



### In This Issue

#### Page 1

Introducing New Sage Mobile Apps

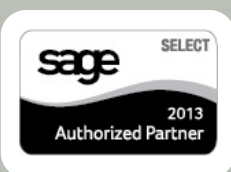
#### Page 2

New Tool Simplifies FRx to Sage Intelligence Reporting Tree Conversion

Welcome to the Sage City Online Community

#### Page 3

Getting Started with Sage CRM Mobile



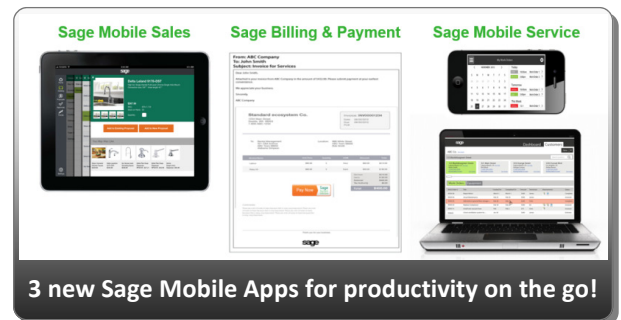
## INTRODUCING NEW SAGE MOBILE APPS

Sage recently unveiled 3 new mobile apps designed to help businesses improve customer service and cash flow. These new cloud-based solutions are affordable, easy-to-implement, and integrate directly with your Sage 100 ERP system. Let's take a closer look.

### Sage Mobile Sales

This native iPad app provides your sales team with the information they need to close a sale at the customer site. **Sage Mobile Sales** enables you to process quotes and orders, take payments, and collect signatures while out in the field. What's more, it automatically links to your Sage 100 ERP system so you can:

- Access real-time inventory availability anywhere and anytime
- Review recent orders with your customer and view/edit their information instantly
- Enter orders on-site and accept immediate payment using your iPad



### Sage Mobile Service

With **Sage Mobile Service**, field technicians can use an iPhone to schedule work, optimize routes, access customer information (i.e. service history, work orders & approved estimates), take before and after photos, and even accept payments - all while on-site. With this new app, you can also:

- Email estimates and receipts so everyone stays informed
- Modify work orders for **actual** hours & work performed and get customer signoff onsite
- Access Sage 100 ERP information on the fly, get paid faster, and increase cash flow

### Sage Billing and Payment

This new subscription-based app allows you to easily process electronic customer payments - which reduces paper costs, saves time, shortens the A/R cycle, and gets you paid faster. Payments can be processed by credit card or ACH, making it easier for customers to do business with you.

**Sage Billing and Payment** also provides your customers with a 24/7 web portal so they can manage their accounts and make payments online, on their own time. You also get an online dashboard with the ability to quickly re-send outstanding invoices and view invoice delivery history.

### Sage Data Cloud - The Best of Both Worlds

All these new Sage Mobile Apps are connected through the Sage Data Cloud which is hosted in Microsoft Azure and connects to your Sage 100 ERP system. Sage Data Cloud is the glue that connects your on-premise ERP software with a world of add-on cloud applications without the need for configuring web servers or installing special hardware.



[Contact us](#) with your questions or [go online](#) to learn more about the new Sage Mobile Apps.

# FRx Report Conversion Even Easier Now!

## New Reporting Tree Conversion Utility

We previously introduced you to the Sage Intelligence Report Designer Add-in - an important tool in converting your old FRx reports to Sage Intelligence reports. The only time-consuming task that remained was the process of manually converting your reporting trees - but no more!

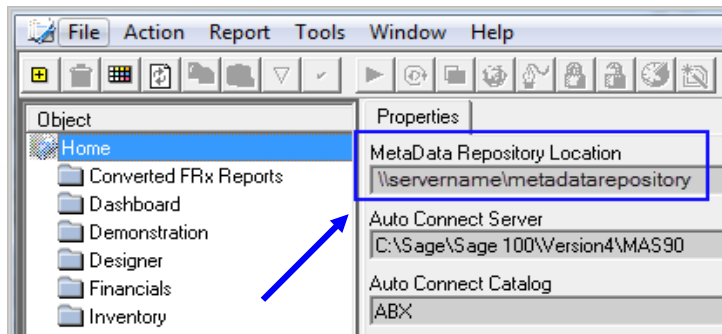
A new **FRx Reporting Tree Conversion Utility** converts FRx Reporting Trees into Sage Intelligence Reporting Trees. It's a great complement to the Report Designer Add-in and together, they significantly speed up the conversion process.

## Using the Reporting Tree Utility

Following are the steps for using the new FRx Reporting Tree Conversion Utility.

1. Download the [FRx reporting tree utility](#) and related conversion guide for Sage 100 ERP.  
**NOTE:** The link above initiates a download of the **zip folder** containing the utility files and related documents.
2. Extract the **FRxTreeConverter.zip** files into a new folder.
3. Inside the new folder, run **FRxTreeConverter.exe**
4. Browse to the location of and select the **FRx Specification Set** you would like to load FRx reporting trees from.
5. Press **OK**
6. You will be prompted to select an **output location** for your FRx Reporting Trees. Browse to the location of your **Sage Intelligence MetaData Repository** and press **OK**.

