

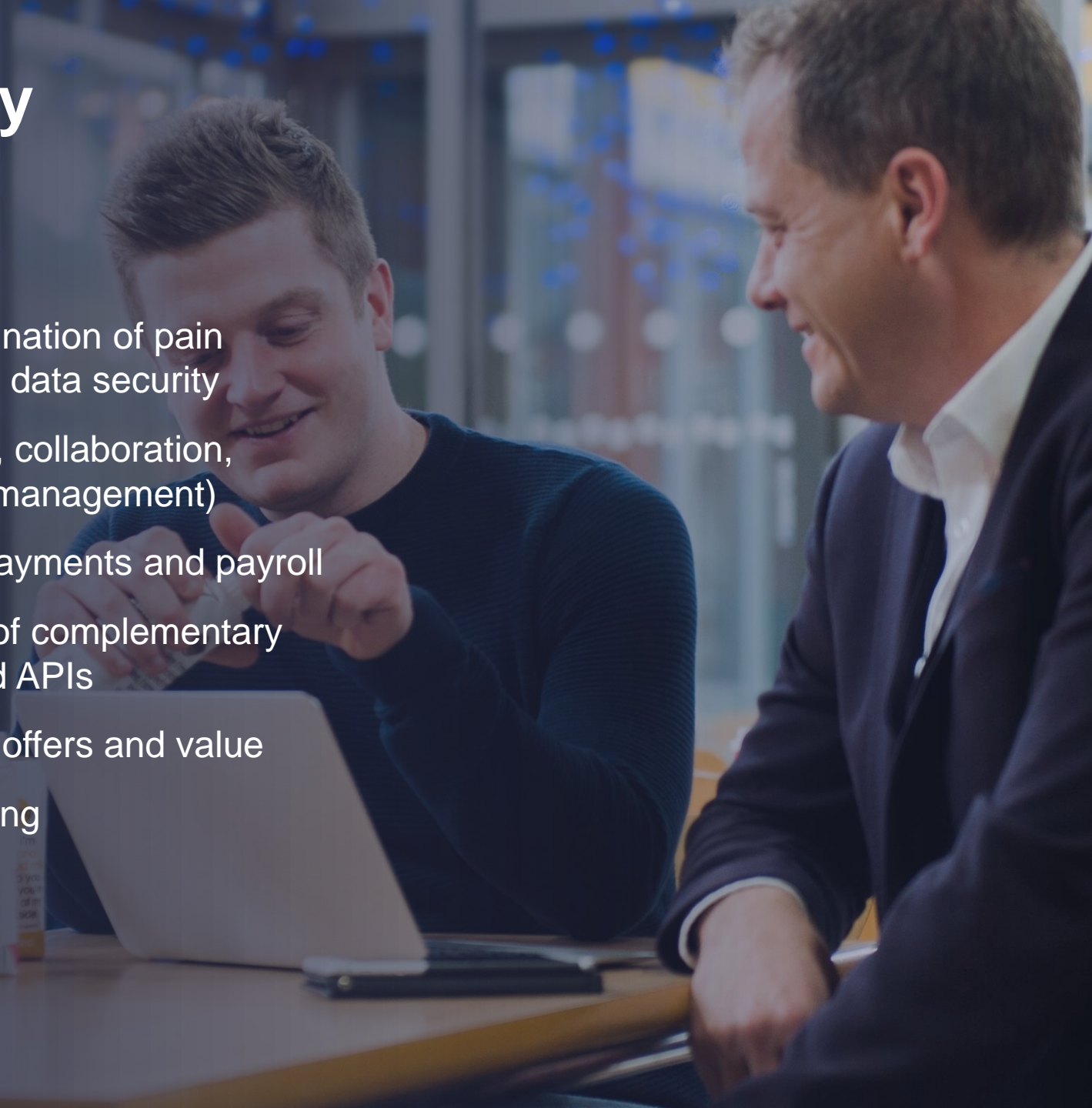


Sage 300 2017.2 Update

Product Vision and Strategy

Product modernization

- User experience modernization and elimination of pain points such as installation, upgrades and data security
- Connected cloud apps (e.g. banks feeds, collaboration, invoicing) and self service (e.g. account management)
- Unparalleled integration of accounting, payments and payroll
- Simple integration to a large ecosystem of complementary 3rd party products through standard cloud APIs
- Usage intelligence elevates relevancy of offers and value
- Growing with Sage is as easy as upgrading



Sage 300 2017.2

Key Messages



Increase
company-wide
**business
visibility**

**Optimize and
forecast** your
inventory

**Customize and
improve** your
user experience

Process
incoming
payments
faster

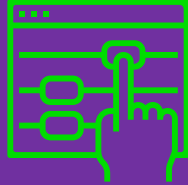
12 Month Sage 300 Product Roadmap



	April 2017 (2017.2)	August 2017 (2018.0)	December 2017 (2018.1)	April 2018 (2018.2)
Connected ecosystem		Sage AP Automation Sage Budgeting and Planning Business Intelligence SIRC enhancements: In product tour Customized folder structures Multiple browser support Online Management Packs Online Drill to Balance New UI design	Bank feeds: Sage Banking Cloud	
			Office 365: Attach documents	
Experience	UX modernization (web UI): OE Invoice entry OE Shipment entry OE Capture payment with invoice entry AR Customer & document inquiry Keyboard navigation Help menu	Hosted Desktop New Sage 300 Online (Phase 1 - NA only)	Hosted Desktop Sage 300 Online (Phase 2)	Hosted Desktop Sage 300 Online (Phase 3)
		UX modernization (desktop UI): Modernize desktop screens	UX modernization (web UI): Recent history	UX modernization (web UI): Adhoc inquiry
	Pain Points: Implement ideas from customers	Architectural modernization (Web UI): Oauth	Pain Points: Implement ideas from customers	Pain Points: Implement ideas from customers

