

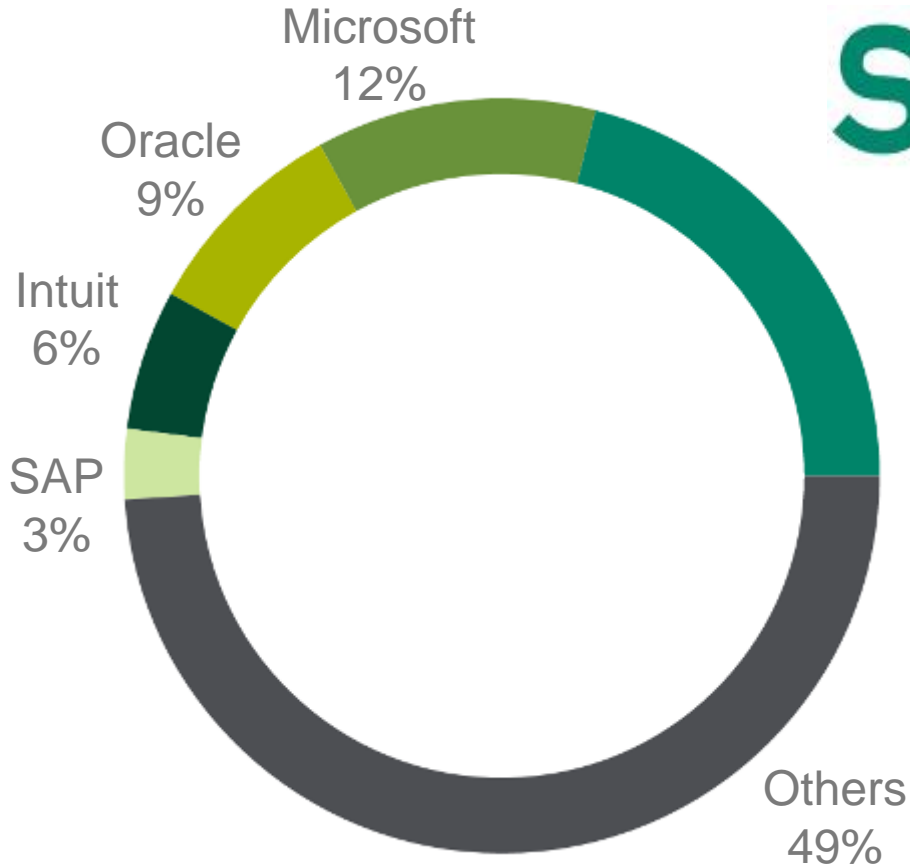


# **Sage Accpac Product Roadmap**

Collaborate. Innovate. Evolve.

January 2010

# Sage - #1 Worldwide for SMB



**sage** 21%

- 14,500 Employees Worldwide
- 5.7M Customers Worldwide
- 2.9M Customers North America
- 40,000 Support Calls per Day
- 1,500 Customer Purchases per Day

Source: IDC, October 2006, Worldwide ERP applications vendor shares, based on ERP revenue small business; <500 employees

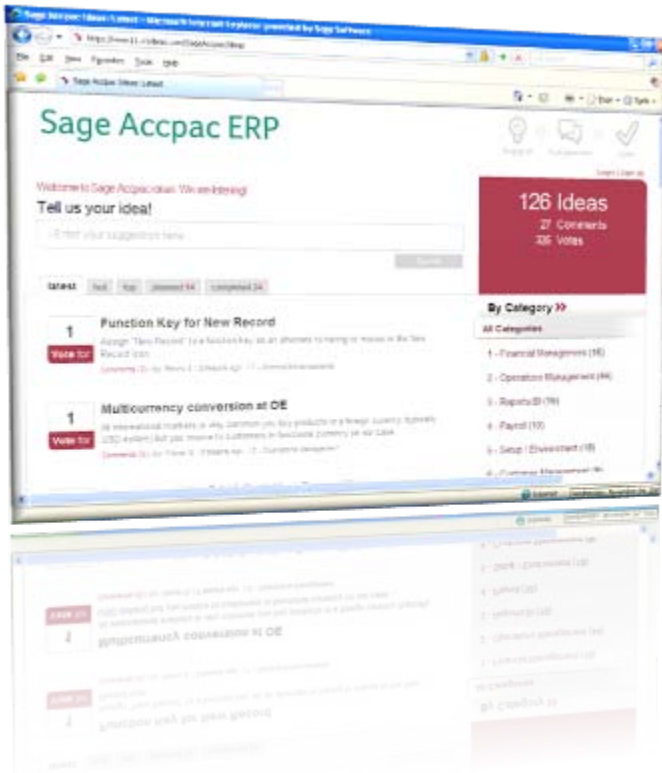
# Sage Accpac



- Sage Group Endorsed *Global Strategic Product*
- Since 1979
- 45,000 Customers / 270,000 Users
- Over 1,500 Solution Providers
- Over 300 Development Partners
- Global Footprint -169 Countries, Multilingual & Multicurrency
- Major Markets: US, Canada, Asia, Africa, Australia

# Your Opinion Matters!

- We Want to Hear from YOU!  
*“The Voice of the Customer”*
  - Sage Accpac Evolves at Pace of Customer
  - Solutions that Work the Way you Want
  - Suggest and Vote on Future Sage Accpac Enhancements



[www.sageaccpac.com/feedback](http://www.sageaccpac.com/feedback)

# Suggest, Collaborate, Vote

## Sage Accpac ERP

[Suggest](#) [Collaborate](#) [Vote](#)

[Login](#) | [Sign Up](#)

Welcome to Sage Accpac ideas. We are listening!

