K E Y Notes from Quality IT

Newsletter for Sage 100 ERP

What's Inside

Headline News

Sage North America has announced the results of its *Reinvention of Small Business Study*. The study found that many small business owners are putting in more hours, extending their work week, and taking less vacation compared to five years ago. In order to stay more connected after hours and weekends, many small business owners indicated that they are utilizing more mobile solutions and tools. Click here to read more.

Sage 100 ERP 2013

Sage ERP MAS 90 Has A New Name And An Upcoming Release Filled With Enhancements

The Sage 100 ERP 2013 release (also known as Version 5.0) is scheduled for release in the fall. Many of the new capabilities planned for this release are customer-requested enhancements. Sage also continues to expand the connected web services available for customers, and to provide more flexible deployment and pricing options. Here we cover just some of the new capabilities that will be found in the upcoming release.

Expanded Accounts Payable Invoice Numbers

With the Sage 100 ERP 2013 release the Accounts Payable Invoice Number is expanded. It will accommodate up to 20 characters so that the entire invoice number of a vendor can be entered, minimizing the need to truncate. This will simplify the process of matching invoices from vendors, and reduce errors because you will be able to use the entire vendor's invoice number in the Sage 100 ERP system.

Naturally, the new longer invoice number takes up more space on reports. Sage is planning to keep as many reports in convenient portrait format as possible. As a result, some reports and listings, such as the Aged Invoice Report and Trial Balance, will be slightly modified. Journals and Journal Comments that contain references to the Vendor Number, Invoice Number, and Comment Detail will use additional rows in order to accommodate the longer field length.
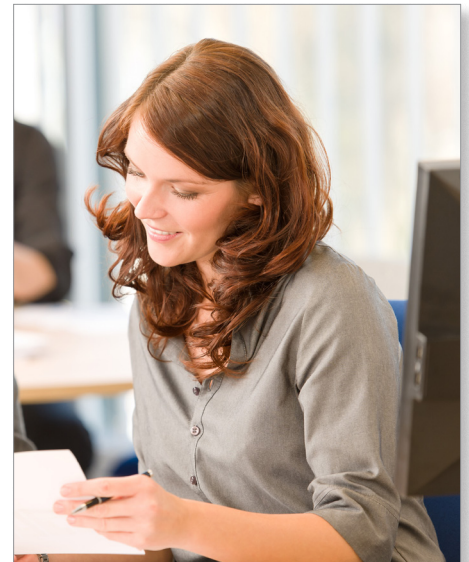
Convenient Cleared Check Information

Prior to this release, you had to navigate to the Bank Reconciliation module in order to view cleared check information. In response to customer requests, Sage has added the option to view cleared check information in Vendor Maintenance on the Invoices, Transactions, and Checks tabs. Sage has added this as an Accounts Payable Setup Option, allowing you to choose whether or not you wish to take advantage of this new feature.

Make Customers And Vendors Inactive

Have you ever had to discontinue a relationship with a customer or vendor? While you may decide to discontinue doing business with a particular organization, you will

Sage 100 ERP 2013

(continued from cover)

still want to retain all the historical information pertaining to the business relationship. Now you can designate a customer or vendor as Inactive to prevent users from accidentally processing transactions against the account.

For Inactive vendors, you will be able to enter a Reason Code explaining why this vendor should not be used, and you also can choose to remove them from lookups and listings to keep your entry screens clean.

For customers that you designate as Inactive, you will still be able to receive payments against their accounts and you can create a targeted group of inactive customers for collections activities. You also can choose to remove inactive customers from lookups and listings.

Full details of actions taken on inactive customers and vendors will be entered in the audit log.

ACH Electronic Payment Details Added To Bank Reconciliation

Customers told Sage they needed to be able to see the full details of ACH transactions entered in Accounts Payable within the Bank Reconciliation screen. A new Accounts Payable option gives you the ability to do just that. Once the option is activated, ACH transactions will be posted to Bank Reconciliation in detail, including the unique electronic check numbers. This option will be activated with and without vendor remittance, and no deposit or check entry is necessary.

Enhanced Inventory Maintenance Screen

There are so many details stored in Sage 100 ERP relating to your inventory items and Sage enhances the display of these items in the upcoming release. In the 2013 release customer service personnel will be able to see on-hand quantities and pricing directly from the main tab of Inventory Maintenance. It will then be possible to click on each of the items and use the Quantity Recap button to drill into details, such as the specific quantities available in each warehouse.

