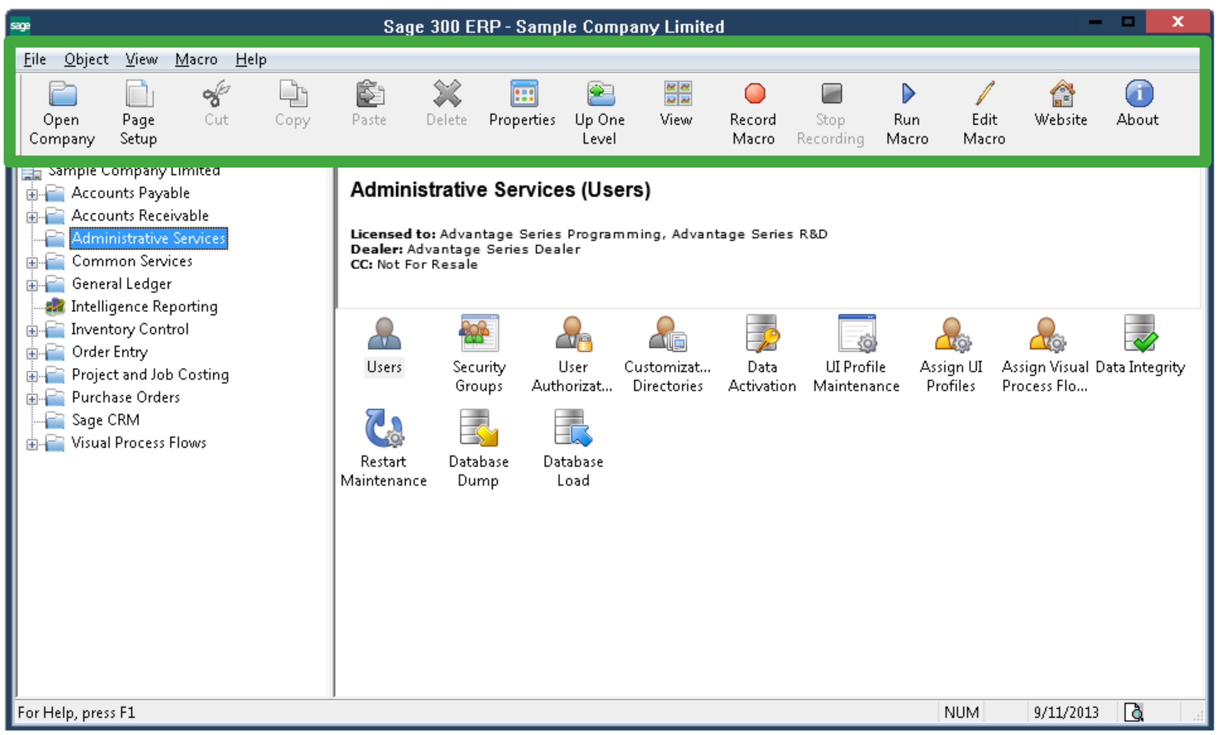
Sage 300 ERP 2014 includes several user experience enhancements that help users to be more productive. Enhancements include a modernized desktop with more intuitive screens, the ability to better manage user licenses, a new version of Sage Intelligence, and deeper integration with Sage Inventory Advisor. Sage 300 ERP 2014 now supports Microsoft Office 2013 32-bit.

2.1.1 User modernization

Sage 300 ERP 2014 has been updated with a fresh, modern look and feel to make it easier to find information and complete tasks:

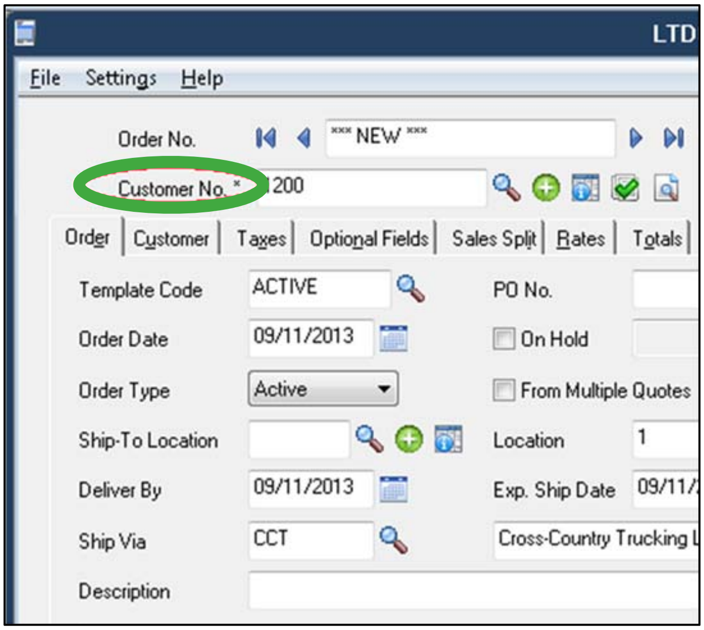
On the desktop you'll find:

- Redesigned icons makes it more intuitive to navigate to programs, and screens are presented so you can work more efficiently.
- A new ribbon-style toolbar to help you find tools and commands quickly and easily.



On a selection of frequently used screens you'll see:

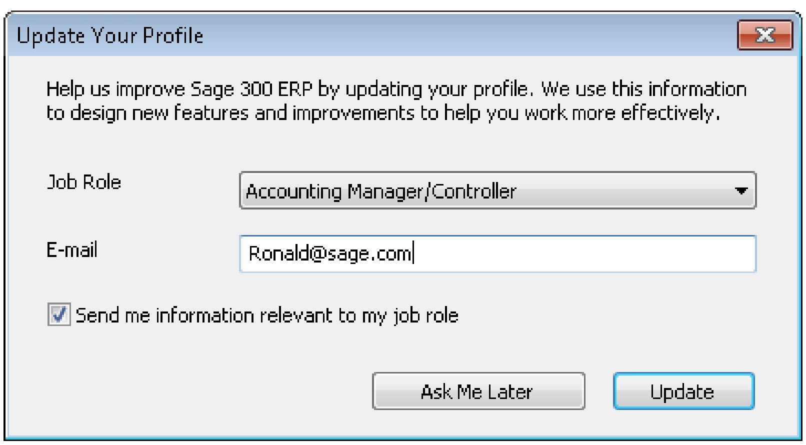
- Redesigned buttons (such as the Zoom button and the Finder) to make the user experience more intuitive.
- Required fields are clearly indicated with an asterisk to show users which fields they need to fill out during data entry, to maximize their productivity.