Tell us your idea!

[Search](#)

[latest](#) [hot](#) [top](#) [planned 14](#) [completed 24](#)

**11** **Vote for** **Be able to pull simple "list-like" data from Accpac** planned

Being able to pull information from Accpac without always needing to generate it from a Crystal Report - I want to be able to specify exactly what information I want ...

[Comments \(1\)](#) | by: [Jacqueline L.](#) | about a month ago | 3 - Reports/BI

**10** **Vote for** **Allow easier creation of reports in FR (Financial Reporter)**

It will be great if there is some wizard-like tool or face-lift for FR so that it is easier to create reports from scratch in FR. Understanding all of the codes is hard, ...

[Comments \(3\)](#) | by: [Jacqueline L.](#) | about a month ago | 3 - Reports/BI

**10** **Vote for** **Integrated dashboard for KPIs and other data** planned

Integrate that dashboard into the Sage Desktop, so I can see Key Performance Integrators when I log in to Accpac

[Comments \(0\)](#) | by: [Guillermo T.](#) | 19 days ago | 3 - Reports/BI

**160 Ideas**

74 Comments

691 Votes

**By Category >>**

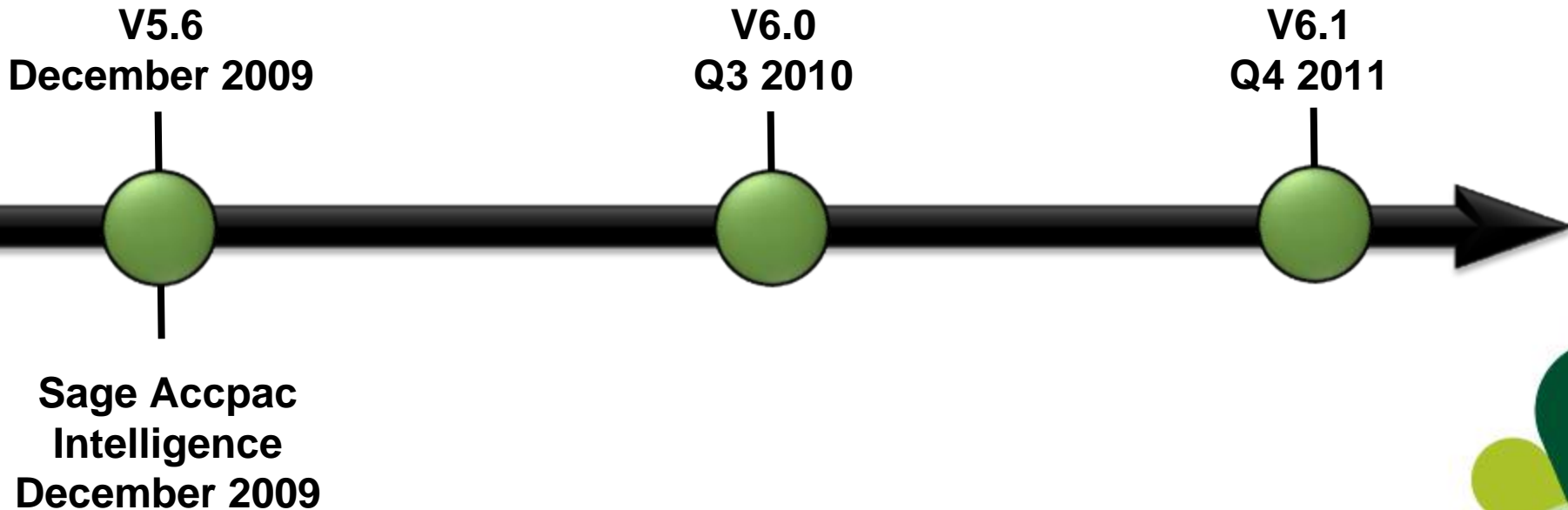
All Categories

- 1 - Financial Management (20)
- 2 - Operations Management (56)
- 3 - Reports/BI (20)**
- 4 - Payroll (11)
- 5 - Setup / Environment (18)
- 6 - Customer Mgmt (CRM) (14)
- 7 - General Enhancements (20)
- 8 - Other (1)

# Product Survey Results – Top 3

- *“What is the one area you would improve to make Sage Accpac better for you and your company?”*
  1. Reporting
    - Simplify Getting Information *out* of Sage Accpac
    - Make it Easier to Create and Customize Reports
    - Financial Reporting
  2. Functionality/Features
    - Accounts Payable / Accounts Receivable / General Ledger
    - Bank Services Usability
    - Inventory Control
  3. Usability
    - Faster Data Entry – Streamline Processes
    - Navigation – Faster Access to Supplemental Information

# Sage Accpac Product Roadmap



*This roadmap is intended for use as a guideline and for information purposes only, and represents Sage's current view of its product direction. The information is subject to change at any time without notice.*

*As Sage develops products using an Agile development methodology, any one of the milestones, features, release periods or versions could change. None of the information should be interpreted as a commitment on the part of Sage.*



# Sage Accpac Intelligence

Access Decision-Quality Information and Improve  
Visibility into Business Measurements

Darryn Shewchuk  
Director of Sales and Marketing  
Island Lake Resort  
Sage Accpac and SageCRM customer

sage

# New Business Intelligence Option

## **Sage Accpac Financial Reporter**

- Financial Report Design in Excel
- Access to General Ledger Data with Drilldown
- Easily Report on Optional Fields
- Included with Sage Accpac General Ledger Module

