



# Sage 300 ERP

Applications Brochure

See your business in a new way.

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Realise the future of your business today.



## See your business in a new way. Realise the future of your business today.


To stay competitive in today's global economy, you need more than simple financial accountability and compliance. Sage 300 ERP contains the power and tools to help you see your business in a new way so you can improve productivity, envision success, and accelerate growth. It's time to turn your business dreams into reality with the real-time visibility, collaboration, agility, and innovation you need to succeed.

### Designed for Growth

If your company wants to compete in today's fastpaced business arena, you need to control costs in order to maximise profitability. Sage 300 ERP is a comprehensive, flexible business management solution designed to keep your total cost of ownership low by supporting multiple technologies, databases and operating systems. Available in multiple editions, Sage 300 ERP gives you the opportunity to add users and adopt greater functionality as your business grows and offers built-in support for multiple languages and multicurrency transactions, so your business can comfortably reach around the globe.

## One Solution Provides a 360° View of Your Business

Our rich history of innovation and growth has enabled us to build a portfolio of products and services widely recognised for ease of use and low total cost of ownership. Sage 300 ERP connects your entire operation with a single, integrated solution that provides you with greater visibility, making it easier to share information and communicate. Mid-market businesses across the globe use Sage 300 ERP solutions to unlock potential, reduce costs and improve performance.

A photograph of two women sitting at a desk in an office. The woman on the left has dark hair and is wearing a black top. The woman on the right has blonde hair and is wearing a light blue shirt. They are both looking down at a large stack of papers on the desk. The background is bright and out of focus, suggesting a window with natural light.

“ Sage 300 ERP will provide the means for Big Concerts to improve business efficiency and cost control over many different projects that are running simultaneously, in an environment where all our key players are not always under one roof. ”

— Justin Van Wyk,  
CFO , Big Concerts



# Freedom of Choice Helps Control Total Cost of Ownership

We believe your business management solution should support your business strategy—not hinder it or force you to buy what you don't need. That's why Sage 300 ERP offers you the flexibility to build the best possible solution for your business by giving you the freedom to select the edition (Standard, Advanced, or Premium), database, modules, deployment method and payment options that keep your total cost of ownership as low as possible.

## Editions

Sage 300 ERP helps you slash the time and cost associated with complex processes and redirect those resources toward growing your business. Whether you choose the Standard, Advanced, or Premium Edition, you can select from any of the Sage 300 ERP applications to create a custom-fit solution to support your business management requirements. Use the chart below to determine which Edition is right for your company.

Edition Differences	Standard Edition	Advanced Edition	Premium Edition
<b>General Features</b>			
Number of Companies Allowed	5	Unlimited	Unlimited
Number of Users	Up to 10	Up to 20	Unlimited
<b>General Ledger Module Differences</b>			
Account Rollup	Included	Included	Included
Number of Account Segments	3	4	10
Number of Account Structures	3	4	Unlimited
Number of Budgets	2	3	5
Number of Years of History	7	7	99
<b>Purchase Order Module Differences</b>			
Vendor Contract Cost	Not Available	Included	Included
<b>Inventory Control Module Differences</b>			
Customer Item Numbers	Not Available	Not Available	Included
Below Cost or Sales Margin Price Checks	Not Available	Not Available	Included
Number of Item Segments	4	10	10
Price by a Cost Plus a Percentage or Amount	Not Available	Not Available	Included
Price by Unit of Measure	Not Available	Not Available	Included
Price by Weight or Quantity	Not Available	Not Available	Included

Easily adopt new functionality without retraining your staff, as each Edition is built using the same technology and intuitive workflow.

## Superior Architecture

As your business looks for cost-effective ways to meet your bottom line, Sage 300 ERP provides the foundation required to keep pace with ever-changing technology without giving up the functionality you need to compete in today's marketplace. Accelerate the growth of your company with the scalable, open architecture of Sage 300 ERP. No matter what Edition you choose, you have the option to utilise a Microsoft SQL, Pervasive.SQL, or Oracle database, as well as multiple server and client operating systems and customisation tools.

## Global Reach—Local Touch

An international presence is not only important for modern enterprises, it is essential. Empower your organisation with the tools required to easily maintain international currency standards. Sage 300 ERP provides you the power you need to easily support multiple entities (intercompany and consolidations), languages (by user), currencies (recognised gain/loss or unrealised gain/loss accounting methods), and so much more.

“ Of all its benefits, Sage 300 ERP’s financial accuracy is the most impressive. A Sage 300 ERP user since 2004, Motorsport SA can easily process a large volume of transactions per month and, as a result, accuracy is of utmost importance. Using Sage 300 ERP ensures that our financial data is spot-on each month.”

