

A photograph of a young Black woman with short braids and glasses, smiling warmly. She is wearing a dark blue, long-sleeved top with a Peter Pan collar. She is holding a large stack of papers in front of her. The background is a blurred office setting with large windows.

Sage 500 2017

New Features Summary



Maximize operational efficiency and increase productivity and profitability across every aspect of your business.



Finance and Accounting



Distribution and Supply Chain



Manufacturing



Sage 500 2017

New features and improvements

New features and improvements



- **General ledger (GL) synch** to Sage Payroll Solutions for customers that require an integrated payroll solution.
- The ability to **inactivate GL accounts** based on natural accounts segments for GL accounts no longer used or needed.
- New, customizable **Sage Intelligence report templates** accessible via a desktop link for improved operational reporting and better insight into day-to-day business operations. New templates include a Change Order Report, Inventory On-Hands Analysis, Period Cash Flow Projections and Vendor Performance Report.
- **Support** for Microsoft Office 2016, and Microsoft SQL Server 2016.



Reasons to upgrade

Fast facts about the previous Sage 500 releases that you may have missed.

“Sage 500 is doing the same work as our tier-one product, but for only 75 percent of the cost. We’ve done two version upgrades since implementation, and they both came in on time and within budget. I’m extremely pleased.”

Roger Smith, VP of finance and IT
Luzenac America, Inc.



Solution improvement highlights



Sage 500 2016 | Simplify tasks when working with multiple companies or records and reconciling accounts, credit card payments, and inventory data.

1. Quickly identify which company you are working on— Minimize confusion and data entry errors by assigning distinct colors to each company.
2. Easily compare data and spot trends—As you move between records, you'll be able to easily keep your eye on the same fields to identify trends or compare data.
3. Save time when reconciling bank and cash accounts— Simplify the allocation and distribution of entries across various GL accounts with the new Accounts button on the Bank Transaction Entry screen.
4. Purge your stock data for better inventory management— Improve inventory reporting and analysis by streamlining your data without losing valuable information.
5. Save processing fees with Level 3 credit card data security—Capture the data you need for Level 3 data submissions in Sales Order Processing and reduce processing fees with enhanced identity verification.
6. Ensure important customer information isn't overlooked— Prioritize memos to flag key information about your customers and ensure they display at the right time during key business processes.
7. Design reports that deliver the information you need— Create better reports with the updated Sage Intelligence Reporting Designer in Sage 500 ERP 2016.

Sage 500 2014 | Enhance inventory management and order fulfillment. Collect payments faster through EFT.

1. Optimize your safety stock levels— Forecast future demand and review suggested optimal replenishment levels with Sage Inventory Advisor. Adjust safety stock levels item by item to account for different risk tolerance levels.
2. Eliminate paper check handling costs and trips to the bank with electronic fund transfer (EFT) — Manage your cash receipts, business-to-business payments, and Automated Clearing House (ACH) payment processing all through Sage Payment Solutions.
3. Improve fulfillment productivity— Save time and improve productivity by displaying sales order and shipping numbers where your team needs them. Shipment ID numbers are now displayed in "Generate Shipments" and line item sales order numbers are printed on invoices to make your fulfillment process smoother and faster.
4. Make it easier to manage contact information— Simplify data entry and ensure accuracy with an expanded 255-character email address field.

Sage 500 2013 | Simplify accounting and other business processes. Boost payment and credit card capabilities.

1. Process cash receipts more accurately and efficiently—Import pending cash receipts directly into your accounting solution instead of entering them manually.
2. Close your period end with confidence— Lock down postings to subledgers individually so you can better manage period end closing.
3. Save time navigating business processes—Work through your business processes easily using Sage Visual Process Flows and make improvements where needed.
4. Accept credit card payments anywhere and anytime—Process credit cards with ease and confidence wherever you go with Sage Mobile Payments.

Sage 500 2016 | What's New



Purge your stock data for better inventory management | When purging data to speed up overall processing, Sage 500 ERP 2016 creates a new transaction type, which records the quantity and associated costing information as of the purge date to improve ongoing management and analysis of inventory data. You can now utilize past records without having to maintain large transactional history files.

Save processing fees with Level 3 credit card data security | Minimizing fraud risk by providing enhanced identity verification to your processor is often one of the keys to reducing processing charges. With Sage 500 ERP 2016, you can capture the data needed for Level 3 submissions in Sales Order Processing and take advantage of the potential savings in card processing.

