

What's Inside

Page 2

Sage 100 ERP 2013 CONTINUED

Page 3

CRM For The Entire Organization

Page 4

Sage CRM Tips And Tricks

Headline News

The Sage 100 ERP documentation team has posted a number of videos of Sage 100 ERP features on YouTube. You can use these videos to familiarize yourself with a function before you start using it or as a training tool for new employees. Topics include entering credit card information in Customer Maintenance, entering a wire transfer, and setting up expense distribution tables. To view the available videos, [click here](#).

Sage 100 ERP 2013

Release Includes Productivity And Workflow Enhancements For Everyone On Your Team

Sage 100 ERP 2013 is available for download from the Sage customer portal. We previewed many of the beneficial enhancements in this release in previous issues of this newsletter. In this issue we will cover several exciting new features that were added at the last minute and also recap the entire release.

Benefits Across The Organization

Sage 100 ERP 2013 includes a wide range of features across the system, so many different roles in your organization can benefit from the enhancements. It includes many new capabilities specifically requested by customers through various feedback mechanisms, such as the enhancement request website and customer surveys. It also includes capabilities that leverage the latest technology to give customers advantages they may not even have known they needed, such as new Visual Process Flows.

Visual Process Flows

Perhaps the most compelling new capabilities that were added to this release late in the development cycle are the Visual Process Flows. As software has become more and more capable, it inevitably becomes more complex. Visual Process Flows create simplicity and clarity with a graphical view of all the steps in your business processes. Visual Process Flows include both predefined processes, and a Designer that can be used to easily create custom flows for unique needs

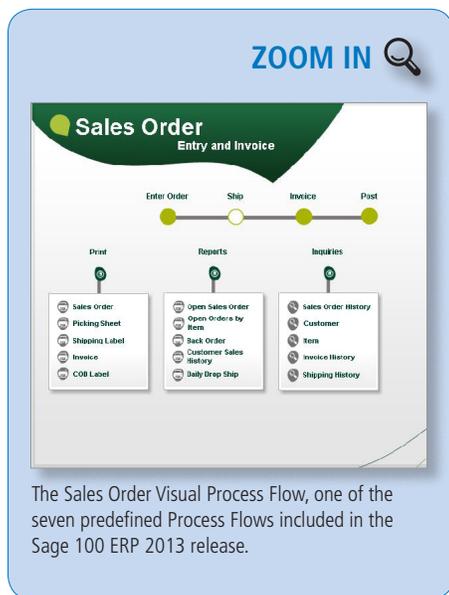


and specific roles. These customizable process flows make it easy for new users to learn Sage 100 ERP, while existing users can more easily complete tasks that are only performed occasionally, such as year-end.

Visual Process Flows can help increase productivity, reduce time navigating business processes, and reduce errors caused by forgetting a step in a procedure. From within each process, you can directly access the data entry screens, inquiries, reports, and form printing that are related to the current task, making it a new way to navigate the system. Sage 100 ERP 2013 includes seven predefined process flows: Sales Orders, Returns, Shipping, Inventory Physical Count, Purchase Order, Accounts Receivable, and Accounts Payable.

Sage 100 ERP 2013

(continued from cover)



Sage 100 ERP Intelligence Reporting Enhancements

Also announced recently are new features added to Sage 100 ERP Intelligence Reporting for the 2013 release. These include performance enhancements for Financial Reports and enhanced Report Designer functionality. Sage 100 ERP Intelligence Reporting also has been added to the Productivity tools for convenience during the installation process.

Report Designer Add-In

Sage 100 ERP Intelligence Reporting includes a new Report Designer Add-In as an alternative to the Current Report Layout. This Mapping Tool allows you to take full control of all the design aspects of your report layouts and takes the complexity out of designing financial reports within Microsoft® Excel®. The Add-In provides drag-and-drop Excel financial formulas that communicate with a new In-Memory processing engine for brilliant performance and greatly enhanced flexibility.

From the Mapping Tool Interface, you have the flexibility to add reporting groups

and delete existing reporting groups. And now it automatically sizes each column according to the longest value that the field contains, to save you time.

