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Issue 4
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Sage 100 ERP Newsletter

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A SNEAK PEEK AT SAGE 100 ERP 2013

Sage recently published a pre-release guide for Sage 100 ERP 2013 (previously referred to as Sage ERP MAS 90 and 200 Version 5.0 before the [Sage rebranding](#)) which provides us with a sneak peek of all the new features and enhancements that are expected. Let's take a closer look at this upcoming release which is scheduled for auto-delivery (via download) to existing customers in December.

Core Financial and Inventory Management Modules

In **Accounts Payable**, the invoice number field will be expanded to support up to 20 characters to minimize truncating and make it easier to use the same invoice number as your vendors for simple invoice matching. Also in response to [customer requests](#), you can view cleared check and bank information from Accounts Payable Vendor Maintenance without having to launch Bank Reconciliation.

In both Accounts Payable and **Accounts Receivable**, you'll have the option to set the status of vendors and customers to "inactive." This option preserves all historical data for reference (until you decide to permanently delete) while reducing clutter for faster searches and data entry.

Sage made **Inventory Management** easier with a variety of screen enhancements that improve the way inventory information is displayed. The 2013 release will allow you to see real-time stock levels and pricing details directly from the main tab. Need more information? Just click on individual items to drill into details such as the specific quantities available in each warehouse.

Sage CRM Enhancements

With each new release, the integration between Sage 100 ERP and Sage CRM becomes more seamless than ever. For example, new Quick Order Entry screens will enable Sage 100 ERP quotes and orders to be processed from within Sage CRM without installing Sage 100 ERP on the sales person's workstation, nor require an additional ERP user license to access accounting-related screens.

Customers that are running more than one company or division can now map multiple ERP companies to a single Sage CRM database. This provides decision makers with a consolidated view of all customer activities while sales customer service staff can move efficiently between customers and prospects across companies and divisions.

Other Notable Enhancements

Sage Advisor will enable self-service management of Product Updates and new software releases.

Sage 100 ERP Shipping by SmartLinc - a new web-based, multi-carrier shipping solution that can be deployed at single or multiple locations.

Credit Card Processing - enhancements throughout including card swipe capabilities, charges for repetitive invoices, mobile payments, and more.

Reporting - new intelligence reports will be added along with compatibility with Crystal Reports 2011

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Sage 100 ERP 2013 Pre-Release Guide

There are so many new features in Sage 100 ERP 2013, we can't possibly get them into a single article. But please feel free to [Contact Us](#) for a copy of the 40-Page initial pre-release guide that's packed with all the details!

Credit Card Processing Enhancements

When you integrate all your points-of-payment directly to your accounting system, you ensure timely collection of customer invoices, maximize cash flow, and minimize the hassle of manual reconciliation. Perhaps that's why Sage put so much effort into improving credit card processing functionality in Sage 100 ERP 2013. Here are the improvements we expect to see when the new version is released later this year.

Reduced Fraud Exposure

Credit Card Processing will include connection to the **Sage Exchange Vault**. This secure online vault stores sensitive credit card information and processes transactions outside of your Sage 100 ERP system. It also keeps your business compliant with PA-DSS and ever-changing credit card processing laws.

For added cardholder security, Sage 100 ERP 2013 will also allow a "one-time use" credit card for payment transactions without saving credit card information. Customers migrating from previous versions of the software will be able to easily move their customers' credit card information from the current database location into the secure Sage Exchange Vault.

Sage Mobile Payments Integration

In the 2013 release, you can collect payments anytime and anywhere using **Sage Mobile Payments** on a Smartphone. Ideal for collecting cash payments, Sage Mobile captures payment information and sends it to SageExchange.com. Using Sage Exchange's secured connection, the payment information is then transferred directly into your Sage 100 ERP system as an Accounts Receivable Cash Receipt entry. No manual reconciliation needed.

Companies that provide services and collect fees on the go - like mobile pet grooming for example - will find this new feature especially helpful.

