Sage and FMS Customers' Day
What's New for Sage 300

John Thomas

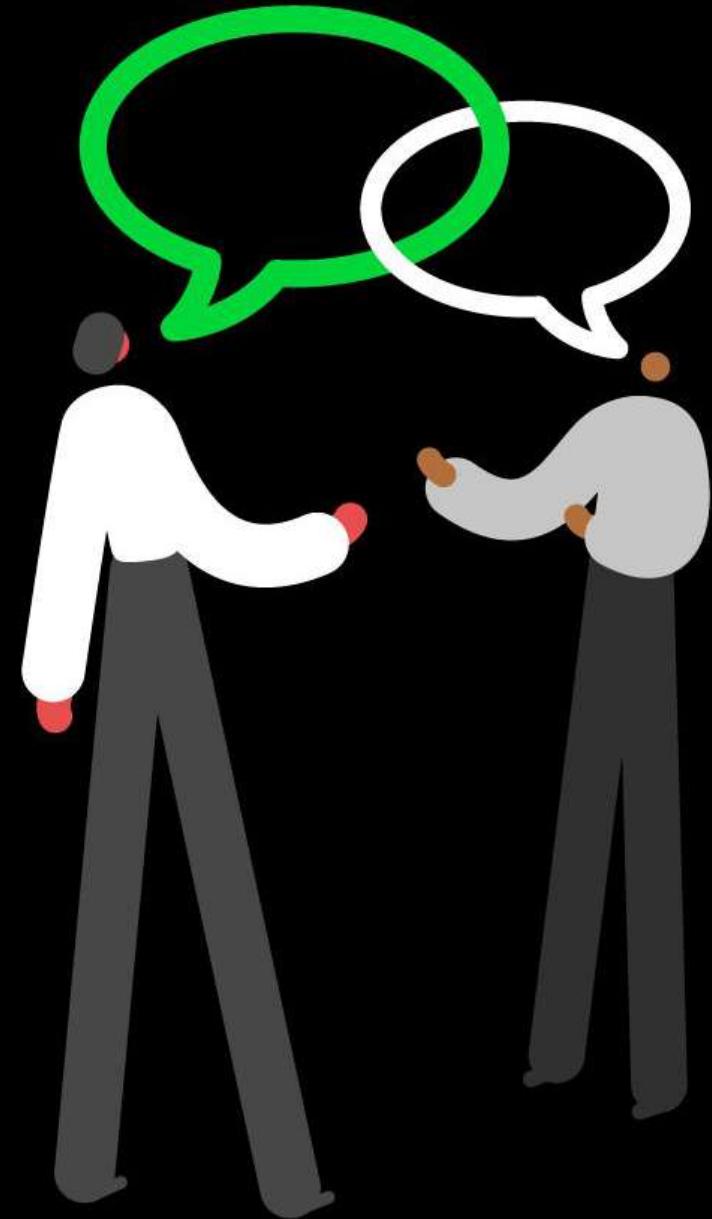**Principal Software Architect – Sage 300**

April 24, 2023

Sage

Sage – FMS Partnership

30 Year Celebration

- Welcome!

- Thanks to Sage Asia and FMS for invitation

- John Thomas (JT)
  - Principal Software Architect
  - 29 years at Sage, 14 years on Sage 300, 40 years developing software

- Collaborative effort to move into new paradigm

- Partners are crucial for Sage 300
  - Vast eco-system
  - Extended functionalities
  - Technical and business relationships
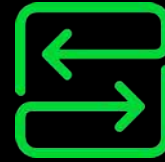 - Dependencies
  - Opportunities

