

Sage 100 Roadmap: 2023 release and beyond

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Sage



Agenda

Sage

Customer Focused

Sage 100 A Look Back

Quick overview of previous versions

Security

TLS

Payroll & 1099 Compatibility

Sage 100 2023.0 & 2023.1

Highlights of our latest release

Future roadmap

What is coming next

Sage

Customer Focused



A global company with deep roots



40+ years

Perfecting the tools that help businesses like yours to succeed.



2 million

Business owners use Sage software in 26 countries.



40,000+

Business partners, allowing us to deliver exceptional support.



60+

Awards for customer support, software innovation, and more.

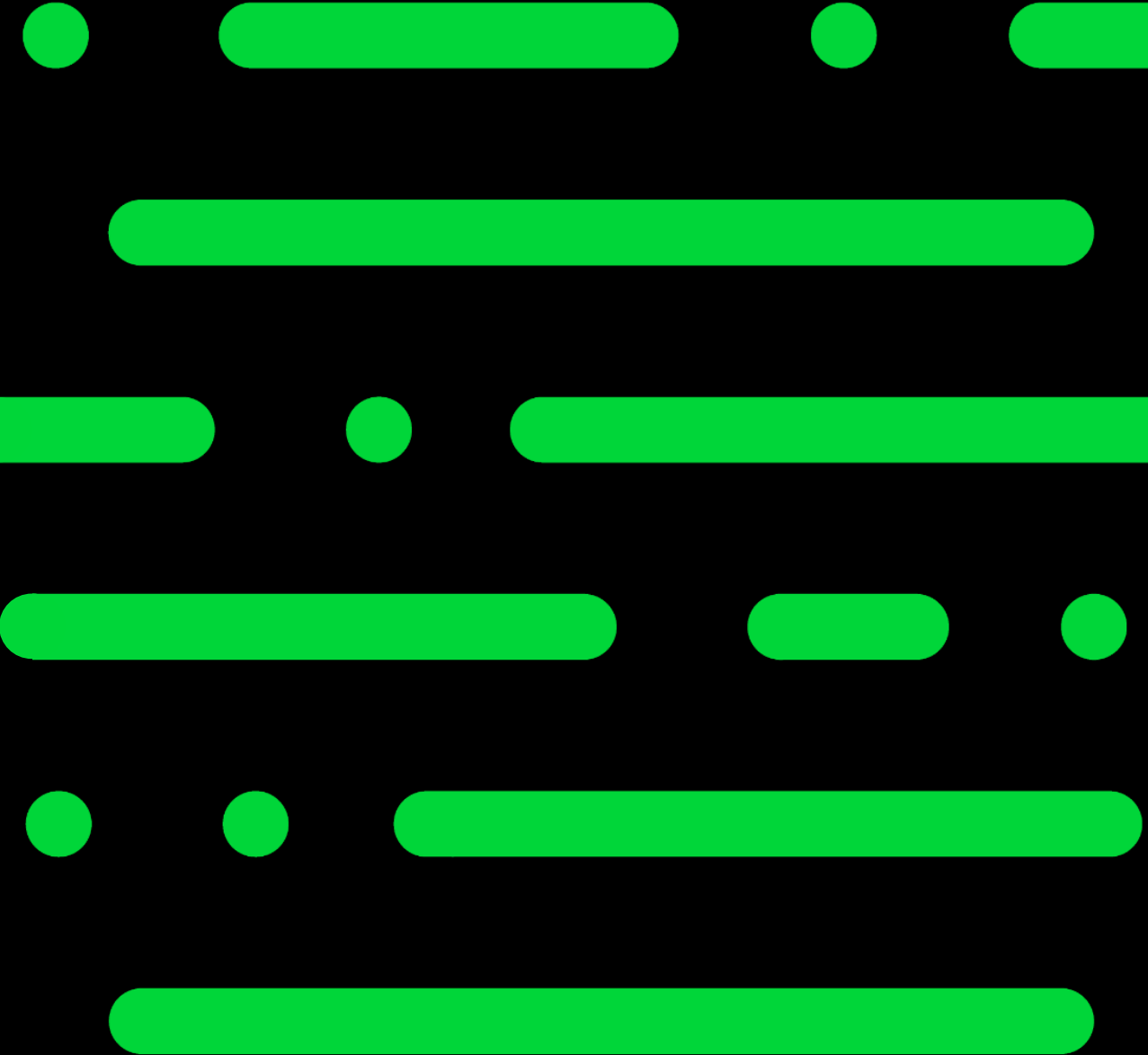
Sage 100

A look back

As we look back on the first 100 years of the Sage Group, we reflect on the challenges we have faced and the opportunities we have seized. Our journey has been marked by innovation, resilience, and a commitment to excellence. We have grown from a small, family-owned business to a global leader in our field, thanks to the dedication and hard work of our employees, customers, and partners. As we move forward, we remain committed to our core values and our vision for the future. We are proud of the progress we have made and excited about the possibilities ahead. Together, we will continue to build a legacy of success and innovation.

Our commitment to innovation and excellence has been a driving force in our success. We have invested in research and development, creating new products and services that have transformed our industry. We have also focused on improving our operational efficiency and customer service, ensuring that we are always at the forefront of our field. Our dedication to these principles has allowed us to overcome challenges and seize opportunities, leading to our current position as a global leader. We are confident that our commitment to innovation and excellence will continue to drive our success in the years ahead.