– Michelle van Tonder, Finance Manager, Motorsport SA

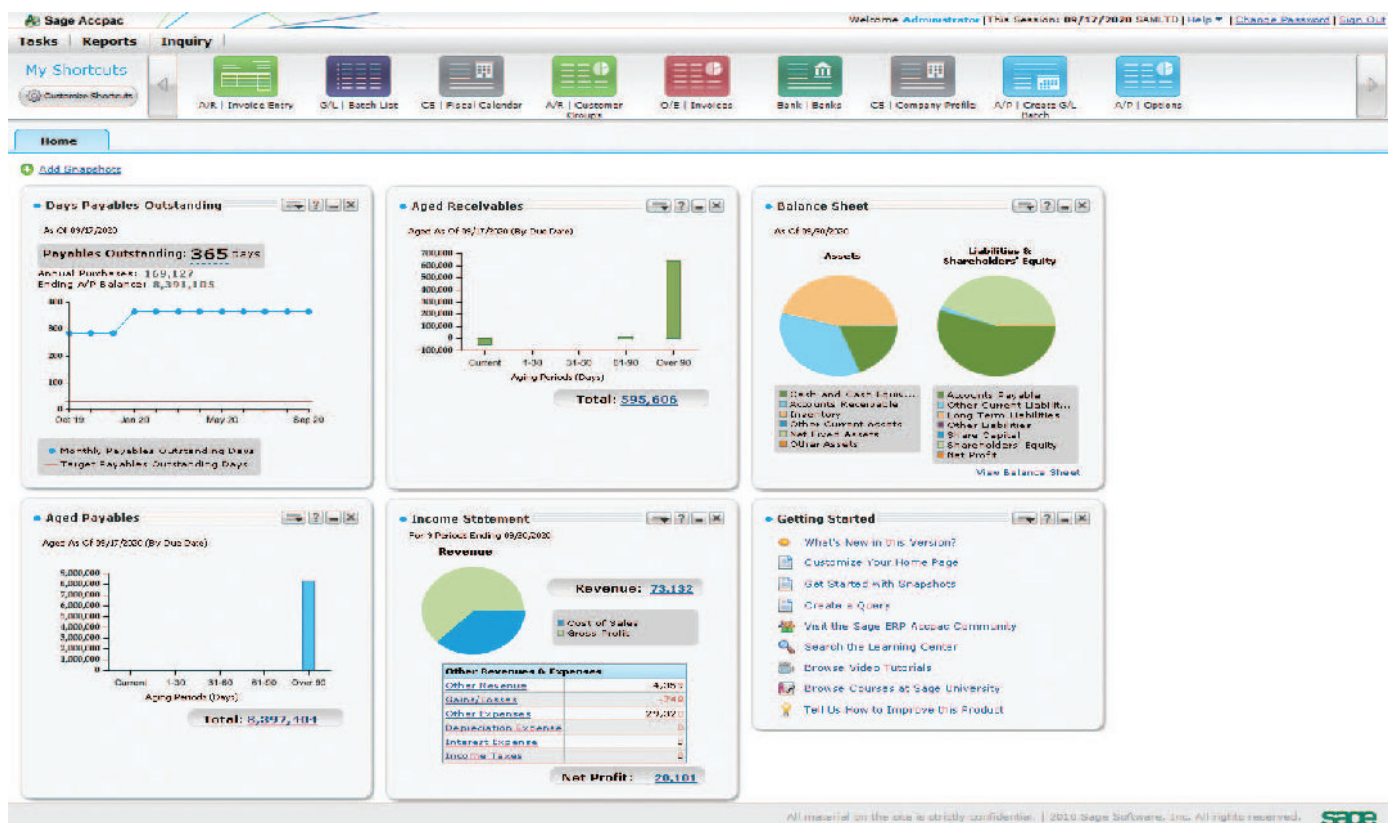


# Comprehensive Accounting/ Finance Applications

## Sage 300 ERP Core Accounting

- General Ledger
- Accounts Payable
- Accounts Receivable
- System Manager with Bank
- Reconciliation for Cash Management
- Comprehensive Cash Management and Reconciliation, Powered by PereSoft
- Multicurrency Management
- Fixed Assets Management
- Advanced Budgeting and Forecasting, Powered by idu
- Workflow Management, Powered by AccTech Systems
- Purchasing Workflow, Powered by Pacific Technologies
- Workflow Management, Powered by Flowcentric

The powerful financial tools of Sage 300 ERP help you confidently manage your company's complex finances and remain compliant with government regulations such as GAAP or IFRS. Features include full multicurrency capability, powerful bank reconciliation and tax reporting, flexible transaction processing options, powerful management of fiscal periods and informative dashboards for analytical reporting. Sage 300 ERP Core Accounting modules help businesses succeed by accurately presenting valuable financial information in a clear, understandable format.



Financial Snapshots increase insight with secure access of key performance indicators (KPIs), with drill-down capabilities to underlying reports.



## General Ledger

Track and analyse your financial data to optimise your productivity using tools and accounting structures that are tailored to your business needs. Flexibility includes user-defined chart of accounts structure, account types, journals, controls for processing and balancing options, batch control totals, earnings controls and much more. You can even control the amount of detail the system maintains. What's more, month-end and year-end procedures are a snap. Since Sage 300 ERP automatically updates all balances and history every time you post, all you need to do is make the adjusting entries. Plus, you'll be able to perform fast data queries and then drill down to the source for more details. With its built-in financial report writer, you can maintain a variety of sophisticated reports so decisions are always based on insight gained from in-depth analysis.

## Accounts Payable

Easily manage your cash flow, track and predict purchases, and analyse expenditures and product purchases, while maintaining good vendor relationships. Sage 300 ERP Accounts Payable provides quick access to the type of comprehensive data that allows you to analyse the past monitor the present, and plan for the future - helping you make the right decisions today to gain a competitive edge. Accounts Payable offers several options to save time and reduce administrative costs by automating vendor-related tasks and simplifying voucher entry. It also accommodates multiple vendor addresses, multiyear history retention, automatic payment selection, cheque printing and more.