2.2 Sage Advisor enhancements

When you sign in to Sage 300 ERP 2014, you may be asked to update your user profile with information relevant to your job role. They include tips and suggestions to help you work faster and easier, or details about promotional offers.

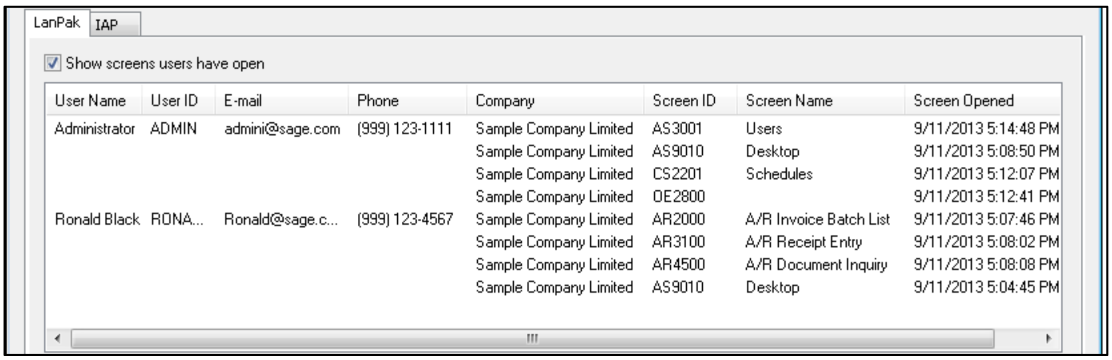
In future versions of Sage 300 ERP, we'll design new features and improvements tailored to unique user roles based on the insights we learn from the data you provide.



To learn more about how information is collected and used for the Sage Advisor Product Enhancement Program, see the Sage Privacy Policy at: na.sage.com/Sage-NA/privacy-policy.

2.3 System Manager enhancements

Sage 300 ERP 2014 assists companies to maximize the value of their ERP investment with improved user license management functionality. Sage 300 ERP users can now see who is logged onto their Sage 300 ERP system, what screens their colleagues are accessing, and how long they've been logged on. If a situation occurs where someone cannot log on who needs to perform an important task, this information will allow help senior personnel determine what user should be asked to log off in order to free up a user license. In a future product update, the administrator will be able to log off any user; Sage has also changed our licensing model, per our customers' request, to ensure any Sage 300 ERP user can access the Current Users screen at any time, even if the license count has been reached.


LanPak IAP

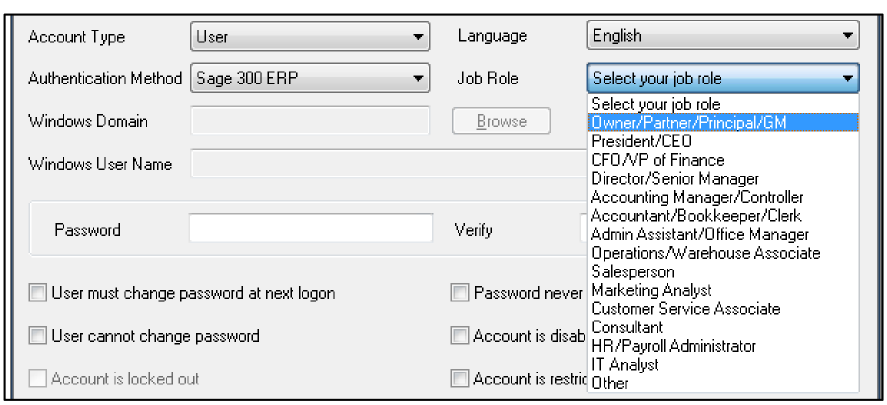
Show screens users have open

User Name	User ID	E-mail	Phone	Company	Screen ID	Screen Name	Screen Opened
Administrator	ADMIN	admini@sage.com	(999) 123-1111	Sample Company Limited	AS3001	Users	9/11/2013 5:14:48 PM
				Sample Company Limited	AS9010	Desktop	9/11/2013 5:08:50 PM
				Sample Company Limited	CS2201	Schedules	9/11/2013 5:12:07 PM
				Sample Company Limited	OE2800		9/11/2013 5:12:41 PM
Ronald Black	RONA...	Ronald@sage.c...	(999) 123-4567	Sample Company Limited	AR2000	A/R Invoice Batch List	9/11/2013 5:07:46 PM
				Sample Company Limited	AR3100	A/R Receipt Entry	9/11/2013 5:08:02 PM
				Sample Company Limited	AR4500	A/R Document Inquiry	9/11/2013 5:08:08 PM
				Sample Company Limited	AS9010	Desktop	9/11/2013 5:04:45 PM

Additional information provided in the current Users screen displays include:

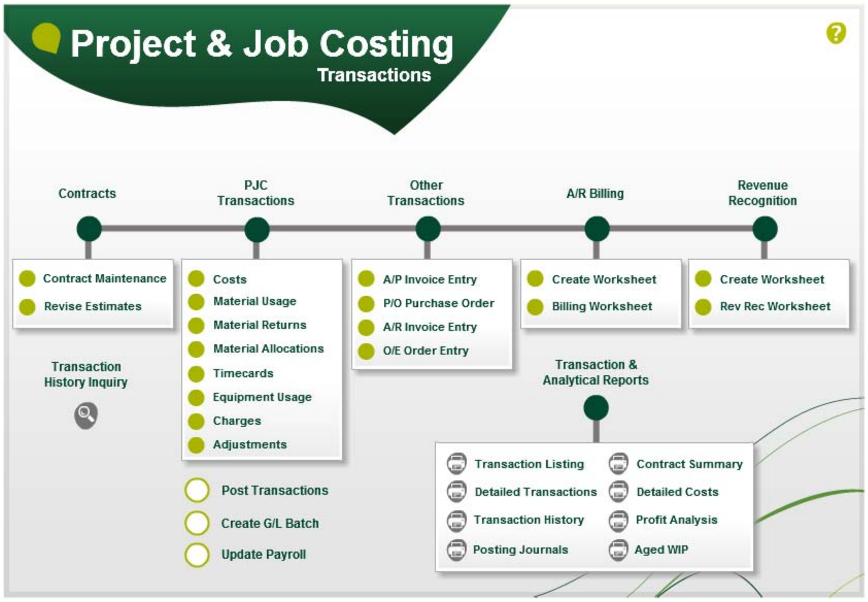
- Contact information for users.
- Information about user activity, such as the screens each user is using.
- Information about users who are signed in without using a license, such as Timecard users.