Sage CRM Enhancements

Sage will deliver Sage CRM Version 7.2 with the Sage 100 ERP 2013 release.

Seamless Integration

Sage CRM Version 7.2 receives several enhancements aimed at making the software work more seamlessly with Sage 100 ERP. With this release, Sage 100 ERP tasks launched from Sage CRM will not require the use of a Sage 100 ERP user license. Therefore Sage CRM users can launch accounting-related tasks without the need to purchase an accounting user license.

Multi-Company Sage CRM

While you may run multiple companies in Sage 100 ERP to keep different lines of business, such as product sales versus service sales, separate, you would probably rather keep all your prospect and pipeline management within a single CRM company. With the Sage 100 ERP 2013 release you will be able to map multiple ERP companies to a single Sage CRM system. With this enhancement, organizations using Sage CRM will be able to obtain a single consolidated view of all their customer-facing activities and salespeople will be able to more efficiently move between all their customers and prospects.

Sage CRM Quick Order Entry

Another customer request has been for Sage CRM users to be able to do a quick order entry in the familiar Sage CRM interface, without having to launch the Sage 100 ERP order entry screen. With the Sage 100 ERP 2013 release, new quick order entry screens will be an option for Sage 100 Advanced ERP and Premium ERP.
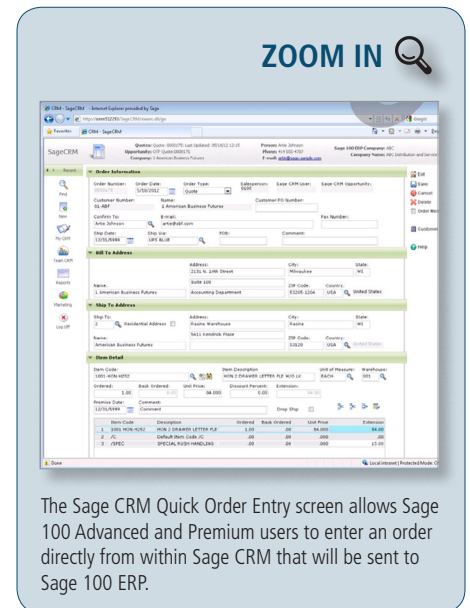
The Sage CRM Quick Order Entry screen allows Sage 100 Advanced and Premium users to enter an order directly from within Sage CRM that will be sent to Sage 100 ERP.

Upgrade-Safe Sage CRM Customizations

Sage CRM 7.2 includes safeguards to preserve Sage CRM customizations when installing a CRM patch or service pack. If the Sage CRM SDK or in-product customization tool components have been used to develop the customizations, they will not have to be reapplied following an update.

There is more in the Sage 100 ERP 2013 release than we have space for here. Look for more of what is in store in the upcoming release in our next issue. Please call us with your questions. ✴

Why You Should Attend Sage Summit

Sage Summit is just around the corner, and with it your opportunity to gain insights and practical ideas that can deliver real business benefits for your organization. Here we take a closer look at what you can expect to learn at the 2012 Sage Summit conference. And remember, by attending this year's event, you can earn as many as 17 CPE credits.

Get More From Your Sage Solution

Sage Summit brings forth dozens of Sage product experts and solution architects who are eager to share their insider perspective and tips. The in-depth sessions and hands-on labs will help you avoid wasting time and money with the frustrating trial-and-error approach. You can take advantage of proven techniques that help you work better, faster, and smarter.

Solve Real Business Problems

Sage understands the particular challenges organizations like yours are up against. Sage brings industry leaders and experienced product end-users to the table who can explain how they solved similar problems, enabling you to learn what works and what doesn't. Attendees of Sage Summit take home actionable ideas on how Sage solutions can be used to increase productivity, cut costs, and improve their decision-making process.

Get Answers To Your Questions

At Sage Summit you can schedule a 30-minute appointment in the on-site Support Center and meet one-on-one with a technical expert who knows your Sage solution inside and out. Come prepared with your product or technical questions. The support experts from Sage will provide straightforward advice and walk you through the simplest way to accomplish your task.

See What's Next In Business Technology

Business technology is constantly evolving. The Sage Summit trade show attracts top solution providers exhibiting solutions that enhance and expand the power of your Sage software—including cloud technologies, connected Web services, mobile technologies, reporting and analytics solutions, and more. Come to Sage Summit to see what is next in business technology.

