



# Sage 100 ERP Newsletter

From Your Company Name, Inc.

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## INTRODUCING SAGE INVENTORY ADVISOR

We recently saw the introduction of **Sage Inventory Advisor** - affordable cloud-based software that's helping companies reduce excess inventory and working capital while eliminating stock-outs. Let's take a closer look at this new and unique add-on solution for your Sage 100 ERP system.

### What is Sage Inventory Advisor?

Sage Inventory Advisor is a web-based application that connects to your Sage 100 ERP system, crunches the numbers, and delivers a real-time health-check on your inventory. Leveraging the power of a sophisticated forecast engine, it delivers data and insight that helps determine the optimal investment required to achieve target fill rates.

### Decision-Making Tools and Monitoring

The graphical, web-based dashboard displays key performance indicators (KPIs) so you can quickly identify problem SKUs and then drill into the underlying data for deeper insight. Sage Inventory Advisor will also monitor inventory status and provide early warning for critical items such as inventory out of stock or near out of stock as well as excess and surplus orders.

You also benefit from features like supplier performance tracking, order scheduling so you know when and what to order, and order management to review and amend existing orders.

### The Business Benefits

Benefits of Sage Inventory Advisor include:

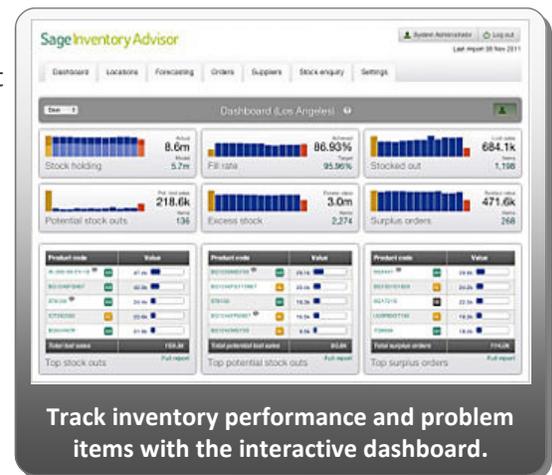
- Reduce excess inventory and carrying costs
- Free up cash that's tied up in inventory
- Improve fill rates and eliminate stock-outs
- Reduce time spent crunching numbers and forecasting
- Cloud-based software that's up and running in just a few hours with no hardware installation

### Complements Your Sage 100 ERP System

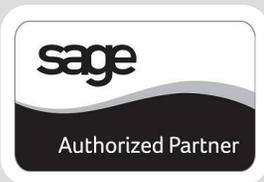
It's important to note that Sage Inventory Advisor **does not replace your existing inventory module** which is used to manage day-to-day inventory transactions. Instead, it **complements** your existing functionality, adding advanced forecasting and planning features that work hand-in-hand with the supplier, inventory, sales, and purchasing information in your Sage 100 ERP database.



Sage Inventory Advisor is offered as a monthly subscription service with the monthly rate determined by the number of SKUs. [Contact us if you'd like to learn more](#), or read about how [Hubert Glass Oil saved \\$300,000 in 5 months](#) using Sage Inventory Advisor.



Track inventory performance and problem items with the interactive dashboard.



# New Features in Accounts Payable

## For Sage 100 ERP Version 2013

Some of the new features in Sage 100 ERP 2013 - like Visual Process Flows - are high profile and get all the attention. Then there are new features that fly under the radar, but are perhaps just as important to your business. So here are some enhancements in Accounts Payable that we think you should know about.

### Expanded Invoice Number to 20 Characters

The Invoice Number field in Accounts Payable is expanded in the 2013 release to accommodate **up to 20 characters** so that the entire invoice number of a vendor can be entered, exactly as it appears, minimizing the need to truncate.

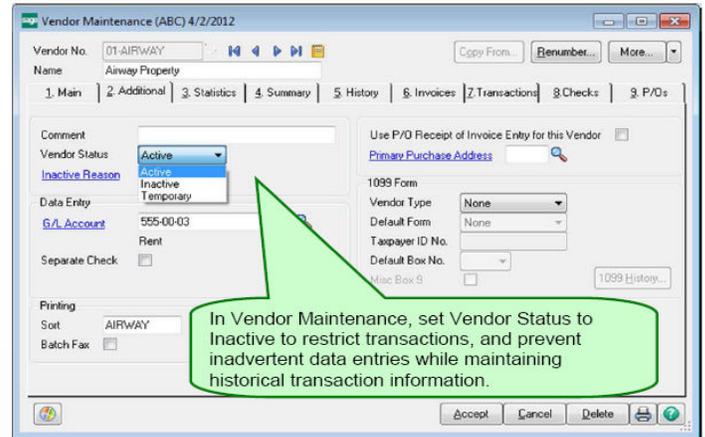
For some, this added flexibility can simplify the process of matching invoices (and reduce errors) by allowing you to use the same invoice number in Sage 100 ERP as the invoice number used by your vendor.