As we look back on our 100-year journey, we are grateful for the support and partnership of our customers, partners, and employees. It is their dedication and hard work that have made our success possible. We are committed to continuing our partnership with them, as we move forward into the future. We are excited about the possibilities ahead and confident that we will continue to build a legacy of success and innovation.



Current versions

2021

- **26+ new features**
 - ✓ Enhanced role security.
 - ✓ Improved form and reports maintenance.
 - ✓ Extensive paperless office improvements.
 - ✓ Critical technical updates.

2022

- **12+ new features**
 - ✓ Minimize repetitive and manual processes.
 - ✓ Support business continuity.
 - ✓ Increase productivity.
 - ✓ Elevate employee satisfaction.
 - ✓ Production Management and Inventory Requirements Planning to Sage

2023

- **40+ new features**
 - ✓ Simplify workflows.
 - ✓ Increase personal data security.
 - ✓ Streamline procurement.
 - ✓ Improve accuracy in decision-making.
 - ✓ Continued Sage Production Management and Inventory Requirements Planning enhancements

2024

Security Focus



Security Requirements

TLS 1.0 and 1.1 support ending effective October 1, 2023

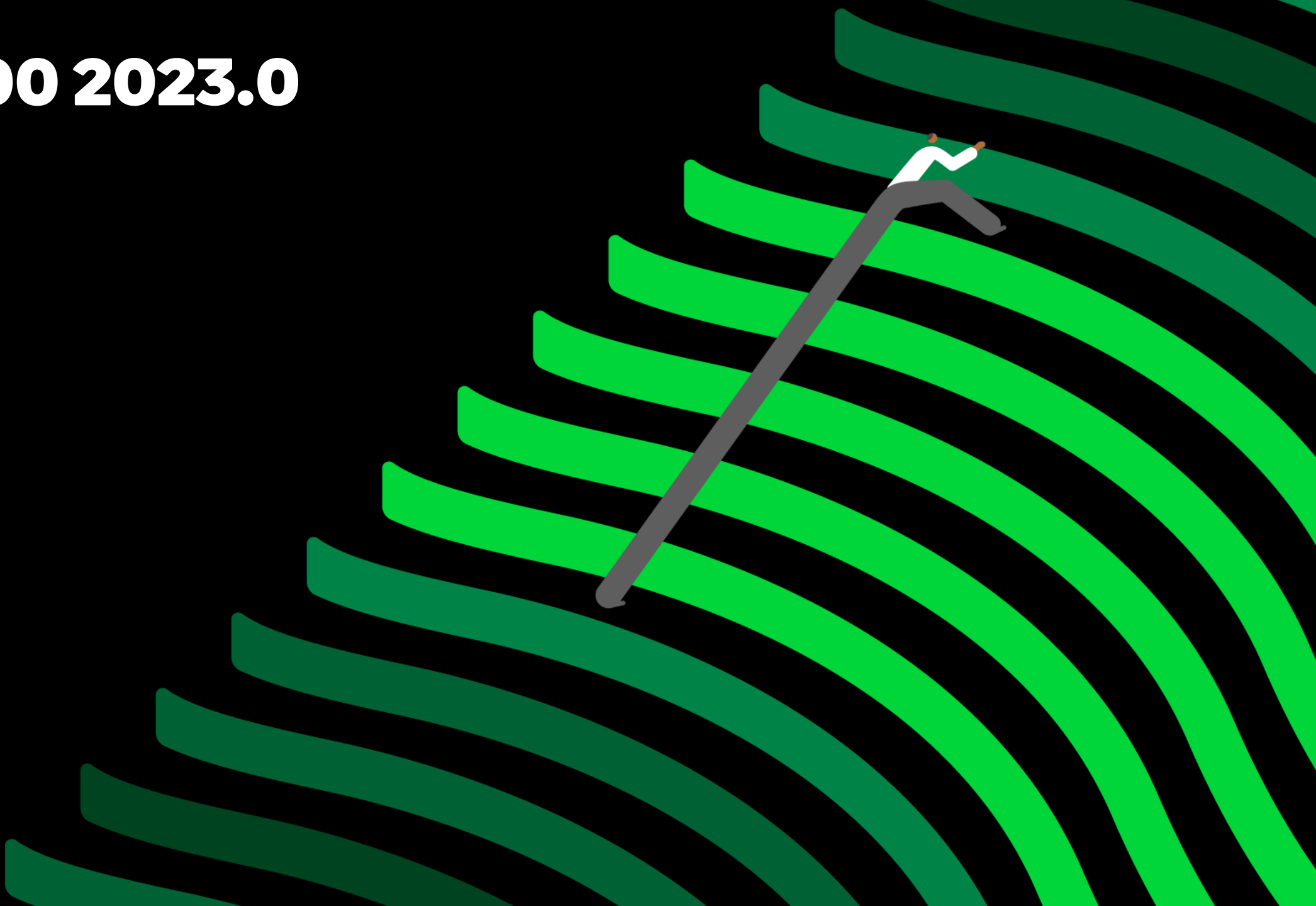
- Transport Layer Security (TLS) is a protocol for securely transmitting data across the internet. TLS 1.1 was replaced by TLS 1.2 in 2008, providing significantly increased security.
- Sage 100 uses TLS to communicate to our servers, including subscription checks.
- If you are not on at least 2018.10, 2019.4, 2020.1 or a more current version, you may experience warning messages and product disruptions.