## Accounts Receivable

Effectively manage your cash flow, track and predict customer buying patterns, analyse sales and provide a superior level of customer service. Sage 300 ERP allows you to gain complete control of your receivables and invoicing processes and leverage automatic calculations that avoid errors and eliminate duplicate data entry. Consolidate customer receivables, statements, reporting and credit checking across national accounts. Accounts Receivable offers prompt access to the type of comprehensive data you need to analyse the past, monitor the present and plan for the future - giving you valuable insights to make the right decisions.

## System Manager–Bank Reconciliation

To make effective decisions in today's fast-moving business climate, you need accurate, up-to-date information on your company's cash position, as well as reliable projections of future cash balances. The System Manager module in Sage 300 ERP comes equipped with comprehensive Bank Reconciliation functionality, which enables you to quickly and accurately reconcile all of your bank accounts, as well as perform bank transactions with pinpoint accuracy. Bank Reconciliation is built into the System Manager, providing seamless connectivity to all submodules to help you better track your cash position, so you can make insightful and timely decisions for your business.



## Cash Management and Reconciliation, Powered by PereSoft

A comprehensive cash management solution, Cashbook Powered by PereSoft is a streamlined business tool that maintains your bank account and organises your cash flow. Automate your bank reconciliation with RecXpress, Powered by PereSoft.

## Advanced Budgeting and Forecasting, Powered by idu

Use a real-time system that budget owners access via the web, taking budgets from start to finish in quick time. The financial budgeting module powered by idu is easy to use and understand, which helps build budget buy-in and make cost centre managers accountable for the numbers they produce.

## Fixed Assets, Powered by Norming Software

A powerful and complete Asset Management solution, which can be used to process all the asset accounting transactions including acquisition, depreciation, adjustment, disposal, merge and split, as well as facilitate the asset maintenance and lease management.

## Workflow Management, Powered by AccTech Systems

Use the tools provided within eWorkflow.NET, Powered by AccTech Systems to monitor and control the procedures within your business processes. Increase your business efficiency in procedure-driven processes, enabling you to manage procurement, stock and sales. This real-time workflow solution provides full tracking of every procedure from source to end - it bridges the gap between the back office and the operations side of the business, enforcing transparency and compliance throughout the organisation.

## Purchasing Workflow, Powered by Pacific Technology Solutions (PTS)

Purchasing Workflow, Powered by PTS provides a sophisticated workflow engine with configurable rules, routing and approval functions. An easy-to-use requisition interface creates documents that are controlled through the workflow process. It enables organisations to tightly control and manage their procurement system.

## Workflow Management, Powered by Flowcentric

The solution, FloPac, enables companies to optimise their investment in Sage ERP software by providing workflow enabled processes to automate and control business processes not inherently handled by Sage ERP.

Integrated with Sage ERP's, the solution makes businesses run with optimum efficiency. FloPac is a valuable and logical solution for any company utilising Sage ERP. Boosted with FloPac, Sage ERP becomes an integrated solution for managing all aspects of a business, from everyday tasks like travel requests, stationery orders, and capital expenditure, to implementing and monitoring enterprise-wide processes for improving internal communication and collaboration; ensuring adherence with internal and external service level agreements; improving response to customer issues, and enhancing service quality. These processes can be effectively monitored in real-time to identify issues and bottlenecks, and track performance. FloPac also helps prevent costly mishaps, indiscretions and delays through enforced segregation of duties, strict legislative conformance, and by enforcing employee compliance with business rules, policies and procedures.



# Multicompany and Global Operations Management

## Sage 300 ERP Multicompany and Global Operations

- Multiple Language and Localisation Support
- Multi-Currency Manager
- G/L Consolidations
- Inter-Company Transactions

Easily manage global commerce across multiple companies or subsidiaries. No matter where you do business, maximise your international insight and exchange information worldwide with Sage 300 ERP Multicompany and Global Operations Management. Enhanced visibility into business metrics provides critical information at your fingertips for easier, smarter daily and long-term planning, providing the vision you need to respond to business trends while minimising risk and maximising the effectiveness of your decisions. Set up multiple companies in one or more databases, run processes, close books and report results by company or in a consolidated company.

### Multiple Language and Localisation Support

When operating in different countries, you need the ability to support the local language and accounting standards such as reconciliation and taxation. Sage 300 ERP ships with five language overlays that allow you to configure the language of the software for individual users. You receive English, Spanish, French and Simplified and Traditional Chinese out of the box. In addition, due to the configuration flexibility, the software allows you to provide local language, tax and accounting rules through seamless default settings and templates. When it comes to financial reporting, multinational companies face a two-prong challenge. Each division or subsidiary must pay its employees, manage accounts receivable and accounts payable and pay taxes in the local currency using local accounting standards. Yet financial data from subsidiaries also must be consolidated into the ledger of record in the monetary unit and accounting standards of the country in which the corporation as a whole is operated. Exchange rates between currencies change constantly and the ledger of record must reflect these changes and ensure that all entries balance. With the multinational capabilities of Sage 300 ERP and the Multi-Currency module, you easily can comply with the international currency standard.