To augment our new functionality in Sage Advisor, a new job role and contact information fields on the users screen have been added. Four new fields—Job Role, Phone, Email 1, and Email 2—allow you to specify a user's job role and contact information. A new user will receive an email from Sage containing information relevant to their job role options, and indicates whether they consent to receive email from Sage.



2.4 Visual Process Flow enhancements

Three new visual process flows are included in 2014 in Canadian Payroll, U.S. Payroll, and Project and Job Costing. All major modules in Sage 300 ERP 2014 have a main Visual Process Flow that customers can use as a landing page, which will enhance the user experience for power users in these modules.



When customizing process flows, users can now link elements to programs, reports, macros, and other process flows. This gives companies the ability to create one landing page as an intuitive interface for their employees that they can use to design and customize entire workflows across numerous applications.

2.5 Accounts Receivable enhancements

Improving the ability to quickly and efficiently use Sage 300 ERP remains a key priority to the Sage development team. Help functionality in Accounts Receivable has been revised to improve search results, enhance the readability of help topics, and make it easier for you to find important information and instructions. We have also added a new Accounts Receivable User's Guide, available in Docs\62A\ENG.

Another major area of focus has been to make certain the integration between our powerful new Sage Billing and Payment solution and the Sage 300 ERP Accounts Receivable (AR) module is robust. On the AR Customers screen, the Sage Billing and Payment Customer option allows you to specify that a customer is a Sage Billing and Payment customer. This functionality ensures that businesses don't send receivables statements twice to their customers in error.

On the AR Invoices screen, an Include Sage Billing and Payment Invoices option allows you to specify whether to print invoices created in Sage Billing and Payment. This saves your business time and money by avoiding unnecessary printing of invoices to customers who are billed automatically online.

On the AR Statements/Letters/Labels screen, the Include Sage Billing and Payment Customers option allows you to specify whether to print statements for Sage Billing and Payment customers. This saves clients time and money by avoiding unnecessary printing of statements to customers who are billed automatically online.

2.6 Accounts Payable enhancements

The 1099 and 1096 forms have been updated to meet the following changed IRS specifications for 2013:

The alignment and positioning of some information has been changed so that it prints correctly on these forms.

- The 1099-MISC form now includes the following boxes:
- 11 Foreign tax paid
- 12 Foreign country or U.S. possession

2.7 General Ledger enhancement

When printing the GL Transactions Listing, you can now print a report that spans multiple fiscal years and periods. This feature was a highly ranked enhancement. In previous versions users were required to run the listing annually. Customers will be able to generate and compare data more efficiently using the new listing report.

2.8 Inventory enhancements

A major focus in this release has been to improve the integration between Sage 300 ERP Inventory Control and our powerful new Sage Inventory Advisor (SIA) solution. On the Location Details screen:

- Inventory Minimum (SIA). This field allows you to specify the minimum quantity of an item that must be in inventory at a location. This enables SIA to ensure that your location will not be understocked.
- Lead Time (SIA). This field allows you to specify the lead time to allow when ordering goods. This enables SIA to ensure that you have sufficient time to order and receive your stock to avoid inadequate inventory on hand.
- On the Vendor Details screen: Order Minimum (SIA). This field allows you to specify the minimum quantity of an item that you must order from a vendor. This enables SIA to better manage inventory costs and select the correct vendor to supply inventory based on your cash and inventory needs.
- Preferred Vendor (SIA). If you purchase an item from multiple vendors, this field allows you to specify a preferred vendor for the item.
- A new Use as Default option on the Bills of Material screen. This option allows users to specify a default number to use for a BOM item when it is entered on the IC Assemblies/Disassemblies screen. This information is also displayed on the Bills of Material report. **Note: Information in this field is used only by Sage Inventory Advisor (SIA).**

- On the Lot Numbers screen and the Serial Numbers screen, you can now change the stock date. If you change the stock date, the expiry date is recalculated automatically. In previous versions users could only update the stock date by creating transactions on the serial and the lot. With 2014 we have enabled users to modify serials and lots as needed.

- Allow Duplicate Serial Numbers option on the Options screen. This option allows you to disable whether multiple items can be assigned to the same serial number. Clearing this option does not change existing assigned serial numbers, so any existing duplicated serial numbers remain. Some businesses prefer to not allow duplicate serial numbers under any circumstance. This enhancement ensures Sage 300 can be customized to your businesses business process.

- A new Unit Cost field on the Lot Numbers Inquiry screen. This field displays the unit cost for items in a lot, calculated based on the quantity of items in the lot and the total cost of the lot. In previous versions users could only see costs at the location level. Now users have the power to view greater cost details at the lot level.

2.9 Order Entry enhancements

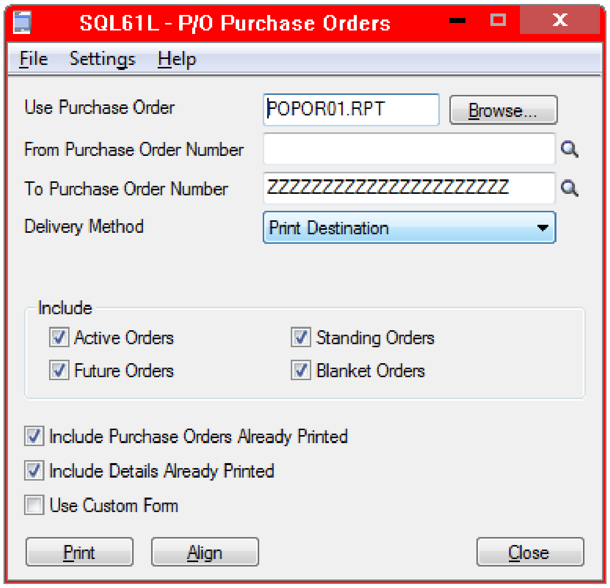
In previous versions of Sage 300 ERP, users who needed to switch between data piped and non-data-piped forms were required to modify the OERPT.INI file. This enhancement makes the application easier to use, and avoids human error making manual changes to the file.

You can now specify whether miscellaneous charges are discountable by default. To do this, you edit the [ApplyInvoiceTermsDiscountToMiscCharge] setting in the OE.INI file. In previous versions the user was required to manually turn off the option in invoice entry. This enhancement makes the application easier to use and avoids human error making manual changes to the file.

