

Sage 300 ERP | White Paper

Growing Pains

What to Do When You've Outgrown Small Business Accounting Software



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Straight Talk About Selecting the Right Solution to Support Your Company's Growth Requirements

Your small business software provided the basic bookkeeping capabilities you needed to get your company started. But as you have grown, things have changed. You have more customers, more employees, more data, more automation requirements. In short, your small business isn't so small anymore, and you need more from the software that is the foundation for your growing business.

So how do you make the move to a more powerful business management solution? First things first: It's critical to gather all the facts before you make a decision. Implementing a new system can affect many departments across your organization, so proper planning and analysis are critical to your success. It pays to be meticulous.

At Sage, we've been responding to the needs, challenges, and dreams of small and mid-sized businesses for more than 30 years. Our experience gives us first-hand knowledge of the challenges and pressures you face every day. This insight, along with the conversations we've had with many of our 3.2 million customers, has helped us assemble this guide.

"Growing Pains: What to Do When You've Outgrown Your Small Business Accounting Software" is designed to give you smart, unbiased tips as you prepare to make the move to a more sophisticated business management solution.

Please note that the ideas we highlight in this guide make no mention of our software. We believe that after performing the due diligence suggested in this booklet, you'll agree that Sage provides an ideal, cost-effective next step for your company. To illustrate that point, we've also enclosed a helpful reference chart that compares the differences between Sage 300 ERP (formerly Sage ERP Accpac) and several other small business solutions. In addition, we've included three case studies that show how our customers have successfully made the move. We look forward to helping you grow your business!

Key Indicators You're Ready to Move From Small Business Accounting Software

- System lock-up and performance degradation
- Multiple user lock-up
- Difficulty accessing key information as it is not readily available
- Inventory complexity, such as necessity to track a large number of inventory items, multiple units of measure, multiple bin numbers, and manufacturing or warehouse management processes
- Slow report processing and lack of reporting
- High volume of transactions
- Large amounts of historical data
- Use of external, nonintegrated payroll solutions
- Large database
- Manual processes and use of outside systems such as Microsoft® Excel®
- Industry-specific requirements
- Regulation compliance (such as IFRS, SOX) and incurring auditing and noncompliance fees
- Need to improve employee productivity and reduce downtime
- Exceeded limitations on document numbers, customer, vendor, inventory, and general ledger account field sizes
- Multinational transactions and global commerce requirements

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- Multiple entities and location functionality requirements
- Web access and customer portal needs
- Multiple company support including consolidated financial statements and intercompany transactions
- More than ten users who require access to the system
- Automation requirements for job costing, CRM, industry-specific requirements, and supply chain management

Essential Tips for Evaluating and Purchasing New Business Management Software

Getting Started

The first step to implementing a new solution is evaluating your company's readiness for change. Before you begin looking at new features and setting fast-track time lines, take the time to set realistic goals, get buy-in, and build momentum. Preimplementation planning is the key to success.

1. Change before you have to

By the time you are certain that your current systems are inadequate, you're probably already losing money to reduced productivity, lost opportunities, poor data quality, and insufficient information to make insightful decisions. Don't wait until you simply can not bandage the system any longer. If you're already seeing warning signs that your system can't keep up (data inaccuracy, slow turn-around, time-consuming or manual processes), begin your needs analysis now. Many professional systems analysts use the steps outlined on the right. Keep them in mind as you evaluate your system requirements.

2. Calculate return on investment

Implementing a new business management solution requires an investment of resources and money. But an inadequate system is costing you money now—sapping your productivity and softening your competitive edge. It's important to do a comprehensive return on investment analysis when considering a new system. However, remember when calculating the return on your investment, you should include the benefits and the costs to not solve your current issues. This process will ensure you determine the total value of owning a new system.

Cost not to solve

It's important to consider the cost not to solve in your evaluation. Assign costs to lost productivity, overstocking inventory, lost sales opportunities, system down time, inadequate customer service, and tasks that are not automated.

New solution benefits

Remember that the right system will pay for itself with process improvements and better data for decision making. A new business management system can provide automated systems for faster processing of accounting transactions, easier retrieval of accounting information, and better reporting and business intelligence.

Don't disregard hard-to-quantify benefits

A new system will deliver broad improvements, the overall impact of which may be difficult to calculate with precision. Consider all the benefits of more reliable and faster access to more informative data. Think about how much it is worth to your company to improve strategic planning. How much will it cost you if your next audit doesn't stand up to scrutiny? How will your company's reputation improve if your new system gives your customers better, faster, and more professional service?