Financial Reports

Enhancements to the Financial Reports include the addition of Current Month Identifier, Company Code Identifier, and Changed Note Pages. A new Current Month layout allows you to see values for a selected period. The period can be changed by clicking on the Change Period button in the BIToolbar. The Financial Containers have been enhanced to include Segment Code Descriptions, New Budget YTD Expressions, Prior Budget YTD fields, and YTD Excel Expressions.

The 2013 Release Recap

Sage 100 ERP 2013 includes enhancements across the product in Accounts Payable, Accounts Receivable, Bank Reconciliation, Inventory Management, Paperless Office, Sage CRM, Intelligence Reporting, and enhanced Credit Card Processing through Sage Exchange. In addition to the New Visual Process Flows and enhancements to Sage 100 ERP Intelligence Reporting, the release also provides you with the following benefits:

- » Use the expanded Accounts Payable Invoice Number field to simplify the process of matching invoices from vendors.
- » Experience increased flexibility of Credit Card processing through Sage Exchange including card-swipe capabilities, charges for repetitive and Accounts Receivable invoices, and mobile payments.
- » Efficiently designate customers and vendors as Inactive without losing historical information.
- » View relevant bank information in convenient places, such as cleared checks

in Accounts Payable Vendor Maintenance, to streamline Bank Reconciliation.

- » Align Multiple ERP companies or divisions to a single Sage CRM database.
- » Process Sage 100 ERP quotes and orders in the familiar Sage CRM environment via optional Quick Order Entry screens.
- » Efficiently and cost effectively manage your shipping process and streamline rate shopping with the new SmartLinc online shipping service.
- » Enjoy the power of Paperless Office now available in Sage 100 ERP 2013 on public mail servers. This eliminates the need to manage your own mail server.
- » Simplify your software update process using the new Sage Advisor Update console.

Retirements

Credit Card Processing Powered By PCCharge and Sage Business Alerts have been retired with this release. Sage Business Alerts is being replaced by Sage ERP Alerts and Workflow by Vineyardsoft, a Sage Endorsed Partner Solution.

Currently planned to be retired with the next release, Sage 100 ERP 2014, will be the traditional Accounts Payable Form 1099, Payroll Quarterly 941 Form, and Payroll Form W-2 printing using pre-printed forms, and the W-2 and 1099 file creation using the Electronic Reporting module. This functionality is now available using eFiling and Reporting powered by Aatrix.

The Sage 100 ERP 2013 release offers benefits for everyone in your organization. Please call us to plan your upgrade. ✨

CRM For The Entire Organization

Traditionally, front-office employees use CRM applications for customer-facing activities such as sales, marketing, and customer service. Back-office employees use ERP applications for activities such as invoicing, accounts receivable, cash flow management, and financial reporting. If these applications are properly integrated, important business processes that cross over the two systems can be connected into one seamless workflow. This helps you to manage customer relationships more effectively, reduce costs, increase profitability, and achieve a sustainable competitive advantage.

Here we provide some compelling examples of how CRM can provide workflow improvement across the organization to help you improve your bottom line.

Reduce Time Spent Providing Information To The Front-Office

Sales and customer service representatives need information such as the status of a customer refund, how much credit a customer has available, whether a payment was received, and when an order shipped. Sage CRM provides a secure window into your Sage 100 ERP system. Authorized front-office staff can get answers faster so they can serve customers better, and because they don't need to call accounting for the information, your accounting team saves valuable time.

Speed Up Credit Approvals

Sage CRM automates the customer credit approval workflow so the accounting team does not have to handle paperwork and the sale can close faster. You can give the sales team a button in Sage CRM that will trigger the credit approval process for the customer. This one click can generate a workflow process that will:

- » Send the credit application to the

customer automatically.

- » Create, send, and receive calendar tasks and reminders to responsible parties for each stage of the application.
- » Allow access to centralized information about the application process so that sales representatives can check status on behalf of the customer.

Save Time On Data Entry And Troubleshooting

With integrated CRM and ERP, your entire team can have centralized access to customer contact and interaction information. Customer address and phone number changes can be entered by front-line staff while they are speaking to customers to ensure the information is up to date and that invoices are sent to the correct place.