### Multi-Currency Manager

Businesses that want to succeed in the world market need core financial capabilities with the flexibility and power to handle the complexities of multicurrency enterprise. The Multicurrency module in Sage 300 ERP provides robust multicurrency and analysis capabilities so you can optimise your international opportunities. You can maintain an unlimited number of currencies and exchange rate schedules, update exchange rates daily and post realised and unrealised gains or losses due to currency fluctuations. If you have subsidiaries outside the U.S. or your company is planning to expand globally, this application will help you to address the currency issues inherent in a worldwide market. Multi-Currency Manager can help simplify your transactions and provide insight into how the international arena is impacting your bottom line. The Multi-Currency module uses international principles for accounting and reporting with adherence to IFRS, FASB-52, and IAS 125 guidelines.

### G/L Consolidations

Sage 300 ERP G/L Consolidations has built-in flexibility to meet the needs of companies requiring a sophisticated tool to consolidate multiple general ledgers. G/L Consolidations provides a feature set that allows your company to define the level of detail to consolidate and provides a comprehensive audit trail. G/L Consolidations is designed so that information can be easily transferred to other locations, allowing subsidiaries and holding companies to run without being on the same network.

### Inter-Company Transactions

Simplify the recording of your intercompany transactions to prevent data-entry errors. With the Sage 300 ERP Inter-Company module you can save time reconciling multiple companies when a subsidiary is involved in a transaction with headquarters or another subsidiary. Intercompany transactions include the declaration and payment of dividends, the purchase and sale of assets and borrowing and lending. The intercompany transaction must be recognised in the financial records of both units of the entity as if it were a transaction with an unrelated party. Sage 300 ERP allows you to enter transactions that affect more than one company in one account and then automatically distribute those transactions across companies, performing required currency translations and creating the necessary journal entry as soon as transactions are posted, balancing the books of both companies.

# Communicate, Collaborate and Compete with CRM

## Sage 300 ERP Customer Relationship Management

- SageCRM
- SageCRM Sales Management
- SageCRM Marketing Management
- SageCRM Customer Service Management

### SageCRM

SageCRM is a comprehensive customer relationship management (CRM) solution for businesses seeking a low-cost, low-risk option. With seamless integration to Sage 300 ERP, SageCRM lets you view critical customer data from the back office, providing your staff with a complete view of customer interactions. By integrating your sales, marketing, and customer service functions, SageCRM makes it easier for everyone inside your company to work together and share critical information. Sales, marketing and customer service teams gain the tools they need to find new customers, close sales more quickly and build lasting, more profitable relationships.

The screenshot displays the SageCRM web interface. At the top, there is a search bar and navigation tabs including 'Recent', 'Welcome', 'Dashboard', 'Calendar', 'Contacts', 'Leads', 'Outbound Call Lists', 'Opportunities', 'Forecasts', 'Cases', 'Solutions', 'Shared Documents', 'Preferences', 'Groups', 'Collections', and 'Contracts'. A sidebar on the left contains a 'Main Menu' with categories like Administration, TechnoTropic, Find, New, My CRM, Team CRM, Reports, and Marketing. The main content area features an 'Aging' report with a 'Last Synchronization: Today 1:51 PM' and a table of aging buckets. Below this is a legend for invoice counts: 1 - 30 (404), 31 - 60 (8), 61 - 90 (472), and Over 90 (814). The 'Invoices' table below shows columns for Account, Customer, Phone/Email, Invoice Number, Dates, Amounts, and Last Call Date. The table lists four invoices for 'Sample Company, Inc.' with details on invoice numbers, dates, and amounts.

Age As Of:	1	30	Amount
09/30/2019	31	60	0
Cutoff By: Dec. Date	61	90	421.97
Cutoff Dates: 09/30/2019	Over	90	813.95

Account Database / Account Customer Number / Company Name / BILL TO/SHIP TO	Phone / Email	Invoice Number / Inv. Date / INVOICE DATE / Due Date	INVT. AMOUNT / INVT. DEDUCTIBLE / AMOUNT DUE	Last Call Date / Last Call Note	Add Call Note	Add Follow Up Task
Sample Company, Inc. - FY2020 - SAH156 / 1200 / Mr. Ronald Black - SAH156 / Black	/ ronaldblack99@hotmail.com	IN000000000000119 / 09/04/2019 / 09/04/2019 / 10/01/2019	1,426.05 / 270 / 226.24	12/09/2010 11:24 AM / Sorry the office dog ate the checks. And we are out of printer ink and ink is on order.		
Sample Company, Inc. - FY2020 - SAH156 / 1200 / Mr. Ronald Black - SAH156 / Black	/ ronaldblack99@hotmail.com	IN000000000000223 / 10/12/2019 / 10/12/2019 / 10/25/2019	994.32 / 249 / 94.40	/		
Sample Company, Inc. - FY2020 - SAH156 / 1200 / Mr. Ronald Black - SAH156 / Black	/ ronaldblack99@hotmail.com	IN000000000000062 / 06/25/2010 / 06/25/2010 / 07/05/2010	363.13 / 348 / 363.13	/		
Sample Company, Inc. - FY2020 - SAH156 / 1200 / Mr. Ronald Black - SAH156 / Black	/ ronaldblack99@hotmail.com	IN000000000000064 / 09/29/2010 / 09/29/2010 / 10/05/2010	129.88 / 3396 / 129.88	/		

Sage 300 ERP ships with SageCRM and provides a single user license. Get better visibility into your cash flow with the SageCRM Collections Manager.