Payroll and 1099 compatibility

- Effective with the December 2023 release of Sage 100 Payroll 2.24, payroll customers and those utilizing 1099 functionality must upgrade to install Payroll 2.24 and up – if they are running Sage 100 versions 2018 and 2019.
- One of the following versions of Sage 100 will be required:
 - 2023.x
 - 2022.x
 - 2021.x
 - 2020.x
- A failure of the Payroll update installation and the inability to generate 1099's, W-2's or associated tax reporting documents will be experienced if no action is taken.

 **Note:** Talk with your Sage business partner regarding software update and upgrade options.

Sage 100 2023.0



iShip Tracking replacement

- New solution does not rely on any tracking aggregators (like iShip)
- Code will now determine the carrier based on the tracking number structure, and launch the tracker associated with that number
- Now supports UPS, USPS, Fedex, DHL and OnTrac. If code is unrecognized, defaults to Google
- No action necessary from partners or customers

Tracking Example 1

Shipping History Inquiry (ABC) 2/9/2023

Shipping/Invoice No. 0100049

Ship Date 5/1/2024

Order No. 0000158

Tracking...

1. Shipping

2. Lines

Customer No. 02-AUTOCRAutocraft Accessories

Terms Code 01Net 30 Days

Customer PO

Confirm To Max Johnson

E-mail Address

Comment

Warehouse 001EA

FOB

Ship Via UPS BLUE

Ship Zone

Ship To Address

Ship To

Name Autocraft Ad

Country

Address 310 Fernand

ZIP/Postal Code 92661-0002

City Newport Be

Summary Package Tracking Inquiry

Pkg	Tracking Number	Comment
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Tracking Number 9405511108070480291508



9405511108070480291508

[Edit Name](#)

9405511108070480291508

Delivered:
IRVING, TX 75064 on February
26, 2023 at 12:37 am

Additional Information

Your item has been delivered and is available at a PO Box at 12:37 am on February 26, 2023 in IRVING, TX 75064.

[Get Text and Email Updates](#)

Tracking History

February 26, 2023
12:37 am
Delivered, PO Box,
IRVING, TX 75064

February 25, 2023
12:06 pm
Available for Pickup,
IRVING, TX 75064

Installation changes

The image displays four overlapping windows from the Sage 100 2023 installation wizard, illustrating the changes in the installation process.

- Sage 100 2023 (Main Menu):** Shows the Sage logo and navigation links: Documentation, **Install Sage 100 2023** (highlighted), and Productivity Applications. At the bottom, it includes Support and sage100erp.com.
- Select the architecture to use for Sage 100:** This window allows choosing between **Stand-Alone or LAN** (selected) and **Client/Server**. The Stand-Alone or LAN option is described as a common server configuration.
- Select the database to use for Sage 100:** This window allows choosing between **Providex** (selected) and **Microsoft SQL Server**. The Providex option is described as using the native Sage 100 database stored directly on the server.
- Sage 100 Integration Engine Service:** This window prompts for account information. It includes fields for User Name, Password, and Port ID (set to 8888). A note states: "The user account must have the appropriate permissions for accessing both Sage 100 data and the CRM Server SQL database over the network. If you are installing on a Windows domain network, the user name must include the Windows domain name hosting the account." Navigation buttons at the bottom include Skip, <Back, Next>, and Cancel.

