Sage 300 Update & The Road Ahead

April 16, 2021

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Safe Harbor

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Statements regarding our product development initiatives, including new products and future product upgrades, updates or enhancements represent our current intentions, but may be modified, delayed or abandoned without prior notice and there is no assurance that such offering, upgrades, updates or functionality will become available unless and until they have been made generally available to our customers.

Sage 300 | New Customer Stories

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Story 1 — Alkan Air

Alkan Air Soars to New Heights with Sage 300cloud

Aviation company Alkan Air relies on Sage to transcend market turbulence and strict industry oversight

Founded in 1977, Alkan Air is a highly diversified aviation company offering flight services for tourism, medical evacuations, and mining expeditions across the Yukon and throughout British Columbia, as well as instruction in aviation and aviation management.

For decades, the company has relied on Sage 300—and more recently, Sage 300cloud—to manage multiple business lines in a volatile and regulated industry.

Key outcomes:
- Efficiencies gained save upwards of $50k annually
- Timely, accurate financial reporting informs minute-by-minute business decisions
- Seamless integration with key industry software
- Unmatched traceability ensures total financial transparency

ALKAN AIR
LEADING TOGETHER

Company
Alkan Air, Ltd.

Location
Whitehorse, Canada

Industry
Aviation

Solution
Sage 300cloud

For more info, visit:
https://www.sage.com/en-us/products/sage-300

Story 2 — Simpli Home

Simpli Home Scales to Meet Skyrocketing Demand with Sage 300

International home furnishings e-tailer harnesses growth—up to 100% over forecast

Founded in 2000 out of Vaughan, Ontario, Simpli Home began as a wholesale home furnishings importer supplying retailers like Home Depot, Walmart, Fred Meyer, and more. Today, it's a thriving e-commerce brand, selling directly to consumers worldwide. The company relies on Sage 300 to manage ongoing, explosive growth.

Key outcomes:
- Able to scale global operations to meet unprecedented demand—up to 100% over forecast
- Seamless integration with EDI facilitates thousands of daily transactions
- Multi-currency functionality streamlines international sales, purchasing, and payroll
- Inventory control enables multi-warehouse costing with landed cost modules
- Real-time analysis of data; automatic spreadsheet updates cut thousands of work hours

SIMPLI HOME
LIFE BY DESIGN

Company
Simpli Home Ltd.

Location
Ontario, Canada

Industry
E-commerce, Imports

Solution
Sage 300
Sage Enterprise Intelligence
Sage Microsoft® Excel® Add-in

Partner
Impac Solutions

For more info, visit:
www.sage.com

Story 3 — PS Lightwave

PS Lightwave calls on Sage to streamline processes

Houston-based telecom service provider uses Sage products to increase efficiency and drive increased ROI.

PS Lightwave is a woman-owned business with approximately 90 employees that specializes in ethernet, internet, dark fiber, and phone service (VoIP). Founded in 2010, the company continues its steady growth in the Houston metropolitan area.

Sage 300, and its flexible integration with other software applications, are helping the company improve business processes while continuing to grow its customer base.

Key outcomes:
- Reduced inventory by 58% in four years
- Slashed time to close month by 50%
- Supported company growth from 4 to 90 employees
- Developed an annual budget which helped rein in costs
- Developed specialized financial and job cost reports
- Took the accounts payable to about 90% ACH pay

LIGHTWAVE

Company
PS Lightwave, Inc.

Location
TX, US

Industry
Telecommunications

Solution
Sage 300, Sage CRM, Sage Intelligence

For more info, visit:
https://www.sage.com/en-us/products/sage-300/

Story 4 — Sawing & Shearing Services

Sawing & Shearing Services, Inc. cuts through the competition with Sage 300

Illinois-based custom steel fabricator uses Sage products to scale its business growth while remaining efficient

Sawing & Shearing Services, Inc. is a privately-held company that employs fifty-five people and specializes in custom steel fabrication. The company was incorporated in 1991. The owners rented a 15,000 square-foot building but soon upgraded to a 75,000 square-foot warehouse in the southern Chicago suburbs, where it is thriving today.

Sage 300 is helping the company simplify and automate business processes and sustain growth.

Key outcomes:
- Supported company growth from one employee to fifty-five employees
- Reduced man-hours
- Supported sales increase to eight million dollars annually

Sawing and Shearing Services

Company
Sawing & Shearing Services, Inc.

Location
Illinois, US

Industry
Process Manufacturing

Solution
Sage 300

For more info, visit:
https://www.sage.com/en-us/products/sage-300/

Recap of 2021.0

Pay Now Link

Customers can now add a Pay Now link to their invoices. We've partnered with PayPal and Stripe to bring instant e-invoicing to Sage 300cloud.

Invoices can be modified by business partners to customer's branding needs.

Withholding Tax in AR and AP

Businesses can now withhold taxes during a sale to customers and remit that tax amount to tax authorities as required.

AR Withholding tax screens is available in the desktop UI and in web screens.

Web Screen Updates

A new Text Size setting lets you change the size of text on web screens to smaller sizes than the default.

Using smaller text lets you see more fields and controls without having to scroll down.

Sage 300cloud only

Expanded Character Limits

Expanded size of Check and Deposit numbers from 9 to 15 digits in Bank Service that can avoid these fields getting truncated leading to a longer auditing process.

O/E Templates Update

You can now specify customer account sets in Order Entry templates.

US Payroll Enhancements

Expanded size of Check and Deposit numbers from 9 to 15 digits in Bank Service that can avoid these fields getting truncated leading to a longer auditing process.