2.10 Purchase Order enhancements

A new Entered By field on transaction entry screens (Requisition Entry, Purchase Order Entry, Receipt Entry, Invoice Entry, Return Entry, and Credit/Debit Note Entry) indicates who entered a transaction. This customer-requested enhancement allows users to identify who entered or posted the transaction. This is particularly helpful when the person responsible to approve the Purchase Order has questions or needs more information about it. This new purchase order entered by field quickly identifies who in the organization originally entered the transaction. **Note: On the Purchase Order Entry and Requisition Entry screens, the Entered By field replaces the Source field.**

Another new Purchase Order feature is that customers no longer need to edit the PORPT.ini file when selecting Purchase Order forms. This was previously required to switch between data pipe and non data pipe reports. For example, PO.POR01.rpt and PO.POR02.rpt are data pipe reports. PO.POR03.rpt and PO.POR04.rpt are not data pipe reports. Prior to this users would receive an error if they tried to run a report in error if their ini file had not been adjusted accordingly. For those who are more technically inclined, data pipe reports tend to be faster because the parameters are programmed but cannot be customized as a result. This will save power users a lot of time.



If you do not allow negative inventory, you can now specify whether this setting is strictly enforced. To do this, you edit the [NegativeInventory] setting in the PO.INI file. For more information, see Knowledgebase article 21367.

2.11 Improved help and documentation

We have revised help for the following Sage 300 ERP programs to improve search results, enhance the readability of help topics, and make it easier for users to find important information and instructions in:

- Accounts Receivable.
- Accounts Payable.
- G/L Consolidations.
- Intercompany Transactions.

We have also added the following new user's guides, available in Docs\62A\ENG:

- Accounts Receivable User's Guide
- Accounts Payable User's Guide
- G/L Consolidations User's Guide
- Intercompany Transactions User's Guide

This release also includes French- and Chinese-language versions of Inventory Control help and the Inventory Control User's Guide.

2.12 Sage Intelligence

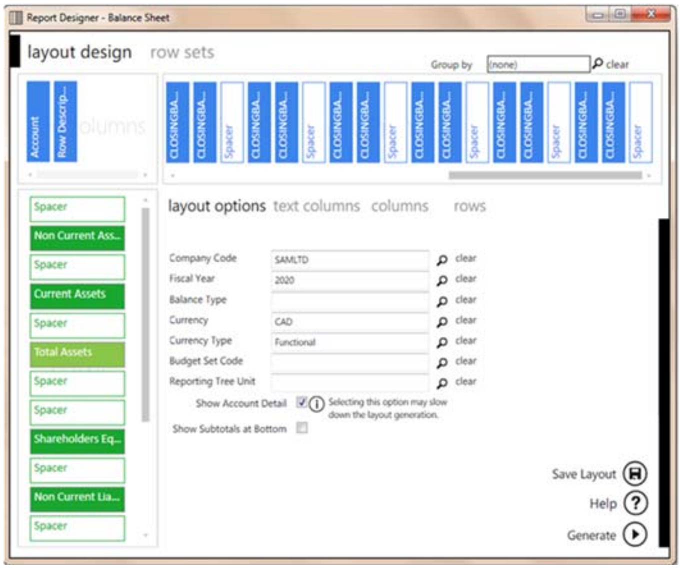
New Sage Intelligence enhancements enable users to quickly and easily navigate the system menus and improve their productivity. With improved report design capabilities, a fresh look, and the ability to use Microsoft® Excel® 2013, Sage Intelligence for Sage 300 ERP 2014 will help your team to make better decisions, faster.

2.12.1 New Report Designer

The new Report Designer boasts a fresh new user interface, and has vast improvements in performance through its powerful new In-Memory technology,* giving users a quick and responsive experience when designing reports in the familiar interface of Microsoft® Excel®.

The new Report Designer gives users two methods to create their financial reports depending on their Excel knowledge.

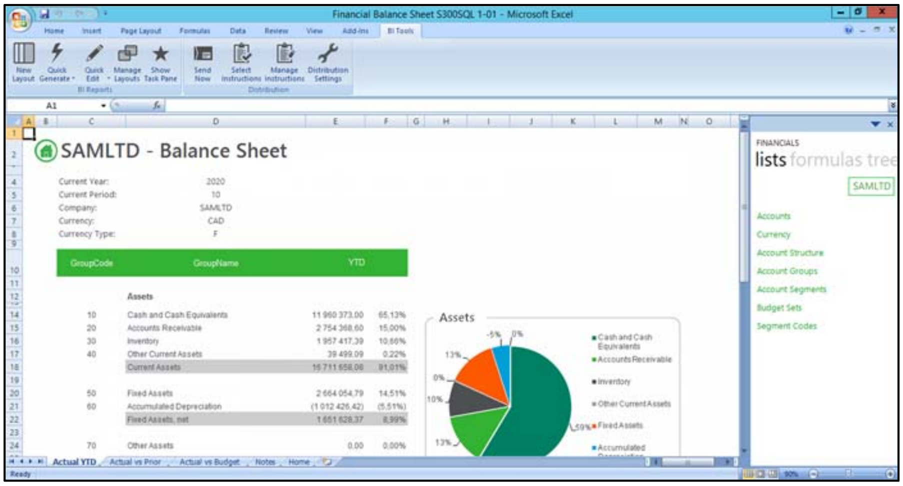
If users are still getting used to Excel, the Layout Generator is easy to use and automates the design and generation of simple financial report layouts quickly and accurately within Excel. The Layout Generator provides users with a set of standard financial layouts to get them up and running immediately and these can then be edited to suit user's unique requirements.



Layout Generator interface for wizard driven creation of financial layouts.

The Layout Generator user interface and performance has been enhanced, greatly improving user experience. The generated layouts have also been given a cleaner look and feel and are now easier to customize using the Task Pane once the layout is created.

If users are more familiar with Excel, the new Task Pane greatly enhances their Excel reporting experience, by providing instant and dynamic access to data within the General Ledger. Simply drag in data lists, formulas, or Reporting Trees from the Task Pane on the right-hand side of the Excel window, and the In-Memory technology will update results instantaneously. Users can also change the level of detail seen at a row level by using account ranges, account wildcards, and account exclusions giving you maximum control and flexibility over their financial report layouts.