## **Sage Accpac Intelligence**

- Simple Report Design and Data Analysis in Excel
- “Out Of The Box” Reports for Financial, Sales, Purchasing, and Inventory
- Consolidated Reports for Multiple Companies and Data Sources, Including SageCRM
- Dashboard Data View
- Multi-dimensional Data Cubes Analysis
- Single User License of Report Manager Included With V5.6
- Sage University Training offered Free

## **Sage Accpac Insight**

- Report Design and Analysis in Excel
- Complex Budgeting and Consolidations
- Data Warehousing
- Licensed Separately

# Sage Accpac Intelligence

- **Access Business Critical Information**
  - Empower Your Staff With Vital Information When They Need It!
  - Improves Collaboration and Productivity
- **Complex Reporting Made Easy**
  - Business Intelligence in a Familiar Microsoft Excel Interface
  - “Out of the box” reports
    - Financial Reports
    - Sales/Purchasing/Inventory analysis
- **Insightful Decisions**
  - Sophisticated, Customizable Dashboards
  - Transform Your Data Into Strategic Decision-making Intelligence
- **Rely On Flexible Powerful Analysis**
  - Perform What-if Scenarios that go Beyond Just Transactional Data
  - Quickly Identify and Respond to Trends and Abnormalities
  - Utilize Multi-dimensional Analysis
- **Multi-national & Multi-company Capabilities**
  - Easily Consolidate Data From Multiple Companies
  - Competitive Edge to Succeed in Today’s Fast Paced Global Marketplace

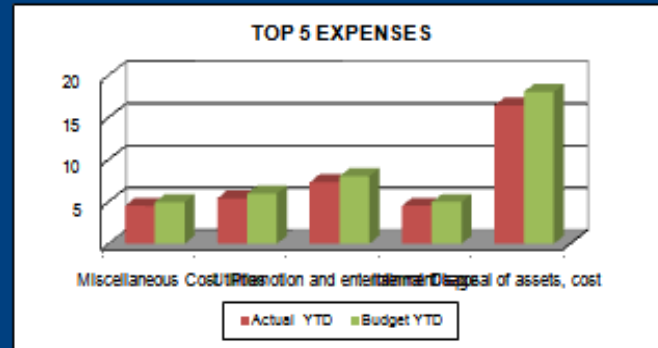


# DASHBOARD - SAMPLE COMPANY INC.

Period: **January 2011 to August 2011**

Profit & Loss	Actual Aug-11	Budget Aug-11	Variance	Actual YTD	Budget YTD	Variance
Sales	25,097	(22,000)	47,097	63,597	(22,000)	85,597
Cost of Sales	5,505	5,200	(305)	5,505	5,200	(305)
<b>Gross Profit</b>	<b>19,593</b>	<b>(27,200)</b>	<b>46,793</b>	<b>58,093</b>	<b>(27,200)</b>	<b>85,293</b>
Expenses	-	-	-	-	-	-
<b>Net Income before tax</b>	<b>19,593</b>	<b>(27,200)</b>	<b>46,793</b>	<b>58,093</b>	<b>(27,200)</b>	<b>85,293</b>

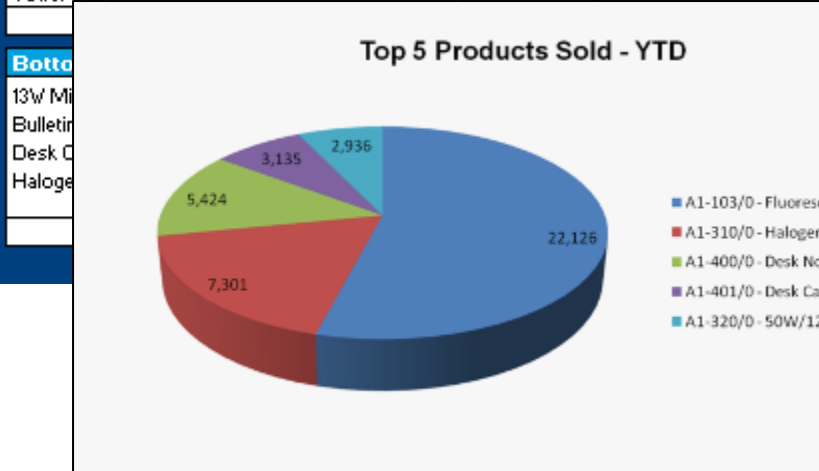
Top 5 Expenses	Actual Aug-11	Budget Aug-11	Variance	Actual YTD	Budget YTD	Variance
Miscellaneous Cost	1,500	1,650	150	4,500	4,950	450
Utilities	1,800	1,980	180	5,400	5,940	540
Promotion and entertainment	2,430	2,673	243	7,290	8,019	729
Internal Usage	1,503	1,653	150	4,509	4,960	451
Disposal of assets, cost	5,468	6,015	547	16,404	18,044	1,640
	<b>12,701</b>	<b>13,971</b>	<b>1,270</b>	<b>38,103</b>	<b>41,913</b>	<b>3,810</b>



Top 5 Customers	YTD	%	Customer Groups
Astral Construction Co Ltd.	6,900	35.7%	Wholesale Sales Gr
Mr. Ronald Black	5,990	31.0%	Retail Sales Group
J & Y Builders Ltd.	2,850	14.8%	
ACME Plumbing	2,675	13.8%	
The Courtyard	900	4.7%	
	<b>19,315</b>	<b>100.0%</b>	



Top 5 Items	YTD	%	Item Group
Fluorescent Desk Lamp	5,990	32.1%	Computer Equipmen
Computer mouse	5,275	28.3%	Accessories
CPU	3,000	16.1%	
Computer Keyboard	2,500	13.4%	
Tower Case	1,900	10.2%	



