



Sage ERP Accpac

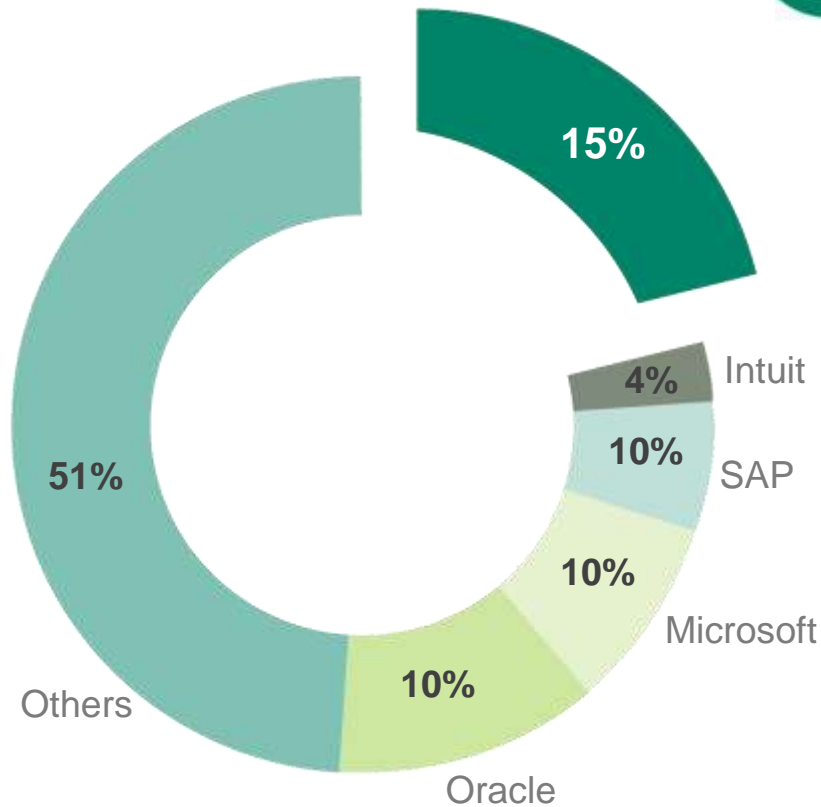
Version 6.0

See Your Business in a New Way

Improve Productivity. Envision Success. Accelerate Growth.

August 16, 2010

Sage - #1 Worldwide for SMB



- Business Management Solutions is our Core Business
- 14,500 Employees Worldwide
- 5.7M Customers Worldwide
- 2.9M Customers North America
- 40,000 Support Calls per Day
- 1,500 Customer Purchases a Day

Source: **IDC, January 2010, Worldwide** ERP applications vendor shares, based on ERP revenue small business; <500 employees



Sage ERP Accpac Solution



- One Solution: fully integrated business management solution
- Superior Architecture: flexible & scalable - grows with your business
- Global Reach, Local Touch
- Collaborative Ecosystem
- Proven, Reliable, Experienced
- A Sage Global Strategic Product

Serving Over 45,000 Mid-Market Customers

Customer Connected



Built on Direct Market Feedback

Welcome to Sage Accpac Ideas. We are listening!

Tell us your idea!

- Enter your suggestion here

Search

latest hot **top** planned 17 completed 27

504 Ideas

673 Comments
4,217 Votes

By Category >>

All Categories

- 1 - Financial Management (95)
- 2 - Operations Management (169)
- 3 - Reports / BI (32)
- 4 - Payroll (22)
- 5 - Setup / Environment (29)
- 6 - Customer Mgmt (CRM) (58)
- 7 - General Enhancements (83)
- 8 - Other (16)

71
Vote for

You cant see which modules users are accessing/using

It would be great if you could say "Mary, please exit A/P", instead of "Everybody out of Accpac".

Comments (10) | by: Guillermo T. | 7 months ago | 5 - Setup / Environment

61
Vote for

Ability to kick users out the system

to gain exclusive access for administration updates

Comments (6) | by: Stuart M. | 5 months ago | 5 - Setup / Environment

58
Vote for

Ability to lock fiscal periods per module planned

Ability to lock and unlock fiscal periods. For example, lock period 3 for AR but leave it open for AP for another week. Also, when locking periods by module to allow a ...

Comments (3) | by: Guillermo T. | 7 months ago | 5 - Setup / Environment

54
Vote for

Sort data using column header planned

Able to sort by clicking on the column header.

Comments (6) | by: Guillermo T. | 7 months ago | 5 - Setup / Environment



SAGE ERP ACCPAC 6.0

SEE YOUR BUSINESS IN A NEW WAY

IMPROVE PRODUCTIVITY. ENVISION SUCCESS. ACCELERATE GROWTH.

sage

Sage ERP Accpac Version 6.0

See Your Business in a New Way



Improve Productivity

- Personalized view within your ERP solution provides your people with faster and smarter information access, simplifying processes and saving time, so more time is spent on strategic activities.