Sage 300 Cloud Solution is a Great Choice

- Adoption

- Collaboration

- Integration

- Partnership

- Multiple Products in One

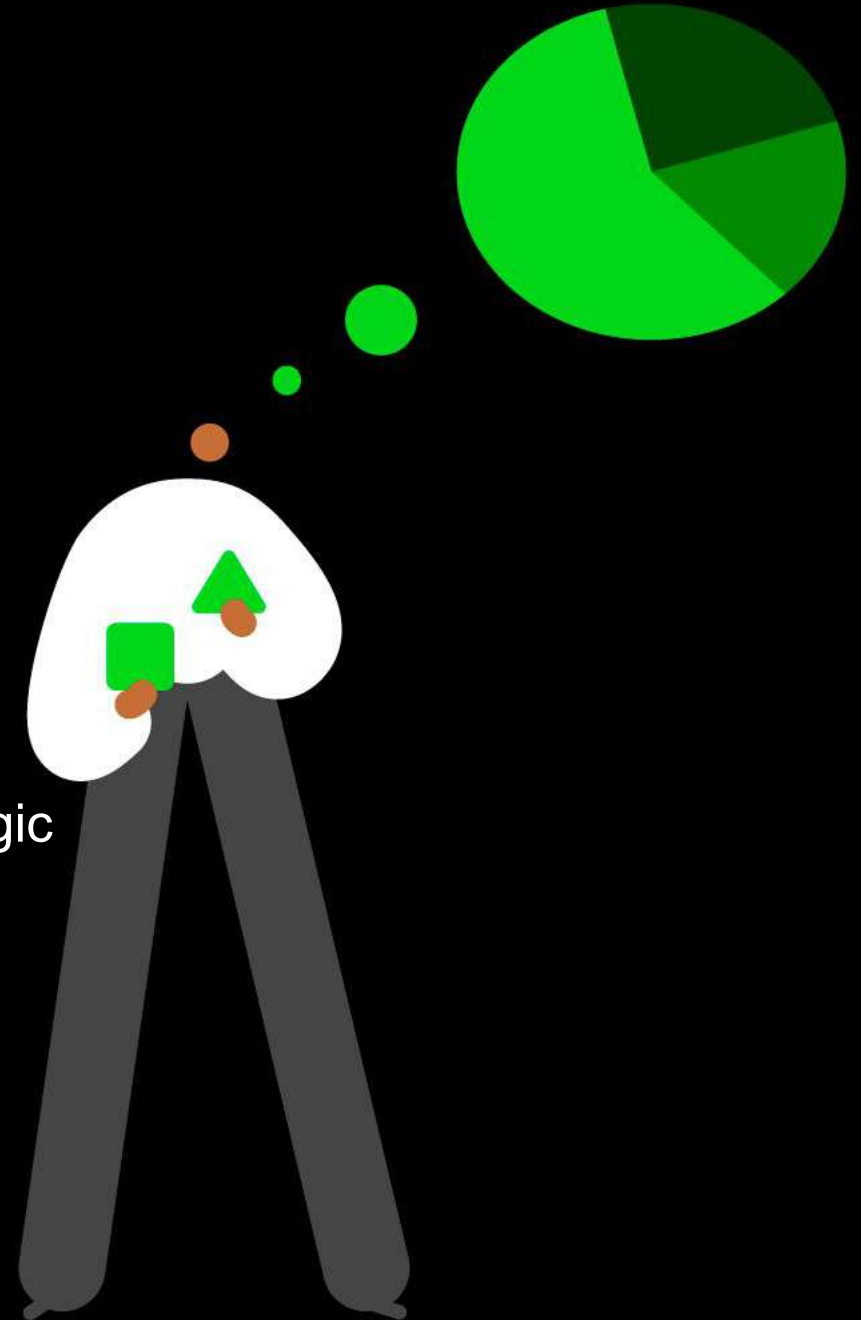- Public vs. Private Cloud

- Hybrid Model

- Focus on Parity

- Full Roadmaps

- Future Technologies

- Innovation

- Untethered Access

- No Loss of Investment

Sage 300 Multiple Products in One

- Desktop
  - On-Premises
  - Client/Server Install
  - Business logic layer
  - Not browser based

- Web
  - On-Premises
  - Web Server Install
    - Requires desktop components
  - Same trusted business logic
  - Same database
  - Hybrid
    - Tethered and untethered
  - Keep your investment, training, relationships

Sage

Public Cloud vs. Private Cloud

Public Cloud

- Utilizes shared infrastructure

- Management and security performed by provider

- SaaS, PaaS

- Application shared by tenants

- Customizations, modifications, third-party applications are management issues unto itself

Private Cloud

- Utilizes an organization's own infrastructure

- Management and security performed by organization

- Resources accessed over private network or VPN

- Application not shared

- Customizations, modifications, third-party applications are easily managed

  - Hybrid has best partner and ISV modules, add-ons, modules, customizations, integrations on desktop and web

- No loss of investment

Sage

Striving for Parity and Looking Ahead

Striving for Parity

- On the journey to have all functionality in the web

- Hybrid mode until we get there
  - No loss in functionality

- In-progress
  - PJC, PJC Integrations, Payroll, HRMS Integration
    - Creating universal Proxy availability

Roadmaps

- Product Roadmap

- Technical Roadmap
  - Additional Technical Topics
    - .NET 5.0 (Core)
    - OAuth Support (SSO)
    - 64-Bit
    - Developer Portal
    - ChatGPT
    - Etc.

