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Sage 300 ERP Newsletter

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Sage Authorized Partner

Version 2012 Gets a Little Smarter

With the release of Sage 300 ERP 2012 last year, your ERP system received a nice boost from a host of new features and enhancements. Your system also got a lot smarter with fantastic new capabilities that were added to Sage 300 **Intelligence Reporting** in Version 2012. Here's a look at some of the new reporting tools that we think you'll like.

New Reports Available

For starters, a couple of brand new pre-built reports are now available in Sage 300 Intelligence Reporting including:

Sales AR Master Report - based on data from your Accounts Receivable module, this report displays line item sales information by customer, invoice description, and stock items sold, along with Gross Profit and Gross Profit Percentage figures.

Dashboard AR Analysis Report - a graphical report for managers that want a summarized view of YTD and Fiscal Period Profit and Loss figures, top 5 customers, top 5 expenses, and top 5 variances.

But that's not all … there are a bunch of other free report templates available for download from the Free Report Templates Group on the Sage BI Community website. It's a group of developers and third parties set up to foster a community of sharing, featuring new free reports added regularly.

Report Designer and Reporting Trees

The new **Report Designer** for Sage 300 Intelligence is a handy tool that allows you to easily create new reporting formats - including report columns and pre-defined formulas - using a really simple drag-and-drop interface. Plus, a new Formula Builder helps in the creation of additional calculated fields, while the "What If Analyzer" provides a sliding scale you can use to dynamically change amounts for budgeting, forecasting, and projections. Download the Report Designer Guide for details.

Sage 300 ERP 2012 also saw the introduction of new **Reporting Trees** that allow you to create a visual model of your company's reporting structure without changing the underlying financial data. This enhancement for Sage 300 Intelligence Reporting is perfect for companies that have a hierarchical structure in which other business units (or departments) roll up and report to higher levels.

Other Notable New Intelligence Features

Sage Intelligence Reporting also comes with a collection of other "smart" new features. Perhaps the most significant is the **automated report distribution** feature allowing you to send reports to a file, ftp site, or via email. Other enhancements include improved data refresh tools, simplified drill down, faster report generation, and a handy report designer progress bar.

SAGE 300 ERP 2012 INTELLIGENCE RELEASE NOTES

Download the Sage Intelligence release notes with all the details about important new features and changes made since the last release of **Sage Intelligence Reporting** for Sage 300 ERP 2012.

How To Color Code Companies in Sage 300 ERP

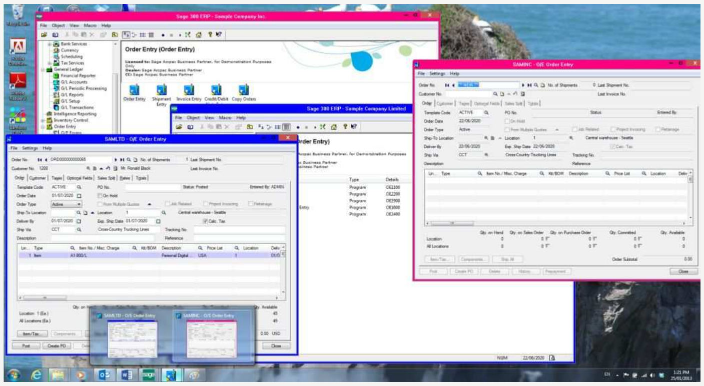
Expected for availability in late February 2013, Sage 300 ERP 2012 **Product Update 1** (PU1) will include enhancements to Sage CRM, Intelligence Reporting, and Payroll. But one useful new feature that will perhaps fly under the radar is the ability to color code different companies in Sage 300 ERP.

Why Color Code?

Before we talk about how, let's talk about why. The ability to color code will come in handy for Sage 300 ERP customers that have data stored in multiple databases. In those cases, it's possible to have multiple screens for multiple companies open at the same time. It's also easier to accidentally post transactions to Company A when they should have been posted to Company B. That's where color coded companies comes into play.