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How to Create a System Needs Analysis

- Determine key areas that are automated with your current system.
- Determine what you "like" about your current solution and cannot live without.
- Determine current challenges that need to be solved.
- Investigate and document manual operations that need to be automated throughout the organization.
- Determine what information is currently pulled from the system and which information is required.
- Identify and map the information that flows through your current system.
- Determine the information-sharing requirements among the accounting/finance team and other departments
- Distinguish all the different types of reports required.
- Determine types of intelligence reporting required.
- Determine how many users will have access to the system.
- Ascertain the level of accounting and computer experience of potential system users.

3. Setting Objectives

People who buy accounting software usually spend most of their time evaluating features. The fact is, however, you should spend most of your time evaluating your own business. The more you know about the problems you expect the new system to solve, the better informed your final choice will be.

Create a task force

Business management solutions affect many departments within your organization. One of the easiest ways to ensure cooperation is to involve representatives from other departments right from the beginning. You may feel that you don't have time, especially if your old system is failing and you need to hurry the new project along. But in the long run, a task force saves time and guarantees that other departments will cooperate during the implementation phase.

Where to begin

The first task for your task force is to determine where in your organization you experience the biggest productivity losses and highest error rates. Determine how inaccuracies are affecting your business. Understand which tasks require automation. Begin by identifying the problems you experienced this year because your existing system wasn't adequate.

Which features you can't live without

When you survey your task force, you'll uncover a few system capabilities that are critical to your organization, such as particular reports or tracking methodologies. Once you discover that they are absolutes, put them on your must-have requirements list.

What's special or unusual about your company

Every company is unique! Your company will have some unique requirements that can't be changed. Perhaps you need to track products by lot or serial number. Do you need to price product by warehouse location? Do you need to support multinational commerce? Does your industry have special reporting techniques or compliance requirements? Make a list of requirements unique to your industry and organization.

Aim high

Many people don't aim high enough when they implement a new system. Just about any product can deliver financial statements. You should be looking for much more. Think back to last year's planning sessions. What information could have boosted productivity and profitability? This might include current gross profit by product, customer, or salesperson or trends on how customers and products are growing or declining. You may want to use financial ratios to measure your company's performance against your competitors.

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Compromise Is Good

Your final solution probably won't satisfy everyone in your organization, but through clear communication, planning, and education, most people will recognize that the decisions being made are fair and reasonable. You should plan for handling objections, especially in the early phases of the project. Plus, have a strategy for fine-tuning the system once the initial implementation is completed. Count on a new system to satisfy about 90 percent of your requirements, and determine how to manage the remaining 10 percent. You may need to consider some staffing changes or revising your policies and procedures.

4. Selecting the Right Solution

In order for a system to meet your business needs, it should mesh with your existing business practices and adapt to technological innovations. Again, ideally you want software that's simple, intuitive, and works the way you do business. Be sure the system can:

- Easily adapt to your business needs.
- Scale to meet the needs of your growing business.
- Embrace industry-standard technology.
- Maintain a low total cost of ownership and high total value of ownership.
- Customize easily to fit your unique requirements.
- Be accessible to remote or traveling employees.
- Keep global commerce in mind.

Start with the big picture

Don't dive into details at the beginning of your selection process. Rely on your list of features that you cannot live without and unique requirements that you laid out in your planning process. Eliminate any packages that don't comply with your fundamental requirements and you'll narrow the field significantly. There is no point in having a 200-page Request for Proposal (RFP) if fewer questions will shrink the field from 50 possible vendors to five.

Ensure the software can adapt to your needs

If you have a growing business, one of the most important characteristics of your system is its scalability and the ability to grow along with your company. Finding a system that can adapt to the specific needs of your company is essential. What if you need to automate new areas of the business in the future? Look for a solution that offers open architecture, which allows you to easily add on additional features and adapt to new IT paradigms. Open architecture is especially important if you expect your company to experience growth or change in the future. Beware of "one size fits all" solutions—if all functionality is included, then you are paying for everything, even the features that you do not need.

Think forward to the next step

Most software companies have various families of products geared toward specific business sizes of customers. A key question to ask is whether or not the products are built on unified system architecture and if they have a built-in upgrade path from one product to the next. If the family of products has been developed on the same architecture, future upgrades from product to product and the subsequent data exchange can be managed much more smoothly. Ensure that as your company grows and you move up in the family of products that you will not need to retrain your users on a completely different workflow and user interface. The smart choice is a product that will fit your business requirements for at least the next seven to ten years.