Sage 300 | 4 Year Roadmap

	v2023.x Aug 2022+	v2024.x Aug 2023+	v2025.x Aug 2024+	v2026.x Aug 2025+

Technical Compliance & Maintenance of Line	•Ongoing maintenance:
	  •Security
	    •Updated SQL Client to v18
	    •Complex Passwords
	  •Sage Partner Cloud
	  •Sage 300 Technical Debt
	•Ongoing technical MOL:
	  •Technical Compliance
	   (SQL & Crystal update, OS compatibility)
	•Deprecate Sage 300 Online
		•Ongoing maintenance:
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Sage 300 Web Screens

Singapore IRAS Tax Reporting

JSON Payload

User in Singapore Tax module to instigate upload

Upload to Sage CE which communicates with IRAS

IRAS receives payload and acknowledges job

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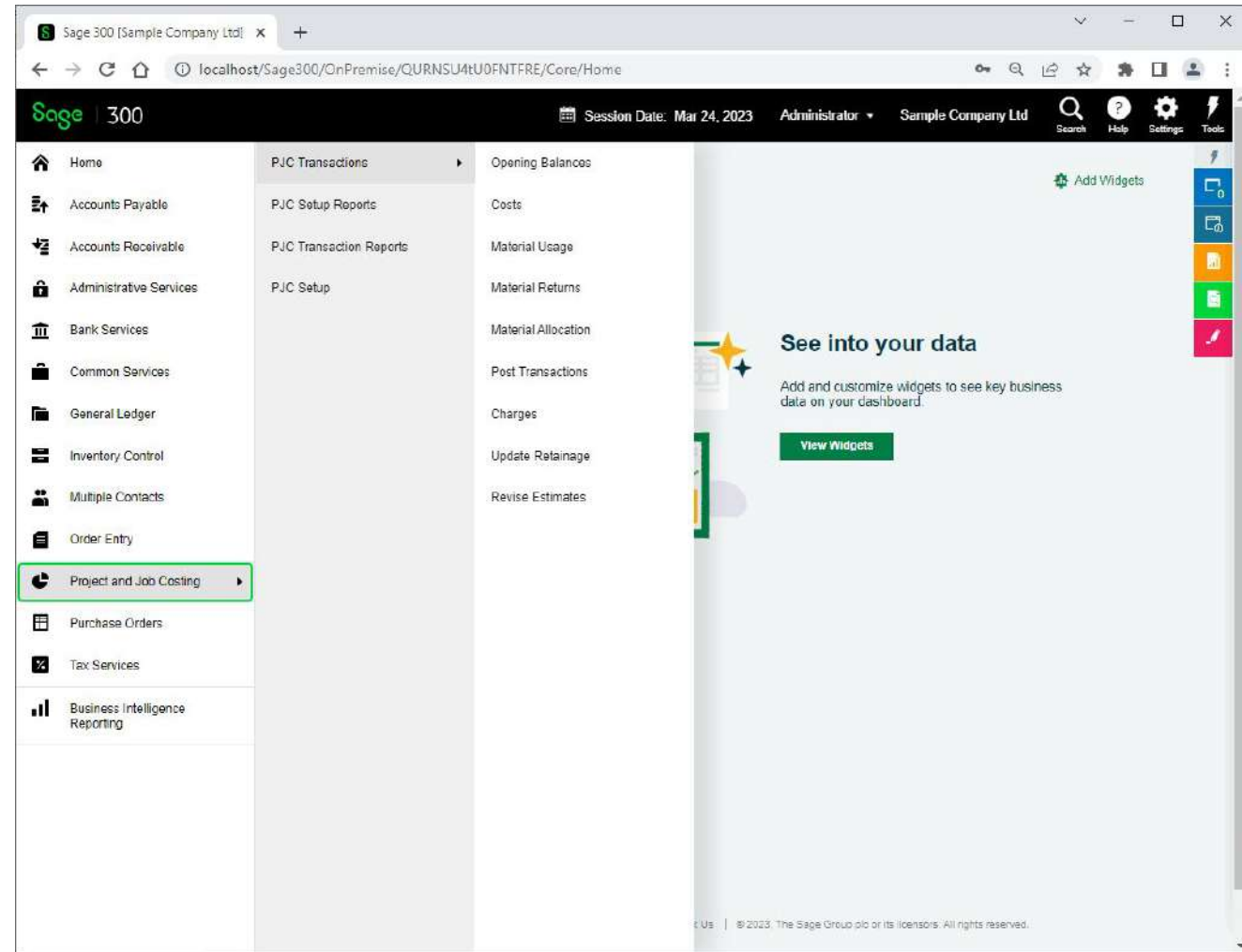|	v2023.x Aug 2022+	v2024.x Aug 2023+	v2025.x Aug 2024+	v2026.x Aug 2025+