Production Management enhancements

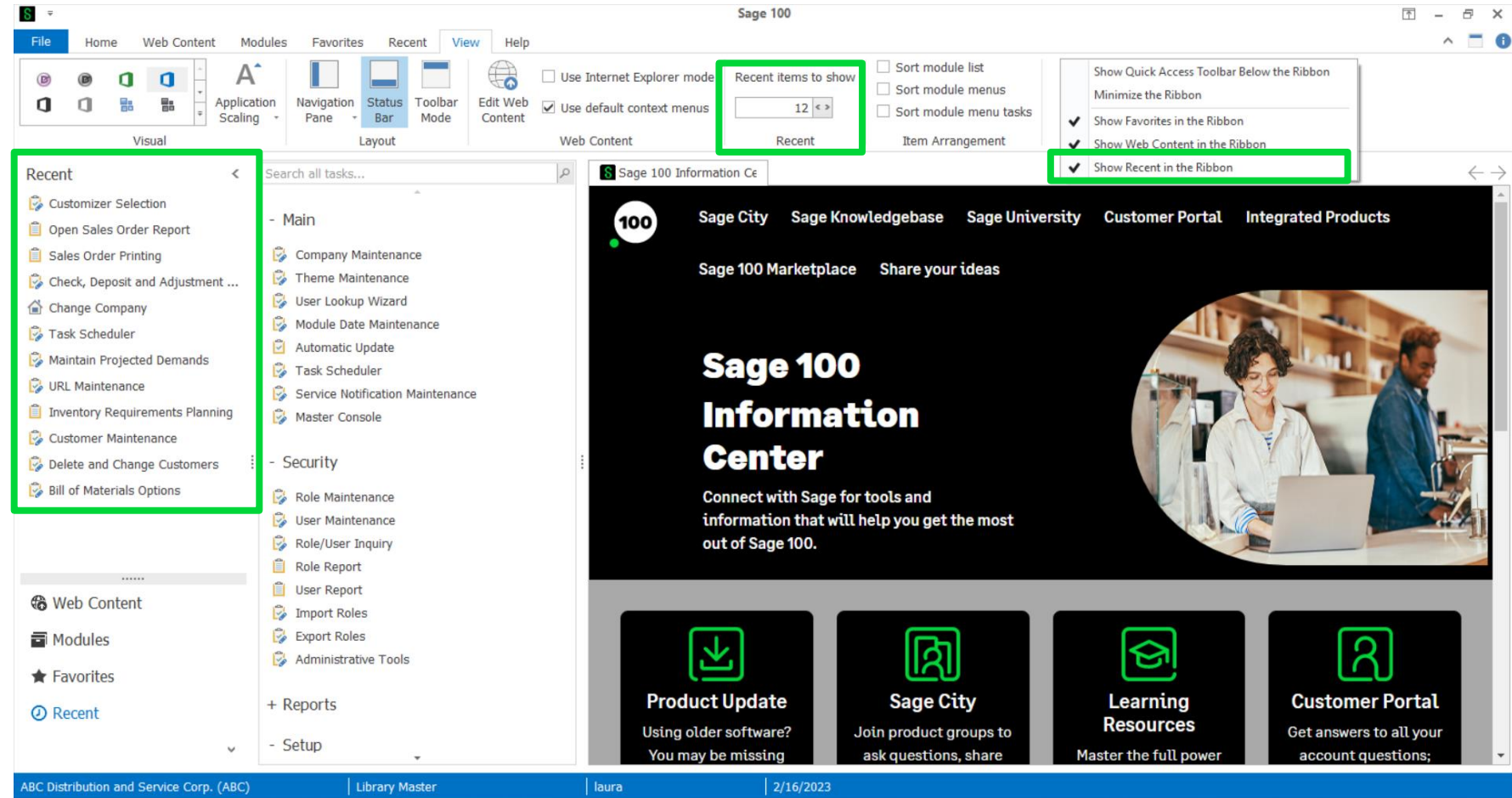
- Enhanced Scheduling
- Explode Bill Subassemblies
- Work Ticket Transaction Entry – Material Issue Workflow Improvement
- Work Ticket Template Maintenance – Allow Entry of Scrap Percentage for Materials
- Purge Work Ticket History – Selections for work ticket number, release date and close date
- Work Center Capacity Inquiry - review capacity information (commitments against work centers) in three formats: daily, weekly, and detail.
- Scheduled Capacity Report - print capacity information (commitments against work centers) for a range of work centers in three formats: daily, weekly, and detail.
- New security option to add activity codes and work centers on-the-fly
- Labor Entry – Payroll Check Register will use G/L account of department entered if different from employee's department
- Work Order Module is NOT available in 2023

Inventory Requirements Planning (IRP)

- Setup options have been added for IRP Generation
- IRP Inquiry – View purchase and production information for an item based on last IRP Generation
- Maintain Projected Demands – If IRP Generation is in progress, a warning message will display
- Schedule IRP Generation through Task Scheduler
- Projected Demands Report
 - Fiscal/Calendar Year
 - Consolidate Customers check box
- New Reports
 - Inventory Requirements Planning Report
 - Action By Vendor Report
 - Work Ticket and Sales Order Demand

Launcher & Information Center changes

- NEW Recent Tab
- Expanded Tooltips
- Active Tab Persists
- Dynamic Info center



A/P Select Invoices for Payment

The image shows two windows from the Sage software. The left window, titled 'Invoice Payment Selection (PMZ) 2/8/2023', contains selection criteria. A green box highlights the 'Select...' button, with a green arrow pointing to the right window. The right window, titled 'Select Invoices for Payment', displays a grid of invoices. A green box highlights the 'Include' column, where all five invoices have their checkboxes checked. The 'Total Selected' at the bottom right of the right window is 10,807.91.

Invoice Payment Selection (PMZ) 2/8/2023

Select By: Invoice Due Date Only
Invoice Due Date: 5/31/2025
Always Take Discounts: ☐
Discount Due Date:

Include Electronic Payment Vendors: Yes
Pay Electronic Payment Vendors by Check: ☐

Select Field	Operand	Value
Vendor Number	All	
Discount Due Date	All	
Sort Field	All	
Vendor's Balance Due	All	

Select Invoices for Payment

Vendor No.	Vendor Name	Invoice No.	Include	Invoice Date	Due Date	Disc. Date	Past Disc.	Invoice Amount	Comment
COMROO	COMPUTER ROOM S	0971	<input checked="" type="checkbox"/>	4/8/2025	4/8/2025		Yes	1,860.32	DISKETTES/RIBBONS
COMROO	COMPUTER ROOM S	1001	<input checked="" type="checkbox"/>	5/2/2025	5/2/2025		Yes	123.56	
COMSUP	COMPUTER SUPPLY	AC-002342	<input checked="" type="checkbox"/>	4/8/2025	4/8/2025		Yes	2,658.48	
MAKE	MAKE ITEM VENDOR	7000921	<input checked="" type="checkbox"/>	5/6/2025	5/6/2025		Yes	2,888.32	
MINCOM	MINCO COMPUTERS	250004018	<input checked="" type="checkbox"/>	4/8/2025	4/8/2025		Yes	3,277.23	MONITORS