Make integration a high priority

Connecting all functions and linking to customers, suppliers, and other business partners externally can dramatically reduce lead times and waste throughout your organization. You'll streamline operations and gain a competitive edge by integrating your accounting, business intelligence, customer relationship management, supply chain, and human resource management applications. When evaluating software, check to see how seamlessly they integrate or can be integrated with other systems. Tight integration will save you time, promote greater efficiencies, and add value to your business.

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The Right Solution

Understanding your business's financial information needs is the first step in selecting the appropriate solution. However, there is typically no obvious choice because so many competing products promise similar results. You can end up mired in the feature lists and still be uncertain of your final selection. Don't get caught up in detailed Request For Proposal (RFP) documents and features that are not important to your business; however, be sure that you are forward thinking and the solution you select is adaptable to your future requirements.

Integration is especially important for manufacturing and distribution companies. Inventory that sits in your warehouse is cash your business could otherwise be using. When considering solutions, study what options are available for warehouse management. The proper use of integration will pay your organization huge dividends in the form of reduced inventory cycles, more efficient warehouse operations, less paperwork (including the reduction duplicate data entry), and better order accuracy.

Embrace industry-standard technology

The evolution of technology is as certain as death and taxes! Hardware, databases, operating systems (OS), servers, and all IT infrastructures are ever-evolving. You can't afford to be running your business on unsupported software. Ask the software vendor which databases it supports, along with which operating systems and server systems. Look for vendors that stay up to date with technology and frequently advance their technology.

On-demand or on-premises deployment?

With advances in web technologies and growth in broadband access to the Internet, alternative deployment methods have emerged. Most evaluations of software will include the question of whether to implement the solution "on-premises" or "on-demand." There are two common types of on-demand software: software as a service (SaaS) and hosted. The relative advantage or disadvantage of one deployment type over others is dependent on your objectives and circumstances. The more important question is that of versatility and options. If you select an on-demand solution, do you have the option to move your data to on-premises in the future? And what is the cost? You don't want to invest in a solution and not have the agility to adapt to the future.

Verify customization capabilities

No one software package is right for everyone. And no solution on the market will have every single feature you require. Look for a solution providing modification features that allow you change or add new reports and tailor the interface to individual user preferences. For even more control over your system, review software that enables you to make more specific customizations. This will ensure that your software will meet your needs as requirements change in your business.

Understand the difference between standard functions and extras

Some organizations provide basic functions but then make you purchase the various extras that come standard in other software. An extreme example would be to buy a car, and then discover that you must pay additional for the engine, steering wheel, and tires. Confirm what is included in the core pricing and what must be purchased separately.

Evaluate the software by what it can't do

Software product limitations are often much more revealing than feature list comparisons. Find out the maximum number of account types, customers, vendors, and inventory items allowed. Determine the maximum size of the document numbers, general ledger account numbers, and other key fields. Ask how many line items a single invoice or sales order can handle, and find out the maximum number of users who can work with a particular application at the same time. Is there a limitation on database size, or at what point is system performance impacted. These types of questions will uncover key points and help you make a more informed decision.

Test for common mistakes

People make mistakes. If the software handles errors intelligently, that's a sign of good design and usability. Some of the most widely promoted solutions do not allow you to correct an error in a purchase order without canceling the entire P.O. and reentering it from scratch. You should test for errors or ask for the vendor to demonstrate error management. Look at mistakes such as duplicate customers and vendors, incorrect item numbers, and unreasonable amounts and dates. The system should also flag unusually high quantities or unit prices and offer valid alternatives. The system should prevent errors that cause data corruption, such as deleting a customer or general ledger account number. Understanding how the system handles mistakes will help you determine if your data integrity is at risk.

Evaluate the learning curve

Intelligently designed software is easy to learn and use. Common tasks should be intuitive and quickly executed. An insightful interface will shorten training times and facilitate adoption of the new system. Look for information in consistent and expected locations and screen design similarities among all modules. Be sure that the software comes with effective training! Ask what learning tools, classes, online, anytime, and demonstrations are available to speed the learning process.

Documentation and online help reflect software quality

You rarely find excellent documentation with poorly designed software. Clear, accurate, and useful documentation and online help takes time to produce and indicates a long-term commitment to users. You'll save time hunting through manuals if the software is easy to use and provides intuitive help at your fingertips while using the software. Evaluate the available materials to see if they assist users with learning and using the system quickly.

Explore what support will be available to you

Find out what technical support each software manufacturer makes available to its customers. What days of the week and times during the day are telephone technical support specialists available? What costs, if any, are associated with various levels of support? Does the manufacturer provide classroom, self-study, or web-based training programs? How frequently does the manufacturer keep in contact with customers regarding product announcements, upgrades, and more? You will need assistance getting the most out of your software—the best manufacturers provide this assistance.