Your Data Pulled Directly Into a Familiar Excel Environment

# Sage Accpac Intelligence



*Build Your Business  
Intelligence Solution to  
Fit Your Business*

- **Report Manager Licenses**
  - Author New Reports (Organize, Create, Edit)
  - Filter and Aggregate Data
  - Set Permissions/Security for Reports
  - Per User/Workstation
  - 1 Free Single User License Included With Version 5.6
- **Report Viewer Licenses**
  - Basic Editing Capabilities (Filter / Change Parameters)
  - Drill-down Functionality on Existing Reports and Templates
  - For Staff Members who do not Need to Create New Reports
  - Per User/Workstation
- **Connector Module**
  - Simplifies Day-to-Day Operational Tasks
  - Access Information From Multiple Sources
  - Consolidation of Data From Multiple Companies
  - Connect to Unlimited ODBC Data Sources
- **Analysis Module**
  - Support Business Strategy and Decision Making
  - Advanced Analysis of Trends and What-if Scenarios
  - Utilize Built-in Microsoft Excel Pivot Tables
  - OLAP Cubes Enabling Multidimensional Analysis

# Sage Accpac Intelligence



*Re-Visualize Your Business...*

*Re-Vitalize Your Results!*

- A New Way to View Your Business
- Fast Implementation
- Low Cost Business Intelligence Strategy and Dashboard Technology
- Consolidate Business Information into a “Single Version of the Truth”
- Dynamically Connected to Your Business Solutions
- View Data Textually / Graphically and Quickly Drill-Down to Details



# Sage Accpac v5.6

Increase Productivity. Streamline Operations.  
Improve Visibility.

Kristi Schmidlap  
HR Manager  
Corrugated Services  
Sage Abra HRMS customer

sage

# V5.6 – Delivering on Top Requests

- Access Decision-Quality Information and Improve Your Visibility Into Business Metrics With the New **Sage Accpac Intelligence** Application
- Adopt the Release With Confidence and Save Money on Your Upgrade Costs With **Free Training**
- Accelerate Your Collections Efforts and Provide Better Customer Service Utilizing the Now **Built-in AR Inquiry Tool**
- Gain a Faster and More Accurate View of Your Cash Position With **Improved Workflow in Bank Services**
- Lower Operations Costs Through **Better Management of Your Inventory**

# V5.6 - Platform & Version Support

- Extended Support with “N-2” Version Support Policy
  - Version 5.6
  - Version 5.5
  - Version 5.4
- Additional Platform Support
  - Windows 7
  - 64 Bit Server/workstation
  - Virtualization (VMWare and Citrix)
- Single Release
  - All Modules and Option Products
  - English, French, Spanish and Chinese Available at Time of Release
- Platform Support Discontinued
  - IBM DB2 Database
  - Windows 2000 Server/MS SQL Server 2000
  - Excel 97/2000/XP



# V5.6 - Extended Solutions Compatibility

- SageCRM 6.2 and 6.1
  - New Integration Features not in 6.1
- Sage Abra HRMS 10
- Sage FAS 2009.1
  - 2010.1 in Spring 2010
- Sage Accpac Alerts 5.4
- Financial Professional Link 5.3
- EFT Payroll 5.5
- EFT Receivables and Payables 4.1
- Crystal 2008 (SP2)
  - Customers can Continue to Utilize Crystal 11 with 5.6
- For full Details:
  - <http://www.sageaccpac.com/products/systemrequirements>