Design better custom reports | You need access to reliable business data to make good decisions, manage your business effectively, and forecast with confidence. The updated Report Designer in Sage 500 ERP 2016 Intelligence Reporting gives you maximum control and flexibility over your financial report layouts. Missing accounts will be automatically detected and flagged, zero value rows can be suppressed from reports making them easier to read and to present, and you can now distribute reports with calculated values or with embedded formulas so everyone can see how calculations were made.



Sage 500 2016 | What's New

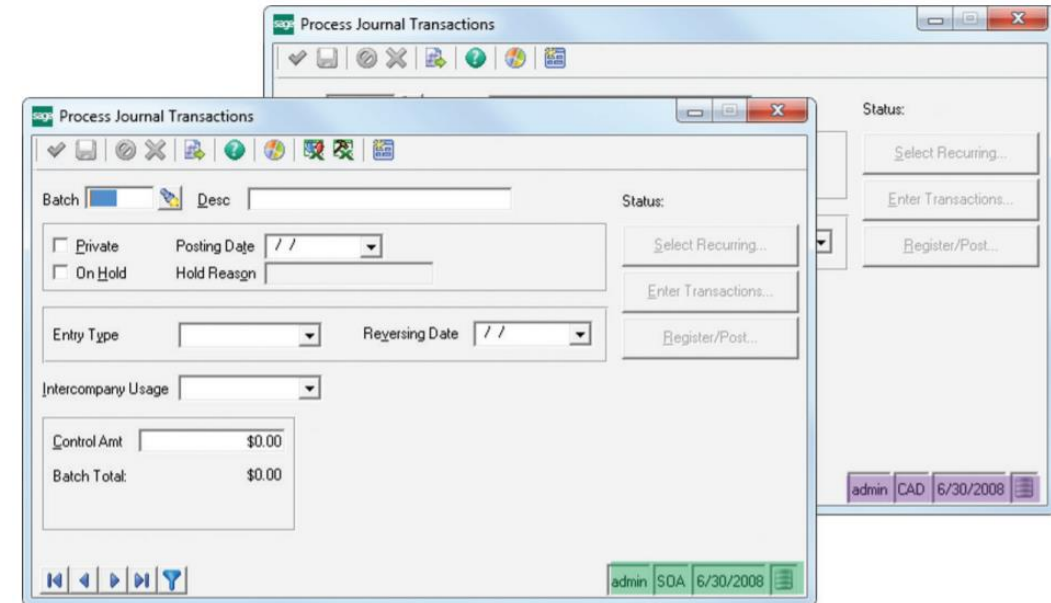


Quickly identify which company you are working on | You can now assign distinct colors to each company you are working on so you can quickly identify company codes to eliminate confusion and incorrect entries.

Easily compare data and spot key business trends | To compare or look for trends in data, you often need to scroll through numerous records. In Sage 500 ERP 2016, you can move between records more easily with the new Next and Previous buttons.

Choose your credit card merchant processor | To provide your customers with a variety of payment options, you need to accept credit cards and debit cards at your store, online, or on the go. Retain your current processor and take advantage of Sage Exchange, a web-based payment management system that provides real-time data across all payment types with the latest security compliance so you can make better and faster decisions.

Ensure important customer information isn't overlooked | Customer memos provide information about a customer to your employees. With Sage 500 ERP 2016, you can prioritize these customer memos to flag key information about your customers and ensure they display at the right time during key business processes.



Sage 500 2014 | What's New



Optimize safety stock levels with Sage Inventory Advisor | Too much inventory is tying up working capital for some items. Stock-outs of other items are leading to unhappy customers. You tried to forecast demand but got the numbers wrong—too high on some items, too low on others. Stock many thousands of items and your predicament grows even more daunting. That's where Sage Inventory Advisor comes in.

Easily rectify incorrect book entries using Reverse Applications | Designed to simplify reversing an incorrect application by automating and vastly reducing the steps in the process. When an error is detected, your accounting staff won't have to wait until they have time to tackle a cumbersome manual process. Your accounting staff can correct the error immediately upon discovery—without sacrificing productivity.