Envision More

- Enhanced visibility into business metrics provides critical information at your fingertips for easier, more insightful daily and long-term planning.



Accelerate Growth

- Simplified automation through the right technology and functionality improves business efficiency, integration and collaboration allowing your business to grow faster.

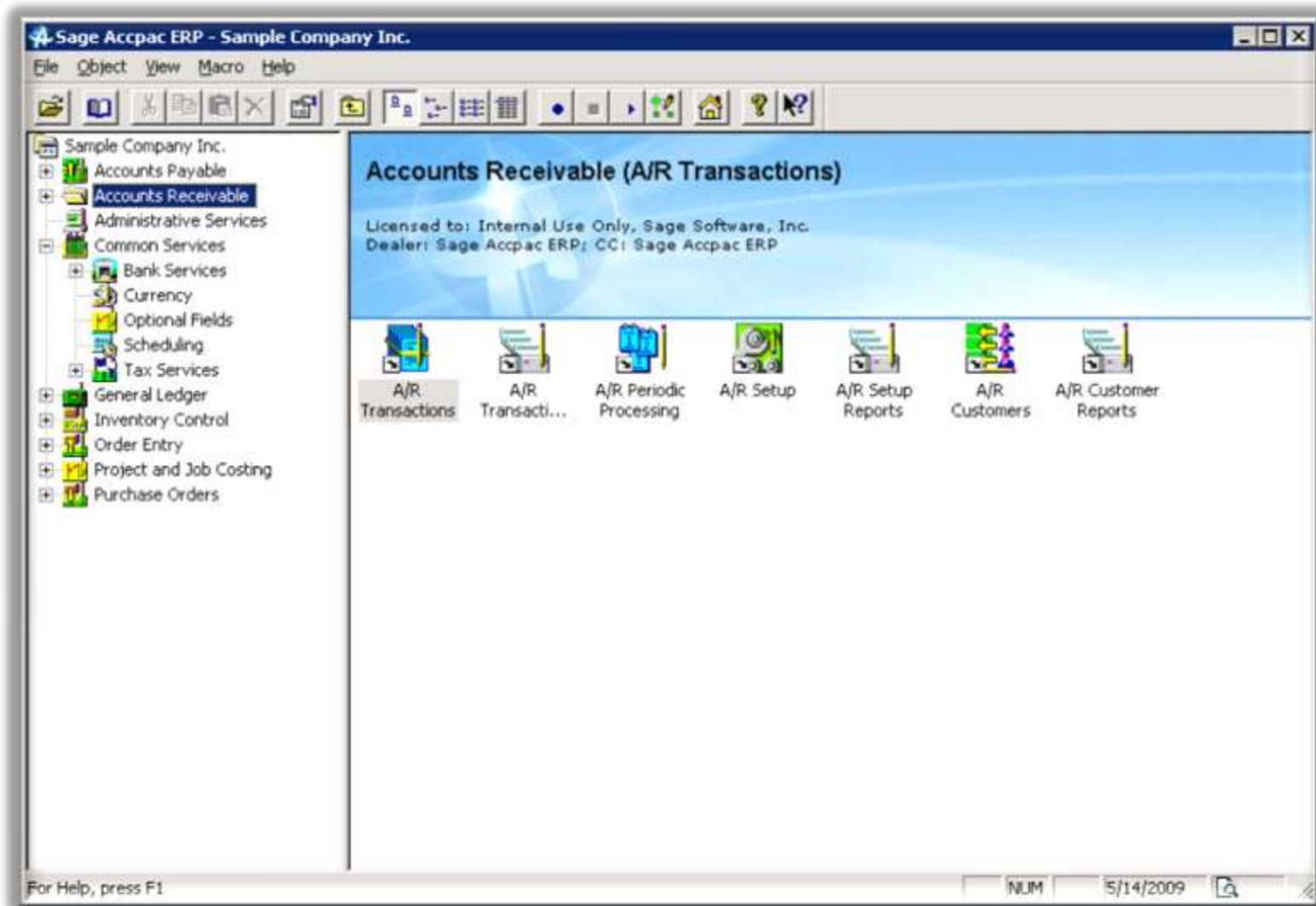
What's New in Version 6.0



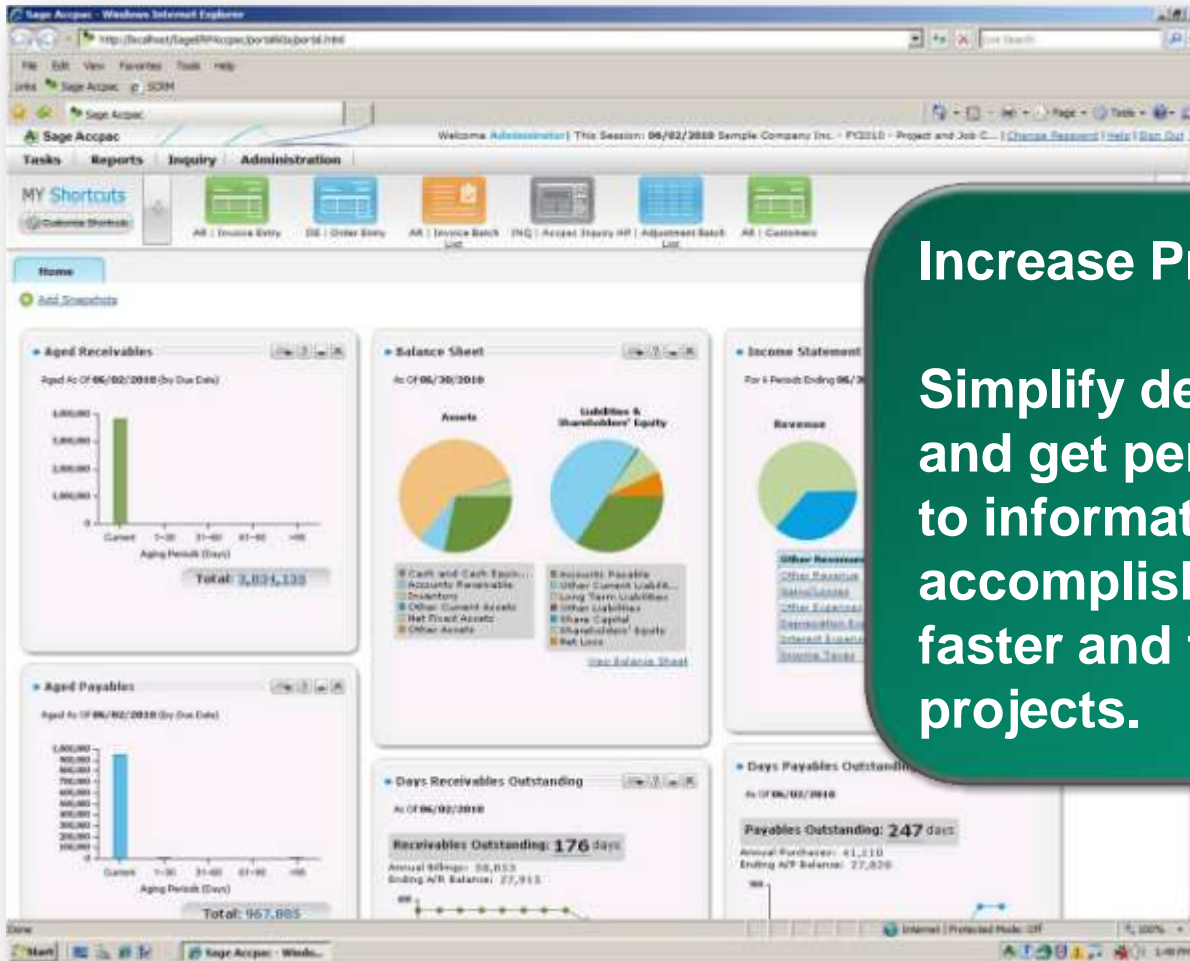