Universal ISO

We've streamlined the process for checking customer entitlement for all regions which enables customers to access 300-related products no matter where their business is headquartered. Now, customers can select different product options from a **universal installer.**

Recap of 2021.1

Updated 1099 Tax Reporting 2021.1

For tax year 2020, Nonemployee Compensation is reported in box 1 on a new 1099-NEC form (instead of box 7 on the 1099-MISC form where it was reported previously).

On the **A/P Print 1099/1096 Forms** screen, you can now print to the new 1099-NEC form, as well as updated versions of the 1099-MISC and 1096 forms.

Improved 1099/CPRS Codes 2021.1

1099/CPRS codes no longer correspond to specific box numbers on forms, because these box numbers may change from year to year (which has happened with several boxes in tax year 2020, including the change to Nonemployee Compensation)

Available in both Sage 300cloud web screens and Sage 300 classic desktop screens

Improved data integrity checking 2021.1

We have improved data integrity checking for integrated products. For some third-party products that integrate with Sage 300, you can specify options to refine data integrity checks.

Available in Sage 300cloud web screens

Updated Visual Process Flows 2021

We have redesigned Visual Process Flows so they no longer require Adobe Flash, because Flash will not be supported after December 2020. This release includes updated versions of the process flow templates that were available previously. You can use these templates as well as any custom process flows that you already have.

Available in Sage 300 classic desktop screens

Recap of 2021.2

Sage 300 | What's New in March-April

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300
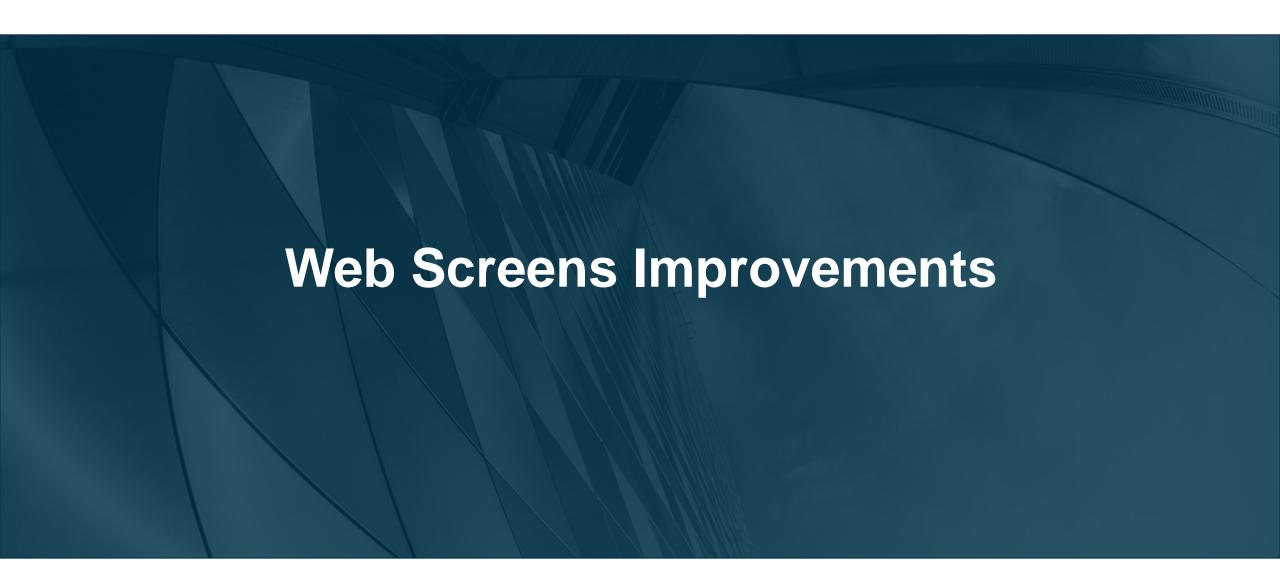
2021.2 Release Mid-April

sage
Data &
Analytics

- Big update for Web Screens

- Redesigned Finder

- Report printing process update

- Latest Sage CRM integration

- Sage Data & Analytics
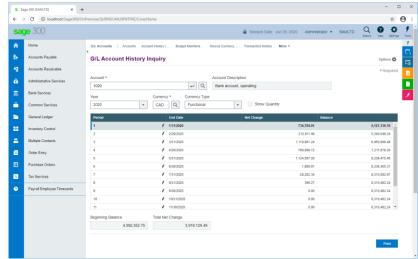
  integration – *Available Now!*

Web Screens Improvements

New Web Screens

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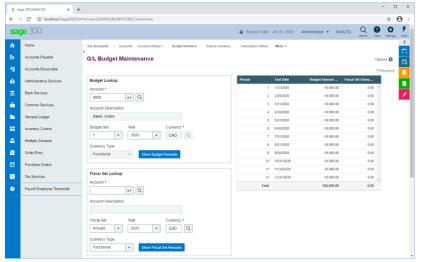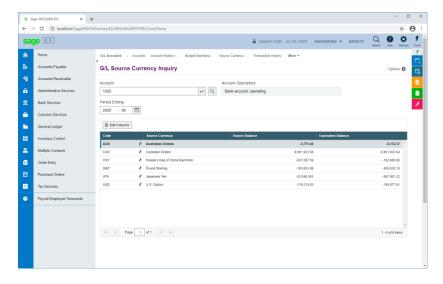
General Ledger

