

Sage 100 ERP 2014

Connect your business.

sage



The foundation for connecting your business to provide a better customer experience, increase revenue, and make better business decisions

New web and mobile functionality: driving better customer experiences and increasing revenue.

For 2014, Sage 100 ERP offers more ways than ever to connect everyone involved in your small to midsized business, from your customers to your vendors to your in-house departments. Your customers expect more from their experiences with your company—Sage 100 ERP 2014 will help your team deliver on those expectations from anywhere business takes them. The new web and mobile connections, now available through Sage Billing and Payment, Sage Mobile Sales, Sage CRM, and Sage Mobile Service, power opportunities to generate more sales, increase revenue, and provide a better customer experience.

New business intelligence and analytics: driving better decision making.

When you transform raw business data into meaningful, useful information, the end result is business intelligence. Business intelligence is critical because it helps you react quickly to challenges, build on successes, and discover new ideas, insights, and innovations. In Sage 100 ERP 2014 you can connect to useful information with the Sage Intelligence Profitability Dashboard and Sage Inventory Advisor. Using the Profitability Dashboard makes it easy for you to identify customer, product, and salesperson profitability in variable time frames. Using Sage Inventory Advisor, you can classify and evaluate hundreds of thousands of separate items and analyze historic sales data to accurately forecast future demand. Most importantly, Sage Inventory Advisor recommends safety stock levels that help ensure you don't run out of the items you need to satisfy demand or tie up working capital by stocking overages of slow-moving and seasonal items. When you have what your customers want, in stock when they want it, you deliver a great customer experience.

2014 Connections

- Do more to connect on the road with **Sage Mobile Sales, Sage CRM, and Sage Mobile Service.**
- Control, automate, and analyze your data with **Sage Intelligence**, now accessible through the Sage 100 ERP menu.
- Optimize inventory management with **Sage Inventory Advisor.**
- Enable electronic invoicing, receipts, and online payments with **Sage Billing and Payment.**

User Experience Enhancements

- Find customers, vendors, and item descriptions by name instead of number with **Autocomplete.**
- Look up invoices with just a click using the new **Invoice list flashlight.**
- Search more easily with an improved **Search grid window.**
- Run multiple reports faster using the **Print stay open** option.
- Stay up to date with a range of important **Payroll Enhancements.**
- Quickly identify profitability with the **Sage Intelligence Profitability Dashboard.**

Sage 100 ERP 2014

What's new in Sage 100 ERP 2014

Sage 100 ERP 2014 connects and mobilizes your sales team.

Your sales team doesn't have to be bound by the four walls of your business—they can carry the interactive, real-time functionality of **Sage Mobile Sales**, **Sage CRM**, and **Sage Mobile Service** on their smartphones, iPads, and Windows tablets wherever business takes them.

Sage 100 ERP 2014 helps you provide a better customer experience, from sales call to fulfillment, by:

- Knowing your customers more thoroughly through social media integrations.
- Presenting your entire product line-up to customers with a visual catalog on an iPad.
- Empowering customers to send out receipts following a payment received on the mobile solutions.
- Taking photos and collecting customer signatures on service work using a smartphone.

Sage 100 ERP 2014 helps you increase sales, up-sells, and cross-sells by:

- Accessing customer information, including past sales activity and more, out in the field.
- Suggesting and capturing sales of add-on, accessory, or substitution items through a visual iPad catalog.
- Providing and confirming sales quotes, placing orders, and taking payments with an iPad.



Sage CRM 7.2b is now better connected to Sage 100 ERP 2014 in many ways, including improvements to product stability, reporting, maintenance, integration and usability.