Total Selected: 10,807.91

- Changed from list view to grid
- Easier and faster selection with Include check box

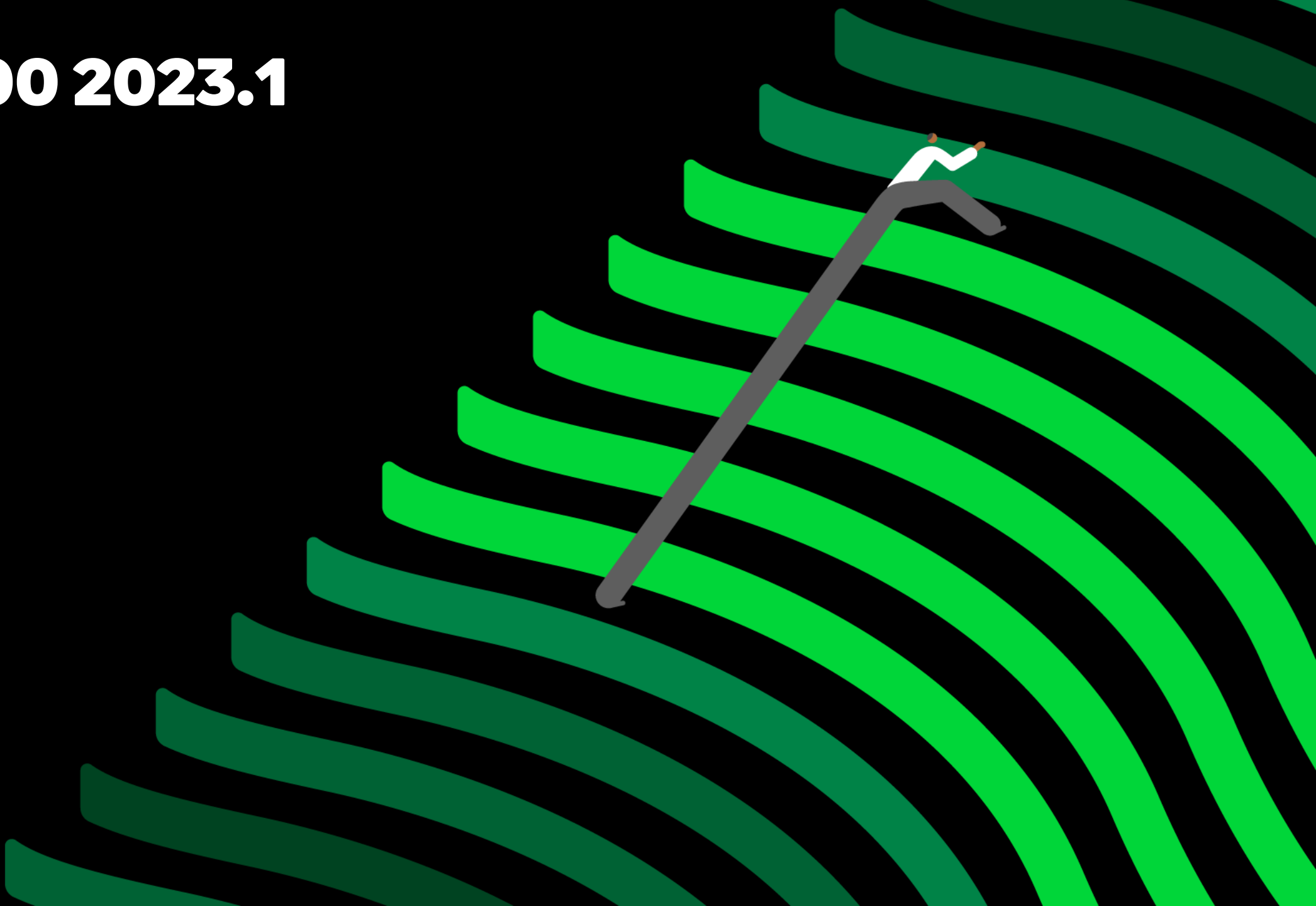
Additional updates

- Mask & permission protect 1099 and ACH data in AP
- Hide inactive warehouses or zero quantity lot/serial items
- Allow selection of serial numbers by range
- Remove inactive inventory items
- Years to Retain History Option – Default is 9 years for new companies (previously 5 years)
- New Image Viewer in Item Maint and Misc Item Maint – Delete image based on security option
- User Maintenance – Option to Suppress Expired Messages
- Retain Last Path in DFDM (Data File Display & Maintenance)
- Sage Branding

Features no longer Subscription only

- Paperless Office Journal and Register Viewer
- Task Scheduler – Email reports printed from a task scheduler job
- DFDM Enhancements – Select and filter a subset of fields from a table
- Map Service – Option in User Maintenance to select Google Maps, Bing Maps or Mapquest