Business Intelligence is not just a buzz phrase

In order to increase insight into your business and realize your strategic vision, you need business intelligence reporting functionality. Companies today are facing constant pressure to increase profitability, improve cash flow, reduce costs, and mitigate risk in order to improve financial performance. Focusing on driving working capital processes is critical in order to achieve these objectives. Software vendors are now focused on turning the vast amounts of information stored in enterprisewide solutions into "knowledge," or intelligence that allows you to respond more quickly to new business trends and processes. Ensure you review the tools available for each solution and ask to see business intelligence reporting features. This new functionality enables your employees and partners to adapt successfully to changes in today's markets and make better, faster business decisions.

Don't forget about your sales team

The better your customer relationships, the more your business can prosper. Customer Relationship Management (CRM) software allows your organization to fully manage the life cycle of your customers. Your sales team will have a much better understanding of customer purchasing habits, both in aggregate and individually. You should research which CRM options are available with each system you are evaluating. The best CRM systems provide functionality that is important to the success of sales, marketing, finance, and management roles. CRM should also enable your company to roll out web-based customer self-service quickly and cost effectively. Evaluate the information available on reports and dashboards, such as metrics provided on call volume, case resolution times, communications, follow-up statistics, and escalation. These tools allow you to quantify the benefit of customer service and sales to the business and to their customers.

Employees are the life-blood of your organization

Take time to research human resource management systems. Evaluate the choices available for the software; don't just assume it will meet your needs. Look past compensation and benefits to be sure that it meets your company's specific requirements in other areas, such as integration with federal and state agencies and online filing of reports and documents. Be sure that it really does integrate and synchronize with your payroll, eliminating the need for redundant data entry.

Go paperless

Today's most cost-effective applications utilize less printed paper. As you explore solutions, focus on how much paper you can eliminate and time you can save during order entry, basic input, shipping and handling efforts, billing, and communications with vendors, customers, and among other areas within your organization. The less printed paper you use, the more time and money you'll save. Efficient and timely document access and distribution can enable you to provide better customer service, too.

Extend your business to the web

Software optimized to leverage future e-business opportunities delivers a significant strategic advantage. Look for accounting software with strong e-business capabilities, even if e-business functionality is not one of your current requirements. Areas to consider include support for business-to-consumer and business-to-business buying and selling, the ability to empower employees through the intranet and browser-based applications, and the capability to extend systems through mobile, wireless applications. Choosing a software manufacturer offering e-business tools ensures that your system can grow to match your organization's evolving strategic goals.

A web store isn't really efficient if it doesn't integrate with your back office. When shopping for web store creation and management software, look for one that eliminates time-consuming manual reentry of orders received over the web. It should seamlessly integrate with your system without costly customization. web orders and payments must automatically flow through to your solution. Changes to customer and inventory information in your accounting system should automatically flow through to the web store. Furthermore, you should be able to process orders in either real time or batch mode.

Track Fixed Assets

It's an unfortunate reality that many companies and organizations overpay thousands, sometimes even millions, in insurance and tax costs due to improperly or ineffectively managing and depreciating their fixed assets. Ask the software vendor if it provides a solution for fixed asset depreciation calculations for financial and tax reporting, asset inventory reconciliation, and customized reporting.

Conducting business across borders

Competition is rapidly becoming a global challenge. An international presence is not only important for modern enterprises, it is essential. A multilingual system that takes into account national customs, laws, and currencies without additional customization is ideal for today's globally oriented companies. Look for a solution that supports global commerce and multiple entities.

Check out the software publisher

Study the company behind the software. Find out how long the company has been in business, its long-term prospects, and what kind of customer support, upgrade protection, and technical support it provides. You want to ensure that your investment is protected for the long haul. The worst mistake would be to buy a solution that is set to be discontinued by the software publisher or to purchase from a company that will not be in business in a couple of years.

Should you retain any of your current data?

You will need to determine which data you want to migrate into your new solution. This is a key area to evaluate when making your final decision. How much of your current data can be migrated into the solution? What tools are available? And what is the cost associated?

Evaluate TCO compared to TVO

The current business climate and renewed emphasis on corporate accountability are driving the need to look more closely at costs associated with technology investments. However, ensure that you are quantifying the Total Cost of Ownership (TCO) with the Total Value of Ownership (TVO). TCO is a financial estimate designed to help you assess direct and indirect costs. TCO offers a statement on the financial impact of deploying information technology during its whole life-cycle. In contrast, TVO is understanding how the system can affect the organization and help it reach its strategic goals. The TVO demonstrates how the software solves key business challenges and justifies the TCO.