How to Color Code

The new option to configure company colors will be found in **Database Setup**. The list of companies displayed will now include a "color" column with the option to automatically assign default colors to all of your companies. If you don't like the defaults and would prefer to assign a specific color to each company, you could manually edit the individual company color profile in the **Edit SQL Server Database Profile** task. When finished, your various company windows will be easy to distinguish and look something like this (below):



OTHER NEWS & UPDATES

News, updates, and resources for Sage 300 ERP that we think you should know about.

Version 5.5 Retirement - March 30th

With the release of Sage 300 ERP 2012 in September of last year, Sage will no longer support Sage 300 ERP (formerly "Sage ERP Accpac) **Version 5.5** after **March 30, 2013**. This is in accordance with standard Sage Product Support Policy that provides support for the current version plus two versions back.

Be sure to contact us if you're currently running Version 5.5 and would like to schedule an upgrade. Or to learn more about the newest Sage 300 ERP Version 2012, go online to:

www.Sage300ERP.com/2012release

Preparing for an Upgrade

With Sage 300 ERP 2012 now available and the chaos of year end processing behind you (hopefully!), many customers are thinking about an upgrade. However before you download the newest version and begin the process, there are several important questions to ask and preparations to make. Does your current hardware and technology support the newest version of Sage 300 ERP? What are the steps involved in upgrading and are product updates required before starting the process? Do I need to prepare the data?

To answer those questions and more, here are a couple of resources that will come in handy:

Sage 300 ERP Compatibility Guide

Sage 300 ERP Installation Guide

Sage 300 ERP Upgrade Guide

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Working with File Attachments in Sage CRM

The latest version of Sage CRM for Sage 300 ERP 2012 introduced several enhancements to the file attachment functionality, including the ability to upload multiple files at once, attach multiple files to a single task, and a new drag-and-drop interface. Here's a closer look.

First, A Word About Web Browsers

It's worth noting that in the past, Sage CRM was primarily compatible with Microsoft Internet Explorer (IE). But recent enhancements have made the system compatible with all major web browsers including Apple Safari, Google Chrome, and Mozilla Firefox. While it opens up more options and possibilities, it also means that each browser might work just a little bit differently with Sage CRM which you'll notice as we discuss the file attachment enhancements here.

Uploading and Attaching Multiple Files

In previous versions of Sage CRM, you could only upload one file attachment at a time … and that's still the case if you use IE and Safari. However using Chrome or Firefox, you can attach multiple documents to a record or task in a single upload. Here's how to add multiple files to a task.

1. Open a **Customer Record** and select **New Task** from the **Communications Tab**.
2. You'll be prompted to save the task first - Click **OK**.
3. From the **Attachments Tab**, select **Add File** and select all the files you want to add in one single upload.

The files will display on the Attachments tab on the task. If you were uploading files to a Customer Record (instead of a task), the process is similar and the files would display in a list below the Document Details panel. Other enhancements include the ability for administrators to limit the file type, size, and quantity to prevent the upload of potentially harmful files (i.e. .EXE files).

Drag and Drop Option

Document Drop capability allows you to drag-and-drop files as an alternative method of uploading attachments. While this functionality has been around for a while, it's now compatible with Chrome and Firefox which allows you to drag-and-drop multiple files at once using the **Drop Files Here** zone found throughout Sage CRM.

Better Visibility of File Attachments

In previous versions of Sage CRM, you had to drill down to launch file attachments. Now anywhere you see the View Attachment paperclip icon, you can open the attachment directly without drill down.

Contact us if you questions about these new features or want to discuss an upgrade of Sage CRM for Sage 300 ERP.

SAGE CRM CUSTOMER MESSAGE

Sage recently announced plans to sell Sage ACT! and Sage SalesLogix CRM - two other CRM products in their portfolio. With the sale, Sage is now focused on meeting the needs small and mid-sized businesses with **a single, global CRM solution - Sage CRM**. It also means that Sage can focus resources to more quickly bring you new features and capabilities as a Sage CRM customer. So stay tuned for exciting new developments in Sage CRM during 2013!