When sales orders have to be entered in two different systems by two sets of people, you waste time and introduce more possibilities for error. You can give sales and customer service representatives permission to convert quotes to orders at the source and pass it into the accounting system, reducing the risk for data error and eliminating the need for duplicate data entry. And the accounting team can troubleshoot discrepancies faster by researching all communications—not just the ones that are normally visible to accounting.

Improve Cash Flow

Sage CRM gives your collections staff access to all customer interaction information with all transaction and contact history ready and accessible so they can be fully informed when talking to the customer. You can document collection communications (email, phone calls, notes, letters) efficiently in one central location to maximize effectiveness and allow colleagues to easily pick up where the last person left off to avoid duplicating efforts.

Streamline Purchasing

Sage CRM can help you stay on top of vendor discounts, keep track of special contract arrangements, and process purchasing requests and quotes. Calendaring and task management features in Sage CRM let you keep track of each step in the process and set reminders to ensure timely payment by Accounts Payable—to take advantage of any early payment discounts. You can keep a history of communications so that requests don't fall through the cracks and quotes are not inadvertently revised by vendors.

New Capabilities Added With Sage 100 ERP 2013

The Sage 100 ERP 2013 release includes Sage CRM integration enhancements that enable multiple ERP companies to be mapped to a single Sage CRM system. Sage 100 ERP customers who have created and are operating more than one company or division are able to integrate these companies or divisions to one single Sage CRM instance. This allows your team members who use Sage CRM to get a single consolidated view of all customer-facing activities, and salespeople to more efficiently move between all their customer records. Additionally, new quick order entry screens now are optionally available for Sage 100 Advanced and Premium ERP, which can be used in addition to the standard order entry screens.

If you are not yet using Sage CRM, which is included with your Sage 100 ERP system, or you would like to more tightly integrate the front and back office, give us a call for more information and assistance. ✨



IN THE SPOTLIGHT:

Sage CRM Tips And Tricks

Changing The Primary Contact For Customers In Sage CRM

There are two parts to this change. First change the primary contact in Sage 100 ERP as follows:

1. Expand Accounts Receivable and Main. Double-click Customer Maintenance.
2. In the Primary Contact field, select the contact code.
3. Click Accept.

Then in Sage CRM, open People, click Change, and then click Save.

Note: If the Save button is unavailable, exit and restart as a user with sufficient CRM security privileges to modify the People settings. If successful, the new primary Contact Person field refreshes in the Summary window.

Viewing Extended Descriptions Of Sales Orders And Quotes Created In Sage CRM

1. Open the Sales Order or Quote in Sage CRM.
2. Select the View-Edit link on the right-hand side. This will open the Sales Order Entry screen from Sage 100 ERP.
3. Select the Lines tab.
4. Select the item to view and click the Extended Item Description button.

Note: The user must have sufficient permission in Sage 100 ERP to view orders or quotes extended descriptions.

Uploading Contacts From Outlook To Sage CRM

First, export contact information from Microsoft®Outlook® to a Microsoft Excel

spreadsheet. Then use the Sage CRM Data Upload to import the contacts. For more information, see *Running the Data Upload* in the Sage CRM System Administrator Guide.

When performing the Data Upload, you will have a choice of two merge rules for any existing records found: *Merge Duplicate Data With Current Data* or *Overwrite Current Data With Duplicate Data*.

The Merge Duplicate Data With Current Data rule will add new records and for existing records, will only update blank fields. For example, the following record exists in Sage CRM:

- » First Name: John
- » Last Name: Smith
- » Phone: 222-2222
- » Fax:

The Excel spreadsheet contains the following data:

- » First Name: John
- » Last Name: Smith
- » Phone: 444-4444
- » Fax: 888-8888

After the Data Upload, only the blank Fax field is updated. The Phone field will retain its existing original data.

The Overwrite Current Data With Duplicate Data rule adds new records and overwrites all fields for existing records. Using the same example shown above of Sage CRM data and spreadsheet data, after the Data Upload, all fields are updated:

- » First Name: John
- » Last Name: Smith
- » Phone: 444-4444
- » Fax: 888-8888

Please call us if you have any questions or need assistance. ✧



844 Centre Avenue
Reading, PA 19601
(610) 685-2111
(800) 289-9109 toll free
(610) 685-2112 fax
info@keystonesoftware.com
www.keystonesoftware.com