## SageCRM Sales Management

With SageCRM Sales Force Automation, real-time sales opportunity analysis is provided instantly. SageCRM provides a snapshot of all opportunities within the sales pipeline, allowing sales teams to effectively analyse and manage deals at every stage. The sales process is automated, streamlining your business and enabling better business management. The most up-to-date and complete customer information is instantly and easily retrievable within SageCRM through the interactive dashboard, helping users to have a better view of their customer at all times—creating a true customercentric environment.

## SageCRM Marketing Management

SageCRM is an essential tool for marketers to plan, execute and audit highly targeted marketing campaigns. Sage ERP integration gives marketers the ability to create campaigns based on the financial profile, order information and purchase history of customers. This information can assist marketing managers in generating accurate ROI calculations for better marketing measurements. Information can also be displayed on the interactive dashboard, providing users with an instant view of customers.

## SageCRM Customer Service Management

Providing quality customer care and maintaining satisfied customers is a challenge for every business. Sage ERP integration with SageCRM gives customer service staff access to all customer information for a complete view of every customer interaction. Integrated Sage ERP data can be displayed directly on the interactive dashboard for convenient access and analysis from a single workspace.

“ Sage CRM 200 will help us track various synergies throughout our sales and marketing processes. We are finally able to link the relationships between our sales and our marketing efforts directed at clients, allowing us to pinpoint what works and what doesn't. Another great benefit is that we are able to keep track of multiple client contact initiatives that provide a quick overview of our most recent contact history with our clients. Up to date information will be at the fingertips of our sales team out in the field by means of the hosted CRM system when it goes live the second week of July 2011, which will enhance our customer relations edge even further”

– Mandy Govender, COO, Nology



# Cost-Effective Operations, Distribution and Supply Chain Management

## Sage 300 ERP Distribution

- Inventory Control
- Order Entry
- Sage RMS -Retail Management
- Purchase Order
- Return Material Authorization
- Sage Geode Warehouse Management

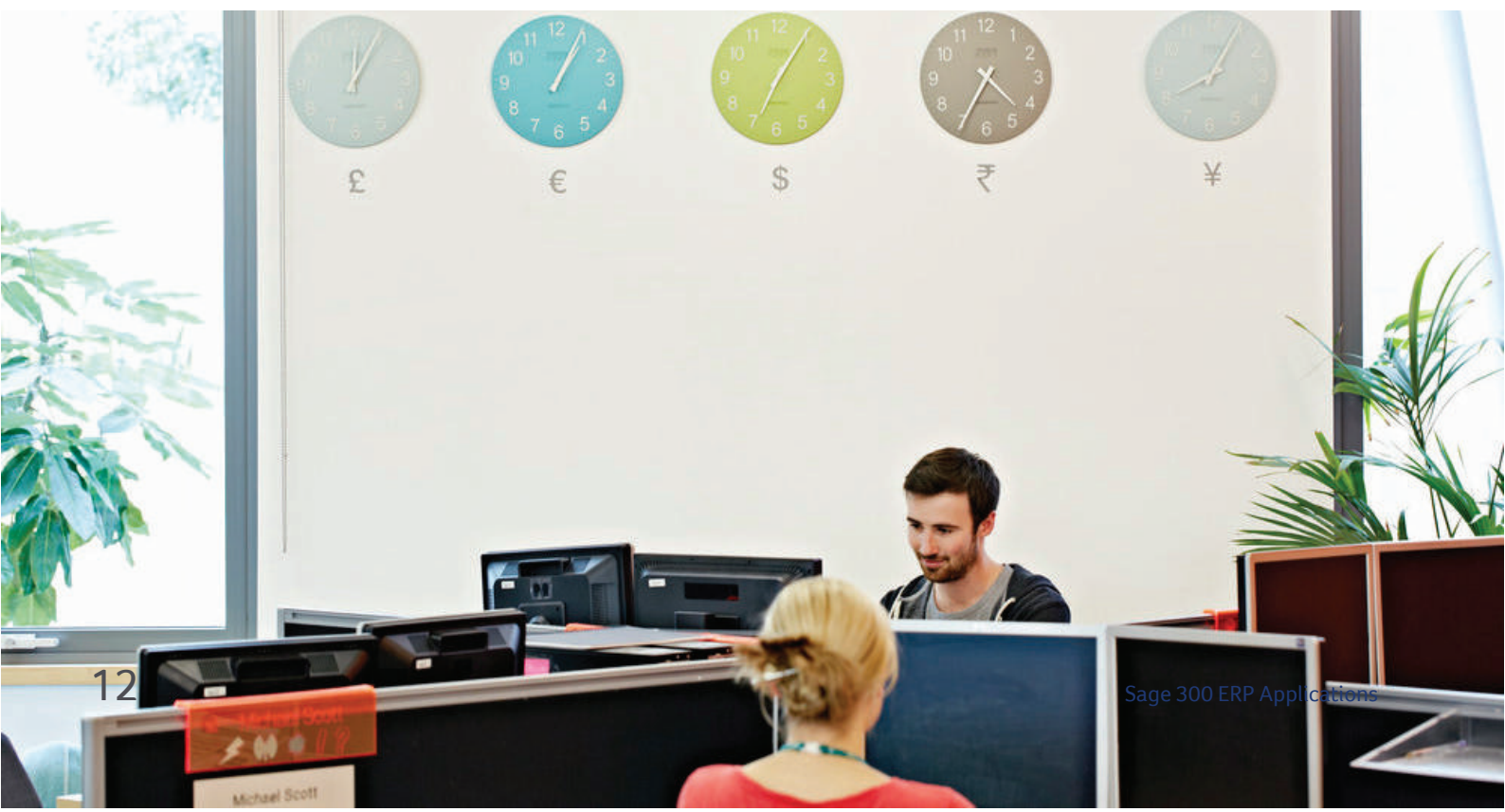
Optimise operations and distribution processes to eliminate waste and deliver on time—every time. Accelerate growth, enhance customer satisfaction, and improve your bottom line. Sage 300 ERP Operations and Distribution Management modules ensure your business follows best practices for efficiency and accuracy by automating and integrating processes to keep your warehouse, inventory, production, and service departments aligned and running smoothly. With features that support multiple warehouse configurations as well as multiple site customers, Sage 300 ERP is optimised for a wide variety of distributors. The Sage 300 ERP distribution solution empowers you to strategically manage every aspect of the distribution cycle, from purchasing all the way through sales, with unparalleled efficiency and control.