Pane Interface with an Income Statement by Product and Region Dimension

2.12.2 Excel 2013 64-bit support

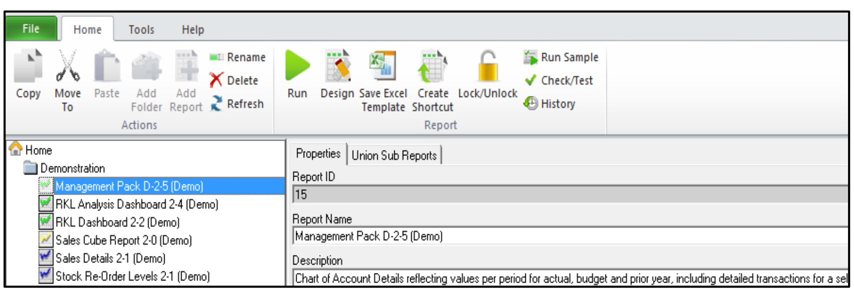
You can now take full advantage of the latest Microsoft Excel technology with Sage Intelligence, because it is now compatible with the 32-bit and 64-bit versions of Excel 2007, 2010, and 2013.

2.12.3 User interface and usability improvements

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

User interface

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



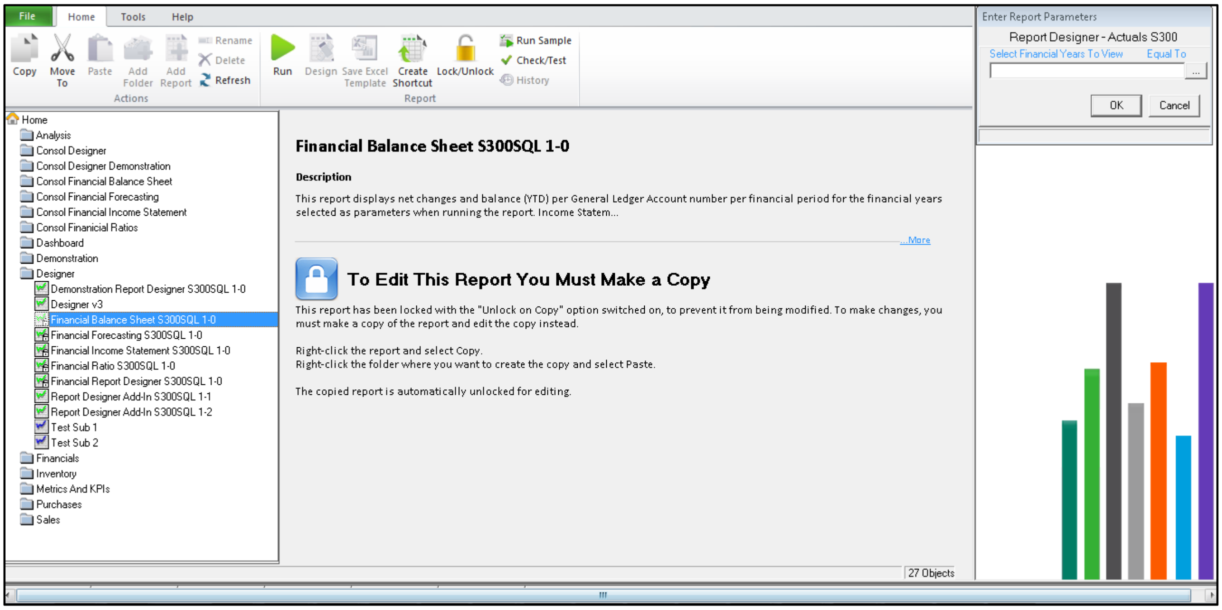
- The standard Sage Intelligence reports have been modernized to give users a cleaner look and feel, as well as quick reference to helpful Sage Intelligence resources.

- When importing reports, you are able to rename duplicate containers.

- When selecting subreports to include in a union report, the report ID is now visible.

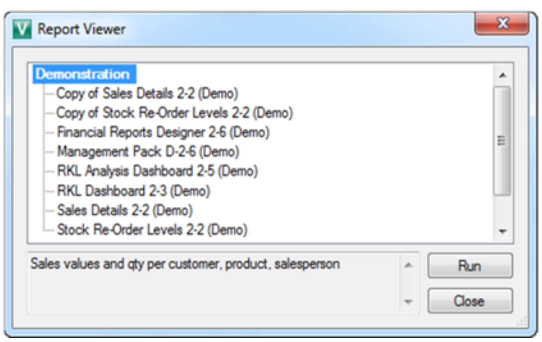
Report Manager

- Improved progress bar when running reports.
- The locked report properties screen and the run report background have been simplified.



Report Viewer

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

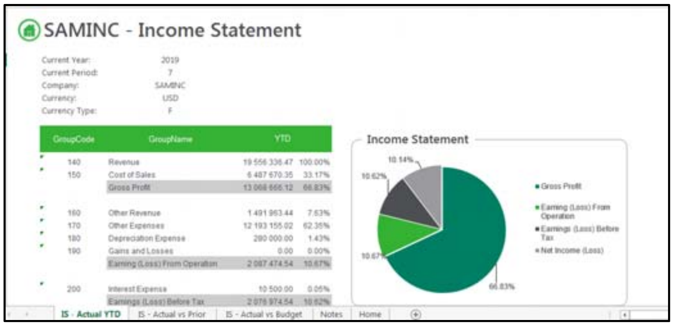


2.12.4 Four new Financial Report Templates

We have created four new Financial Report Designer Templates, which can be run from the Report Manager or Report Viewer user license. **(Note: A Report Designer license is required for these reports to work.)**

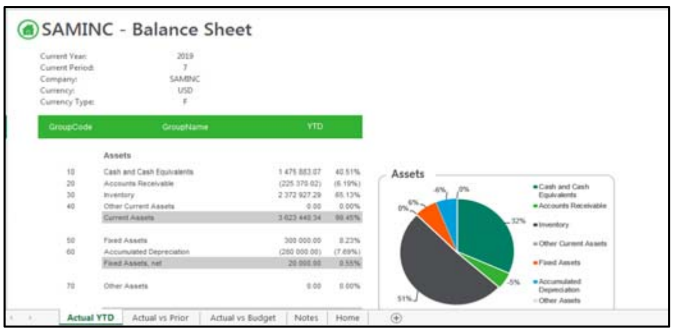
Income Statement

The New Financial Income Statement Report contains sample Report Designer Income Statement layouts to assist users in getting started with their layout design.



Balance Sheet

The New Financial Balance Sheet Report contains sample Report Designer Balance Sheet layouts to assist users in getting started with their layout design.