# V5.6 – Development Partner Solutions

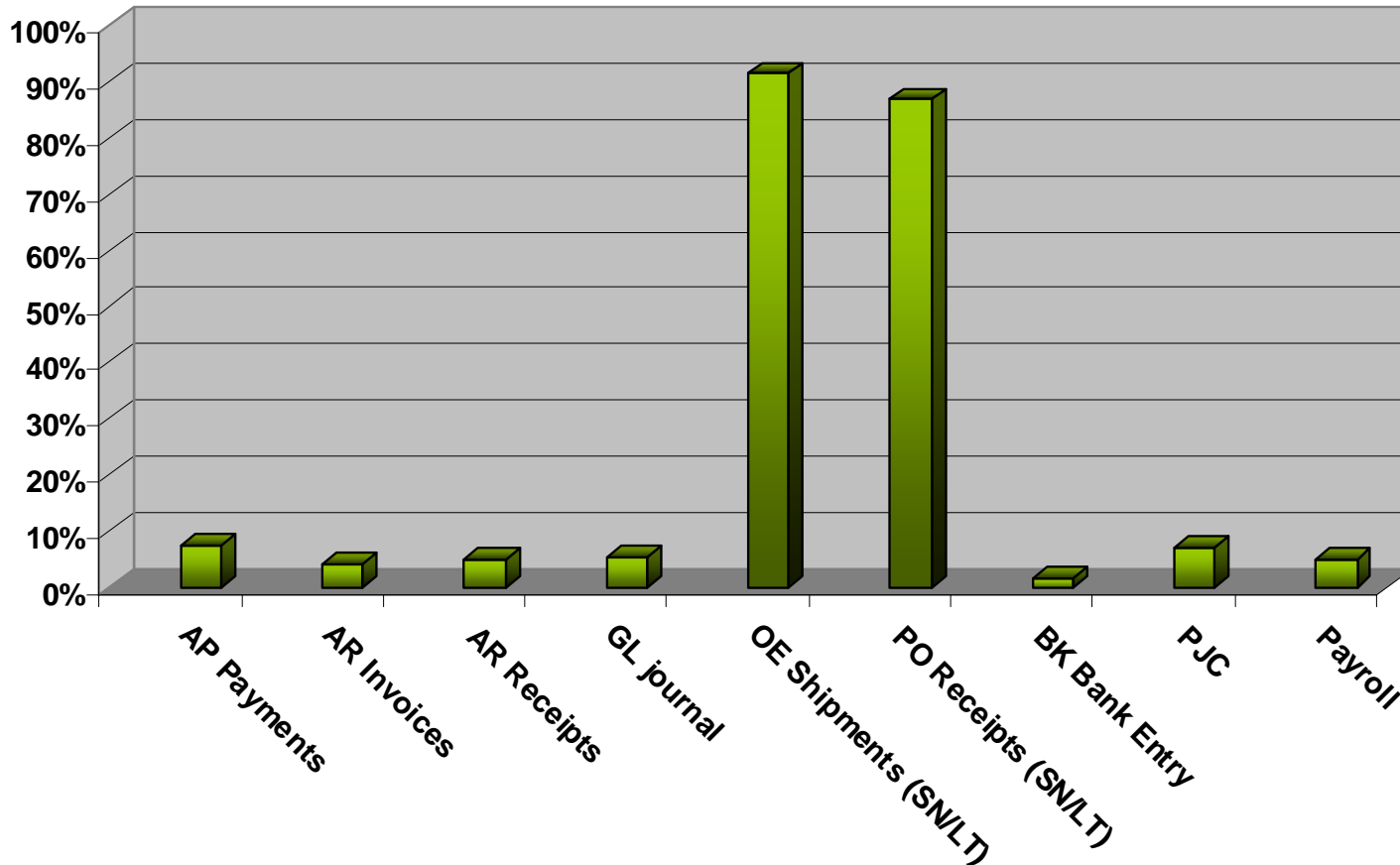


[www.sagepss.com](http://www.sagepss.com)

- Endorsed Solutions are “5.6 Ready”
  - Altec – Document Management
  - Accellos – Warehouse Management
  - MiSYS – Manufacturing
  - PrintBoss – Check Processing
  - Technisoft – Service Management
  - TrueCommerce – EDI
- Most Popular Add-ons are “5.6 Ready”
  - AutoSimply - Manufacturing
  - Greytrix – Data Migration
  - Iciniti Corporation - Webstore
  - Norming – Asset Management
  - North49 – Webstore and Credit Card Processing
  - Orchid – EFT & Inter Entity Transactions
  - Pacific Technologies – Workflow & Audit Logger
  - Systronics – Web Portal
  - Stonefield - Queries

# V5.6 – Performance Improvements

- Improved Across all Modules
- Major improvements in Order Entry, Purchase Order and in Inventory Control for Serialized Inventory and Lot Tracking



# V5.6 – Training

- Free Anytime Learning Course on “*What’s New in Version 5.6*”

- Ensure you are Taking Advantage of Process Improvements and New Functionality in Version 5.6
- In-Depth Information
  - 22 Segments (total 2 hours) on V5.6
  - 9 Segments (total 1 hour) on Sage Accpac Intelligence
- Register at:  
<http://www.sageu.com/accpac/>

## Sage University Sage Accpac ERP

What's New in Version 5.6	Featured Training Course	Certification Programs
		
<h3>Learn What's New in Sage Accpac ERP version 5.6</h3> <p>Version 5.6 introduces numerous usability enhancements that improve productivity and ease of use, including the new Sage Accpac Intelligence reporting tool. You can quickly get all your employees up to speed on the improvements in this release through the “What’s New” Anytime Learning course specifically for Version 5.6. This online course demonstrates how you can put all of the great new enhancements to work in your business. Best of all, this course is offered at no additional cost to you.</p> <p><b>Register Today!</b> for the free “What’s New in v5.6” Anytime Learning Training.</p>		

# V5.6 – Your Requests Delivered

- Reporting: Simplify Information Access
  - Bundled Sage Accpac Intelligence – 1 Report Manager License
  - Integrated AR Inquiry
  - Optimized Reports
- Usability: Increase Efficiency and Productivity
  - Simplification of Bank Reconciliation
- Functionality: Further Streamline Operations
  - Serialized Inventory and Lot Tracking
  - Payroll Employee Security
  - SageCRM Integration Expansion and Solo
- Cost of Ownership
  - Free Anytime Learning Course at:
    - <http://www.sageu.com/accpac/>
  - One-step Installation & Activation
- For full Details:
  - <http://www.sageaccpac.com/products/whatsnew>



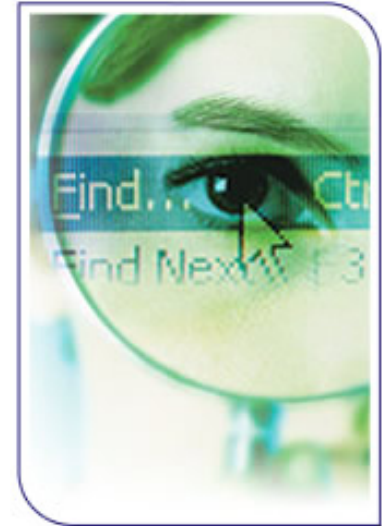


# The Future: Sage Accpac 6

A New Way to Manage Your Business!