## Inventory Control

Maintain accurate stock levels and quickly process inventory transactions. Inventory Control helps you gain complete control over complex inbound and outbound inventory transactions to reduce carrying costs while delivering on-time orders, every time. You can track costs and sales histories by warehouse and manage kits. You also retain complete inventory visibility by tracking your stock transfers both within and between warehouses. Inventory Management fully supports raw material and finished goods lot control and serial number tracking in addition to physical inventory counts. Take charge of inventory receipts, shipments, returns and adjustments with this complete multilocation inventory management solution.

## Purchase Order

Maximise your purchasing power by implementing automated best practices in your organisation. The Purchase Order module helps you manage the requisition, purchase and physical receipt of items and services. You can tag incoming product against customer sales orders so that as product is received, it is immediately designated to customer back orders. You can also verify payable invoices by matching the delivery receipt with the invoice and the original purchase order. Tighter tracking and more accurate purchasing control within your operations means greater cost efficiency and ultimately a better bottom line.



## Order Entry

Stay on top of your customer accounts, inventory levels and purchase histories in real time, anytime. The Sage 300 ERP Order Entry module increases operational efficiency by accommodating multiple customer requests in one transaction. For example, each order or return line item can have its own ship-to address, salesperson, tax rate, ship date, ship-from location and drop-ship designations. In addition, the flexibility of the Sales Order module enables you to price inventory items based on customer class, location, discounts and more. Real-time visibility enables you to confirm stock availability, or if out of stock, source from another warehouse, drop-ship, create work orders, or substitute other items. SageCRM is fully integrated with Order Entry, allowing your sales staff to manage the quotes to orders process without opening Sage 300 ERP. Included in the Order Entry module, Ops Inquiry combines several powerful inquiry programs into simplified points of reference to easily funnel information and generate reports from operational data in your Order Entry, Purchase Order and Inventory Control modules.

## Return Material Authorization (RMA)

Optimise your return processes and build customer loyalty. Expertly track your products through the entire life of the sales process from purchase order through shipping and back. Gain greater insight into the reasons for returns, process claims more quickly, track inventory more accurately, and optimise customer service performance. Sage 300 ERP RMA allows you to quickly identify product faults and take corrective action to eliminate repeat returns, track returned items effectively and lower your cost on returns and avoid losing control of repair revenues. You can automatically assign RMA numbers for easy tracking and speed up data entry using time-saving templates and standard reports.

## Sage RMS - Retail Management

Sage RMS is a complete end-to-end solution for retailers of all sizes. This point of sale (POS) solution can operate in an online or offline environment. Sage 300 ERP delivers the backbone of the solution that feeds POS and receives transactions from POS. There is no duplication of work and the solution offers complete peace of mind that the integration and synchronisation runs live or on scheduled update. Retail Management has never been so easy.

## Sage Geode Warehouse Management

This powerful, scalable and flexible Warehouse Management system (WMS) optimises the available space and logistical operations within the warehouse, from receiving to shipping. Sage Geode integrates seamlessly with automated conveyor systems. It complies with international standards and all types of companies and distribution service providers in various sectors: Logistic Suppliers, Industrialists working in all sectors, Distribution and Trading companies, Healthcare Institutions, Agricultural Corporations. Sage Geode offers mid-sized companies everything they are looking for in a warehouse management system: integrated best of breed functionality and software architecture, current technology and open standards, service and support by experienced staff, tools for personalisation and at a reasonable price.

The company lacked an integrated system to quickly access accurate metrics and timeliness of information was also a big challenge. “Prior to the implementation of the Sage 300 ERP and Sage RMS solutions, we were operating off a separate POS, stock and financial system, which proved not to be user friendly. Financials were recorded separately which called for additional data capturing. Also, forward planning proved a real challenge for management as they had no forecasting tools at their disposal to accurately predict sales.”

– Leslie Levey, Operations Manager, Forma Viva (Jewellery Retailer)

# Optimise Services and Project and Manufacturing Management

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## Sage 300 ERP Project and Service and Manufacturing Management

- Project and Job Costing
- Projects, Powered by Enabling IP
- Service Manager, Powered by Technisoft
- Manufacturing, Powered by AutoSimply

Ensure optimal performance of your services, maintenance and project management processes at virtually any touchpoint. Make smarter, faster service and support decisions that exceed customer expectations with Sage 300 ERP Services and Project Management solutions. Get the visibility and intelligence you need into all information and key performance indicators to effectively allocate resources, increase customer uptime and enhance productivity across all business systems.

