Sage 300 ERP Newsletter

Issue 1 - 2014

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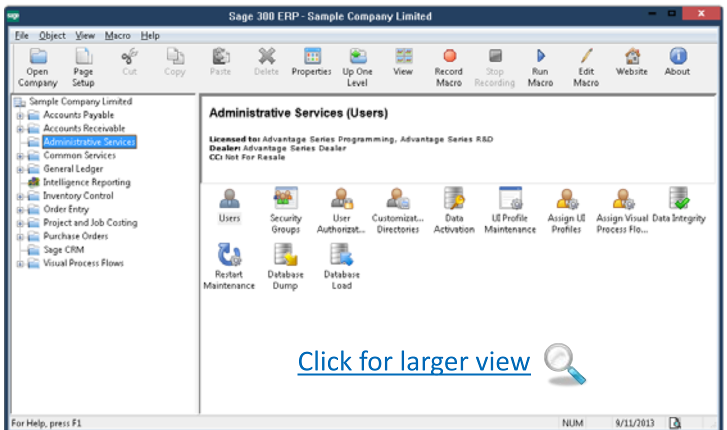
DESIGNED FOR SPEED AND SIMPLICITY

Expected for release March 17th, Sage 300 ERP 2014 takes speed and simplicity to the next level with an improved desktop layout and easier-to-use data entry screens. Let's take a closer look.

Updated Desktop Design

A redesigned desktop in Sage 300 ERP 2014 is more simple and organized so that you can find the screens and functions you need more easily.

The new **Ribbon Style Menu** at the top of the screen puts the tools and features you need most right at your fingertips. The new desktop also features **Modernized Icons** that not only look great, but are more meaningful and help improve screen and menu navigation.



Sage 300 ERP 2014 Will Feature a New Desktop Design

In addition, you'll also notice that the left-side **Navigation Tree** is updated to reflect the standard Microsoft-style menu that most of us are familiar with. More than just a pretty face, the new desktop replaces complexity and little-used functions with a cleaner and simpler design that saves time - all without sacrificing the workflow that you've grown accustomed to.

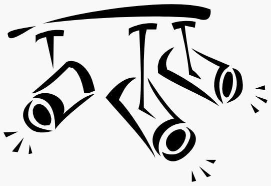
BLAST FROM THE PAST! Check out Sage 300 ERP Desktops Through the Ages for a trip down memory lane. See how far the Sage 300 desktop has come over the years.

Refreshed Data Entry Screens

Every new release of Sage 300 ERP introduces new functionality. But over the years, all those new fields, features, and buttons can clutter up your data entry screens. Since technology has changed quite a bit since the last major screen refresh back in version 5.0A, Sage 300 ERP 2014 embraces new technology with screens that are more clean, modern, and intuitive.

With data entry **screens that are 30% larger**, you get **Improved Column Alignment** and more white space making your system easy on the eyes and less distracting. To ensure you can still find what you need, Sage hasn't rearranged or moved fields around. Everything should be where you remember it, just laid out better using some extra space. In addition, any **Required Fields** in data entry are now visually indentified with an asterisk. This new feature helps you avoid annoying error messages and shorten the learning curve for new users.

Stay tuned for the official Sage 300 ERP 2014 release announcement in March and be sure to contact us if you have questions or need assistance with an upgrade.



Sage CRM and Sage 300 ERP

Two Great Products That Are Better Together

Each new version release of Sage 300 ERP typically includes updates to the integration with Sage CRM, bringing an even tighter connection between the two products. But beyond the technical details, what does it really mean to have CRM and ERP working together in one system and providing a single view of your company? Let's explore.