- Account History Inquiry
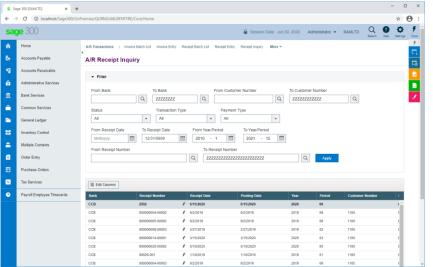
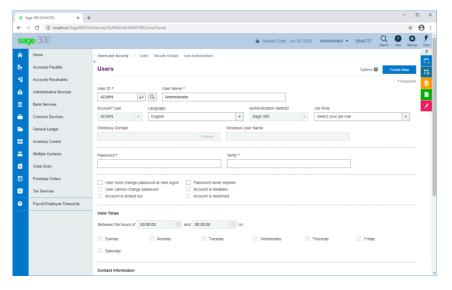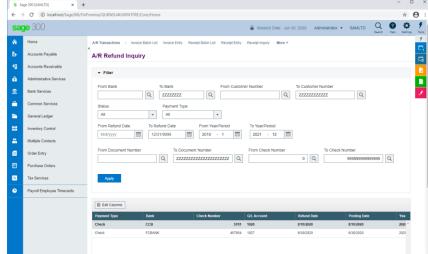- Budget Maintenance

- Source Currency Inquiry

New Web Screens

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Accounts Receivable

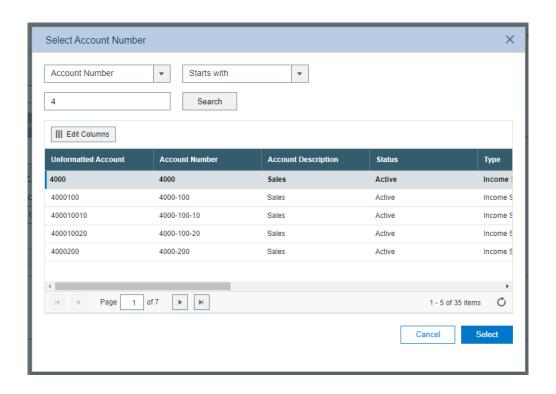- Receipt Inquiry
- Refund Inquiry

Users

Web Screen Improvements

Redesigned Finder

- Improves filtering
- Makes it easier to navigate through large sets of results
- See Sage article **108348** on SageKB.com
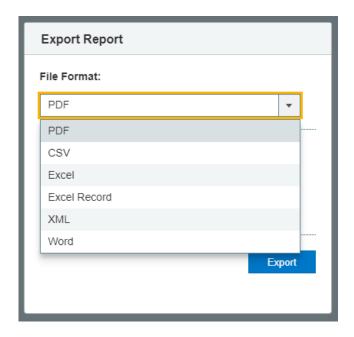
New Keyboard Shortcuts

- **Alt + Down Arrow**: opens finders
- **Esc**: Closes finders, pop-up screens and messages

Web Screen Improvements
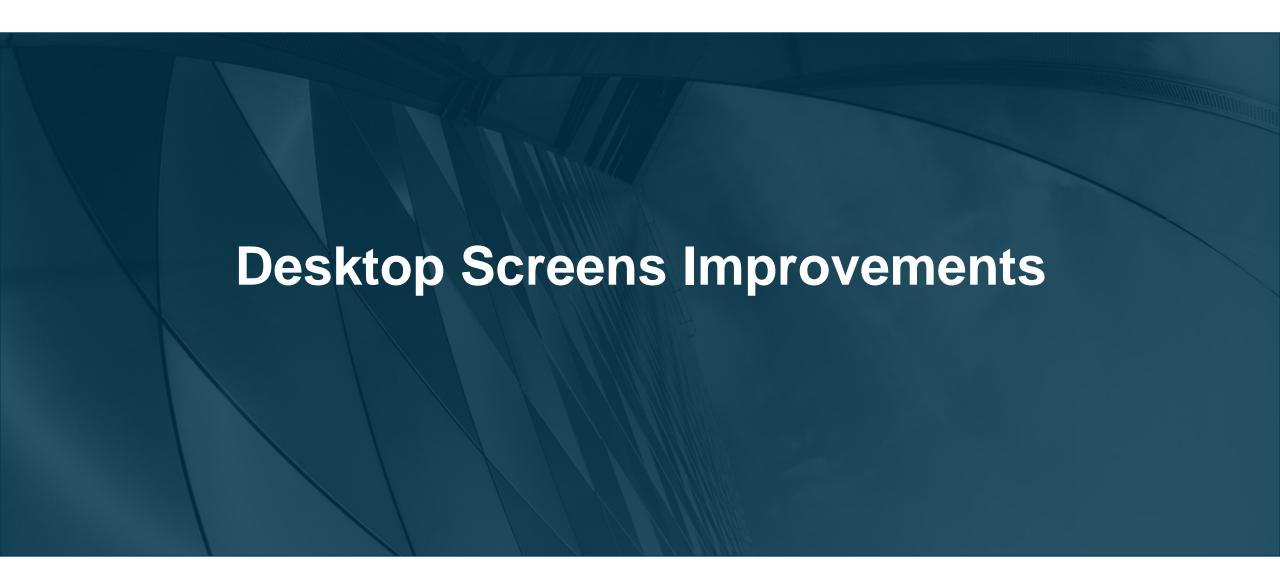
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Improved Process for Printing Reports

- When printing a report, a preview of the report is no longer displayed in the SAP Crystal Reports® viewer. Instead, the Export Report screen appears and provides options for saving the report to a file.