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Sage 300 Web Screens

Declarative Reports and PJC

- Reports for Setup UIs
  - 100+ created for 2023.1 using new Declarative Framework
- Database setup separated from desktop
  - Important for parity
- Close to 30 PJC screens and reports complete

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Sage

Sage 300 Web Screens

Enhanced Credentials Security

- Elimination of certain ISM files containing user credentials

- Leveraging MS SQL Server's authentication features

- Elimination of numerous security configurations and features in Sage 300

  - Now administered by MS SQL Server and local machine policies

  - Keeping high-level integration points or access points intact

  - Coming in a controlled release April 27 (2023 PU2) and a full release August 2023

Security Enhancement Sage 300

How we protect your credentials and maintain the integrity and continuity of critical systems

Sage 300 | 4 Year Roadmap

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Sage 300 | 4 Year Roadmap

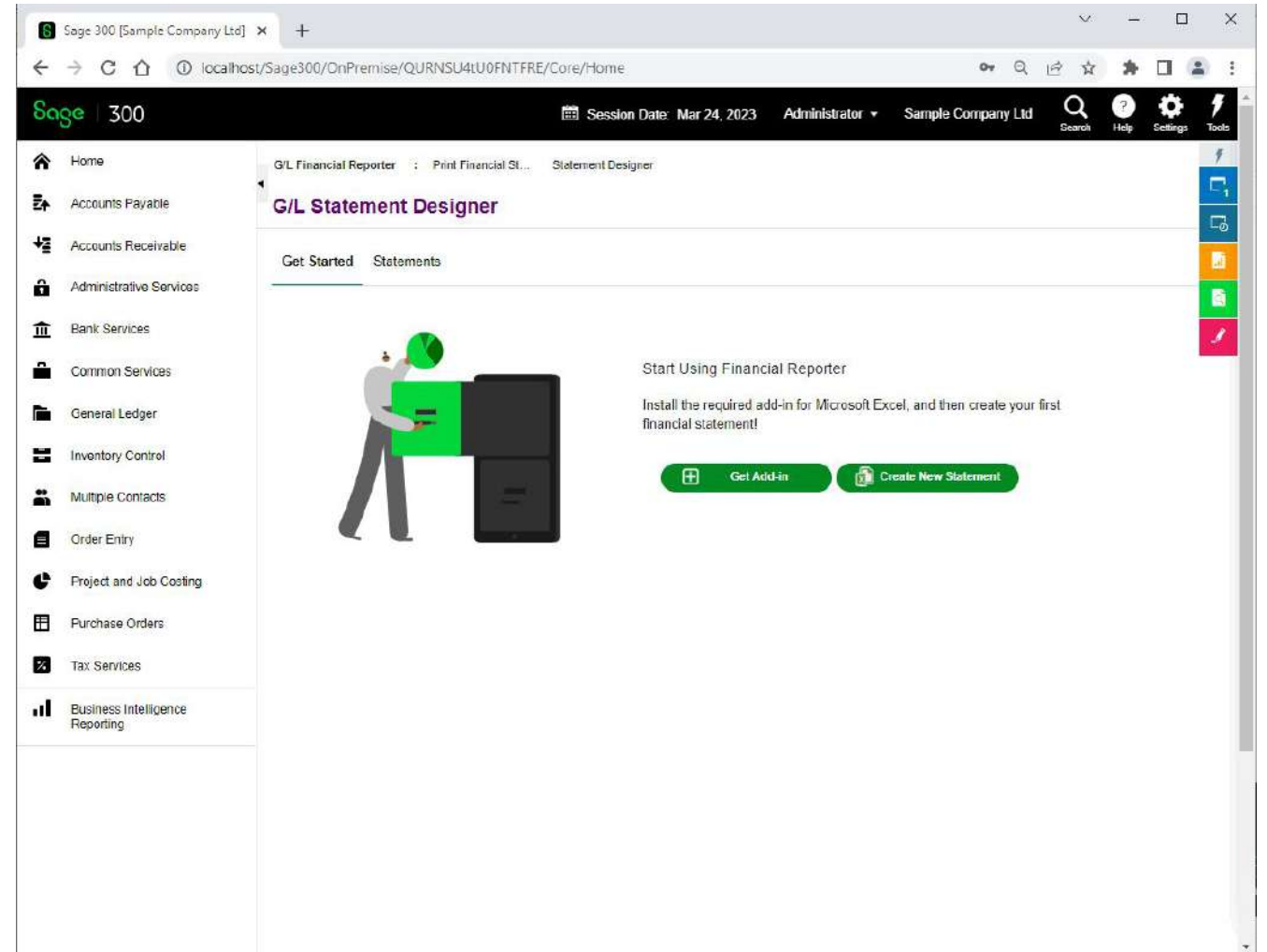|	v2023.x Aug 2022+	v2024.x Aug 2023+	v2025.x Aug 2024+	v2026.x Aug 2025+
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Sage 300 Web Screens