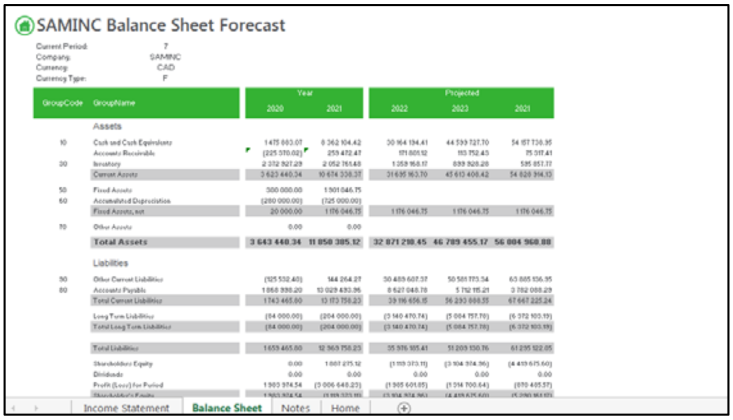


Financial Ratios

The New Financial Ratios Report contains sample layouts to assist users in calculating and visualizing Financial Ratios in order to make more informed business decisions.

Financial Forecasting

The new Financial Forecasting report provides users with sample layouts aimed at projecting growth from the prior to current year and allows for users to input adjustments in growth percentages. The Financial Forecasting report is for General Ledger only and is based on the standard Sage FR GL Forecasting template “Forecast.xls.”



2.12.5 Sage ERP Intelligence Reporting Bundle

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

Rights to use the service include:

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

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

2.12.6 Sage Intelligence Profitability Dashboard

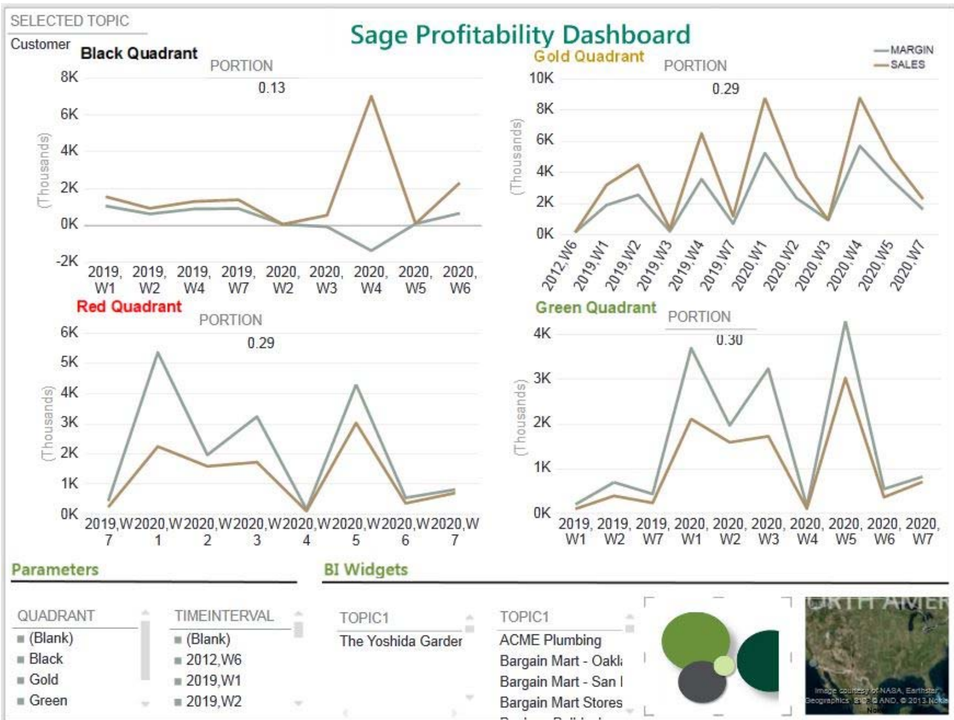
The Sage Intelligence Profitability Dashboard enables Sage 300 ERP users to quickly identify the profitability of customers, products, and salespersons based on weekly, monthly, quarterly, or annual segments.

The profitability dashboard allows companies to:

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

Two versions of the dashboard are available. One is compatible with Microsoft® Excel® 2007 and 2010. The other is compatible with Microsoft® Excel® 2013, giving you more exploration and visualization of your information through mapping, timelines, and data selection.

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



2.13 Sage CRM

Sage CRM is a solution that integrates seamlessly with Sage 300 ERP to help companies grow and succeed by:

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

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

2.13.1 Sage CRM Sales Tracker

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

2.13.2 Sage CRM Sales Lite

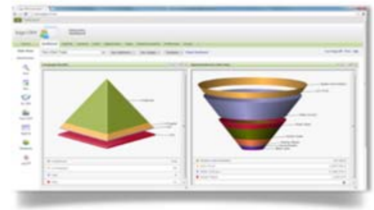
Sage CRM Sales Lite is built for sales users on the road who need up-to-date information on their phone, even when out of coverage. Sage CRM Sales Lite gives users mobile access to their Sage CRM data, tasks, and appointments and integrates with their iPhone, allowing users to track and log outbound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

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

2.13.3 Sage CRM for Facebook

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

2.13.4 Smarter reporting



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

2.13.5 Businesswide collaboration

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

2.14 Payroll

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

2.14.1 Payroll changes and new features

The following sections describe new features and enhancements included in Sage 300 ERP Payroll for Sage 300 ERP 2014.

2.14.2 Sage Payroll Tax Forms and eFiling by Aatrix (U.S. only)

Sage Payroll Tax Forms and eFiling by Aatrix is a feature included with Sage 300 ERP Payroll 2014. This functionality provides updated reports and forms at no cost and enables you to fill out and file tax forms electronically for a fee; including W-2, W-3, U.S. federal forms (941, 943, 944, and 945), U.S. state tax forms, and new hire reporting by state. Sage 300 ERP now offers far more compliance reports and forms than ever before.

2.14.3 Automatic local tax rate update option (U.S.)

Sage 300 ERP 2014 includes a new automated update option for local tax rates supplied by Sage for the U.S. Payroll tax tables. After upgrading to Sage 300 ERP 2014, each time you apply a quarterly tax update, you can immediately and automatically apply rate changes to the supported tax codes currently in Sage 300 ERP Payroll. You can also automatically push the new rates to the tax codes on each employee record. This makes Payroll far easier to use and saves a lot of time for payroll administrators who needed to updates these manually.