- Sage ERP Accpac Portal
- Sage ERP Accpac Snapshots
- Sage ERP Accpac Inquiry
- SageCRM Enhancements
- Sage ERP Accpac Fiscal Period Management

For a live tour of the new features visit
[YouTube - Sage ERP Accpac 6.0 Overview](#)

Current Desktop View



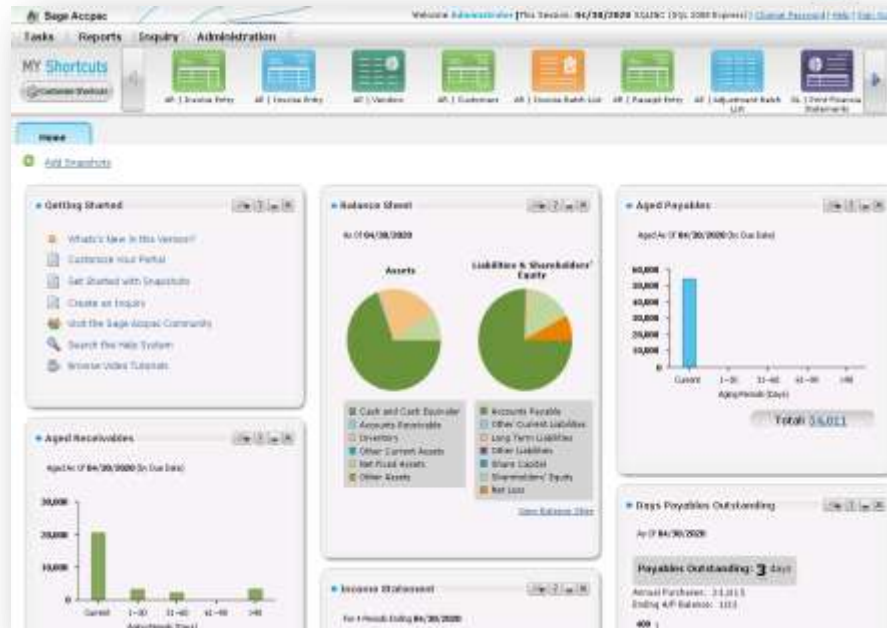
Sage ERP Accpac Portal



Increase Productivity
Simplify desktop navigation and get personalized access to information so you can accomplish everyday tasks faster and focus on strategic projects.