Select software before evaluating hardware

You will need to evaluate the hardware required to implement each solution. Most requirements are generally determined by software, not hardware, so you should choose your software first, and then buy the hardware recommended by the software manufacturer or your consultant.

5. Working with a Consultant or Business Partner

Many companies do not have the resources or expertise to devote to analyzing, purchasing, installing, and maintaining a system. A software consultant firm, sometimes referred to as a business partner or software reseller, can help considerably. These companies have been through the purchasing and implementation process many times, and you benefit from their expertise. The consultants will be virtual members of your company for weeks. You may even end up with a long-term relationship as your company grows if the business partner helps maintain your solution. With this in mind it is important to choose a business partner who comfortably fits your company's philosophy and culture.

Conduct an interview

Arrange a meeting with the prospective business partner and your task force. The focus of the interview should be a high-level overview of the products the partner represents and the available benefits from the partner's services—not details of specific solutions. Ask about company size, number of employees, and business philosophy. Ask for references! Have they worked with companies similar to yours? Ask for contact names and phone numbers, then call to learn as much as possible about the customers' working relationship with the company.

Listening skills are as almost important as product skills

If the consultant doesn't listen effectively, chances are you won't be satisfied with the final outcome. During your first interaction, notice if the consultant seems more interested in "pushing" a particular product instead of analyzing your needs. Avoid people who try to impress you with jargon and immediately start talking about features and programs.

Avoid request for proposals

Contrary to what some software vendors want you to believe, creating and sending out an RFP is not the most effective or efficient way to find the best software system. The process of creating an RFP, sending it out, waiting for proposals, and reviewing them requires substantial internal time and, therefore, expense.

Don't request a product demonstration too early

Salespeople sometimes urge you to sit through a product demonstration before you're ready; it's easy to get caught up in bells and whistles and forget about your objectives. Help your team understand the need for clear objectives and priorities before they spend their time looking at full demonstrations. Ensure you're armed with your list of requirements and can control the process. Also have the consultant present product features in the order of your choosing. This gives you the ability to ensure that the features you need are consistently presented by each vendor you review.

Require cost forecast revisions

Obviously, you'll need to forecast the cost of implementation as accurately as possible. Avoid surprises—get a detailed breakdown of costs and fees before and during the requirements phase. Look for consultants who provide a "fixed cost" implementation. As objectives change, make sure you request revised cost estimates.

6. What modules will help you meet your goals?

| Module/Process | Plan and Control Growth | Reduce Labor Costs | Shorten Billing Cycle | Provide Insight | Manage Inventory | Increase Sales | Control Costs | Manage Cash |
|--|-------------------------|--------------------|-----------------------|-----------------|------------------|----------------|---------------|-------------|
| General Ledger | ● | ● | | | | | | |
| Accounts Receivable | ● | ● | ● | | ● | ● | | ● |
| Accounts Payable | | | | | | | ● | ● |
| Bank Reconciliation | ● | | | ● | | | | ● |
| Purchase Order | ● | ● | ● | | ● | | | ● |
| Sales Order | ● | | ● | | | ● | | |
| Inventory Control | ● | | | | ● | | ● | |
| Warehouse Management | ● | | | | ● | | ● | |
| Manufacturing | ● | | | | ● | | ● | |
| Job Cost | ● | ● | ● | | ● | | ● | ● |
| Payroll | | ● | | | | | ● | |
| Human Resources | ● | ● | | | | | ● | |
| Contact Management/CRM | ● | ● | ● | ● | ● | ● | ● | ● |
| Intelligence Reporting | ● | ● | ● | ● | ● | ● | ● | ● |
| Dashboards and Alerts | ● | ● | ● | ● | ● | ● | ● | ● |
| Fixed Assets | | | | | | | ● | |
| Document Management | | ● | | | | ● | ● | |
| Electronic Documents (EDI) | | | ● | | | ● | ● | |
| Service and Maintenance | ● | ● | | | ● | | | |
| Marketing Management | ● | | | | | ● | ● | |
| Web Store | ● | ● | ● | | ● | ● | ● | |
| Multinational Support | ● | | | | | ● | ● | |
| Budgeting | ● | ● | | ● | | | ● | |
| Allocations | ● | | | ● | | | ● | |
| Shipping Management | | | | | | | ● | |
| Customer Portal | ● | | | | | ● | ● | ● |
| Return Merchandise Authorization (RMA) | | | | | ● | | ● | |

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7. Comparing Product Functionality