**NOTE:** You can determine the location of this folder by opening the Report Manager module and looking at the folder path specified for the MetaData Repository Location as shown in the following screenshot:



7. All reporting trees associated with your FRx reports will be converted and available for use in Sage Intelligence.

## Getting Help and Other Important Details

This utility will only convert FRx Reporting Trees which are associated with FRx Reports. Any disassociated Reporting Trees will be ignored during conversion. Only Microsoft **FRx 6.7 Service Pack 11** specification sets are supported.



[Contact us](#) if you'd like help converting your reports or download the [FRx to Sage Intelligence Conversion Guide for Sage 100 ERP \(PDF\)](#).

## WELCOME TO SAGE CITY!

Sage City is a new online destination that brings the entire Sage Community together to meet, share ideas, ask questions, and impart knowledge and experience. You can connect with product experts, fellow Sage customers, industry peers, and a whole community of support to help you get more out of your software.

*Join the discussion at:*



[>>> http://SageCity.NA.Sage.com >>>](http://SageCity.NA.Sage.com)

## Keystone Software Solutions

844 Centre Ave.  
Reading, PA 19601  
**(800) 289-9109**

[Info@KeystoneSoftware.com](mailto:Info@KeystoneSoftware.com)

[www.KeystoneSoftware.com](http://www.KeystoneSoftware.com)





# Sage CRM Supplement

CRM Software for Sage 100 ERP

## Getting Started with Sage CRM Mobile

Business is becoming increasingly mobile. People are using their phones and tablets to access reports, process orders, communicate with customers, and get work done in the office or on the road. So here's a look at getting started with the mobile functionality offered in Sage CRM.

### Sage CRM Mobile Web

Sage CRM Mobile Web is a **full-featured version** of Sage CRM that you access online through your browser, tablet or Smartphone. Offering functionality similar to the desktop version, Sage CRM Mobile Web must be "turned on" by setting the [Mobile Device Access](#) option to "**True**" under the [User Details > Security](#) tab.

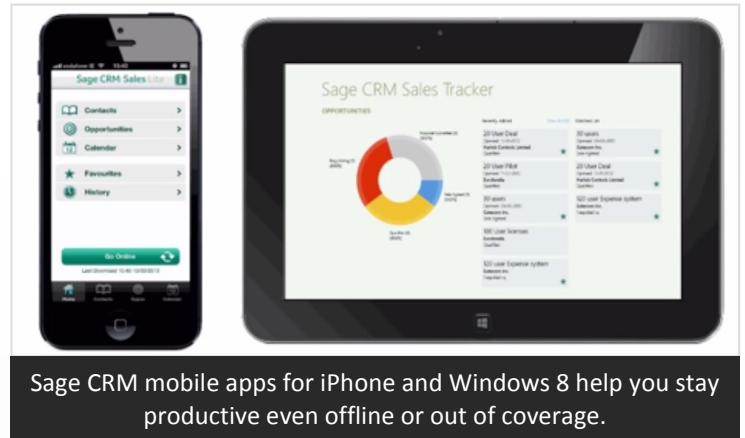
Once the functionality is turned on, you can also save time accessing Sage CRM Mobile Web by adding a bookmark/icon to your mobile device home screen. Simply navigate to the URL provided by your System Administrator and then click the [Add to Home Screen](#) icon.

Now you can easily manage your CRM information, run reports, call or email contacts, update the CRM database and so much more. If you're using a 7" or 10" tablet, you can enjoy the full desktop browsing experience by setting the [Default Tablet Version](#) to "**Desktop**" under [My CRM > Preferences > Change](#). If you're not using a tablet, Sage CRM will adjust navigation to a browsing experience optimized for your device (including iPhone, Android, Blackberry, and more).

### Mobile Apps for Sales Users

There are 2 mobile applications that provide access to Sage CRM functionality that your sales people are most likely to use including Contacts, Opportunities, and Calendar.

The 2 apps are *Sales Lite for iPhone* and *Sales Tracker for Windows 8*.



Sage CRM mobile apps for iPhone and Windows 8 help you stay productive even offline or out of coverage.

**Sales Lite for iPhone** provides access to important customer information and other Sage CRM data even when you're offline or out of your mobile coverage area. You'll simply sync up and send/receive data when you're back online. This app also leverages native iPhone features so you can map appointments, track & log calls, and send email or text.

This app is available in the [Apple Apps Store](#). Be sure to check with your system administrator for system requirements, [additional components](#), or configuration that may be required depending on the Sage CRM version you run.

Similarly, **Sales Tracker for Windows 8** is available in the [Windows Store](#) and provides offline access to your contacts and opportunities. This app is currently compatible with Windows 8 tablets and laptops.

### Need Help Getting Started?



Be sure to [contact us](#) with your questions. Or feel free to [watch this video](#) and learn more about getting started with Sage CRM Mobile.