G/L Financial Reporter

- Bringing FR to the web

- No loss of investment on FR reports and configurations from desktop

- Will replace SIRC

Sage 300 | 4 Year Roadmap

Sage

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Sage 300 | 4 Year Roadmap

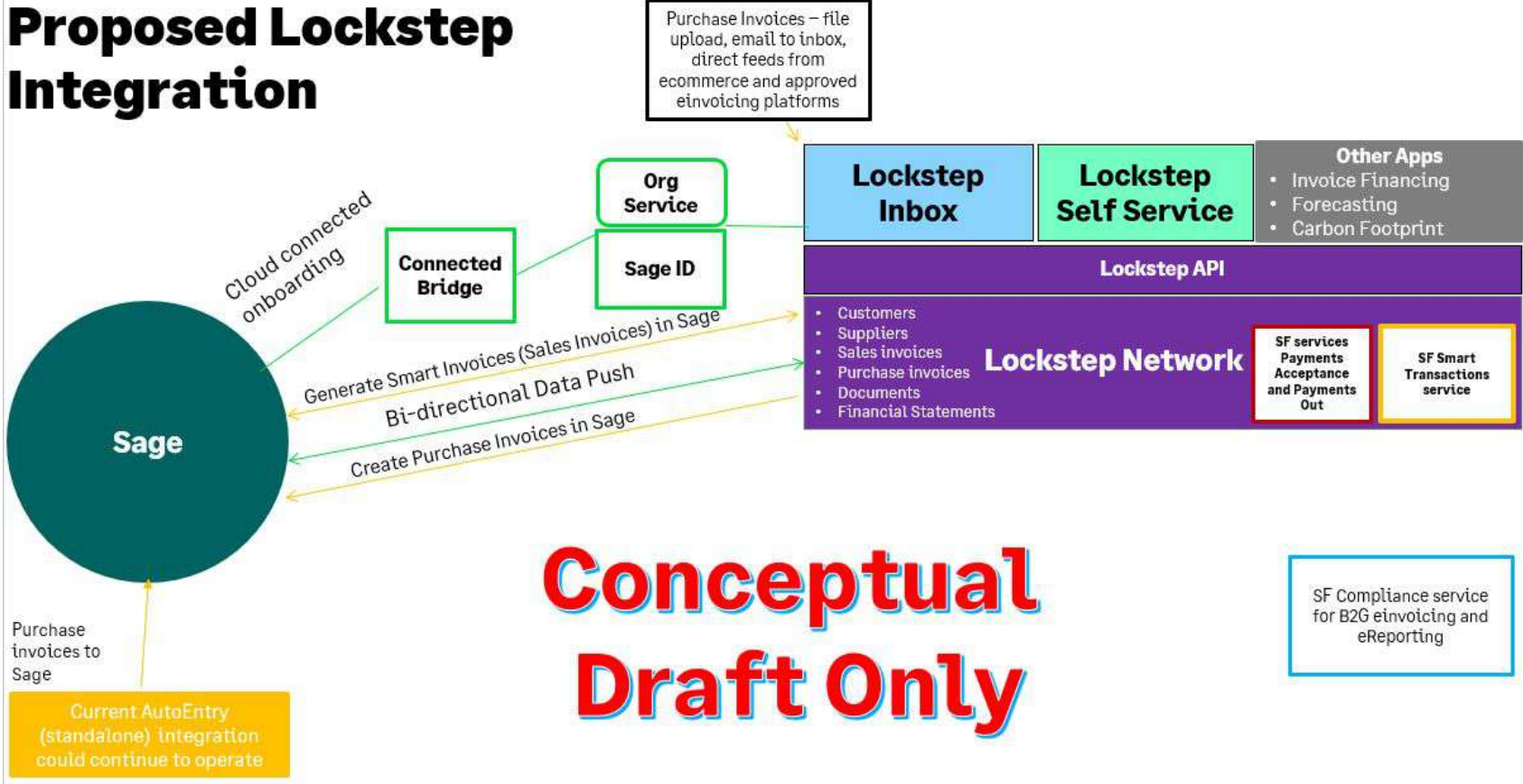|	v2023.x Aug 2022+	v2024.x Aug 2023+	v2025.x Aug 2024+	v2026.x Aug 2025+