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| Functionality/Module/ Information | Sage 50 Quantum Accounting | Sage Simply Accounting Enterprise 2009 | QuickBooks® Enterprise 2009 | Sage BusinessVision Accounting Standard Edition | Sage 300 ERP |
|--|----------------------------------|---|--------------------------------|--|---------------------------------------|
| Database | Pervasive® | MySQL® | Sybase® iAnywhere | Pervasive | Pervasive, SQL Server®, Oracle® |
| Supports Multiple Operating Systems and Servers | | | | | ● |
| Ease Of Use | | | | | |
| Spanish Version | | ● | | | ● |
| Switch Between English and French | | ● | | | ● |
| Additional Languages (Per User) | | | | | ● |
| Setup Wizard | ● | ● | ● | ● | ● |
| Accountants Copy | | ● | ● | | ● |
| QuickBooks (QB) Conversion of Maintenance Records | ● | ● | | | ● |
| QB Conversion of Transactions | ● | ● | | | ● |
| Grows With Business; Same Technology/Look and Feel All Editions; Growing to Over 400 Users | | | | | ● |
| Accounting/Banking | | | | | |
| Chart of Accounts/ General Ledger | ● | ● | ● | ● | ● |
| Multicurrency | | ● | ● | ● | ● |
| Accrual Basis | ● | ● | ● | ● | ● |
| Cash Basis | ● | ● | ● | | ● |
| Switch From Cash to Accrual Basis | | ● | ● | | |
| Real-Time Posting | ● | ● | ● | ● | ● |
| Financial Reports Such as Income Statement and Balance Sheet | ● | ● | ● | ● | ● |
| User-Definable Account Ranges | | ● | ● | ● | ● |

| Functionality/Module/ Information | Sage 50 Quantum Accounting | Sage Simply Accounting Enterprise 2009 | QuickBooks® Enterprise 2009 | Sage BusinessVision Accounting Standard Edition | Sage 300 ERP |
|--|-------------------------------------|---|---|--|--------------------------------------|
| Departmental Accounting | User-Defined up to 5 Segments | Limited to Departments | <ul style="list-style-type: none"> • Uses Classes • Easy Setup • Limited Functionality | Define up to 3 Segments | User-Defined up to 10 Segments |
| Track Tax Line on Accounts for Tax Reporting | | ● | ● | | ● |
| Number of Years of Financial History | Unlimited | 100 | Unlimited | 99 | 99 |
| Easily Add Notes for Financial Statements | | ● | ● | | ● |
| Consolidate Multiple Companies | ● | ● | ● | ● | ● |
| Bank Reconciliation | ● | ● | ● | ● | ● |
| Statement Downloads | ● | ● | ● | ● | ● |
| Manage Fixed Assets | ● | ● | ● | ● | ● |
| Fund Transfers | ● | ● | ● | | ● |
| Budgets | Unlimited | Single | Single | Single | Five |
| Batch/Smart Posting | | | | | |
| Accounts Receivable and Accounts Payable | | | | | |
| Accounts Receivable, Accounts Payable | ● | ● | ● | ● | ● |
| Customer Ship-to Addresses | 20 | 100 | Unlimited | Unlimited | Unlimited |
| Vendor Remit-to Addresses | 20 | 1 | 1 | | Unlimited |
| Apply Line Discount on Sales Forms | | ● | | ● | ● |
| Purchase Quotes | | ● | | | ● |
| Take Deposit on Purchase and Sales Orders | | ● | | ● | ● |
| Merge Customer and Vendor Records | | ● | ● | | ● |
| Access to Customer and Vendor Balances on Maintenance Screens and Lists | ● | ● | ● | ● | ● |
| Customizable Fields for Vendor and Customer Records | ● | ● | ● | ● | ● |
| Quotes, Sales Orders, Invoicing, Receipts | ● | ● | ● | ● | ● |
| Recurring/Memorized Sales Transactions | ● | ● | ● | ● | ● |