Process electronic funds using the ACH network through Sage Payment Solutions | When it comes to making payments, customers now expect more convenience and flexibility. The most commonly used network for EFT transactions in the United States is the Automated Clearinghouse (ACH), which processes more than half of all EFT transactions. To take advantage of the benefits associated with EFTs, customers need an interface to communicate with the ACH network and that is now included through Sage Payment Solutions.



Sage 500 2014 | What's New



Manage contacts better with expanded email address fields |

Expanded email field to accommodate the industry standard 255-character length (from 40 characters) to enable easier contact management. The expanded email address capability applies to customers, vendors, and all business contact records.

Improve fulfillment productivity with easier access to shipping and sales order numbers |

With the new display of the shipment number in "Generate Shipments," your fulfillment efficiency will increase immediately. For single shipments, your team won't need to track down which shipment they were working on because the information is available on screen. Also, the sales order number associated with an invoice and each line item on an invoice is now printed on the invoice itself.

The screenshot shows the 'Maintain Credit Card/EFT' window. It features a toolbar at the top with icons for save, delete, and other actions. Below the toolbar, there is a dropdown menu for 'Account Nickname' with 'Electronic' selected. The 'Account Information' section includes a 'Tender Type' dropdown set to 'EFT', a 'First and Last Name' field with 'Tom Jackson', an 'Account Number' field with 'XXXXXXXX4678', a 'Routing Number' field with '322283767', an 'Account Type' dropdown set to 'Checking', and a 'Print Class' dropdown set to 'Business to Business (CCD)'. The 'Billing Address' section includes fields for 'Street Address' (9 Encina), 'City' (Pine Bush), 'Postal Code' (12566), 'Email', 'Telephone' ((518) 422-5200), and 'Fax' (() -).

The screenshot shows the 'Maintain Contacts - algar' window. It features a toolbar at the top with icons for save, delete, and other actions. Below the toolbar, there is a dropdown menu for 'Name' with 'Mary Margaret Magillacutty' selected. The 'Title' field is empty. The 'Phone' field is (() -) and the 'Ext.' field is empty. The 'Fax' field is (() -) and the 'Ext.' field is empty. The 'E-Mail...' field contains 'MaryMargaret.Magillacutty@AliciaGarageDoors.com'. The 'Document Transmittal' section includes checkboxes for 'Invoice', 'Sales Order', 'Credit Memo', 'RMA', 'Debit Memo', 'Customer Statement', and 'Finance Charge'. The bottom of the window shows a status bar with 'admin', 'SOA', '6/30/2008', and a help icon.



Sage Business Care

Fast facts about the latest maintenance and support plans for Sage 500.

Three different service plans so you can select the level of support assistance you require. Includes enhancements, software alerts to keep your system running at peak performance, and access to additional services.

- Three new tier options provide the flexibility to choose just the right level of care.
- Features beyond the traditional provide added value for the same investment
- New pricing structure delivers world-class business care, beyond what's expected, at an affordable cost.

Beyond the traditional



Sage 500 ERP Business Care Plans include many elements of traditional plans such as:

- Critical product updates
- Version upgrades and enhancements
- 24/7 access to the Sage knowledgebase
- Sage City peer-to-peer community help
- Support cases

Go beyond the traditional with added support benefits, connected services, business intelligence modules, and discounts such as:

- Migration planning assistance
- Appointment scheduling
- Sage University Anytime Learning*
- Data integrity assurance plus services*
- Upgrade planning assistance*

Sage Business Care Levels



		SILVER	GOLD	PLATINUM
Support Services	Critical product updates	√	√	√
	Version upgrades and enhancements	√	√	√
	24/7 Knowledgebase	√	√	√
	Sage City peer-to-peer community help	√	√	√
	Support cases	5	Unlimited	Unlimited
	Migration planning assistance	√	√	√
	Appointment scheduling	√	√	√
	Sage University Anytime Learning Courses	\$	Unlimited	Unlimited
	Data integrity assurance plus	\$	1 instance (no charge)	2 instances (no charge)
	Upgrade planning assistance	N/A	√	√
Connected Services	Sage Intelligence	4 users (Report Manager) ¹ + Designer module	4 users (Report Manager) ¹ + Designer module + Connector	4 users (Report Manager) ¹ + 2 users (report viewer) + Designer module + Connector
	Annual discounts on checks and forms	30% discount	40% discount	50% discount

1 - Additional charges beyond four Sage Intelligence users.