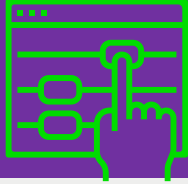
Sage 300 2017.2 Release



	2017.2	
Connected ecosystem		 <p>Customers can now do their shipment and invoice order entries from the web screens. Customers can use the arrow keys to move around the grid in the web screens</p>
Experience	UX modernization (web UI): OE Invoice entry OE Shipment entry OE Capture payment with invoice AR Customer & document inquiry Keyboard navigation Help menu	Currently... Customers need to use the OE Order screen or the desktop screens if they are processing shipment and/or invoice order entries
	Pain Points: Implement ideas from customers	Customers need to use their mouse to navigate around the grids in the web screens instead of the keyboard


Sage 300 2017.2 Release



	2017.2	
Connected ecosystem		 <p>As the PO clerk when I enter invoices from my Vendor in PO Receipt Entry, I will be told if the invoice has already been entered</p>
Experience	UX modernization (web UI): <ul style="list-style-type: none">OE Invoice entryOE Shipment entryOE Capture payment with invoiceAR Customer & document inquiryKeyboard navigationHelp menu	<p>Challenge...</p> <p>When creating a Receipt entry and adding in Invoice number, the system does not check whether it already exists. The user finds out about an existing invoice number after attempting to post to AP. The user is then required to update the invoice number at that point</p>
	Pain Points: Implement ideas from customers	


Sage 300 2017.2 Release



	2017.2	 <p>For the user running Day End, when errors occur, provide the document number that caused the error. Where practical, provide suggestions on how to address the error</p>
<p>Connected ecosystem</p>		<p>Challenge...</p> <p>When running Day End, if there is a document causing an error, the user is not told which document is causing the error and cannot proceed until the error is corrected. It is time consuming and frustrating resolving these errors</p>
<p>Experience</p>	<p>UX modernization (web UI): OE Invoice entry OE Shipment entry OE Capture payment with invoice AR Customer & document inquiry Keyboard navigation Help menu</p>	
	<p>Pain Points: Implement ideas from customers</p>	

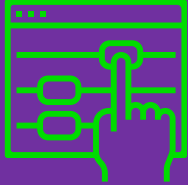
Sage 300 2017.2 Release



	2017.2	 <p>Allow users to remove a customer from a National Account and move the open items with the customer</p>
<p>Connected ecosystem</p>		<p>Challenge...</p> <p>As an AR Clerk I want to be able to remove / change a customer from a National Account group even if open items exist.</p> <p>Currently I need to remove all the open items, remove the customer from the national account and then re-enter the open items.</p>
<p>Experience</p>	<p>UX modernization (web UI): OE Invoice entry OE Shipment entry OE Capture payment with invoice AR Customer & document inquiry Keyboard navigation Help menu</p> <p>Pain Points: Implement ideas from customers</p>	

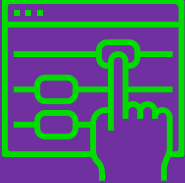
Sage 300 2017.2 Release



	2017.2	 <p>Import Templates for GL Accounts/Journal entries, AR Customers/Invoices/Debit & Credit notes, AP Vendors/Invoices/Debits & Credit notes, OE Orders/Invoices, IC Items/Receipts, PO Requisitions/Receipts/Invoices</p>
<p>Connected ecosystem</p>		<p>Challenge...</p> <p>It is difficult to figure out the file layout required to import transactions into Sage 300 from other systems. Users spend a lot of time playing around with the layouts and get frustrated when it does not work properly</p>
<p>Experience</p>	<p>UX modernization (web UI): OE Invoice entry OE Shipment entry OE Capture payment with invoice AR Customer & document inquiry Keyboard navigation Help menu</p>	
	<p>Pain Points: Implement ideas from customers</p>	

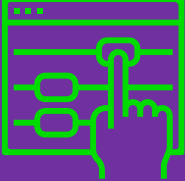
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	2017.2	
Connected ecosystem		 <p>Item Finders show the following quantity info: Qty on hand, Qty on sales orders, Qty on order, Qty committed, Qty available, preferred vendor, and vendor item number</p>
Experience	UX modernization (web UI): OE Invoice entry OE Shipment entry OE Capture payment with invoice AR Customer & document inquiry Keyboard navigation Help menu	<p>Challenge...</p> <p>The sales and purchasing staff need to know how much stock is on hand to sell, how much stock is committed to open sales orders, and how much stock has been ordered</p>
	Pain Points: Implement ideas from customers	

Sage 300 2017.2 Release



	2017.2	
Connected ecosystem		 Customers can now set up and use SMTP email to send emails from Sage 300
Experience	UX modernization (web UI): OE Invoice entry OE Shipment entry OE Capture payment with invoice AR Customer & document inquiry Keyboard navigation Help menu	Challenge... Customers are more commonly using web email clients, such as O365 Outlook, Gmail, etc. These customers are currently not able to use the email functionality in Sage 300 with these web email clients.
	Pain Points: Implement ideas from customers	

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Thank you