Sage ERP Accpac Portal Overview

- New Desktop Home Page with Snapshots
- Fully Personalized Interface
- Task Based Navigation to Increase Productivity
- Multi-Tab Pane for Simplified Multitasking
- Interoperable with Existing Data Entry Screens
- New User Assistance Model



More Intuitive User Experience

Sage ERP Accpac Portal Experience

The screenshot displays the Sage ERP Accpac Portal in a Windows Internet Explorer browser. The portal interface includes a navigation menu with 'Tasks', 'Reports', 'Inquiry', and 'Administration'. A 'MY Shortcuts' section contains icons for 'A/R Invoice Entry', 'A/P Vendors', 'A/R Invoice Batch List', 'GL Post Financial Statements', 'INQ Accpac Inquiry', and 'A/P Adjustments Batch List'. A 'Getting Started' section lists tasks like 'What's New in this Version', 'Customize Your Portal', and 'Create an Inquiry'. An 'Aged Receivables' chart is visible on the left. A modal window titled 'SAGE/TD - A/R Invoice Entry' is overlaid, showing a familiar data entry form with fields for Batch Number, Batch Date (07/27/2020), Invoice Number, Customer Number, Ship-To Location, Document Type (Invoice), Document Date, Posting Date, and Document Number ('NEW'). A table with columns 'Lin.', 'Q.', 'Item No.', 'Q.', 'UOM', 'Description', 'Quantity', 'Unit Price', 'Extended Amt', and 'Status' is at the bottom of the modal. A green arrow points to the 'A/R Invoice Entry' shortcut icon in the portal's shortcuts bar.

Access familiar screens from the new Portal

Sage ERP Accpac Snapshots



Envision More

Secure access of at a glance operational metrics for faster, better business decisions, including:

- Balance Sheet
- Days Receivables
- Income Statement
- Days Payables
- Aged Receivables
- Aged Payables

Sage ERP Accpac Snapshots Overview



- Snapshots of 6 Key Performance Indicators (KPIs)
- User-configurable
- Drill Down Capability
- Ability to Configure, Refresh, Open Report or Print
- Personalize Layout via Drag and Drop
- Snapshots Available Based on User Security Authorization