Mobile Invoice and Card Swipe

The new mobile functionality - launched via smartphone or tablet - will also benefit companies with a mobile sales force that collects payment on invoices. Simply launch the app, identify an existing Sage 100 ERP customer from the mobile device, view the customer's open invoices, and select one or more of the open invoices to pay. And with a Sage Mobile card swipe device connected to the Smartphone, the salesperson can swipe the customer's credit card and present a touch screen to the customer for signature approval of the charges.

Powered by Sage Exchange

All the new features are powered by **Sage Exchange**: cloud-based technology that provides the integration between Sage 100 ERP and the Sage Payments Gateway. Not only does Sage Exchange make credit card processing hassle-free, it saves you money in merchant transaction fees.

SAGE 100 ERP VERSION RETIREMENT DATES

The following dates pertain to the end of phone and email support for the corresponding version of Sage 100 ERP:

Version 4.2 - September 30th, 2012

Version 4.3 - September 30th, 2013

Version 4.4 - September 30th, 2014

[Click here](#) for complete details

OTHER RETIREMENT INFO

Filings for Tax Year 2013 is the last year that Sage will support the traditional **in-product pre-printed** forms for 1099, Quarterly 941, and Year End W2. Also retired will be the W2 and 1099 file creation using the Electronic Reporting module. Both will be replaced in favor of using the plain paper printing capabilities provided in eFiling and Reporting powered by Aatrix beginning with release of Sage 100 ERP 2014.

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SAGE CRM SUPPLEMENT:

CRM Software for Sage 100 ERP

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Working with Saved Searches in Sage CRM

Saved Searches are a simple but powerful feature of Sage CRM. They can spare you the time and effort of manually keying in filtering criteria time and again when running your most frequently-used searches. Here's a look at using this time-saving feature in Sage CRM.

What Can I Save?

You can create a saved search against any of the main entities in Sage CRM including Companies, People, Opportunities, Orders, Quotes, Cases, Solutions, Leads, or Communications that match your search criteria. There is no limit to the number of saved searches you can create and save.

In addition to creating your own customized lists, Sage CRM comes with a number of predefined saved searches that you may find useful. For example, the My Companies saved search available from the Find Company screen is set up to return a list of all of the companies assigned to you.

Saved Searches are Dynamic

Saved searches are dynamic which means they will always populate with the most up to date information each time you run the query. For example, let's say you want to search for all companies in Sage CRM that are located in San Francisco and have 50 - 100 employees. When you create a Saved Search based on this list, you're saving the **search criteria** as opposed to the actual list. So when new companies are added to Sage CRM that meet the search criteria, the Saved Search is automatically updated.

Creating a New Saved Search

1. Click **Find** menu button and select an entity (for example, Companies)
2. Select your required **Search Criteria** and click the **Find** button. Your search results are displayed

3. Click the **New Search** button next to the **Saved Search** drop down box.
4. In the Saved Search details box that displays, **type a name** for your saved search. For example: "San Francisco Companies – 50 to 100 Employees"

Using Your Saved Searches

Now that you've got your favorite and most frequently-used searches saved, you'll also save a bunch of time performing common actions in Sage CRM like creating a mail merge to multiple recipients, sending email to a group of contacts, running reports, and more. In addition, saved searches can be selected from the list of available content to display in your personal Sage CRM [Interactive Dashboard](#).



Now that you know how, go ahead and start creating some of your favorite saved searches and be sure to contact us if you need help.

FREE SAGE CRM LICENSE

Don't forget that if you're running Sage 100 ERP Version 4.5, Sage CRM is already installed and ready for you to use for Free.

All Sage 100 ERP customers on a current maintenance plan get a free Sage CRM license. So if your company hasn't yet taken advantage of all that CRM can offer, maybe now is the time to give it a test drive. And be sure to [contact us](#) if you need help activating your free module and license.

SAGE PRODUCT NEWSLETTERS

What can they do for your business?



Want to Send This Newsletter to YOUR Customers?

Our Sage Product Newsletters help you stay **top-of-mind** with customers and sell more add-on products & services. We currently publish newsletters for:

Sage 100 ERP | 300 ERP | 500 ERP | Sage X3 | Sage Fund Accounting | Sage HRMS

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