Sage 100 2023.1



Sage 100 2023.1 Features

- Lot/Serial Distribution – Next Lot Number Button

Lot/Serial Number Distribution

Item Code: CPU86-89088-16 80486 CHIP 50 MHZ

Unit of Measure: EACH

Lot Number	Available	Distribute
1	.00	.00

Distribution Balance: 100.00

OK Cancel

Item Maintenance (PMZ) 7/27/2023

Item Code: CPU86-89088-16

Description: 80486 CHIP 50 MHZ

1. Main 2. Additional 3. Quantity 4. History

Confirm Cost Increase in Receipt of Goods ☐

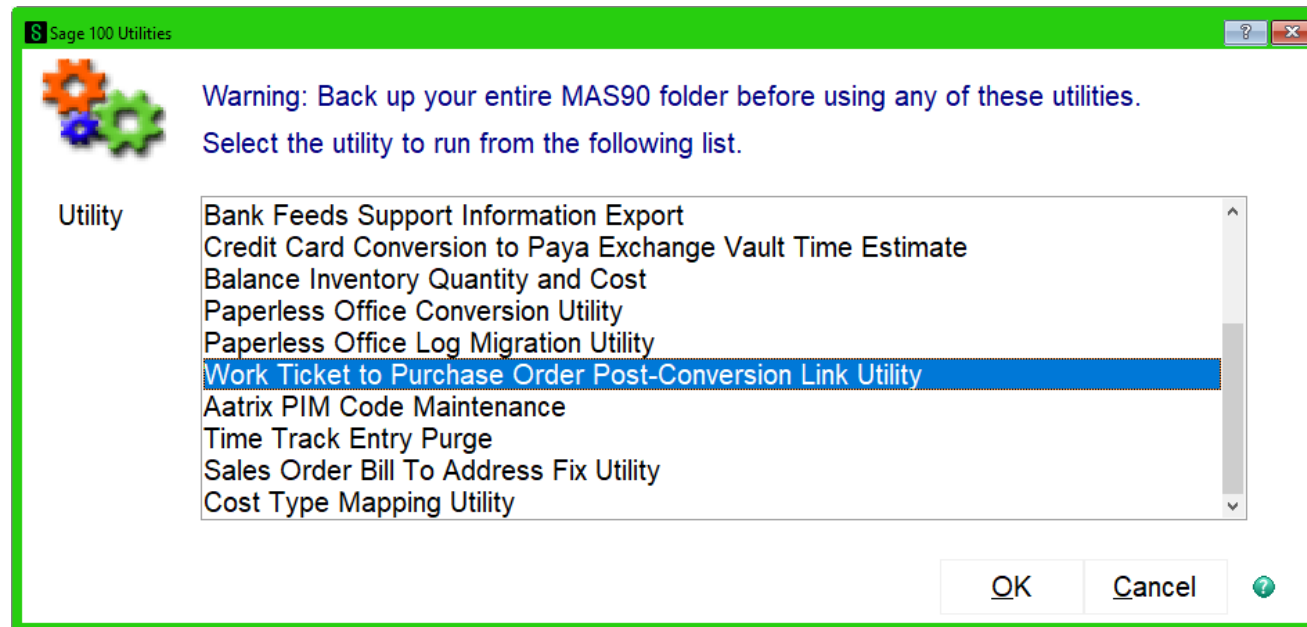
Print Receipt Labels Yes

Explode Kit Items Prompt

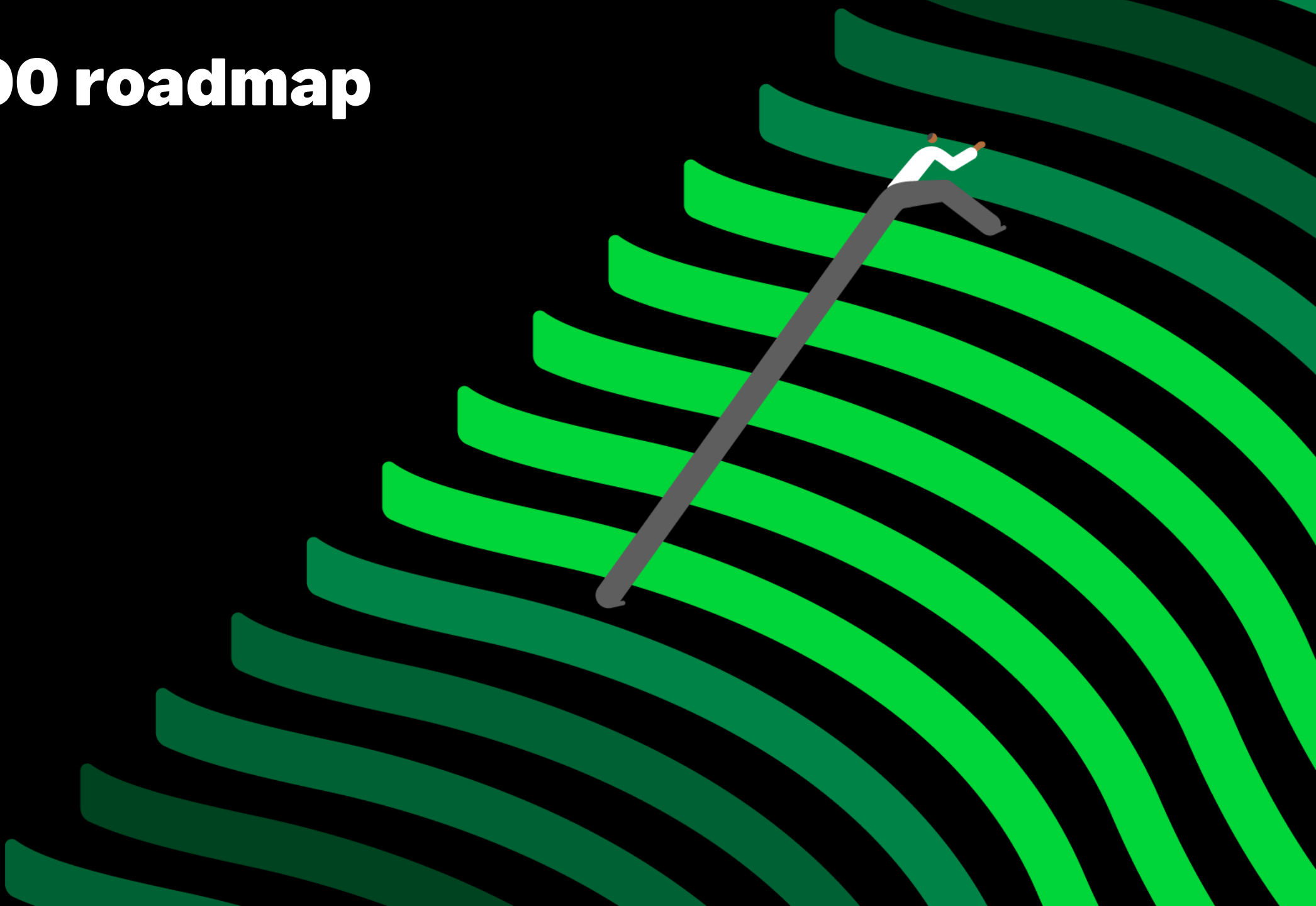
Next Lot/Serial Number 100101

Sage 100 2023.1 Features

- Work Ticket to Purchase Order Post-Conversion Link Utility - Utility will re-link the purchase order detail lines to work ticket material lines after conversion so the customer does not have to do this manually.