### Project and Job Costing

Expertly manage every job with powerful, fully automated cost-control and planning. Sage 300 ERP enables project-based companies to better track and report detailed project costs, using business-critical categories. From professional services and advertising agencies to telephone installation companies and architectural firms, all businesses can cut costs by using Project Costing to track and analyse project expenses. Simplify project management processes for every job and every project type – simple to complex. The Project and Job Costing module maximises efficiency, enabling you to meet customer specifications for products and services without risking profitability.

### Projects, Powered by Enabling IP

Projects, Powered by Enabling IP is an easy to use, fast to deploy Job Costing and Time Billing solution for Sage 300 ERP that provides true visibility of employee utilisation, work in progress and project profitability. Create summary and recurring invoices linked to Projects for billing and allocate time and expenses to these invoices. Project Managers and Supervisors can have a complete view of all project activity.

### Service Manager, Powered by Technisoft

For service-based businesses, the key to success is a streamlined and efficient call centre that presents all the information quickly to your staff when they need it. Sage 300 ERP enables customer information to flow throughout the business—from the call centre to the technicians on the road and ultimately to the customer. Make your service and maintenance resources work harder with true, centralised accountability that helps you manage the resources, products and services your business offers. Access your data locally or from the field using mobile or web technologies to save time, lower expenses, monitor profitability, increase productivity and most importantly, improve customer satisfaction.

### Manufacturing, Powered by AutoSimply

Manufacturing Order, Powered by AutoSimply is a discrete manufacturing solution for SME's. It enables efficient manufacturing operation flow covering material purchase, processing manufacturing orders, work-in-progress, routing cost calculation, material consumption, material scrap and item substitution and order closeout.



# Faster, More Informed Collaboration and Decision-Making

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## Sage 300 ERP Business Intelligence

- Standard Crystal Reports®
- Financial Reporter (FR)
- Spreadsheet Analyst
- Document Management, Powered by DocuVision
- Inquiry Tools
- Intelligence
- Alerts
- Spindle Professional Document Delivery, Powered by Draycir

The business intelligence tools of Sage 300 ERP help you increase insight into your business and make faster, more effective decisions. With real-time metrics and the ability to create personalised dashboards and meaningful reports, you'll have up-to-the minute visibility across all departments and companies in your system and at-a-glance analytics that can be used for strategic planning. Business intelligence tools can help you optimise business processes company-wide and provide decision-makers with insight into financial and operational performance. Using a single solution that ties together and streamlines all of your processes, Sage 300 ERP helps you improve collaboration and accelerates information exchange for a 360-degree view of your business.

## Standard Crystal Reports

Business Objects™ Crystal Reports is the standard reporting tool for Sage 300 ERP. With standard customisable reports and forms provided throughout the solution, you have the power to tailor the system to match your reporting needs more closely. Save time designing and distributing presentation-quality reports. Crystal Reports is a powerful WYSIWYG (What You See Is What You Get) report writer that allows you to create meaningful reports quickly and easily. You can use these reports straight out of the box or modify them to suit your needs, then save and run them anytime. Take control over the look of your documents by selecting font type, size, and color. Enhance the layout by applying lines, borders and shading. Further enrich your reports with embedded pictures, diagrams and logos. Use tables, crosstabulations, or one of 12 graph styles to communicate your financial information. You can even create reports with drilldown capabilities simply by selecting that option for the detail section of a report.

## Inquiry Tools

Empower users at all levels of the organisation to gain immediate access to information from Sage 300 ERP, providing greater business visibility and insight to improve business performance. The Inquiry tools that are built into Sage 300 ERP help uncover opportunities and highlight possible issues, enabling your workforce to make better decisions and execute appropriate actions in response to ever-changing business needs. The Inquiry screens allow comprehensive information access from a single screen. For example, Ops Inquiry allows access to key information to better manage your inventory and avoid costly inventory shortages or overstocking. In addition, Sage 300 ERP Inquiry allows even inexperienced users to create personalised ad-hoc query lists in just a few minutes without the knowledge of databases, programming, or web technologies. The highly intuitive interface puts custom information access within easy reach of everyday nontechnical users and means minimal training and IT support. It's quick and easy to create database connections, add fields and customise data.

Formatted Account Number: Between First Last

Account Group: Between First Last

Account Filter

Submit

Formatted Acc. .	Account Description	Account Group	Fiscal Year	Fiscal Period	Batch Number	Entry Number	Reference
1002	Party Cash	01					
1023	Bank account, operating	01	2013	01	002436	DOC13	4540-Lean In...
1027	Bank account, operating	01	2013	01	002436	DOC14	7400-Kay Pr...
1024	Bank account, operating	01	2013	01	002436	JUL10	1450-Intercon...
1023	Bank account, operating	01	2013	01	002437	DOC23	1000-Knock o...
1023	Bank account, operating	01	2013	01	002437	DOC10	6010 J. D. Ca...
1023	Bank account, operating	01	2013	01	002437	DOC12	1450-Intercon...
1023	Bank account, operating	01	2013	01	002437	DOC27	6010 J. D. Ca...
1027	Bank account, operating	01	2013	01	002436	DOC11	

Auto-refresh

Get better visibility into business metrics with Sage 300 ERP Inquiry.