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| Functionality/Module/ Information | Sage 50 Quantum Accounting | Sage Simply Accounting Enterprise 2009 | QuickBooks® Enterprise 2009 | Sage BusinessVision Accounting Standard Edition | Sage 300 ERP |
|--|----------------------------------|---|--------------------------------|--|--------------|
| Accounts Receivable and Accounts Payable | | | | | |
| Purchase Orders, Purchases, Payments | ● | ● | ● | ● | ● |
| Check, Credit Card, and Other Payment Methods | ● | ● | ● | | ● |
| Recurring/Memorize Purchase Transactions | ● | ● | ● | ● | ● |
| Time and Expense Tracking | ● | ● | ● | ● | ● |
| Alerts, Triggers | ● | ● | ● | | ● |
| Subcontractor Insurance Tracking | ● | ● | ● | | ● |
| Customer and Vendor Balances Available While Entering Transactions | ● | | | ● | ● |
| Proposals With Progress Billing | ● | | ● | | ● |
| Select for Progress Billing | ● | | ● | | ● |
| Account Register for Quick Entry | ● | | ● | | ● |
| Customer and Vendor Credit Memos Transactions | ● | | ● | ● | ● |
| Select for PO Based on Out of Stock or Below Minimum Quantity | ● | | | ● | ● |
| Drop Shipments and Auto- POs for Drop Shipments | ● | | | ● | ● |

| Functionality/Module/ Information | Sage 50 Quantum Accounting | Sage Simply Accounting Enterprise 2009 | QuickBooks Enterprise 2009 | Sage BusinessVision Accounting Standard Edition | Sage 300 ERP |
|--|----------------------------------|---|--|--|---|
| Payroll | | | | | |
| Payroll | U.S. Based | Canadian and U.S. Based | U.S. Version Has U.S. Payroll, Canadian Version Has Canadian Payroll | Canadian Based, U.S. Ships With Sage Pro Payroll | Canadian and U.S. Based |
| Payroll Does Not Require Subscription | ● | ● | | \$99 per Year for Payroll Updates | |
| Inventory | | | | | |
| Inventory Management | ● | ● | ● | ● | ● |
| Inventory Costing | LIFO, FIFO, and Average | FIFO and Average | Average | LIFO, FIFO, and Average | LIFO, FIFO, and Average Most Recent, User- Specified, Standard Cost |
| Price Levels | 10 | 100 | 100 | 20 | Unlimited |
| Multiple Locations For Inventory—Light Functionality | | ● | ● | ● | ● |
| Serialized Inventory and Serialized Item Costing | ● | ● | | ● | ● |
| Service Items | ● | ● | ● | ● | ● |
| Nonstock, Description Only, Labor Types of Items | ● | ● | ● | ● | ● |
| Inventory Assembly/ BOM | ● | ● | ● | ● | ● |
| BOMS (Assemblies in Sage 50) | ● | ● | ● | ● | ● |
| Edit BOMS | ● | ● | ● | ● | ● |
| Buy, Sell, Stock In Different Units | ● | ● | ● | ● | ● |
| Quantity on Hand—Track and Warn When Selling | ● | ● | ● | ● | ● |
| Quantity Price Discounts | ● | | | ● | ● |
| Master Stock and Subitems | ● | | | | |

Sage 300 ERP

| Functionality/Module/ Information | Sage 50 Quantum Accounting | Sage Simply Accounting Enterprise 2009 | QuickBooks Enterprise 2009 | Sage BusinessVision Accounting Standard Edition | Sage 300 ERP |
|---|----------------------------------|---|----------------------------------|--|-----------------|
| Inventory | | | | | |
| Additional Inventory Attributes Such as SKU/ UPC, Weight, Preferred Vendor | ● | ● | ● | ● | ● |
| Vendor Part Number | ● | | ● | ● | ● |
| Warranty Tracking on Serialized Items | ● | | | | ● |
| Track Commissionable Items | ● | | | | ● |
| Track Assembly History | ● | | | | ● |
| Quantity Available—Track and Warn When Selling | ● | | ● | ● | ● |
| Work Tickets | ● | | | | ● |
| Jobs | | | | | |
| Job Costing | ● | ● | ● | ● | ● |
| Monthly Project Budgeting | | ● | | ● | ● |
| Allocate a Single Transaction Line to Multiple Jobs | Only in Payroll | ● | Only in Payroll | ● | ● |
| Phases and Cost Codes For Jobs | ● | | ● | ● | ● |
| Retainage for Jobs | ● | | ● | | ● |
| Labor Burden in Payroll | ● | | ● | | ● |
| Security | | | | | |
| Role-Based Security | ● | ● | ● | ● | ● |
| Screen Level Security | ● | | ● | ● | ● |