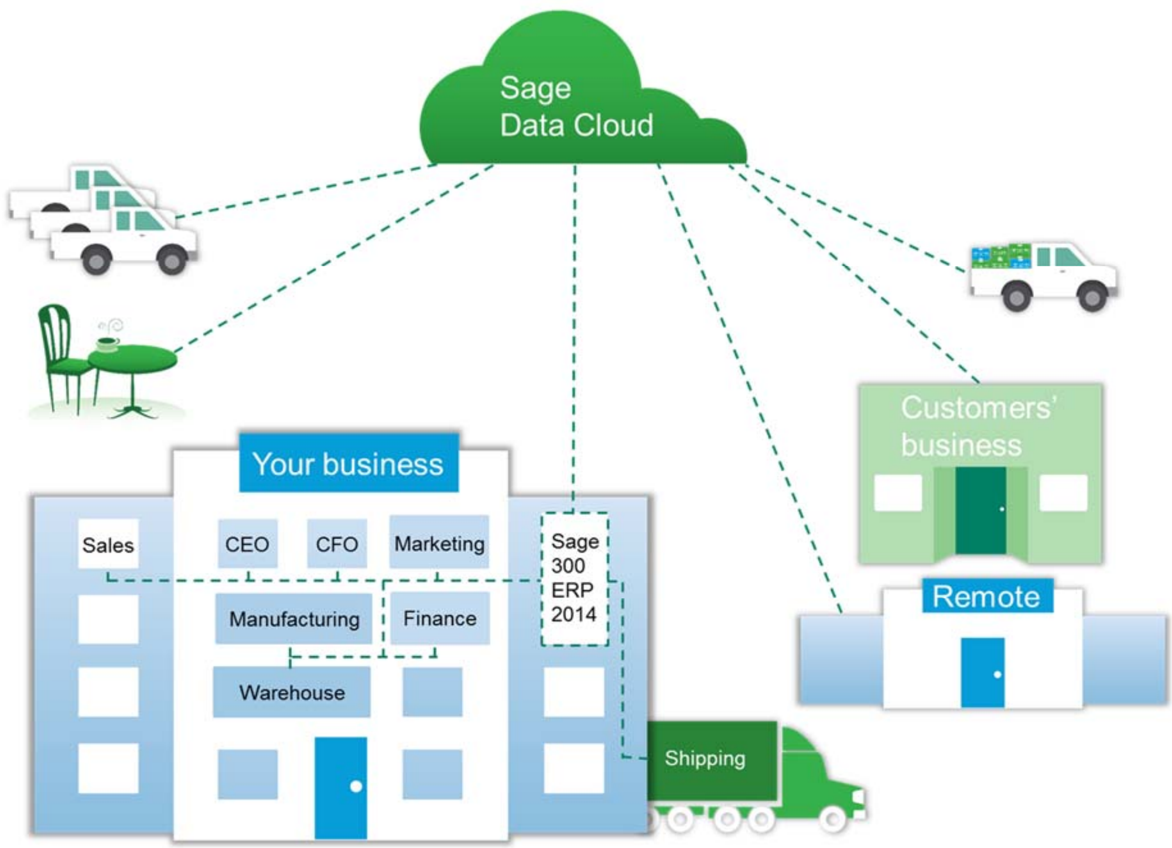
2.14.4 Cost center overrides on timecard imports (U.S. and Canada)

Many of our customers integrate other systems with Sage 300 ERP Payroll. When importing a timecard from another system, Sage 300 ERP Payroll now also imports cost center overrides. The timecard import automatically updates the GL segment corresponding to each cost center override. This matches the way the system already handles manually entered information in the timecards which prevents duplicate data entry and costly data clean up.

3.0 Cloud, mobile, and connected services

3.1 Sage Data Cloud

The Sage Data Cloud allows your company to tie your on-premises Sage 300 ERP system to the cloud, allowing you take advantage of new solutions and integrations to help your business improve customer service, increase sales, and make better business decisions. New cloud, mobile, and connected services will quickly and easily connect to your system through the Sage Data Cloud, included in business care with a free connector and unlimited data storage. You'll be prepared for the future with the Sage Data Cloud and cloud, mobile, and connected services from Sage.



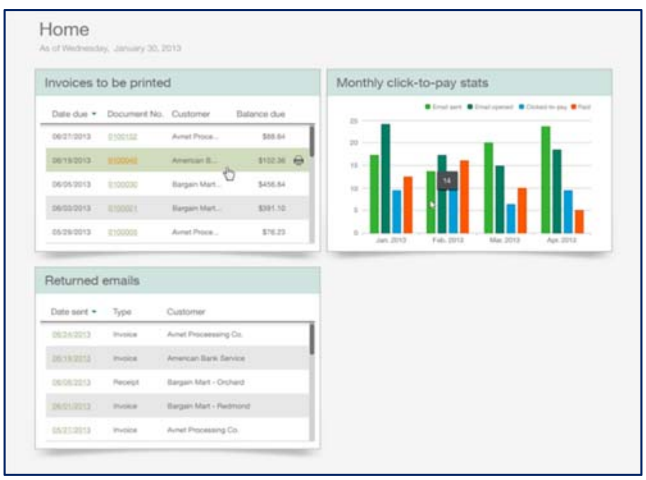
3.2 Sage Billing and Payment

Sage Billing and Payment is an ideal solution for any company 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.

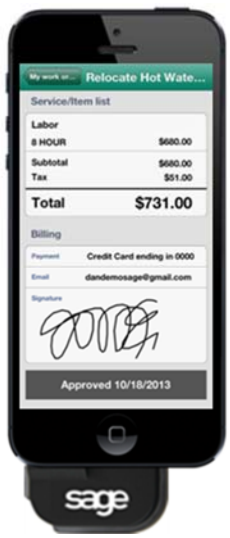


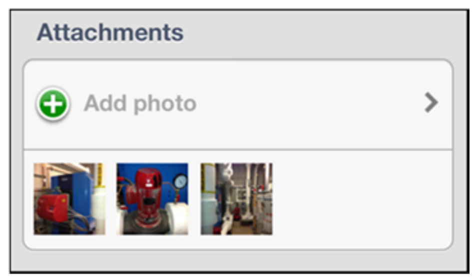
3.3 Sage Mobile Service

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 signoff and take photos onsite.
- Have anytime, anywhere link to customer's Sage ERP information.
- Get paid faster and increase your cash flow.

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





3.4 Sage Mobile Sales

Sage Mobile Sales provides sales reps and managers with the ability to take an order, collect payment, and enter it directly into the ERP anytime and anywhere through an iPad.

Sage Mobile Sales is a solution for companies who are looking to:

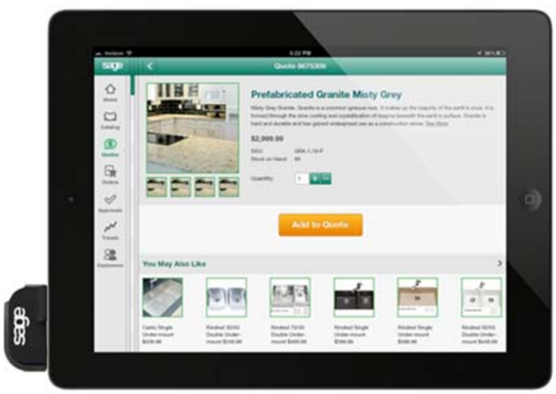
- Increase revenue—close bigger deals per field salesperson.
- Get paid faster—process orders and collect payment onsite.
- Get anytime, anywhere access to customer purchase history and inventory information.

