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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 300 ERP system.

What is Sage Inventory Advisor?

Sage Inventory Advisor is a web-based application that connects to your Sage 300 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.

Track inventory performance and problem items with the interactive dashboard.

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 300 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 300 ERP database.

Sage Inventory Advisor is offered as a monthly subscription service with the monthly rate determined by the number of SKU Locations. **Contact us if you'd like to learn more**.
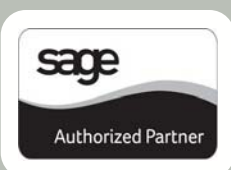
Introducing the New Sage Mobile Apps

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 300 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 300 ERP system so you can:

- Access real-time information about inventory availability
- Review the catalog or recent orders with your customer
- View/Edit customer information on your iPad
- Enter orders and accept immediate payment onsite

Sage Mobile Service

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

- Email estimates and receipts so everyone stays informed
- Modify work orders for *actual* hours & work performed
- Get customer signoff onsite
- Access Sage 300 ERP information on the fly
- Get paid faster and increase cash flow

Sage Mobile Service was designed to improve customer service levels and the efficiency of your field technicians to help businesses gain more referrals and repeat business.

Close more sales, improve customer service in the field, and get paid faster with new Sage Mobile Apps.

Sage Billing and Payment

Sage Billing and Payment makes it easier for customers to do business with you. This new subscription-based app allows you to choose your customers' preferred method of invoice delivery (paper or electronic) and then easily process electronic payments - which reduces paper costs, saves time, shortens the A/R cycle, and gets you paid faster. Electronic payments can be processed by credit card or ACH.

Sage Billing and Payment also provides your customers with a 24/7 web portal so they can manage their accounts and make payments online and 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 300 ERP system. Sage Data Cloud is the glue that connects your on-premise ERP software with a world of cloud applications without the need for added web servers or any other special hardware.

Contact us with your questions or to learn more about the new Sage Mobile Apps.

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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.

Available on the App Store

Be sure to contact us with any questions.