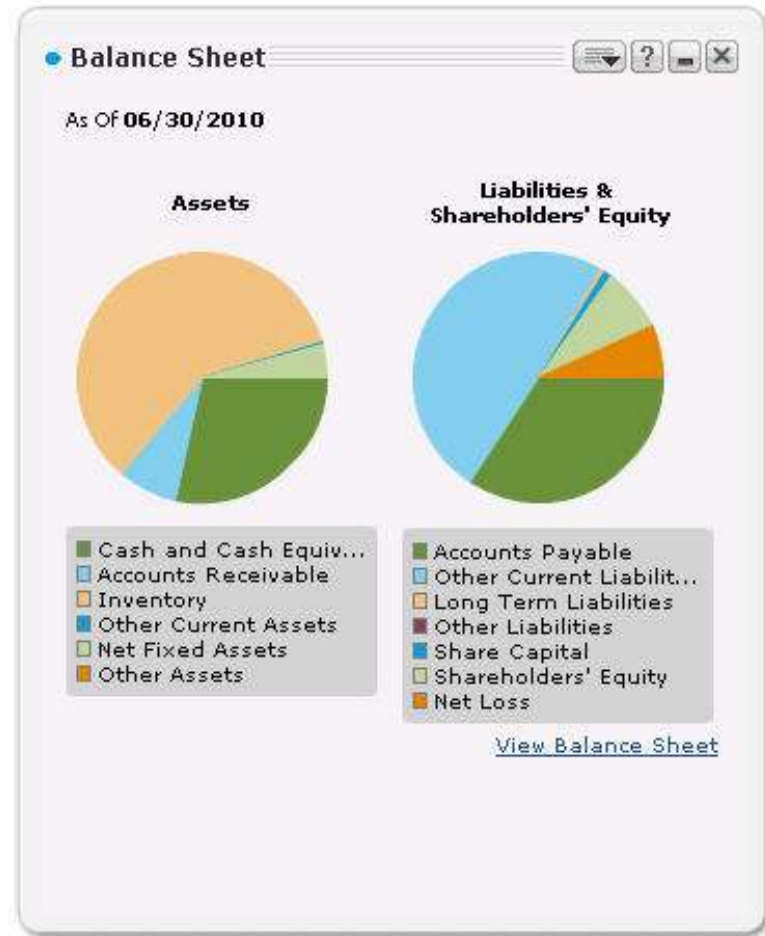
Snapshot – Income Statement



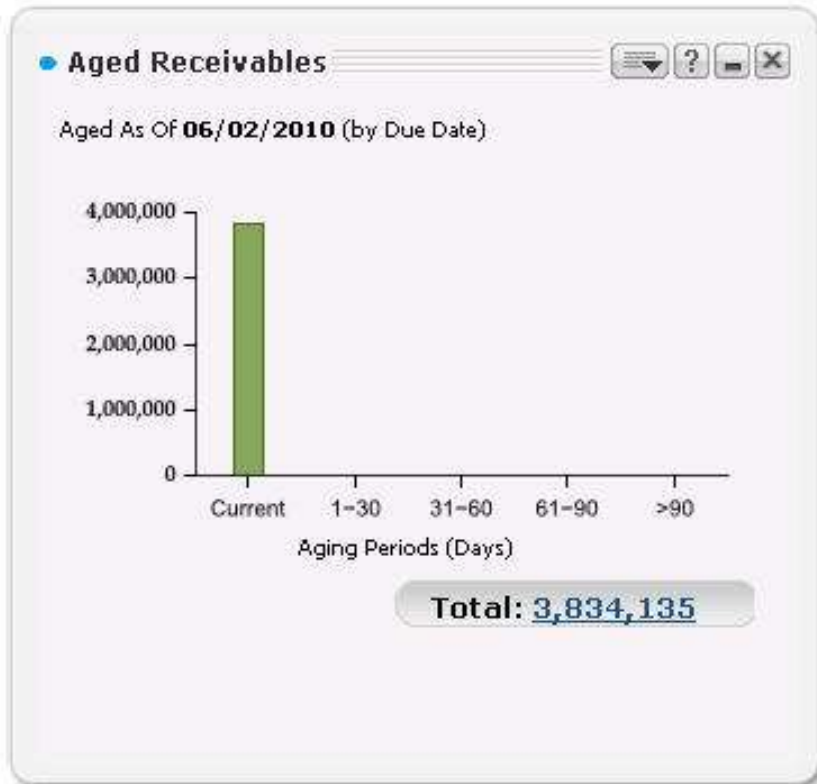
- Summarizes all revenues and expenses for each Group Category for a company for specified period of time
- Drill down from the chart components to view reports for each Group Category as well as to view the *Income Statement* report
- Configuration options to select and show Fiscal Year / Period or Quarter

Snapshot – Balance Sheet

- Summarizes all assets, liabilities, and equity for each Group Category for a company for a given point in time
- Drill down from the chart components to view reports for each Group Category as well as to view the Balance Sheet report
- Configuration options to select Fiscal Year / Period



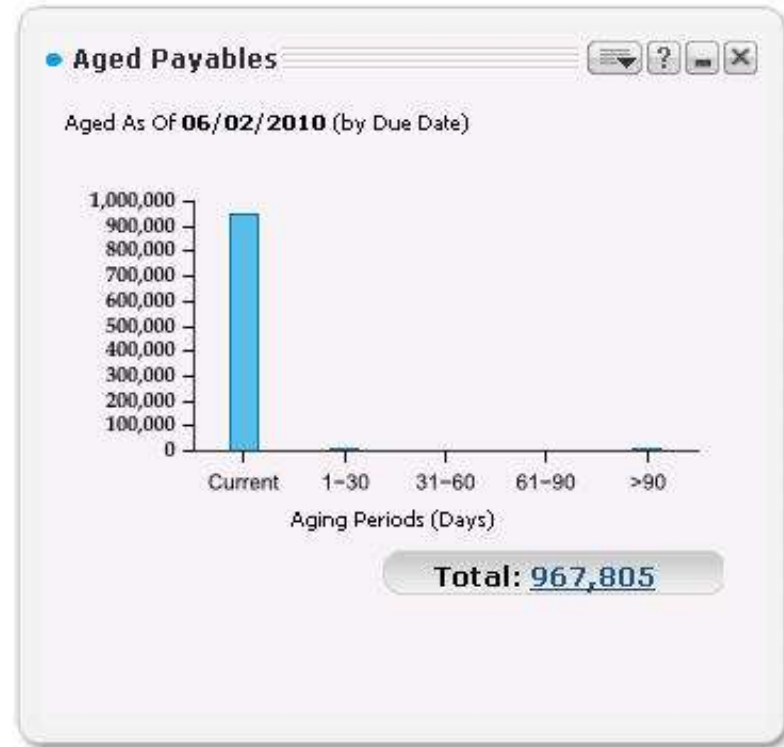
Snapshot – Aged Receivables



- Outstanding receivables organized into aging periods for use in collections analysis
- Drill down from the chart columns to view a report for the aging period selected as well as view a summary report for all outstanding receivables
- Configurable to show aging as of Due date or Document Date

Snapshot – Aged Payables

- Graphical representation of outstanding payables organized into aging periods that could be used in payable analysis
- Drill down from the chart columns to view a report for the aging period selected as well as view a summary report for all outstanding payables
- Configurable to show aging as of Due date or Document Date