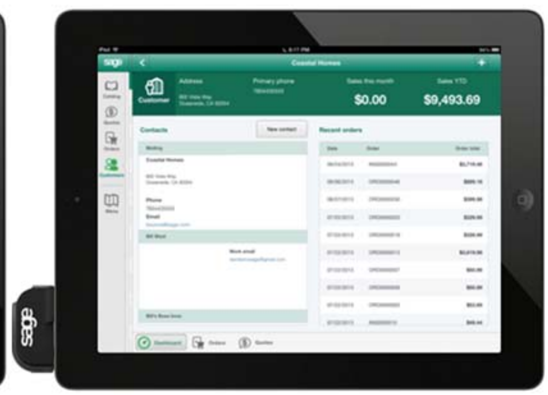
- Present their entire product portfolio to customers on an iPad using a smart online catalog and eliminate the need for printed catalog.
- Build a quote while with a customer, email it, or convert it to an order.
- Confidently commit to fulfilling orders with real-time visibility into product availability.
- Streamline order processing—eliminate the error-prone multiple steps required when taking orders in the field on paper and later having to enter them into an ERP.

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

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

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





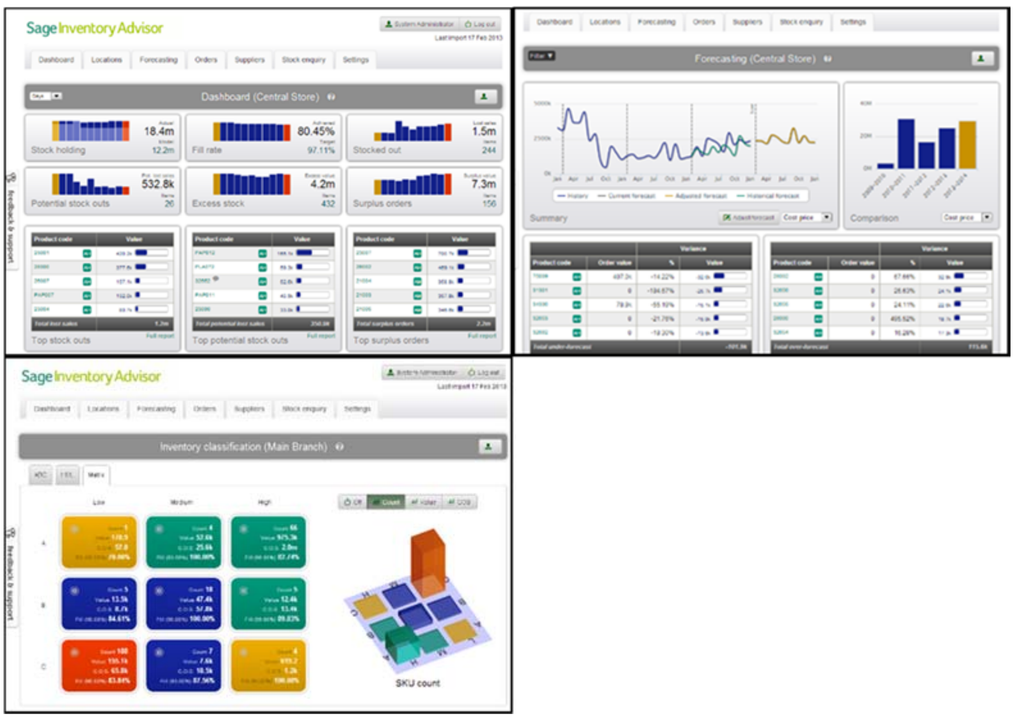
3.5 Sage Inventory Advisor

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

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

Sage Inventory Advisor analyzes Sage 300 ERP data to provide improved stock forecasting and planning capabilities, and suggests optimal replenishment recommendations.

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



4.0 Sage 300 ERP 2014 business partner certification

For the Sage 300 ERP 2014 release, a recertification will be required for all current Sage 300 ERP certified consultants. The recertification will include anytime learning courses and an assessment, which will cover enhancements from both Sage 300 ERP 2014 and Sage 300 ERP 2014. Notifications will be sent out to currently certified consultants when the recertification package is available on: www.SageU.com.

5.0 Third-party considerations

5.1 SAP® Crystal Reports

SAP® Crystal Reports 2011 will continue to be bundled with Sage 300 ERP 2014 providing access to organizational data, report customizations, and report generation.

6.0 Technology and supported platforms update

6.1 Windows 8.1

Sage 300 ERP 2014 is compatible with Windows 8.1. Additional information will be published in an update to this release guide. For the most current information on released products, the current supported platform matrix (SPM) is available on the Sage Customer and Partner Portals.

6.2 Microsoft Office 2013

Sage 300 ERP 2014 now supports Microsoft Office 2013 32-bit.

6.3 Virtual environments

Sage 300 ERP 2014 is supported in VMware ESX and Microsoft Hyper-V virtual environments. However, please note that our support teams will address only application-related issues that can be replicated in a physical environment, and will not address performance issues in a VMware or Hyper-V virtual environment. A virtual server environment is very complex; we recommend that you consult with a vendor-certified virtual server consultant.

6.4 Microsoft SQL Server 2012 for Sage 300 ERP

Sage 300 ERP 2014 is compatible with Microsoft SQL Server 2012. If customers purchased their Microsoft SQL Server licenses from Sage, they will receive the next release as a benefit of their Sage Business Care plan.

7.0 Development partner section

There are no new concerns Sage feels Development Partners should be made aware of for the Sage 300 ERP 2014 release.

8.0 Retirements

No functionality has been retired in Sage 300 ERP 2014.

The Return Merchandise Authorization (RMA) module has transitioned from an OEM to an endorsed product by Orchid.

Sage 300 ERP 2014 will be the last release that Sage offers physical DVDs for purchase. Partners and customers will continue to be able to create their own DVDs, if they desire, from the download file.

9.0 Feedback

Business partners and customers have a voice in our roadmap and in features and functionality that will be incorporated into future Sage 300 ERP releases. Please use your voice on the feedback and request site: www.Sage300ERP.com/Sage300ERPFeedback. 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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