Workflow and Data Entry

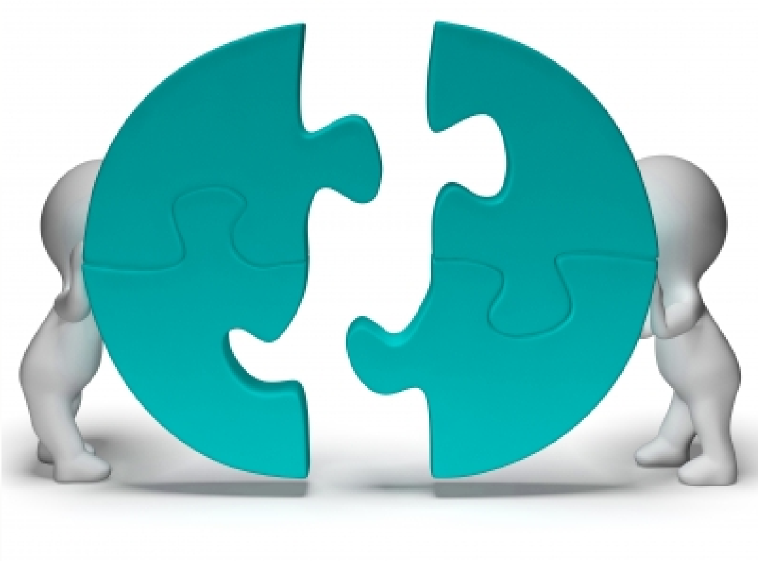
When CRM and ERP are integrated, data is entered one time and then carried all the way through your business system, eliminating duplicate entry and inefficiency.

For example, when your sales people enter an order in Sage CRM - whether from a desktop or mobile device - the order details automatically transfer into Sage 300 ERP. There's no need for your back office accounting or customer service staff to re-enter the same data. You eliminate redundancy, save a bunch of time, and ensure accuracy. It also means that new customers (or existing customer updates) added in one system are synchronized in the other. Your data is consistent and your business is more accurate and efficient.

Reporting And Decision Making

With CRM and ERP data combined in the same system, you get the benefit of one single view of your business across all functional areas - from sales and accounting to warehouse and customer service. Most companies that run disconnected systems have to export data from each application, manually patch it together from spreadsheets and paper documents, and then do it all over again the next time they need to run updated reports.

The result of integrated CRM and ERP is a consolidated, 360 degree view of your business and a reporting process that's faster, more accurate, and delivers greater insight into company-wide operational performance.



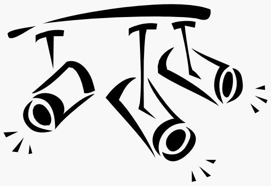
Customer Service

With integrated CRM and ERP, everything you know about your customers - from sales to accounting - is in one single system. Everyone who has direct contact with a customer has up-to-date customer information on-hand. That means sales people have access to inventory availability, recent shipments, or customer credit status without having to fumble around in the accounting system. It also means that service staff is better able to resolve customer inquiries on the spot, rather than passing them to another department or promising a call back hours/days later.

GET THE GUIDE:

4 Ways Integrated CRM-ERP Improves Productivity

If you're interested in more detail about the benefits of integrated CRM and ERP, **Email Us** and we'll send you a copy of this valuable 8-page guide.



Introducing Sage HRMS 2014

Over 50 New Features & Software Improvements

Recently released and currently available for download, **Sage HRMS 2014** includes **over 50 software improvements** suggested through the customer feedback portal online. Let's take a look at what the newest version of this market-leading HR and payroll software has to offer.

Human Resources Enhancements

A new **Benefit Savings Plan Group** feature allows you to combine multiple plans in a single group so that Maximum Employer Contributions are calculated on a combination of *all plans*. This added control is great for employers that offer, for example, both pre-tax 401(k) and post-tax Roth 401(k) plans where the total employer match to both plans should not exceed a maximum designated value. To learn more about this new feature or for step-by-step instructions, go to: **Help > Setup > Employees > Setup Benefits > Set Up Benefit Savings Plans Groups**

Improved Employee ID Management - Sage HRMS now supports a combination of ***both*** numeric and alphanumeric employee IDs without the system automatically restructuring the existing IDs in your database. You also get added flexibility when using the Add New Hire task.

Shared Secure Queries - when creating and using Secure Queries in Sage HRMS HR, Time Off, and Sage HRMS Train, a new ***Share Button*** (visible when the *Access Type* is set to *Private*) allows you share you secure private reports with the employees of your choice.