Snapshot – Receivables Outstanding



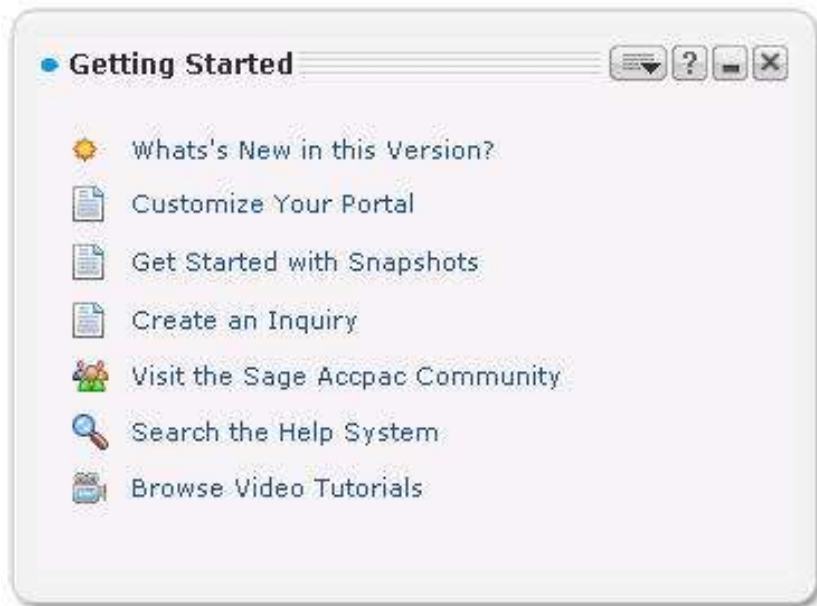
- Financial ratio expressed in terms of the number of days that accounts receivables are outstanding
- Allows the user to set the Target Receivables Outstanding Days
- Calculated based on:
(Ending AR Balance / Annual Billings) * 365 days

Snapshot – Payables Outstanding

- Financial ratio expressed in terms of the number of days that accounts payables are outstanding
- Allows the user to set the Target Payables Outstanding Days
- Calculated based on $(\text{Ending AP Balance} / \text{Annual Purchases}) * 365$ days



Snapshot – Getting Started



- Available for all Users
- Contains Many “How to” Examples and video-based learning
- Helps Users Learn Product
- Quick Links to new Features at all Times

Sage ERP Accpac Inquiry

The screenshot displays the Sage ERP Accpac interface. At the top, the user is logged in as Phil Guston, with a session date of 3 June 2009 for Coastal Electric Company. The navigation bar includes 'Tasks', 'Reports', 'Find', and 'Administration'. Below this is a 'MY Shortcuts' section with icons for 'AR | Invoice Entry', 'AP | Invoice Entry', 'AP | Vendors', 'AR | Customers', 'AR | Invoice Batch List', and 'AR | Prepayment Ent'. The main window is titled 'Adhoc Query Tool' and shows a query for 'Find: AR Customers and Transactions'. A search filter is set to 'Customer Number' with the operator 'Greater Than'. A table of results is displayed below.

Customer Number	Customer Name
1100	Bargain Mart - Sar
1105	Bargain Mart - Oa
1200	Mr. Ronald Black
1210	ACME Plumbing
1240	The Courtyard
1400	Coastal Electric Co
1500	Custom Comfort
1520	Mr. Stephen Kersh
1550	Astral Construction

Envision More

Secure information access of with drilldown capabilities to underlying financial reports, focusing on Accounts Receivable, Accounts Payable, and General Ledger. Graphical presentation helps with quick identification of trends or issues for more proactive decisions.

Sage ERP Accpac Inquiry Overview

- Query Accounts Receivable, Accounts Payable, and General Ledger
- Create Public or Private Queries
- Non-technical Users can Easily Create Customized Ad-hoc Queries
- Add Filters and Sort Columns
- Easily Export to Excel, PDF, and CSV or Quickly Print Reports
- Show Minimum, Average, Maximum, Total Summary



Enhanced SageCRM Workflow

Opportunity: eCRM Ref # =14
Company: Mr. Ronald Black
Person: Black
Phone:
E-mail: ronaldblack99@hotmail.com

Document Details

Document Number: QT0000000000002
Document Date: 05/10/2010
Description:
Expiration Date: 06/09/2010
Include in Opportunity:

Company Details

Template Code: ACTIVE
Terms Code: DUETBL
Price List: USA
Tax Group: CALIF
Person:
Ship-To Address: 2820 Wabash Road
Los Angeles, CA 90048
USA
Ship-Via Code: OCT
Exp. Ship Date: 05/10/2010

Quote Details

Line ...	Type	Item No.	Misc. Charge	Description	Loc
1	Item	A1-310/0		Halogen Desk Light	1

Check Inventory

Comments:

Quote Total: 503.50

Accelerate Growth

Improve workflow for SageCRM and Sage ERP Accpac with the ability to create orders from within SageCRM without opening the full Sage ERP Accpac Order Entry screens