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Sage 300 Web Screens

Sage Acquires Lockstep

- Lockstep connectors already exist for Sage 300

- New Lockstep platform being developed

- POCs are active now with multiple Sage products

Sage 300 | 4 Year Roadmap

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Customer Experience	•PJC Web Screens •User Login/Logout Report	•Sage HR Integration •Address call drivers, defects & NPS •Select enhancement requests	•Address call drivers, defects & NPS •Select enhancement requests	•Address call drivers, defects & NPS •Select enhancement requests

Sage 300 Web Screens

Subclassing

- Design is in-progress

- Subclassing of business views are a core aspect that illustrates the flexibility of the Sage 300 architecture

- Will rely on customization strategy in web screens

- Customization strategy will also be extended as required

Sage 300 Web Screens

Subclassing Design

Properly implement subclassing architecture for all Sage 300 web modules and Web API

Sage 300 | 4 Year Roadmap

	v2023.x Aug 2022+	v2024.x Aug 2023+	v2025.x Aug 2024+	v2026.x Aug 2025+

Technical Compliance & Maintenance of Line	•Ongoing maintenance:
	  •Security
	    •Updated SQL Client to v18
	    •Complex Passwords
	  •Sage Partner Cloud
	  •Sage 300 Technical Debt
	•Ongoing technical MOL:
	  •Technical Compliance
	  (SQL & Crystal update, OS compatibility)
	•Deprecate Sage 300 Online
		•Ongoing maintenance:
		  •Security
		    •Eliminate ShareData Folders
		    •Enhanced Credentials Security
		  •Sage Partner Cloud
		  •Sage 300
		•Ongoing technical MOL:
		  •Technical Compliance
		  (SQL & Crystal update, OS compatibility)
		  •Generic un-bound grid (TBD)
		  •FR for the Web and deprecate SIRC
			•Ongoing maintenance:
			  •Security
			  •Sage Partner Cloud
			  •Sage 300
			•Ongoing technical MOL:
			  •Support for Sub-Classing
			  •Technical Compliance
			  (SQL & Crystal update, OS compatibility)
			  •3-Tier Deployment Model
			  • MFA via Sage ID
			  •Discover and include partner APIs
				• Ongoing maintenance:
				  • Security
				  • Sage Partner Cloud
				  • Sage 300
				• Ongoing technical MOL:
				  • Technical Compliance (SQL & Crystal update, OS compatibility)