- **Sage CRM Sales Tracker** for Windows 8 gives users access to their Sage CRM company, person, and opportunity records from their Windows 8 Tablet device. Users can even build a watch list of opportunities key to their pipeline. Sage CRM Sales Tracker can also be accessed through a Windows 8 PC.
- **Sage CRM Sales Lite** is built for sales teams on the road who need up-to-date information on their phone, even when out of coverage. Using an iPhone app, Sage CRM Sales Lite gives users mobile access to their Sage CRM data, tasks, and appointments and allows them to track and log outbound calls, email, and SMS activities.
- **Sage CRM for Facebook** is a further addition to the social media capabilities in Sage CRM, which already includes LinkedIn and Twitter. With Sage CRM for Facebook, users can discover valuable insights about customers and prospects.
- **Sage CRM Collaboration** by Yammer brings business collaboration and knowledge exchange to individual users and teams of users by connecting them with Yammer Groups and Yammer Topics.



The Sage Data Cloud connects your company's Sage 100 ERP system to the cloud, allowing you take advantage of new solutions. The new web and mobile connected services outlined below will quickly and easily connect and integrate with your ERP system through the Sage Data Cloud, included in Sage Business Care with a free connector and unlimited data storage. You'll be prepared for the future with the Sage Data Cloud: It enables the seamless and immediate delivery of updates and enhancements.

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Sage Billing and Payment is an ideal solution for any company using a Sage ERP solution that sends out invoices to receive payments. This affordable, quick to implement, cloud-based solution can help companies:

- Improve customer service.
- Reduce Days Sales Outstanding (DSO).
- Reduce invoicing expense.
- Reduce invoicing time.
- Reduce redundant data entry.

Sage Billing and Payment makes the tedious invoicing and reconciliation process easier thanks to the ability to electronically send bills and receive payments. It helps companies gain critical visibility into receivables thanks to real-time invoice stats like sent, opened, and paid—all of which help ensure companies stay on top of outstanding customer balances. And with invoice data dynamically transmitted to their Sage ERP Accounts Receivable module, manual data import/export is eliminated.



And, like Sage ERP solutions, Sage Billing and Payment includes customizable invoices—giving businesses a twenty-first century presence at an affordable price. But best of all, because it's all in the cloud, companies are always using the latest version, and their employees don't have to be "chained to their desks" to get work done thanks to web browser accessibility on desktop, laptop, and mobile devices.



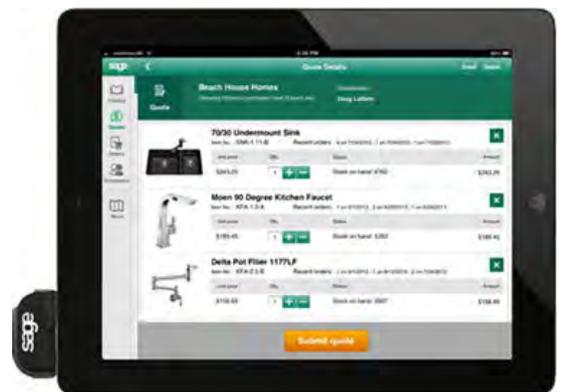
Sage Mobile Sales provides sales reps and managers with the ability to take an order, collect payment, and enter it directly into the ERP anytime and anywhere through an iPad. Sage Mobile Sales is a solution for companies who are looking to:

- **Increase revenue**—close bigger deals per field salesperson.
- **Get paid faster**—process orders and collect payment onsite.
- **Get anytime anywhere access** to customer purchase history and inventory information.
- **Present their entire product portfolio** to customers on an iPad using a smart online catalog and eliminate the need for printed catalog.
- **Build a quote while with a customer**, email it, or convert it to an order.
- **Confidently commit to fulfilling orders** with real-time visibility into product availability.
- **Streamline order processing**—eliminate the error-prone multiple steps required when taking orders in the field on paper and later having to enter them into an ERP.

Sage Mobile Sales enables sales reps to intelligently take customer orders and enter them directly into the ERP system anytime, anywhere. The tablet app increases sales revenue by providing the rep with all of the information needed to close a customer sale, including customer order history, available stock, and an online catalog, while reducing the need for the use of paper order forms and double entry.

A tablet and cloud-based solution, Sage Mobile Sales provides mid-market manufacturers, distributors, and retailers with a mobile solution that helps them increase sales while reducing costs.