Sage 300 ERP

| Functionality/Module/ Information | Sage 50 Quantum Accounting | Sage Simply Accounting Enterprise 2009 | QuickBooks Enterprise 2009 | Sage BusinessVision Accounting Standard Edition | Sage 300 ERP |
|--|----------------------------------|---|----------------------------------|--|-----------------|
| Reporting/Forms | | | | | |
| Export Standard Reports in Excel®, PDF, Email | ● | ● | ● | ● | ● |
| Financials | ● | ● | ● | ● | ● |
| SAP® Crystal Reports– Viewer | ● | ● | | ● | ● |
| Form Designer | ● | ● | ● | ● | |
| Use SAP Crystal Reports To Design Forms | | ● | | ● | ● |
| SAP Crystal Reports– Designer Included | ● | | | ● | |
| Services/Integration | | | | | |
| Magnetic Media | | ● | | ● | ● |
| Online Invoicing and Payment | | ● | ● | | ● |
| Online Back-up Integration | ● | ● | ● | | |
| Payroll Tax Updates– Tables and Forms | ● | ● | ● | ● | ● |
| Sage CRM Integration | | | | | ● |
| Direct Deposit | ● | ● | ● | | ● |
| Remote Access | ● | ● | ● | ● | ● |
| Credit Card Processing– Card Not Present | ● | ● | ● | ● | ● |
| Credit Card Processing– Swipe Card | ● | | ● | ● | ● |
| Electronic Bill Pay | ● | | ● | | ● |
| Integration | UPS® | | UPS, FedEx | | |
| E-File Payroll Forms and Deposits | ● | | ● | | ● |
| Comprehensive Outlook Integration | | | | ● | ● |
| Web Store | ● | | | ● | ● |
| Sage Timeslips Integration | ● | | ● | | ● |

Sage 300 ERP

| Functionality/Module/ Information | Sage 50 Quantum Accounting | Sage Simply Accounting Enterprise 2009 | QuickBooks Enterprise 2009 | Sage BusinessVision Accounting Standard Edition | Sage 300 ERP |
|--|----------------------------------|---|----------------------------------|---|-----------------|
| Multinational (Global Commerce Support)/Multientity Support | | | | | |
| Multicurrency Support | | | | ● | ● |
| Localized for Different Countries | | | | | ● |
| Multiple Companies | ● | ● | ● | ● | ● |
| Intercompany Transactions | | | | | ● |
| Data Consolidation for Financial Reporting | | | | | ● |
| Intelligence Reporting | | | | | |
| Collections Processing | | | | | ● |
| Dashboards and Customizable Financial Reporting | | | | | ● |
| Integration With a Comprehensive CRM Suite | | | | | ● |

8. Success Stories—Customers Making the Move

Customer: Crossroads Diversified Services Inc., Nonprofit

Challenge: Crossroads was severely burdened by tedious, repetitive procedures that made payables, receivables, payroll processes, and report generation inefficient.

Solution: Sage 300 ERP (formerly Sage ERP Accpac) provides Crossroads with robust accounting and reporting capabilities in a flexible and affordable system.

Results: With its new system in place, Crossroads dramatically improves overall productivity and efficiency, specifically in processing accounting data and in producing month-end financial statements.

Read More: <http://NA.Sage.com/Sage-300-ERP/resources/~/media/F5469A65C91E422AA5196BC2D9188084.pdf>

Customer: Source Technologies Inc., Hardware and Software Industry

Challenge: Source Technologies needed an up-to-date, scalable accounting and CRM solution that could handle detailed project accounting, complex sales orders, and sales data tracking and management.

Solution: Sage CRM integrates with Sage 300 ERP and provides sales and customer service representatives with easy web-based access to comprehensive data about prospects, customers, and products.

Results: With the Sage integrated solution, the company earns immediate investment return with improved customer service, forecasting accuracy, and inventory control.

Read More: <http://NA.Sage.com/Sage-300-ERP/resources/~/media/78724B4F52DE4491A57B77BDF2330DC3.pdf>

Sage 300 ERP

“Sage 300 ERP is to be saluted for the design of the system, which provides so much flexibility and has enabled us to conduct our business much more efficiently than before.”

“The bottom line is that Sage CRM has fulfilled our initial needs for the centralized creation of an all-inclusive customer database, and continues to meet our requirements by providing our entire enterprise access to the data needed to close sales, satisfy customers, and build long-lasting relationships.”

About Sage

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. At Sage, we live and breathe business every day. We are passionate about helping our customers achieve their ambitions. Our range of business software and services is continually evolving as we innovate to answer our customers' needs. Our solutions support accounting, operations, customer relationship management, human resources, time tracking, merchant services, and the specialized needs of the construction, distribution, manufacturing, nonprofit, and real estate industries. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 12,600 people and supports more than 6 million customers worldwide. For more information, please visit the website at www.NA.Sage.com or call 866-996-7243. Follow Sage North America on Facebook at: <http://www.facebook.com/SageNorthAmerica> and Twitter at: <http://twitter.com/#!/sagenamerica>.