Regulatory Compliance	•Canadian & US Payroll Tax Updates •Enhancements to US & Canadian Payroll •Data Privacy SIN/SSN masking •AP and Payroll •Support Aatrix for 1099s in AP •Singapore IRAS Tax Reporting	•Canadian & US Payroll Tax Updates •Enhancements to US & Canadian Payroll •New Payroll 7.4	•Canadian & US Payroll Tax Updates •Enhancements to US & Canadian Payroll	•Canadian & US Payroll Tax Updates •Enhancements to US & Canadian Payroll

Support Cloud Native	•Web screens:
	  •Reports for Setup UI's
	  •Admin Service Utilities
	  •PJC Web Screens
	•Sage Partner Cloud:
	  •Update to 2023.1
	
	•Integrations:
	  •Sage Intacct Budget & Planning
		•Web screens:
		  •PJC Web Screens
		  •PO Web Screens with PJC Integration
		  •US Payroll Web Screens
		
		•Sage Partner Cloud:
		  •Improvements from partner feedback
		
		•Service Fabric / Other Integrations
		  • Enhancements to Bank Feed
		  • Lockstep Outlook Integration
			•Web SDK & API improvements
			
			•Web screens:
			  •PJC Web Screens
			  •IC, OE Web Screens with PJC Integrations
			  •US Payroll Web Screens
			
			•Sage Partner Cloud:
			  •Web screens deployed
			
			•Service Fabric / Other Integrations
			  •TBD
				•Web SDK & API improvements
				•Web screens:
				  • CAD Payroll Web Screens
				  •PJC Web Screens
				  •Serialized Inventory & Lot Tracking
				  •Visual Process Flows
				
				•Sage Partner Cloud:
				  •Improvements from partner feedback
				
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Sage 300 | 4 Year Roadmap

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Extending Sage 300 Capabilities

Sage 300 ERP is more than just financials

Multi-Currency - Multi-Language - Multi-Entities

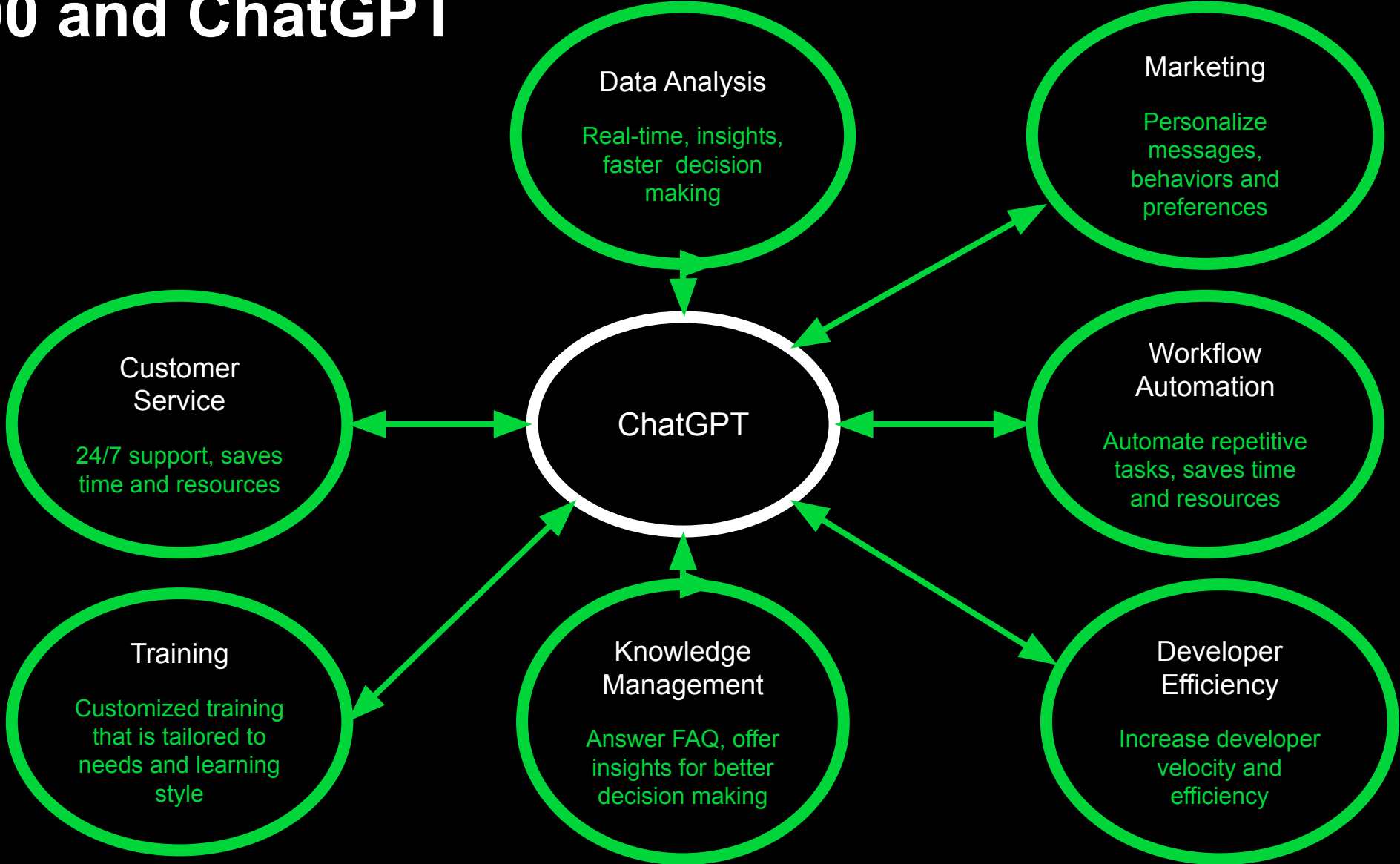|					
Finance and Accounting	Purchasing	Project Job Costing	Business Intelligence	Customer Relationship Management	Sales order
Vendor Management	Inventory				
					Planning, Reporting and Forecasting
	Warehouse Management System	E-commerce	Sales , payment & cash flow automation	AP Automation	