- To print a physical copy of the report, save to a PDF and then print to your printer from the PDF.
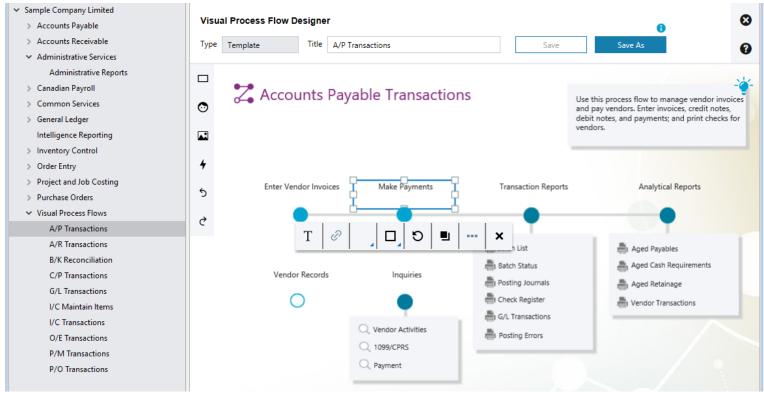
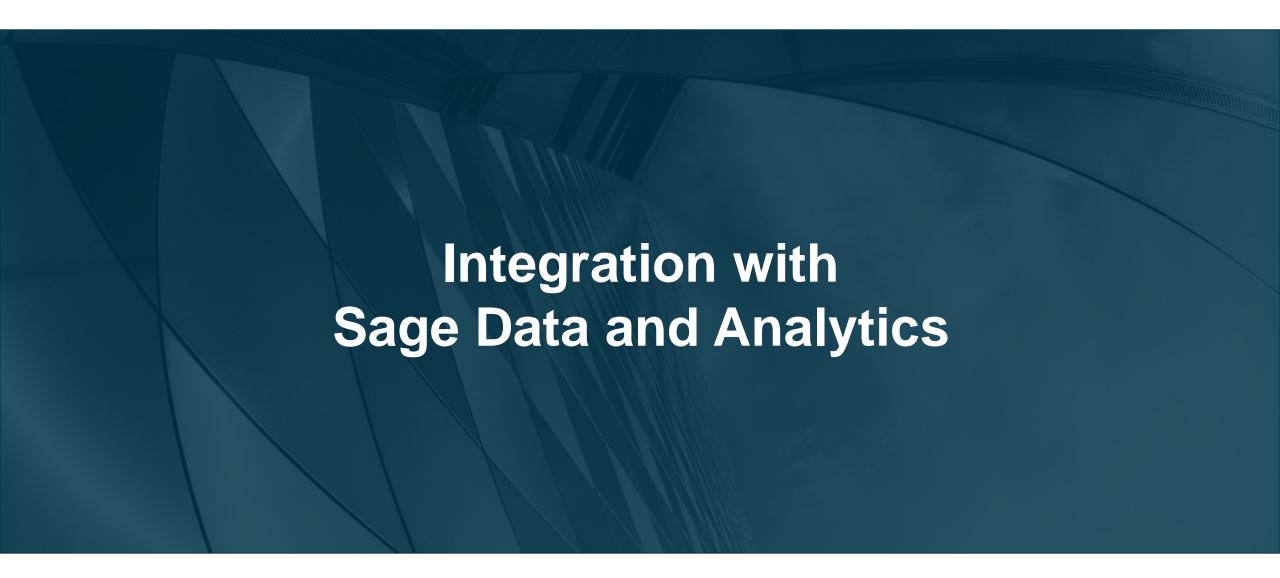# Desktop Screens Improvements

Desktop Screens Improvements

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- Visual Process Flows can once again be created and customized

- See the Help topic for Visual Process Flows at help.sage300.com

Integration with
Sage Data and Analytics

Summary of Customer Benefits

BI in-a-box

Pre-packed and fully customizable data models and analytics right out of the box. Customers can access their data from anywhere, on any device.

Easy to Use

No coding experience or programming needed. Customers can self-serve by creating the reports they need as they need them.