Enhanced SageCRM Overview

- Enhanced Quote-to-Order Workflow
- Simplified Quote and Order Entry
- Sage ERP Accpac User License Requirement Eliminated for SageCRM Order Entry
- Opportunity Management
 - Create a Quote or Order Without Creating an Opportunity First
 - Link Multiple Quotes or Orders
 - Promote Multiple Quotes to an Order Within the Same Opportunity
- Benefits of SageCRM 7.0 Release



Better Manage Fiscal Periods

Fiscal Year: 2020
Number of Fiscal Periods: 12
 Active
 Lock Adjustment Period
 Lock Closing Period

	Period 1	Period 2	Period 3	Period 4	Period 5	Period 6	Period 7	Period 8	Period 9	Period 10
Start Date	1/1/2020	2/1/2020	3/1/2020	4/1/2020	5/1/2020	6/1/2020	7/1/2020	8/1/2020	9/1/2020	10/1/2020
End Date	1/31/2020	2/29/2020	3/31/2020	4/30/2020	5/31/2020	6/30/2020	7/31/2020	8/31/2020	9/30/2020	10/31/2020
AP - Accounts Payable	Lock Column	Lock Column	Lock Column	Lock Column	Lock Column	Lock Column	Lock Column	Lock Column	Lock Column	Unlock Column
AR - Accounts Receivable	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row
BK - Bank Services	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row
GL - General Ledger	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row
IC - Inventory Control	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row
OE - Order Entry	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row
PM - Project & Job Costing	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row
PD - Purchase Orders	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row
UP - US Payroll	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row	Unlock Row

Legend: X = Locked

Save Delete

Increase Productivity

Save time and reduce costs by allowing users to lock fiscal periods by module for more accurate transaction processing

What Customers Told Us

Welcome to Sage Accpac Ideas. We are listening!

Tell us your idea!

- Enter your suggestion here

Search

latest hot top planned 17 completed 27

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631 Ideas
830 Comments
5631 Votes

By Category >>

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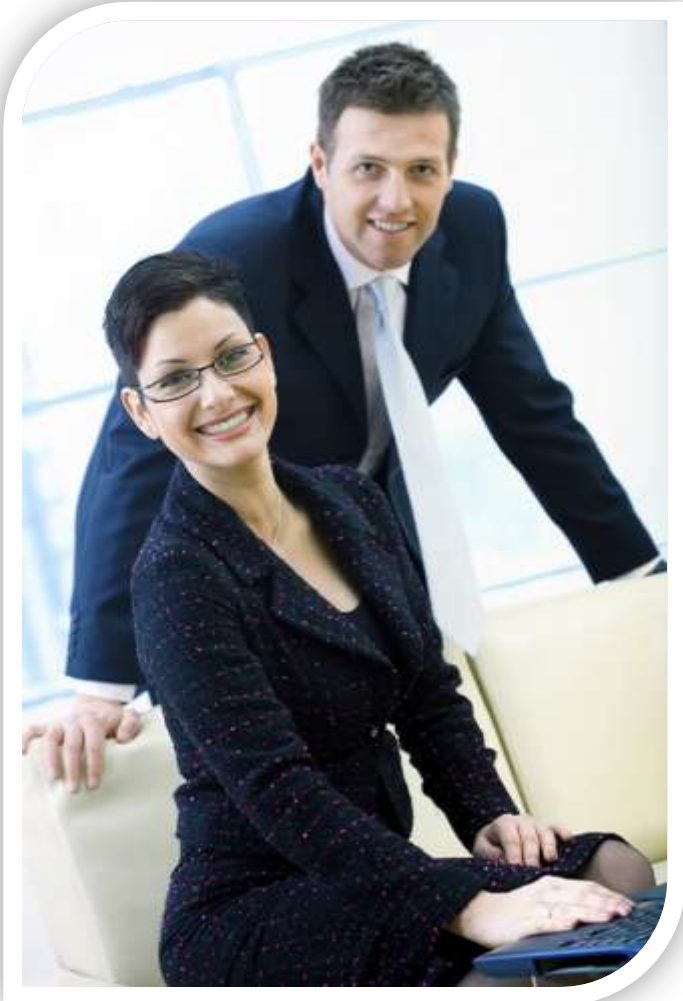
www.sageaccpac.com/feedback

Better Manage Fiscal Period Overview



- Lock/unlock each Fiscal Period per Module for a given Fiscal Year to Prevent Unwanted Posts
- Grid Control set by row, per column or entire Fiscal Period can be Locked Down with Single Click