## Financial Reporter

Built into the Sage 300 ERP General Ledger module, the Financial Reporter Tool allows you to easily create accurate financial reports, such as an Income Statement Summary, Balance Sheet, or other Microsoft® Excel® based reports. The Financial Reporter is a powerful reporting tool that uses Excel to manipulate, format, graph and print general ledger data. The Financial Reporter adds Sage 300 ERP-specific functions and commands to Excel that allow it to read general ledger data directly. Once the data is in a worksheet, the Financial Reporter uses Excel's formatting and printing capabilities to produce the statement. The Financial Reporter includes a set of standard report specifications that are compatible with any chart of accounts that uses the standard account group classifications and user-defined account groups.

## Intelligence

Sage 300 ERP Intelligence and Reporting empowers you to quickly and easily obtain the information you need for operations and strategic planning from your Sage 300 ERP solution. Effortlessly create reports and analyse data, utilising the familiar Microsoft Excel application. With Intelligence you can spend more time focusing on information analysis and interpretation and less time pulling the data together. You have the freedom to build your business intelligence solution to fit your business.

“Our expectations have been exceeded in the way Sage 300 ERP Intelligence delivers critical business information from our system. We have converted weeks of repetitive work every month into a few hours. Now that’s what I call a measurable return on investment.” Sage 300 ERP is a truly global solution which offers the tools and flexibility to successfully accelerate business expansion.

– Ravind Sukdeo, Financial Director , Bidfreight Port Operations

## Spreadsheet Analyst (previously Insight)

A high-performance business analytics tool, Spreadsheet Analyst helps you create and customise reports that withstand the toughest scrutiny. Insight extends far beyond your general ledger, providing a powerful solution complete with bottom-up budgeting, write-back, drill-down and other advanced capabilities. From basic reporting capabilities to full-feature enterprise consolidations, the Insight module makes managing critical data easy. With powerful Universal Database Access (UDA) functionality, you can integrate information not only from the Sage 300 ERP solution but also from other ODBC-compliant databases—and can build your own queries. Insight facilitates rapid report creation by converting information already set up in your transaction-oriented Sage 300 ERP accounting system or any other related application into a single data warehousing system. It helps employees in remote offices and disparate departments manage, distribute and collaborate on data from a single, unified source. Deploy your reports over the web to key personnel throughout your company, or send a Microsoft Excel file that they can review on demand.

## Alerts

Deliver the information needed to create highly responsive, proactive, customer-facing organisations. Alerts enhance communications from your company’s back-office, front-office and e-commerce systems by monitoring data fields for a specified activity. The program automatically communicates specified activities to appropriate customers, employees, or business partners. For you, that means automated processes that reduce delivery cycle time and accelerate revenue. For your customers, that means doing business with a company they can count on for efficient, reliable and attentive service.

## Document Management, Powered by DocuVision

Better manage the storage, retrieval and flow of key information in your organisation. AccArchive, Powered by DocuVision supplies integrated document archiving, processing, control and delivery solutions through its suite of modules to manage the wide variety of paper and other digital documents generated.

## Spindle Professional Document Delivery, Powered by Draycir

With just one click, Spindle Professional for Sage 300 ERP delivers business documents to multiple locations by email, print or fax and archives for future retrieval.

Spindle Professional offers a fast return on investment to businesses looking to reduce stationery and postal costs, save administration time, improve internal communication, enhance the company image and help the environment by using less paper. Adding PDF digital signatures also ensures that PDF documents are authenticated and protected.





## Customise and Personalise

**Build Your System to Fit the Demands of Your Business.  
Not the Other Way Around.**

Be the boss of your ERP system with customised, personalised software designed to meet your unique business requirements. Sage 300 ERP was built to deliver customised ERP design and capabilities without the cost or headaches of traditional customisation. From on-site or cloud computing through Sage 300 ERP Online to business-specific details to ongoing expansion, count on Sage 300 ERP to integrate with your operating systems and databases and easily accommodate upgrades, product enhancements and new releases—and avoid incurring additional costs.

### Effortlessly Customise Your User Interface With Optional Fields

Sage 300 ERP is easy to set up and use, with intuitive wizards and a familiar interface that make configuration and navigation a breeze. Fulfill unique tracking and reporting requirements with the ability to add optional fields and capabilities. Define unlimited text, amount, date, time, integer, number and yes/no optional fields for use in all Sage 300 ERP applications.

### Expand Easily in the Future

In addition to multilanguage, multicurrency, and multicompany capabilities, Sage 300 ERP provides extended flexibility as your company grows. Multitier, scalable architecture allows 250+ concurrent users, as well as extensive customisation capabilities, an integrated development environment, and multi-OS/databases. Add functionality when you need to by adding modules or new user licenses—even moving to a larger edition smoothly when you're ready.

### Personalise to Suit Individual User Needs

Numerous configuration options and built-in personalisation capabilities allow individual users to streamline navigation, reporting, and information access, improve productivity and reduce data entry errors.

# A Collaborative Ecosystem to Help Our Customers Thrive

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The core tenet of the Sage approach is that we provide customers with an unmatched range of expertise, support, training, collaboration and innovation. Becoming part of this ecosystem—which includes Sage people, programs, and resources; a vibrant network of partners, consultants, and developers; authorised training facilities; and software user communities—enables our customers to get the most out of their investment.



# aces

sage 300 ERP



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