Connect Multiple Data Sources
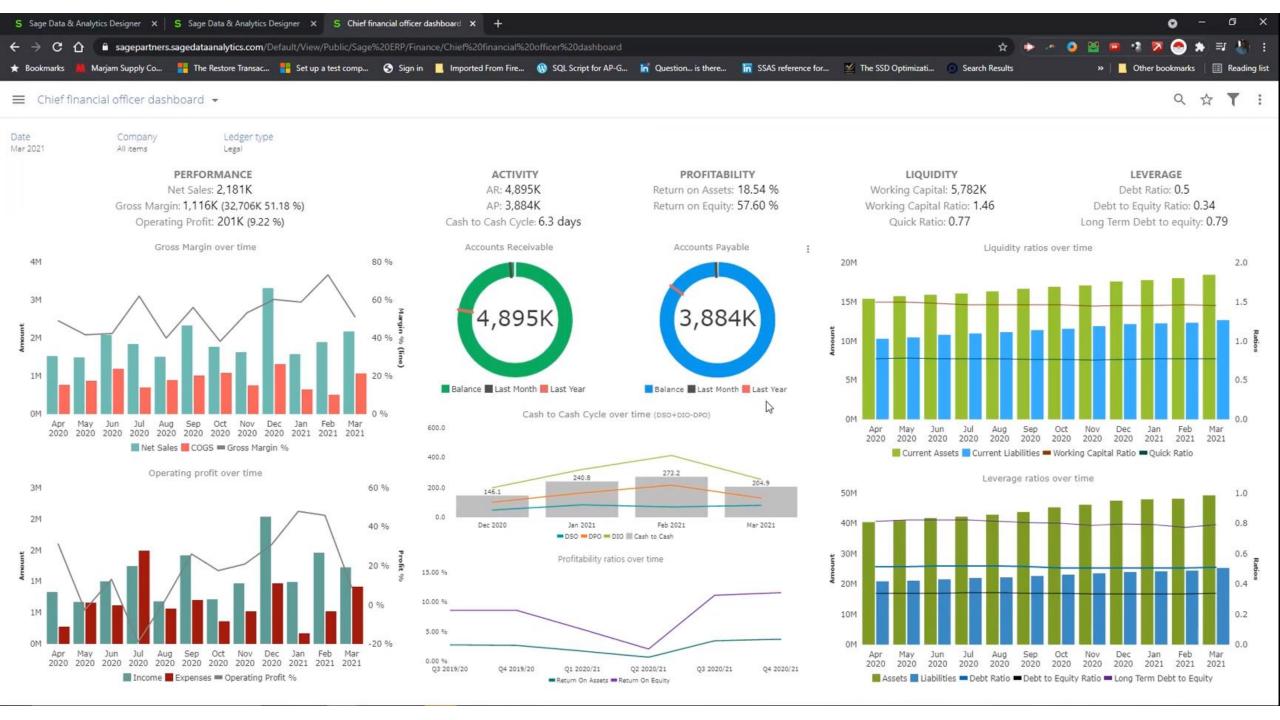
Customers can gain increased transparency into how the business is performing and greater insights by joining multiple disparate data sources together.
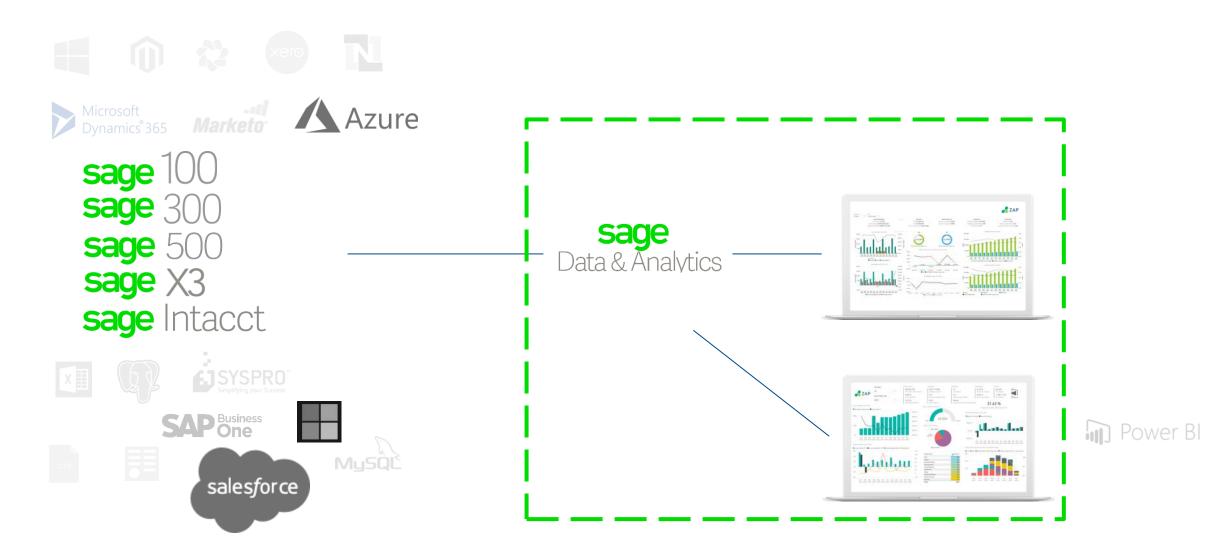
Reduce IT Headaches

SD&A is hosted in Azure which means system maintenance and product releases are fully automated by the SD&A platform saving Sage customers time, money and IT headaches.

The role of SAGE Data & Analytics

SD&A Pricing & Packaging for North America

Standard	Advanced	Premium
Entry-level plan for basic and auto-refreshed reporting in the cloud for Financial, AR and AP data. Includes the following pre-built analytics: 6 Dashboards, 11 Reports, 55 Charts, 75 KPIs.	For more advanced analytics and data design scenarios through a partner. Includes training, extra data storage and extend the pre-packaged analytics coverage.	For enterprise deployments of Data Hub. This plan enables full reporting and data model design as well as Power BI integration in addition to Data Hub's pre-built analytics.

Standard	Advanced	Premium
$2,508 + **$600 Hosting**	**$4,404 +** **$1104 Hosting**	**$7,848 +** **$1,740 Hosting**

Includes

Standard	Advanced	Premium
✔ **2 Companies** [2] ✔ **1 Designer / 5 Consumers** ✔ **10 GB** ✔ GL, AR, AP modules (prebuilt) ✔ Analytics design & distribution ✔ Maintenance & Support ✔ 1 Scheduled refresh per day ✔ Anytime Learning	✔ **5 Companies** [2] ✔ **2 Designers / 10 Consumers** ✔ **30 GB** ✔ All modules (prebuilt) ✔ Analytics design & distribution ✔ Maintenance & Support ✔ 1 Scheduled refresh per day [4] ✔ Anytime Learning	✔ **Unlimited Companies** [2] ✔ **5 connections** ✔ **4 Designers / 30 Consumers** ✔ **75 GB** ✔ All modules (prebuilt) ✔ Analytics design & distribution ✔ Data Model Design ✔ Maintenance & Support ✔ 1 Scheduled refresh per day [4] ✔ Anytime Learning ✔ Power BI integration

Extras Available

Standard	Advanced	Premium
N/A	✔ Data Model Design ✔ Add. Consumers ✔ Add. Data source Connections ✔ Add. Data storage	✔ Add. Consumers ✔ Add. Designers ✔ Add. Connections ✔ Add. Data storage