To improve the Sage ERP customer invoicing cycle for sales made on account, Sage Mobile Sales works with Sage Billing and Payment and the powerful click-to-pay feature. Sage Billing and Payment used with Sage Mobile Sales will reduce invoicing expense, reduce invoicing time, reduce DSO (days sales outstanding), and improve customer service.



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Sage Mobile Service empowers your field technicians to deliver great customer service so you get more referrals and repeat business. Using Sage Mobile Service, your field technicians will arrive on time, use their iPhone to pull up the customer's history and current repair order, take before and after photos, and even immediately process the customer's payment—all while onsite! Provide estimates and receipts through email, so you and your customers stay informed.

- Optimize schedules, routes, and assignments of jobs on the fly.
- Modify work orders onsite to capture actual hours and additional work performed.
- Get customer sign off and take photos onsite.
- Have anytime, anywhere link to customer's Sage ERP information.
- Get paid faster and increase your cash flow.

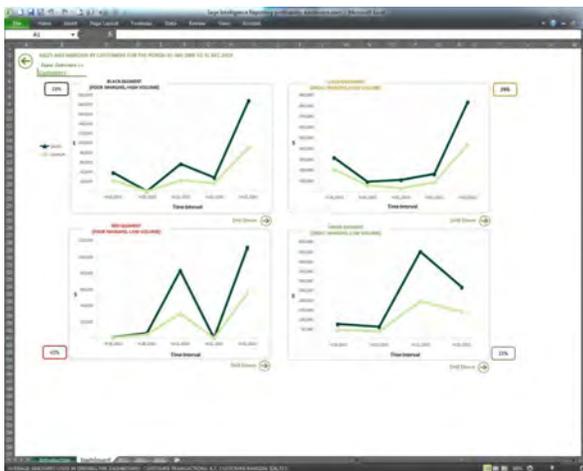


Sage Mobile Service works with Sage Billing and Payment to provide electronic invoicing benefits.

Sage 100 ERP 2014 connects you to the information you need for better decision making.

Sage Intelligence now installs automatically with Sage 100 ERP 2014, allowing it to be accessed through the Module Menu toolbar and the Tasks tab in Sage 100 ERP.

Sage Intelligence is now compatible with the 32 and 64-bit versions of Microsoft Excel® 2007, 2010, and 2013. If you're more familiar with Excel, the Report Designer Add-In enhances your Excel experience and offers you maximum control and flexibility over your report layouts. The Report Designer Add-In gives you a quick and responsive experience when designing and viewing your financial reports through new In-Memory processing. Your user experiences with the Report Manager, Report Viewer, and Connector module have also been enhanced.



The **Sage Intelligence Reporting Bundle** is a new way to purchase Sage Intelligence through a subscription license with no long-term contract. The subscription license allows you to use the service as long as your monthly dues are current and you remain on an active software support plan. Rights to use the service include an unlimited number of Sage Intelligence Report Manager and Viewer licenses, Report Designer to help you easily create and edit your financial reports, and Connector to allow you to access information from multiple sources and consolidate data from multiple companies. The subscription license begins with a term contract of four months, then a monthly subscription thereafter.

Please note: Sage Intelligence can still be licensed through individual users and modules. Customers that have already purchased Sage Intelligence cannot switch to the Sage ERP Intelligence Reporting Bundle.