# Sage Accpac Version 6

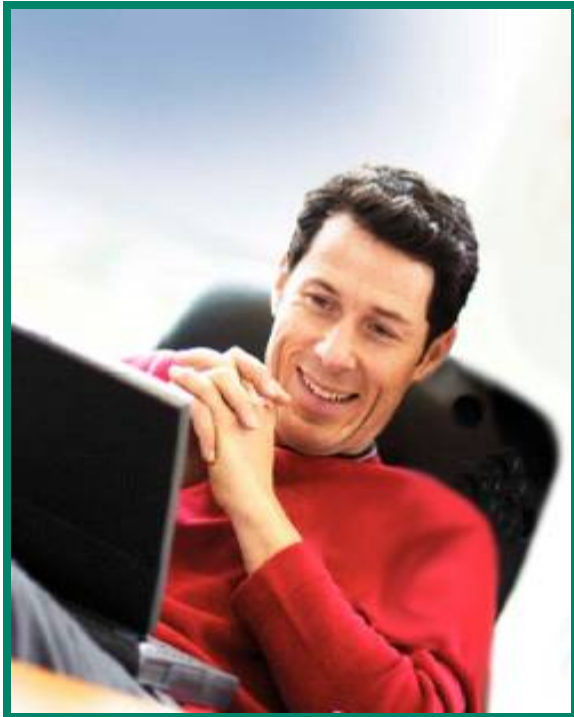
- Solving Customer Requests With Web Technology
  - Usability: Improve Productivity
    - Role Based, Personalized Portal
    - Task Oriented Navigation
    - Contextual User Assistance
  - Reporting: Faster Information Access
    - Integrated Dashboards/KPI's
    - Ad-hoc Inquiry Tool – Quick Information Lists
  - Integration: Streamline Processes
    - Enhanced Quote-to-Order Workflow for SageCRM Users
    - Elimination of Lanpak Requirement for SageCRM User for Order Entry
    - SageCRM 7.0 Support



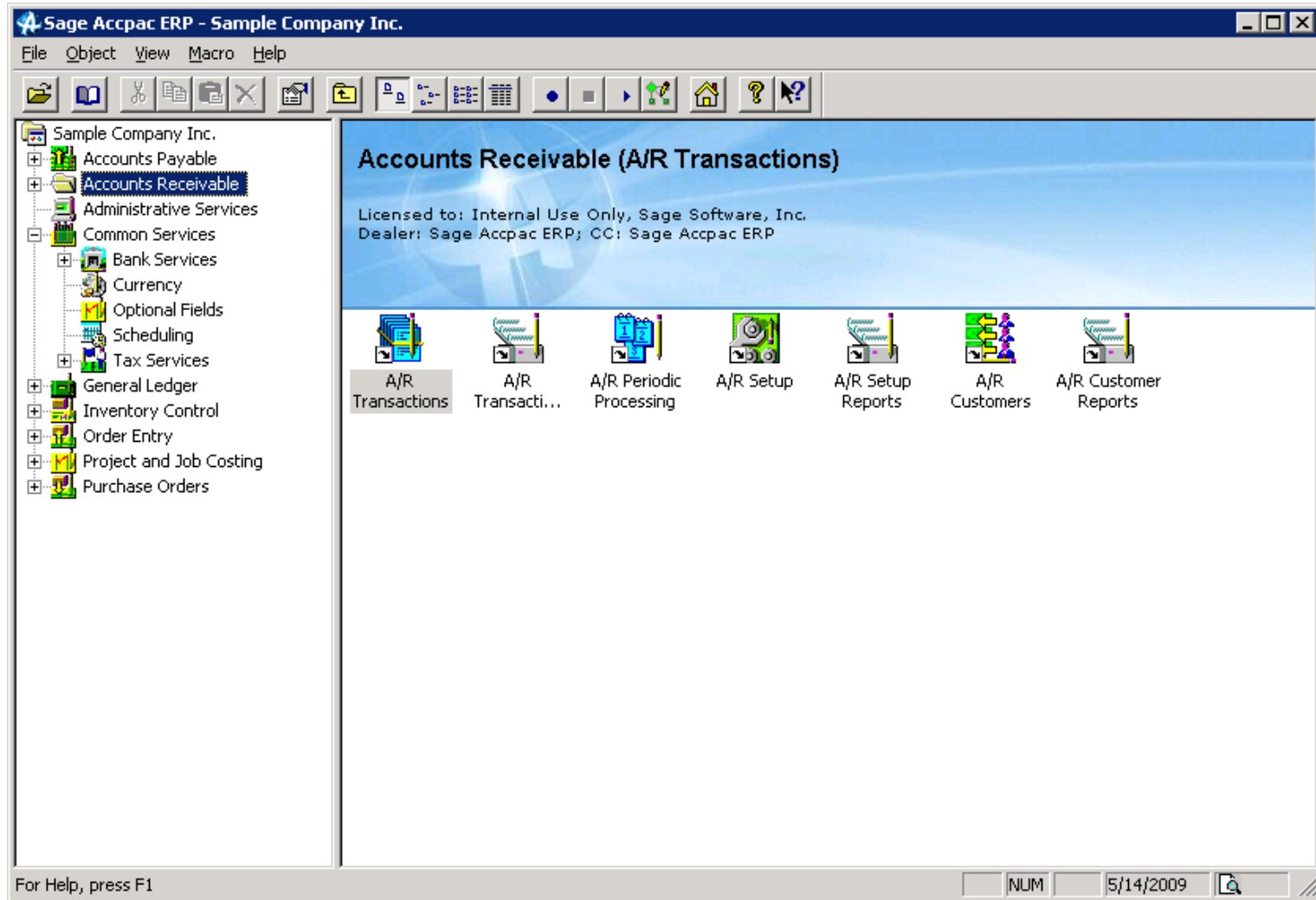
# Sage Accpac Version 6.1

- Improved Usability Leveraging the Agile Sage Accpac 3-tiered Architecture

- Database - *Unchanged*
- Business Logic - *Unchanged*
- User Interface -> Modernized with “Web 2.0” Experience
  - Improved Productivity for Faster Data Entry
  - Improved Learnability
  - Financials: General Ledger / Accounts Receivable / Accounts Payable / Bank Services / Tax
  - Operations: Order Entry / Inventory Control / Purchase Order