Build Your Network Through Face-To-Face Interaction

Sage Summit attracts many Sage product users, early technology adopters, and business leaders. What a great opportunity to meet people who can provide perspective on shared challenges, help your business, advance your software skills, and enhance your career.

Register Today

Sage Summit takes place August 14-17, 2012 at the Gaylord Opryland Resort and Convention Center in Nashville, Tennessee.

When registering for sessions, remember to search for sessions using the new product names: Sage 100 Standard ERP (formerly Sage ERP MAS 90), Sage 100 Advanced ERP (formerly Sage ERP MAS 200), and Sage 100 Premium ERP (formerly Sage ERP MAS 200 SQL). For more information and to register click here.

Please call us if we can assist you.

((Tips & Tricks))

How To Enter Shipments With Multiple Packages In Shipping Data Entry

Assigning items to packages:
1. Expand Sales Order and Shipping. Double-click Shipping Data Entry.
2. Enter the Shipper ID and select an order number. Note: In the lower left-hand corner, the Current Package field is set to 0001.
3. Highlight a line item. All quantities shipped will be placed in package 1.
4. To ship items in another package, click the # button to obtain the next package number. Note that the current package is 0002. All items shipped will be in package 0002.

To maintain or edit items in several packages:
1. In the lower left-hand corner, click the Item Packaging button.
2. Select the package lookup and click the flashlight lookup button. A list of all the items and quantities in the package are displayed.
3. After the necessary changes are made, click the Accept button.
4. In the Shipping Data Entry window, click the Accept button to save the shipment.

Note: Inventory is only relieved by the amount on the original sales order and not the quantity entered in shipping data entry within the package selection.

IN THE SPOTLIGHT:
Shipping By SmartLinc

Sage has announced a new shipping solution for Sage 100 ERP (formerly Sage ERP MAS 90 and 200)—Shipping by SmartLinc. This Web-based service allows you to quickly determine the best and most economical shipping method and process shipments efficiently.

A Complete Solution

The best shipping method for your products can vary greatly depending on customer preferences, the size of the order, and the date required. Shipping by SmartLinc supports all shipping methods, from Small Parcel Shipping, to LTL, to full Truck Loads, and even company delivery trucks. All carriers are supported as the software seamlessly connects through the technology provided by the carrier.

Shipping by SmartLinc not only helps reduce freight costs and increase customer satisfaction, but it is cost-effective to implement as well. It works with your current process and hardware; no specific printers or scales are required. All of the steps involved in shipping are supported and can be initiated from within Sage 100 ERP, including Shipment Creation/Cancellation, Address Validation, Multi-Carrier Rate Shopping, Carrier Label Printing, Tracking, and Proof of Delivery. Comprehensive reporting gives you clear insight into shipping metrics such as costs, carrier delivery performance, and shipment disruption information.

Maximum Flexibility

Shipping by SmartLinc provides real-time rate shopping and is carrier compliant with FedEx, UPS®, USPS, DHL, CanPar, Candian Post, and Purolator. It supports generic and regional carriers as well. The system can accommodate an unlimited number of company vehicles to track specialized company delivery methods. Through one point of entry, you can select from a broad range of carriers and modes, based on your customers' delivery requirements, time sensitivity, and the characteristics of the products being shipped.

Carrier-specific shipping labels can be easily generated in various formats, including thermal labels. Each order is manifested with the carrier as the label is produced, so the driver already knows how many packages to pick up, and an end-of-day manifest is not required. And best of all, your customers are provided with automatic notification by e-mail of the date of shipment, packing slip, and a link to the carrier's tracking number. Forms and reports required for international shipping such as Certificate of Origin and Commercial Invoice are supported as well.

Seamless Connectivity

Shipping by SmartLinc is a Web-based service that can be deployed at multiple locations. Designed to work with your existing business processes and provide seamless integration to Sage 100 ERP, it allows real-time updates of charges and tracking numbers to your system. And the Web service automatically updates rates, eliminating the need to repeatedly install rate changes.

The Bottom Line

Shipping by SmartLinc provides you with a Web-based, flexible and comprehensive shipping solution. It delivers the peace of mind of shipping compliance and the cost benefits of dramatically streamlined processes.

Call us with your questions.

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