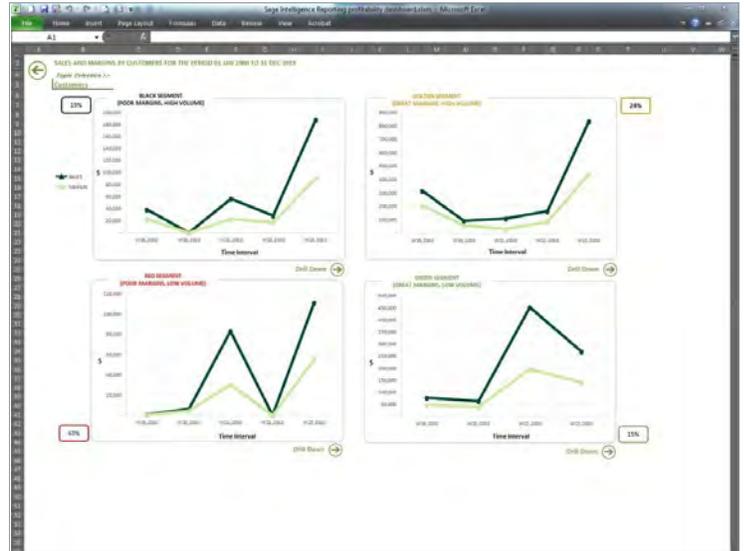
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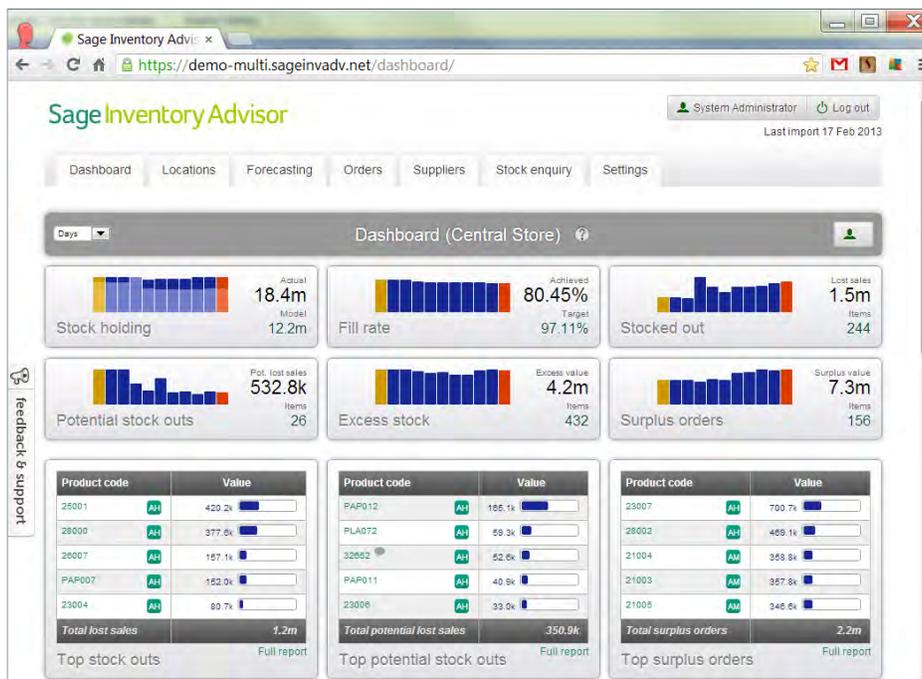
The **Sage Intelligence Profitability Dashboard** enables you to quickly identify the profitability of customers, products, and salespersons based upon weekly, monthly, quarterly, or annual time frames. This helps your company:

- Meet customer demand by focusing on high-volume products.
- Quickly pinpoint top-performing salespeople and trend lines.
- View meaningful graphics for faster decision making.

The Sage Intelligence Profitability Dashboard will be available as a report to import into Sage Intelligence. If you have purchased Sage Intelligence and are currently on a Sage Business Care plan or if you are subscribed to the monthly Sage Intelligence Reporting Bundle, you will be able to access and use this report.



Sage Inventory Advisor is a web-based solution that goes beyond merely tracking what inventory you have on hand and sending alerts when you run low. It helps your inventory management team strike the optimal balance between being ready for demand and avoiding stock overages. Sage Inventory Advisor analyzes Sage 100 ERP data to provide improved stock forecasting, better vendor management, and recommendations for optimal replenishment. It allows you to adjust safety stock levels based on risk tolerance levels and changing conditions on the ground.



Sage Inventory Advisor brings these benefits to companies needing to manage inventory:

- Reductions in costly inventory overages to free up working capital
- Reductions in stock-outs to improve fill rates
- Improved speed and accuracy of demand planning and forecasting

Sage Inventory Advisor is affordable, fast to implement, and accessible on mobile devices through a web browser.