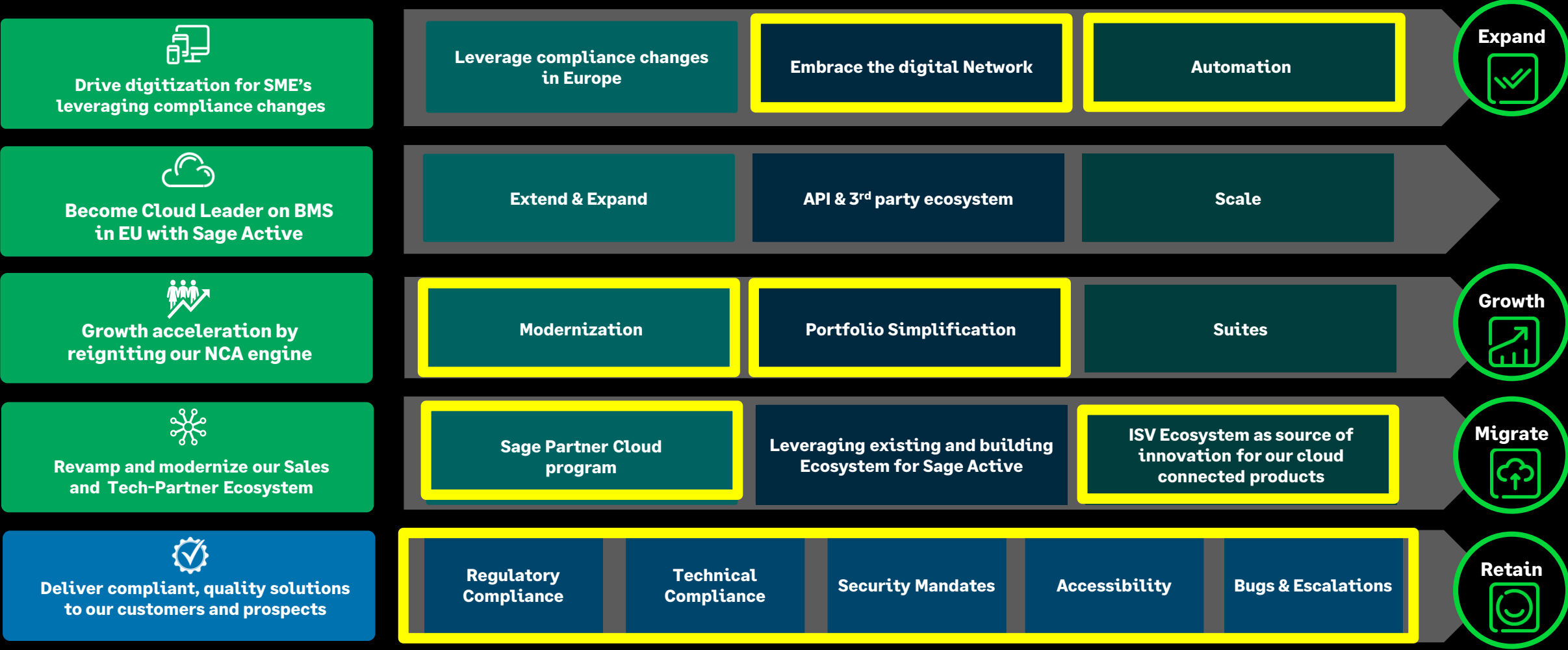
Sage 100 roadmap



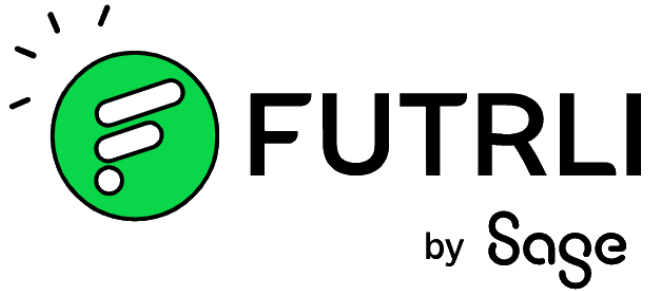
Sage 100 release schedule

Release Date	Product Version
April 2023	v2023.0 (7.2) – Note: V2023.0.1 available
	v2022 PU3 (7.1.3)
	v2021 PU6 (7.0.6)
	Payroll v2.23.1
July 2023	v2023 PU1 (7.2.1)
	v2023 PU1 (7.2.1) Image for SPC
	v2022 PU4 (7.1.4)
	Payroll v2.23.2
October 2023	v2023 PU2 (7.2.2)
	v2022 PU5 (7.1.5)
	Payroll v2.23.3
December 2023	Payroll 2.24.0
	IRD for A/P for 2023, 2022, 2021
April 2024	v2024.0 (7.3)
	v2023 PU3 (7.2.3)
	v2022 PU6 (7.1.6)
July 2024	v2024 PU1 (7.3.1)
	v2024 PU1 (7.3.1) image for SPC
	v2023 PU4 (7.2.4)
	Payroll 2.24.1

BMS Product priorities – Sage 100



Upcoming products & features on Sage Network



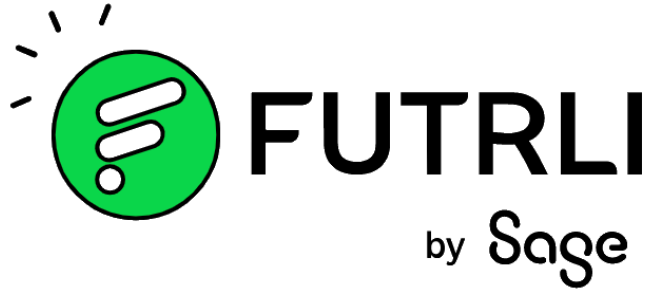
Spherics



Brightpearl



Upcoming products & features on Sage Network



Spherics



Sage 100 Roadmap

FY 2024

Technical & Security

- Defect resolution & maintenance of line
- 64-bit default

Compliance

- US Payroll tax rate updates
- Payroll tax engine updates

Cloud & Digital Network

- Sage Network integration (phase 1 – Q2)
- Update bank feeds
- SQL for Sage Provisioning Portal (image option)
- Support of CRM in SPP
- Launch Sage 100 2024.1 in SPP
- Sage HR integration (initiation Q4)