# Current Desktop View



## Accounts Receivable (A/R Transactions)

Licensed to: Internal Use Only, Sage Software, Inc.  
Dealer: Sage Accpac ERP; CC: Sage Accpac ERP



For Help, press F1

NUM

5/14/2009



# NEW Sage Portal



# Current Data Entry Screens

**SAMLTD - A/P Adjustment Entry**

File Settings Help

Batch Number

Batch Date   No. of Entries  Total Amount

Document | Retainage | Optional Fields

Entry Number

Adjustment Number  Adjustment Date   Posting Date   2008 - 09

Vendor No.

Reference

Document Number   Document Balance

Payment Number  Payment Balance  Retainage Balance

<input type="button" value="Find"/> Adjust Line...	<input type="button" value="Find"/> Dist. Code	<input type="button" value="Find"/> G/L Account	Account Description	Reference

Totals	Debits	Credits
Payables Adjustment Total	0.00	0.00
Retainage Adjustment Total	0.00	

Sage Accpac 6.0 Welcome Phil Gorton | This Session: 3 June 2008 -- Essential Electric Company | Help | Logout

Tasks Reports Recent Tasks Find Administration Search the Learning Center

MY Shortcuts  
 Custom Shortcuts  
 AP | Invoice Entry AR | Invoice Entry GL | Trial Balance Report AP | Adjustment Batch List AR | Year End AP | Posting Journals Report Add Shortcuts

Home New Invoice

New Invoice \* = required information

Entry: 4 of 4 New: Invoice in Batch: #61 | June 2008 Corporate Invoices | \$365.00 | 06/05/2008

Invoice # Automatic Description: Invoice Invoice date: 06/10/2008  
 Posting date: 06/10/2008  
 Fiscal period: 06-2008  
 Account set: DATA

To Customer: John Doe | 1200 Ship to: Customer Billing Address  
 3325 Stevenson Street 3325 Stevenson Street  
 Santa Cruz, CA 95345 Santa Cruz, CA 95345  
 P (408) 654-8725 P (408) 654-8725  
 Attn: (no contact person) Attn: William Blake

Order number: Ship via:  
 PO number: Shipment number:  
 Special instructions:

Custom Fields 0 of 5 required  
 Sales Split  
 Currency Details

Enter items Enter GL accounts Job related Retainage

Line	Item	Description	Quantity	UOM	Unit Price	Extended Amt.	Extended Cost
1	Details CFC-101 Comforty First D...	Office chair for the desk	1.000	EA	200.00	200.00	180.00
2	Details		0.000		0.00	0.00	0.00

Subtotal: 200.00

Taxes  
 GST: 10.00  
 PST: 14.00  
**Total tax: 24.00**

**Total: 224.00**

Terms  
 Discount: 0.00  
 before 07/01/2008

Payment: 20.00

**Amount Due: 224.00**  
 by 07/20/2008

Print document Save to Batch

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# NEW Web Client Data Entry



# Current SageCRM Order Entry

**SageCRM Order Entry**

Order No.  No. of Shipments  Last Shipment No.

Customer No.  Mr. Ronald Black Last Invoice No.

Order | Customer | Taxes | Optional Fields | Sales Split | Rates | Totals

Template Code  PD No.  Status:  Source: Entered

Order Date  Location  Central warehouse - Seattle

Order Type   From Multiple Quotes  Job Related  Project Invoicing  Reimage

Ship-To Location  Exp. Ship Date   Calc. Tax  On Hold

Description  Reference

Lin...	Type	Item No. / Misc. Charge	Kit/BOM	Description	Price List	Location	Exp.

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location	0	0	0	0	0
All Locations	0	0	0	0	0

Item/Tax... Components Ship AJ Order Subtotal 0.00 USD

Quote No.: Automatic  
Opportunity: QPM-003  
Company: Tech Solutions, Inc.

Person: Judy Frank  
Phone: 1 604 343-9577  
E-mail: jfrank@tsolutions.com

SageCRM

Document Details

Document No.: Automatic  
Description: APH401

Government Date: 04/0/2009  
Purchase Order No.:

Company Details

Template Code: Active  
Form Code: R20  
Price List: CD/WH/CL Canadian Wholesale  
Tax Group: DC  
Currency: CAD  
Account Set: US/TRADE

Person: Judy Frank  
Ship-To Address: Max at Office  
300 Main St.  
Vancouver, BC V6A4R6  
P (604) 675-9725  
Attn: IT Support  
Ship-Via Code: F200 Federal Express  
Exp. Ship Date: 04/10/2009

Order Summary

Line	Type	Item No./Misc Charge	Description	Location	Quantity	Qty. Committed	
1.	Unit	CPC-03 Comfort First Ergo...	Comfort First Ergo Chair	NAEN	1	0	Ad
2.	Carton			NAEN			Ad

Order Subtotal: 200.00  
Less Order Discount: (10.0 %): 20.00  
Tax: 23.40  
Order Total: 203.40  
Estimated Weight: 20 lbs.