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Value-added functionality at your fingertips with user experience enhancements.

As always, the user experience enhancements designed into Sage 100 ERP 2014 will boost the productivity of your team.

Autocomplete

Autocomplete simplifies the search for customer names, vendor names, or item descriptions in the corresponding customer number, vendor number, and item code entry fields. When you type in those fields, a list of records matching the entry appears—making it easy for you to select a record from the list.



Type the letter “A” and Autocomplete pulls up all of customers that start with that letter!

“Invoice list” flashlight button

An “Invoice list” flashlight button is now featured in the following areas:

- Accounts Payable Invoice Data Entry
- Repetitive Invoice Entry
- Accounts Receivable Repetitive Invoice Entry

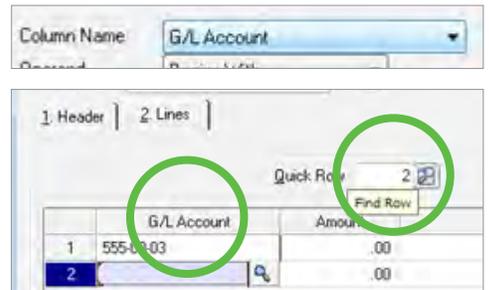
When you click on the “flashlight,” a list of all the invoices in that data entry table appears.



The “Invoice list” flashlight button puts information right where you need it!

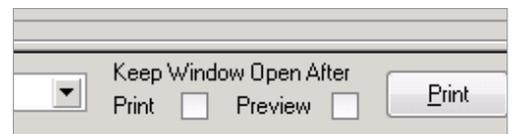
Grid Search default

Searching through grids is easier now. That's because in Sage 100 ERP 2014 the search grid window has been redesigned to automatically default to the first column of values instead of the row column showing the row number.



Print stay open

Customized reports aren't just strategically valuable, they're easy to process with Sage 100 ERP—and the new 2014 release makes running other reports for side-by-side comparison a lot easier. The latest version of Sage 100 ERP allows you to keep the “Custom Report” window open after clicking the “print” and/or “preview” prompts. It's easy to enable this enhancement: Just select the appropriate check box in the custom report window. The same capacity is also available in the print financial reports window in general ledger. So now, after printing or previewing a report, you'll be ready to run other reports more quickly. That means easier comparative analysis with less waiting time.



When you want to compare data sets, you can print a custom or general ledger financial report and be ready to run other reports even faster.

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Payroll enhancements

Sage 100 ERP 2014 keeps you up to date with payroll changes through:

- An Employer Medical Assistance Contribution field.
- The ability to report instead of select up to 16 Box 12 codes when filing W-2s.
- Better display of Form IDs and Form descriptions in Federal eFiling and Reporting.
- Added mapping of Earning and Deductions codes for Puerto Rico reporting.

Sage eFiling and Reporting

Through the Sage eFiling and Reporting module by Aatrix, you can now complete W-2s and 1099s with eFile service. Data autopopulates into Sage eFiling and Reporting, helping your HR team do their jobs more quickly and easily, including delivering tax forms to employees earlier in the year. Happy employees are more productive!



Sage 100 ERP 2014 is the foundation for connecting your business to provide a better customer experience, increase revenue, and make better business decisions.

Endorsed solutions

Sage 100 ERP 2014 works seamlessly with a range of software and system services on offer from our partner solution providers. These add-ons expand the functionality of Sage 100 ERP even further. For the latest information on the integrations currently available for Sage 100 ERP 2014, please refer to the Integrated Solutions Compatibility Matrix. You can find it at the [Sage Customer Portal](#).

Deployment options

Sage 100 ERP can be deployed on a workstation, used in a client server environment, or hosted online. To review the deployment options available for Sage 100 ERP 2014, please refer to the Supported Platform Matrix. You can find it at the [Sage Customer Portal](#).

Sage

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