Limits

Standard	Advanced	Premium
1 Designers / 5 consumers 10 GB Data Storage 2 Companies No Data Model Design	2 Designers / 15 Consumers 55 GB Data storage 5 Companies	N/A

Add-Ons	USD/Annual
Data Model Design	$ 708
Extra data source connection	$ 588
Extra 25GB data storage	$ 468
Extra Designer user	$ 180
Extra Consumer user	$ 108

1 through a partner only
2 including from different remote environments
3 Billed annually & includes hosting fee
4 more available through a partner, within ZAP Fair
  Use Policy

Prices are shown in USD

Recent SDK/API Improvements

Supporting our Ecosystem Partners

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SDK
- New wizards for UI Layout, Finder Definition and Code Generation help our development partners go to market and make updates *FASTER*

API
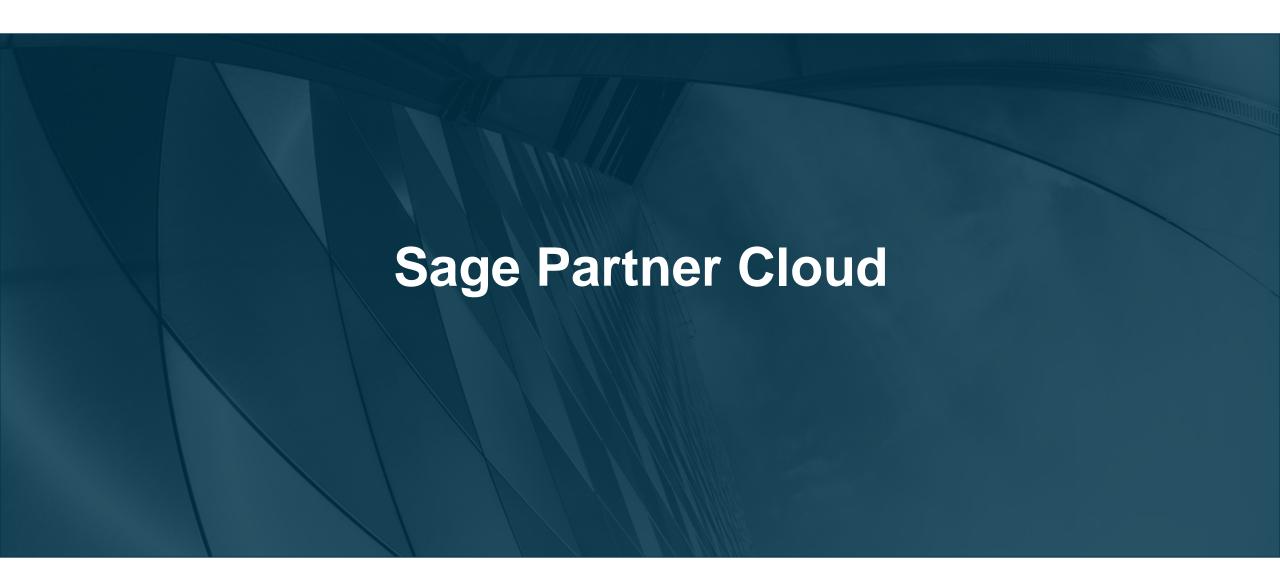- More data and endpoints to enable partners to build rich cloud-connected solutions

DOCUMENTATION
- Better code samples for them to hit the ground running
- Working toward public API documentation

Let's build great things together

Connect to over two million active customers across the globe looking for trusted apps to integrate with their Sage cloud software. By partnering with us we'll connect you to them through the Sage Marketplace. Start innovating today with our free APIs, and let's change the future of business software together!

Start your Sage journey today

https://developer.sage.com/

Sage Partner Cloud

Sage Partner Cloud

Customers can now work with their Sage Business Partner to have Sage 300 on the Microsoft Azure cloud.

Moving your existing Sage 300 deployment to the Azure cloud ensures you get the best in reliability, security and availability to guarantee your business continuity.

Why companies are moving to the cloud – customer deck only

Security

Depend on the experience and investment of Microsoft to protect your data

Cost effective

Minimize the hassle and unexpected expenses associated with maintaining your own IT infrastructure

Flexible & Scalable

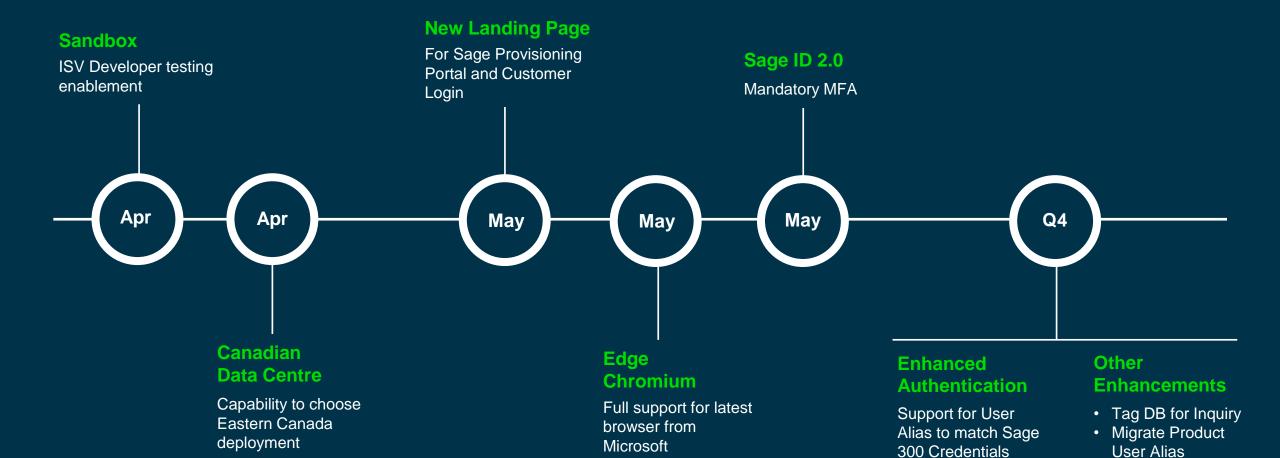*Quickly add new capabilities and users as your business needs require*