# New Quote-to- Order SageCRM Integration

# NEW Sage Accpac Inquiry

sage ACCPAC Welcome [Phil Guston](#) | This Session: [3 June 2009 - Coastal Electric Company](#) | [Help](#) | [Logout](#)

Tasks | Reports | Query | Administration Search the Learning Center

MY Shortcuts Customize Shortcuts

AP | Invoice Entry
AR | Invoice Entry
OEM | Report
AP | Adjustment Batch List
AR | Year End
AP | Posting Journals Report
Add Shortcuts

Home Query: Customers and Transactions

▼ Find: Documents and Transactions Save Load Delete

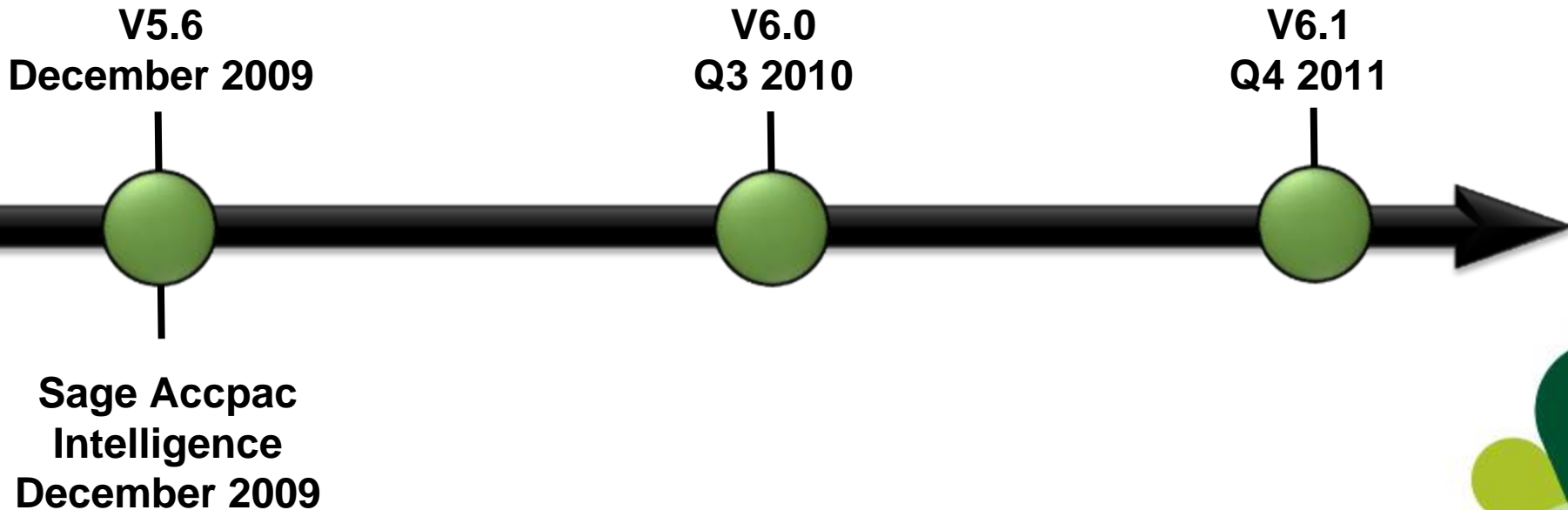
Select an A/R document type: Specify filter criteria to refine your search.

All  
 Invoices  
 Receipts  
 Interest  
 Credit Note  
 Prepayment

Showing: **All documents** View

Customer Number	Customer Name	Document Type	Document Number	Document Date	Currency	Rate	Original Amount	Amount Due	Due Date
1200	<a href="#">UHM Construction</a>	Invoice	<a href="#">0004555</a>	01/12/2009	CAD	N/A	10,024.25	10,024.25	03/12/2009
4354	<a href="#">SHM Accounting</a>	Receipt	<a href="#">0008974</a>	03/06/2009	CAD	N/A	1225.22	1225.22	05/06/2009
2125	<a href="#">Elhio Electrical</a>	Invoice	<a href="#">0002111</a>	05/06/2009	CAD	N/A	3522.05	3522.05	07/06/2009
1988	<a href="#">RBCE</a>	Invoice	<a href="#">0007544</a>	08/06/2009	CAD	N/A	11,544.32	11,544.32	10/06/2009
4155	<a href="#">Sillo Hotels</a>	Invoice	<a href="#">0003652</a>	01/24/2009	CAD	N/A	1122.30	1122.30	03/24/2009
6844	<a href="#">Truckers Ltd.</a>	Credit Note	<a href="#">0009652</a>	06/09/2009	CAD	N/A	7854.66	7854.66	08/09/2009
7433	<a href="#">Ultra Accountants</a>	Receipt	<a href="#">0003221</a>	05/03/2009	CAD	N/A	4522.30	4522.30	07/03/2009
5428	<a href="#">Dellbrook Ltd.</a>	Prepayment	<a href="#">0005664</a>	04/07/2009	CAD	N/A	120.00	120.00	06/07/2009

# Sage Accpac Product Roadmap



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# Resources

- Sage University
  - <http://www.sageu.com/accpac/>
- Get Your Voice Heard - Enhancement Requests
  - [www.sageaccpac.com/Feedback](http://www.sageaccpac.com/Feedback)
- Sage Accpac Community – Collaborate with Other Users
  - <http://community.sageaccpac.com/>
- Sage Accpac White Paper: Vision and Product Plan
  - [http://www.sageaccpac.com/assets/Accpac/PDFs/Futureofaccpac\\_lo\\_res.pdf](http://www.sageaccpac.com/assets/Accpac/PDFs/Futureofaccpac_lo_res.pdf)
- Information on Sage Accpac Version 5.6
  - <http://www.sageaccpac.com/products/whatsnew>