What is Data Integrity Assurance Plus?



Simply put, our gold and platinum plans offer assistance beyond the normal scope should there be a need for that "plus support" to get back on track.

The nature of complex database structures, intricate transactional calculations, and the inherent challenge of heavy traffic over what can be less than reliable distributed networks may be cause for occasional unanticipated data synchronization discrepancies.

A discipline of timely reconciliation between sub-ledgers and the general ledger as well as periodic oversight, such as cycle or physical counts, are measures designed to monitor for just this type of anomaly.

Sage 500 includes utilities designed to assist in addressing these issues, and our gold and platinum business care plans provide an added level of support should the need exceed the reach of the provided tools.

What is Sage Intelligence?



Sage Intelligence is a Microsoft® Excel®-based business intelligence reporting tool that extracts your data from Sage 500 and delivers it in Excel so that you can enjoy the flexibility of designing any type of business report you need in a few mouse clicks.

Business benefits

- Identify and respond to trends using customizable dashboards.
- Drag-and-drop formulas easily create and manage financial reporting.
- Develop in-depth financial, operational, customer, and vendor reports.
- Efficiently view, manipulate, analyze, and distribute reports in Excel.
- Consolidate data from multiple companies, divisions, and databases.
- View your organization in different ways through flexible Reporting Trees and Reporting Groups.
- Extract up-to-the minute high-level summaries, account groupings, or detailed transactions.



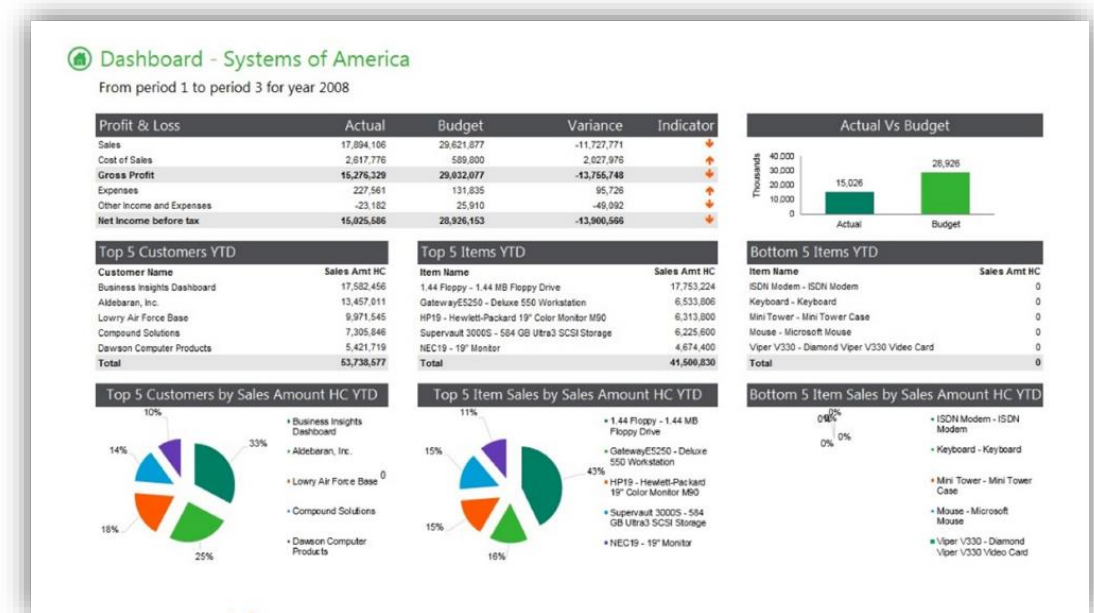
Learn more about Sage Intelligence at <https://www.sageintelligence.com/solutions/sage-500-erp/>

What's included with Sage Intelligence?



There are four Intelligence Reporting modules for available depending on your reporting requirements and Sage Business Care plan you select:

1. **Report Viewer:** Run existing reports, in real time, when you want them.
2. **Report Manager:** Do everything the Report Viewer does, plus edit and customize standard report templates and save them for future use, create new reports, sort drill-down and aggregate data, and automate the distribution of your reports.
3. **Report Designer:** Provides two methods to create and control your financial reports depending on your Excel knowledge and business requirements.
4. **Connector:** Access and consolidate information from multiple sources.



sage

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