Reliability

Minimize risk to interruptions to running your business due of downtime from unexpected outages

SPC - Recent and Upcoming

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Sandbox

ISV Developer testing
enablement

New Landing Page

For Sage Provisioning
Portal and Customer
Login

Sage ID 2.0

Mandatory MFA

| Apr | Apr | May | May | May | Q4 |

**Canadian
Data Centre**

Capability to choose
Eastern Canada
deployment

**Edge
Chromium**

Full support for latest
browser from
Microsoft

**Enhanced
Authentication**

Support for User
Alias to match Sage
300 Credentials

**Other
Enhancements**

• Tag DB for Inquiry
• Migrate Product
  User Alias

Amazing Feedback from our Partners

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"Supporting Sage's journey to the cloud for our mutual Sage 100 and Sage 300 customers base is a win-win. Sage Partner Cloud and Sage Provisioning Portal are very intuitive and easy to use systems allowing any ISV/Partner to easily develop, test and deploy cloud-based Sage applications. And on top of that, the Sage team has been very responsive with any account setup and technical questions helping us on our way. Thank you Sage Team! "

Simon Van Rheenen, Sr. Director, Product Management, Avalara

"Orchid's key modules for Sage 300 are working flawlessly in the Sage Partner Cloud. Deployment of our modules proved to be a breeze and our testing has confirmed that the platform is fast and robust."

Steve Fouche, Director Orchid Systems

"A large part of the efficiency is due to an almost perfect environment being set up by the provisioning portal and ready to start using. Since the environment is provided for the partner in an almost ideal configuration the partner does not have to expense resources to install and set up Sage, SQL etc. ISV products should not prove a challenge once they are tested and certified."

Etienne Grobler, North49 Business Solutions

"The documentation was excellent, making it easy to setup and use the Sage Provisioning Portal. The Sage team were quick to respond to our questions and technical support was able to help us resolve things efficiently."

Mark Kornhauser, Managing Director Technisoft

Sage Partner Cloud ISV Status

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Sage Solutions

- Sage CRM (Sage 100)
- Sage HRMS
- Sage Fixed Assets
- Sage Payment Acceptance
- Sage Bank Feeds
- Sage Intelligence

Sage ISVs

- Sage Enterprise Intelligence
- Sage Sales Tax
- Sage Alerts & Workflow
- Sage Inventory Advisor
- Sage AP Automation
- Scanco solutions
- Multi-bin for Sage 100
- Altec Doclink
- Process Weaver
- Aatrix forms & e-Filing
- eInvoicing (Paya)
- Mapadoc

Other ISVs

- Microsoft Office 365
- SAP Crystal Reports
- EFI SmartLink
- Pacific Technologies
- Systronics
- North 49
- Technisoft
- TaiRox
- Orchid
- Greytrix
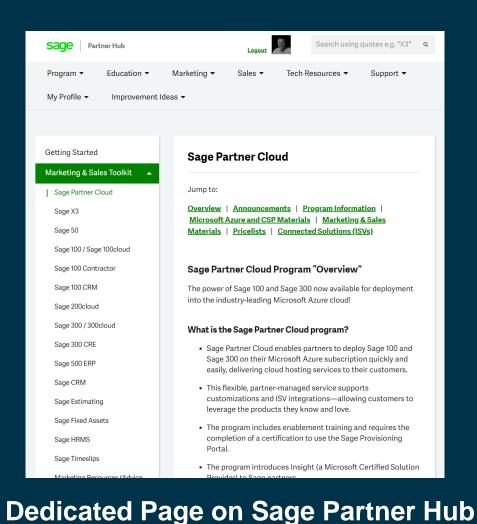- Wellspring Print Boss
- Terminalworks TS Print

- Norming
- Scanforce
- Starship
- True Commerce
- Edisoft
- CimCloud
- Auto Simply
- FusionRMS
- ROI In-Sync
- Peresoft

Legend:
Testing complete by ISV, Sage, or by a Partner
In progress
Not started

New Enablement Materials for SPC

Dedicated Page on Sage Partner Hub

Sage 300 Migration Guide

SPP Technical Whitepaper

Guide to Ordering SPC

Order Forms & Price List

Roadmap Update

Sage 300 Customer Roadmap – 3 Year Priorities

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Web Screens	Business Intelligence	ISV Partner Ecosystem	Migration to the Cloud	Compliancy	Customer Ideas
Continue to invest in **Web Screens** toward parity with Desktop Screens.	Integrate Sage **Data & Analytics,** update Sage Financial Reporter to 64-bit, explore further opportunities	Support our **ISV Partner Ecosystem** with improvements in Web SDK and API	Support our customers **move to the cloud** at their own pace by enabling our partners with tools to facilitate deployment into Microsoft Azure	**Payroll Tax Updates** and other regulatory and compliance developments	Customer requested features from our **Ideas Portal**