### Clearing the Clutter with 'Inactive Vendors' and Reason Codes

New in Sage 100 ERP Version 2013 is the ability to set Vendor status to **Inactive** along with "reason codes" that can be created to reference why that action was taken (No Activity in XX Days, Out of Business, Dispute, Merged, etc). All historical transactions for that vendor are maintained in the database (and can be reported on) until an authorized user chooses to permanently delete those records.

Full details of the action taken are in the audit log, and only authorized users can make a payment to a vendor with an inactive status to avoid payment mistakes. In 2013, Inactive Vendors can be hidden from view, or excluded from listings and forms for faster lookups and data entry.

**NOTE:** Similar "Inactive Customer" functionality is now also available in Accounts Receivable.



### Cleared Check Information

In response to [customer requests](#), the 2013 release includes the option to display and access relevant bank information in more places. For instance, cleared checks now display in Invoices, Transactions, and Check Tabs in Vendor Maintenance. You also have the option to show cleared checks in Bank Reconciliation and A/P Vendor Maintenance without having to access the Bank Reconciliation module.

## SUPPORTED VERSIONS REMINDER

As a reminder, Sage officially supports the current plus 3 prior versions of Sage 100 ERP. Here's a glance at the current versions and support retirement dates:

Version	Phone/Email Support Retirement
Version 2013	Current - no retirement date yet
Version 4.5	9/30/15
Version 4.4	9/30/14
Version 4.3	9/30/13

[Download the Supported Versions Matrix for Details ...](#)



[Supported Versions Matrix \(PDF\) >>>](#)

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# SAGE CRM SUPPLEMENT: CRM Software for Sage 100 ERP

JULY - AUGUST 2013

## New Sales Lite iPhone App

### Offline Access to Your People, Opportunities, and Calendar

Sage recently announced the release of the **Sage CRM Sales Lite App for iPhone**. This handy app gives you offline access to your contacts and other CRM data on the go. It will also track communication you make through the app (call, text, and email) and update the Sage CRM database. Here's a closer look at this handy new functionality for Sage CRM.

#### Working with Contacts

The **Contacts** menu option provides you with 3 tabs which display your CRM contacts, Phone contacts, and Favorites.

When viewing a **CRM Contact**, you'll see all the fields and contact details that are available in the standard CRM summary screen. You can also view that person's history including opportunities, communication, cases, and notes.

The app can optionally access your existing **iPhone Contacts** and allow you to add any of them as a CRM Contact with the click of a button. You can also add ANY contact to your list of **Favorites** - a shortcut to the people you contact most often.

With CRM contacts right in your pocket, you can easily make a call or send an email or text message. The app will automatically save a record of the communication and allow you to add notes on the fly which write back to Sage CRM.

#### Working with Opportunities & Calendars

Like Contacts, the Opportunities screen displays all the fields from the standard Opportunity Summary screen from CRM like lead source, forecast, order value, and other details. Using the iPhone search field, you can filter the list of opportunities that display and even add/update opportunity notes after a phone conversation or text/email exchange.

The Sales Lite App for iPhone will also download your tasks and appointments for the **next 14 days**. From there, you can add alerts/notifications that will display on your iPhone



30 minutes before the start date. The notification will display both inside the app and in your iPhone notifications.

#### Working Offline

Perhaps one of the most useful features of the app is the ability to work offline when you don't have a mobile connection or internet access. Just press the "Offline" button from the home screen and continue working with your contacts, opportunities, etc.. Any changes will be stored locally on your phone, and then synchronized to Sage CRM later when you press the "Go Online" button.

#### Getting Started

The new Sales Lite App for iPhone is compatible with Sage CRM Version 7.2 or later. You'll also need your Sage CRM Administrator to install [this component](#) from the CRM Marketplace. Once these prerequisites are in place, you can click the Apple icon below and [download the iPhone app](#) which is available on the App Store.



Be sure to [Contact Us](#) with any questions.