Time Off Enhancements

The **Attendance Functionality** in Sage HRMS 2014 has been greatly improved which includes far better flexibility for attendance plans and seniority-based accrual rates. Your Accrue Time processes now update pertinent reference fields throughout the Attendance Summary windows, as well as update the rules that govern attendance plans.

New Accrual Calculations Process - attendance plans calculate seniority-based accruals depending on the **Attendance Plans Detail** > **Seniority Levels Tab** > **Calculate Service As Of**.

SAGE HRMS UPGRADE NOTE:
For existing customers upgrading from Sage HRMS Versions 10.1 or 2012, both your current plan settings (for Use and Calculate Service As Of) and current data will be transferred to new options that preserve your current accrual calculations. No other action is required. To see which options default after upgrade, refer to this Enhancement Details table.

Payroll Enhancements

You now have the option to **Customize the Process Payroll Map** in Sage HRMS 2014 to add custom reports, websites, and executable files (.exe).

Sage HRMS 2014 also offers a new **Automatic Tax Update** option for Local/Other tax code rates supplied from Sage to the Sage HRMS Payroll U.S. product. Each time you apply a quarterly tax update, the system will prompt you and automatically apply rate changes to the supported tax codes currently in your Sage HRMS Payroll program (note: you can click **NO** at the prompt and continue using your current method). You can also automatically push the new rates to the tax codes on each employee record.

Lastly, when importing a timecard Sage HRMS Payroll now includes the importing of **Cost Center Overrides** which will automatically update the G/L segments corresponding to each cost center override. This matches the way the system already handles information manually entered in timecards.

Get the Whole Scoop!

Download the Sage HRMS 2014 Release Notes for details about all enhancements and system requirements for this new release.

How to Change Company Screen Colors

One of the newer features in Sage 300 ERP is the ability to color code company databases. In a previous newsletter, we briefly introduced this new functionality and discussed **WHY** you would color code (i.e. differentiate screens when multiple companies are open at the same time). In this article, we'll show you **HOW** to color code companies - step by step.

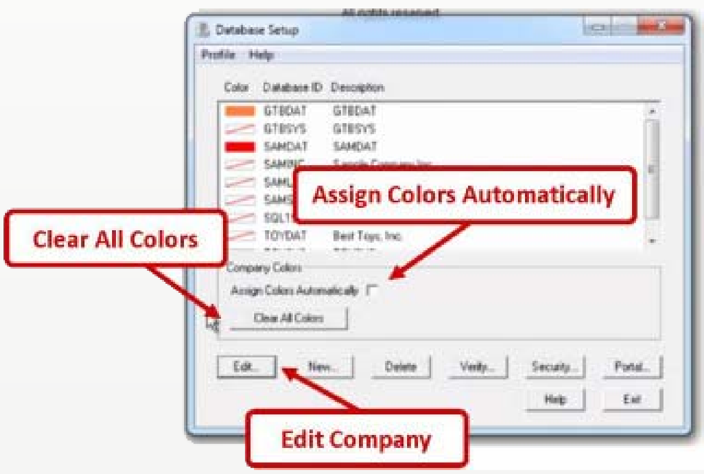
1. Access Database Setup

Before getting started, note that this functionality is only available in Sage 300 ERP 2012, Product Update 1 or above.

As an **Admin** user in Sage 300 ERP, select **Database Setup** and then enter the password.

2. Edit Company Colors

You'll now see that there is a Color column next to the Database ID column. Also note that you have the option to **Assign Colors Automatically**, as well as **Clear All Colors**.



Click on the company that you wish to color-code and then select **Edit**.

Under **Company Color** click on **Select Color** to chose your desired shade. Click **Ok**.

Note: *If you want the default or natural Windows look then select 'No Color.'*

3. View Company

Now just open up one of your color-coded companies in Sage 300 ERP and you'll notice that the Windows title bar and border have been changed to your choice of color. Even the preview windows that appear when you hover over the task bar icons have been color-coded.

SEE IT IN ACTION! Watch the [Changing Your Company Colors] video on YouTube or contact us for additional guidance.

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