Sage 300 | Global 3 Year Roadmap

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	FY21 (2022.x)	FY22 (2023.x)	FY23 (2024.x)
Regulatory Compliance	• Canadian Payroll Tax / 1099 Updates • Enhancements to US & Canadian Payroll • Data Privacy and further anonymization enhancements to SIN/SNN	• Canadian Payroll Tax / 1099 Updates • Enhancements to US & Canadian Payroll	• Canadian Payroll Tax / 1099 Updates
Technical Compliance & Maintenance of Line	• Sage 300 Online • Sage Partner Cloud • Ongoing security maintenance • Enhancements to performance for web screens & API	• Sage Partner Cloud • Ongoing security maintenance	• Sage Partner Cloud • Ongoing security maintenance
Support Cloud Native	• Web SDK & API improvements • Web screens for PJC transaction screens • Web screen setup report tool • Improvements to Sage CRM Integration • Web screens for Visual Process Flow	• Web SDK & API improvements • Web screens PJC & SN/LT • Improvements to Sage 300 and Sage CRM integration	• Web SDK & API improvements • Web screens for Option Products & Fixed Assets Integration • Integration to Sage Payroll Cloud & Sage HR
Customer Satisfaction	• Customer requested features (Ideas) • Address call drivers & NPS	• Customer requested features (Ideas) • Address call drivers & NPS	• Customer requested features (Ideas) • Address call drivers & NPS

Roadmap for Sage 300

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August 2021

November 2021

December 2021

April 2022

August 2022

November 2022

Core Sage 300

Sage 300 2022.0
- GL Web Screens: Chart of Accounts, AR Customer List
- PJC Web Screens: Costs, Material Usage, Material Returns, Material Allocation
- UX Finder Improvements - Ongoing
- Sage Financial Reporter 64-bit
- PO Improvements
- Entitlement changes
- Reserving Lanpaks
- Help for 3rd party applications

Sage 300 2022.1
- Defects
- SDK/API Documentation

- Tax Updates

Sage 300 2022.2
- Defects
- Aatrix Integration for 1099

Sage 300 2023.0
- PJC web screens continue
- Payroll Enhancements
- T4A Enhancements
- Enhancements for Sage CRM Integration

Sage 300 2023.1
- Defects

Sage 300 Payroll

June 2021

Canadian & US Payroll Q2 2021

September 2021

US Payroll Q3.2021

December 2021

Canadian & US Payroll Q4 2021 AP 1099s

March 2022

US Payroll Q1 2022

PO Enhancements from Ideas…

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Additional Costs in PO
Votes **6** — Vote for
by: Kerry J. | over a year ago | Operations Management

When processing invoices in PO you can
invoice - this works great on a singular lev

However if you are an imported and your c
often consolidate their billing onto one inv
and apply the additional cost to multiple p
you end up with an accurate unit cost per

An acceptable scenario would be to have

PO Receipt 1
Item 123 - QTY 2 Unit Cost 10 Extended (

PO Receipt 2
Item 456 Qty 3 Unit Cost 20 Extended Co

PO Receipt 3
Item 789 Qty 4 Unit Cost 15 Extended Cost 60

Each of these has their own singular invoice from different vendors.

Have Invoice ABC as an additional cost that can be applied to multiple receipts. As an easy example we
will use the logic that they are going to apply the cost to each item on a qty basis. Additional Cost
invoice from ABC Co is 250 so. Total of 9 Items == 250/9 = 27.77 additional cost per item.

Update the unit cost for each item to

Receipt 1

Update unit cost to 37.77 - total cost to 75.54

Receipt 2
Update unit cost to 47.77 - total cost to 143.31

Receipt 3
Update unit cost to 42.77 - total cost to 171.08

Total Vendor Invoice Value 140 + Addition Cost of 250 = updated receipt cost of 390

This example does not quite add up with rounding it is 5 or 6 cents out but all of the business logic is
there.

Additional Cost on Purchase Order
Votes **87** — Vote for
by: Riekie R. | over a year ago | Operations Management

It would be great to be able to add an estimated Additional Cost on the Purchase O
Sometimes the receiving clerks aren't accounts people, and only receipts the quanti
fast moving and the Additional Costs only gets entered once the invoices arrive (ma
later in cases of imported goods), then then valuation of inventory is completely wro
in this fashion, then there would just be a smaller receipt adjustment, and the impac
stock won't be so large.

by: Riekie R. | over a year ago | Operations Management

Receipting Stock with Additional costs
Votes **2** — Vote for
by: Ian A. | over a year ago | Operations Management

It SUCKS SUCKS SUCKS
Entering a pile of receipts into Inventory

Punch in the PO number from the first in
Enter quantity received
Click on additional costs
Add the freight cost
Punch in invoice number
Post

Simples

But try it with the next invoice
Punch in the PO number
Enter quantity received
Click on additional costs
YOU CANNOT ADD ANY ADDITIONAL

So Exit ithout saving
Shut down inventory receipting

Reopen inventory receipting
enter 1 invoice with additional costs

then Close it again

Then open it for the next invoice

Most Recent costs - system bug re Additional costs
Votes **1** — Vote for
by: Phil J. | over a year ago | Financial Management

There appears to be a system bug with Additional costs. We have two additional costs set up - freight
prorated on Weight and Duty prorated manually. Freight and Duty get included in Actual costs but only
Freight gets included in Most Recent Costs. I understand that manually pro-rated costs are stored in a
different table, which seems to have been overlooked in calculating Most Recent costs.

Also, it would be very useful to be able to select Most Recent costs when running a costed BOM as the
most up to date costs are generally what you want to know commercially - after all, Actual is only a
weighted average of Most Recent.

by: Phil J. | over a year ago | Financial Management

Need report to identify receipts that not being invoiced in PO
Votes **83** — Vote for
by: Jacqueline L. | over a year ago | Reports / BI

Need report to identify receipts that not being invoiced in PO

by: Jacqueline L. | over a year ago | Reports / BI

Thank you!

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