Synchronized Release



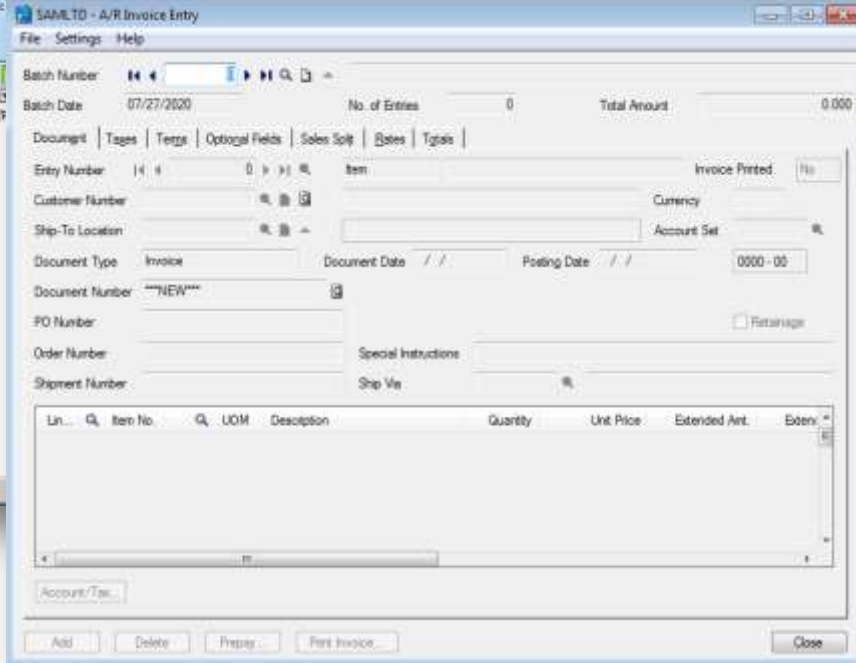
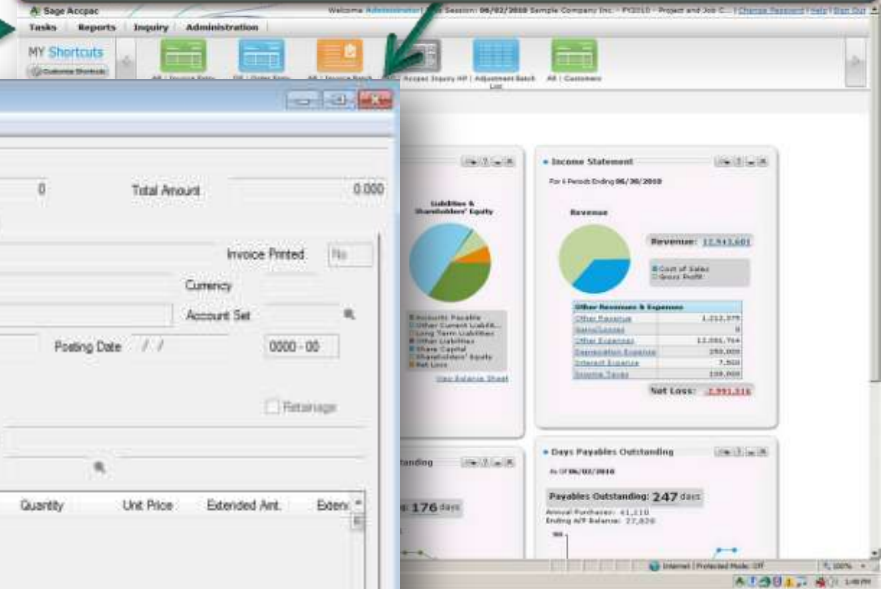
- All Sage ERP Accpac Modules
 - Financial Suite
 - Operational Suite
 - Payroll
 - Project Job Cost
 - Optional Products
- All Add-on Sage Products
 - Intelligence
 - Insight
 - SageCRM 7.0
 - Sage Abra HRMS 10
 - Sage FAS 2010
- All Languages

Synchronized Release

Desktop



Portal



Option to Utilize Current Desktop or New Portal, as Both will Access Familiar Data Entry Screens

Sage ERP Accpac Version 6.0 Key Dates



● Beta

- August 2010
- Partners and Customers
- Copy of Data Not Live

● Controlled Release

- October 2010
- Customers go Live

● General Availability

- December 2010

<http://community.sageaccpac.com/beta>

Sage ERP Accpac Version 6.0



- Improve Productivity.
- Envision More.
- Accelerate Growth.

● Increase Productivity

- Role Based, Personalized Portal
- Task Oriented Navigation
- Manage Fiscal Periods by Module

● Envision More

- Snapshots: Integrated Key Performance Indicators (KPIs)
- Inquiry – Quick Information Lists through Ad-hoc Queries

● Accelerate Growth

- Enhanced Workflow for SageCRM and Sage ERP Accpac Users
- Improved Usability



Additional Resources

- Get Your Voice Heard - Enhancement Requests

www.sageaccpac.com/Feedback

- Community – Collaborate with Others

<http://community.sageaccpac.com/>

- Vision and Product Plan

www.sageaccpac.com/assets/Accpac/PDFs/Futureofaccpac_lo_res.pdf

- Live tour of Sage ERP Accpac Version 6.0

www.youtube.com/watch?v=HYUErIxYiPg