Legend:
- Sage
- Tech ISV
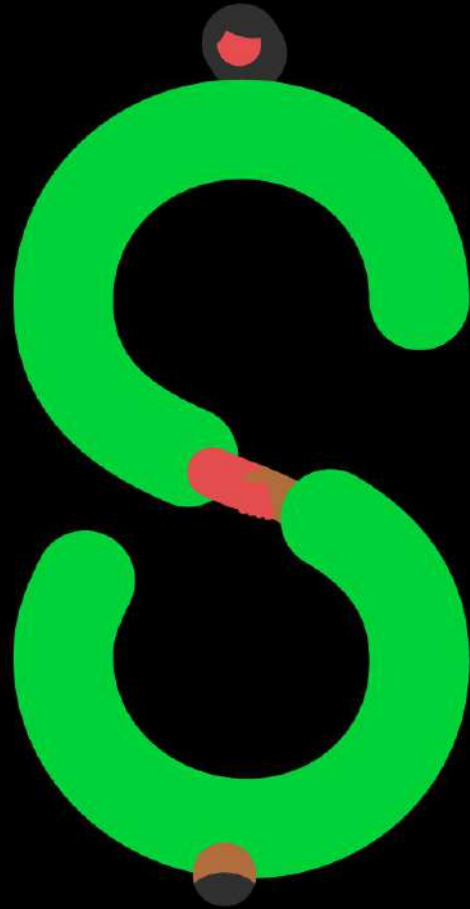- New Tech ISV

Sage 300 Cloud Solution - A good choice

- Three Horizons
  - Defend and extend current product, customer, and partner satisfaction
  - Build momentum with innovation and customer/partner excitement
    - ChatGPT…
  - Disruptive innovation with customer/partner captivation
    - ChatGPT…
- Untethered access
- No loss of investment
- Full roadmaps
- Best partner and ISV modules, add-ons, modules, customizations, integrations on desktop and web

Sage

Sage 300 and ChatGPT

ChatGPT

Data Analysis

Real-time, insights, faster decision making

Marketing

Personalize messages, behaviors and preferences

Customer Service

24/7 support, saves time and resources

Workflow Automation

Automate repetitive tasks, saves time and resources

Training

Customized training that is tailored to needs and learning style

Knowledge Management

Answer FAQ, offer insights for better decision making

Developer Efficiency

Increase developer velocity and efficiency

Thank you!