Customer Experience & Modernization

- Usability enhancements
 - Quick completion of Purchase Orders
 - Delete/merge warehouse
 - Full product search, include auto-complete
 - Improved audit trail (customers, vendors)
 - Other TBD (partner/customer feedback, NPS)
- Refresh Demo Data
- Complete license simplification journey

FY 2025

- Security enhancements – Accelerate & Elevate
- Sage ID (two factor authentication)
- Defect resolution & maintenance of line

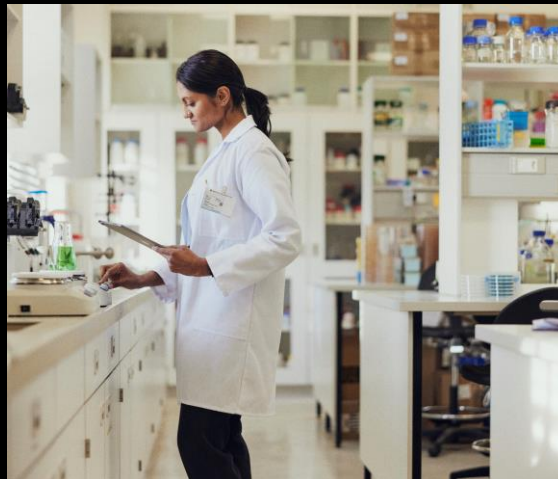
- US Payroll tax rate updates
- Payroll tax engine updates

- Sage Network integration (phase 2 - TBD)
- Launch Sage 100 2025.1 in SPP
- Sage Inventory Manager Integration
- Futrli integration (initiation)
- Sage HR integration delivery

- Usability enhancements
 - Native alerts (phase 1)
 - Lot/Serial number & AR Invoice number expansion
 - Paperless Office consolidated emails
 - Quotes
 - Intercompany transactions (phase 1)
 - Other TBD (partner/customer feedback, NPS)
- CRM integration improvements

Sage 100 in North America

- Sage 100 is critical to Sage, our success and our growth
- We are committed to our customers, partners and markets
- We continue to invest in technology and other innovations to drive growth
- We want all of you to be part of this exciting journey



Thank You

