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SAGE 300 WEB SCREENS
Answers to Frequently-Asked Questions (FAQs)

A marquee feature of the Sage 300 2016 release last year was the new web screens that were introduced. With the more recent Sage 300 2017 release in July of this year, even more web screens were rolled out. Now that they've become more prevalent in the software, we thought we'd take a closer look at some frequently-asked questions.

What's the Difference Between Web Screens and the Sage 300 Portal?

Web screens are **completely redesigned** versions of Sage 300 desktop screens that run in a browser and are launched from a new browser-based home page. They are more compatible and easier to use on a wider range of devices than the traditional desktop screens.

The **Sage 300 Portal** provides **access** to Sage 300 desktop screens from a web browser, but the screens themselves are not web-based. You're simply accessing desktop screens over the web.

Do Web Screens Replace the Sage 300 Portal?

Not yet. The portal is still available and required if using the quote-to-order feature in Sage CRM.

Are All Sage 300 Desktop Screens Available as Web Screens Too?

Not all modules and screens from the Sage 300 Desktop are available as web screens yet. With the 2016 and 2017 releases, Sage began with a selection of screens from frequently used modules like GL, AP, AR, Order Entry and Purchasing. However, more web screens are planned for future product releases. You can get the full list of CURRENT Sage 300 Web Screens here.

Can I Use Web Screens and Desktop Screens at the Same Time?

Yes. For example, if you've customized some of your desktop screens, you can continue to use those while using the web screens for other tasks.

Do I Have to Install Sage 300 on Every Computer or Device to Use Web Screens?

No. You do not need to install any software. You just need access to a web browser. However, any computer or mobile device that will be used to access the web screens must be connected to the network on which the Sage 300 server is running.

Get the Whole Scoop

To get the FULL scoop on web screen features, capabilities, and customization options, go online to the Sage 300 Web Screen FAQs support page for full details.

And be sure to Get In Touch if you need help upgrading your Sage 300 software or want to know how to put these new web screens to work for your business.

TIPS FOR A SUCCESSFUL YEAR END CLOSE

1. **Back Up Your Data** - before you begin any year end process, be sure to execute a complete back up of your database. You should also **test the back up** to ensure it was successful and the data is readable. The only way to "reverse" year end processing is to restore your data from a backup. So do it now!

2. **Check Your Version Number** - closing procedures can vary depending on the version of Sage 300 (or "Accpac") you're currently running. Check your version number and service pack before starting year end.

3. **Create a New Fiscal Calendar** - Sage 300 allows you to begin entering transactions for the new year without closing out the current year. Simply create a new fiscal calendar in **Common Services > Fiscal Calendar** and then click the **New** icon. If the period date ranges are correct, then **Save** the year. Do this before entering transactions for 2017.

4. **General Ledger Closing** - While it's a good idea to close modules in a timely fashion, your General Ledger can remain open as long as you need while awaiting final processing (or audit adjustments) in other modules.

5. **Check Data Retention Settings** - Sage 300 will retain historical data based on your software version and the settings you've configured in each module. So it's a good idea to review all module and system settings to avoid the unintended loss/purge of important data during year end close. In particular, check GL Options to see how many years of history your system is set up to retain.

6. **Remember, We're Here to Help** - As you begin year end closing procedures and prepare to start fresh in 2017, be sure to contact us if you need assistance during this important time of year. As your software and technology partner, we're here to help!

HOW TO CREATE A DATABASE BACKUP IN SAGE 300

One of the most important things you can do before starting the year end closing process is to backup your data. Here's how to do it in Sage 300:

1. Click the **Start** button, highlight **Programs**, then **Sage 300**, **Tools**, and click **Database Dump**.

2. Type the password for the Admin user in Sage 300, then click the **OK** button.

3. Click to highlight the database that you want to Dump. Click the Set Directory button to enter the location where you want to save the files.

4. Click OK. You'll return to the Dump Sage 300 ERP Data screen.

5. Click the **Dump** button to proceed. A confirmation message will appear. Click **OK** to continue.

6. A Dataset Description screen will display in which an optional description of the database may be entered.. Enter a description, then click Done.

To see this full backup process in action, you can watch the Sage 300 backup video demonstration on YouTube.
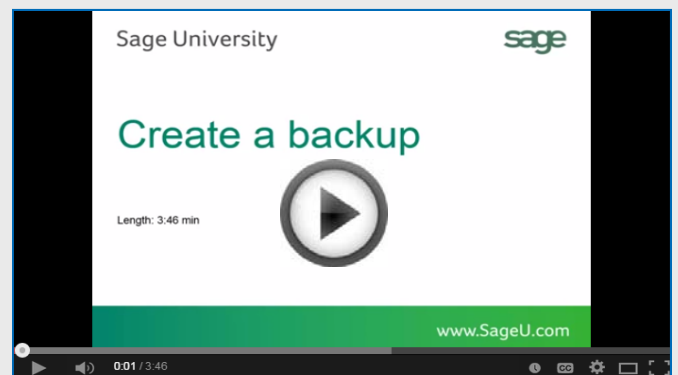
OTHER HELPFUL YEAR END RESOURCES

Here's a collection of tips and video tutorials that we think will help you with a smooth year end closing process and to get you ready for a fresh start in 2017.

General Ledger Year End Procedures

This collection of video clips demonstrate various year end closing procedures in the General Ledger.

Create a New Fiscal Calendar

Lock and Unlock Fiscal Periods

Post all Current Transactions in GL

Backup Data Separate Folder/Location

Print Trial Balance & Financial Reports

Create a New Year

Print Posting Journals

Sage 300 Year End Center

Sage has created a Year End Center that provides valuable resources that can help guide you through a smooth year end closing process in Sage 300 including:

• Year End Articles and Checklists
• Video Tutorials
• "Hot Topics"
• Online Q&A and Discussion Forum
• Live Chat With Tech Support
• Tax Forms, Payroll, and Report Guidance

Take advantage of this free and valuable resource!

Visit Year End Center!

Download & Review Year End Checklists

Checklists are great for helping you keep things on track and to ensure processes are executed in the right sequence. That's why Sage provides helpful year end checklists that are built right into Sage 300. To access the checklists:

1. Logon to your Sage 300 system
2. From the menu bar, click **Help** and then **Documentation**
3. Browse the **ENG folder**
4. Find the PDF called **Sage300ERP_Checklist_YearEnd.pdf**

Sage 300 Payroll FAQs and Videos

For companies running the payroll module, here are answers to a couple of frequently-asked questions along with helpful instructional videos to help prepare for year end.

When do I close the year?

You never close the year. Continue processing payrolls as you do all year long, entering period-end dates in the new year as you cross the calendar year boundary. After you have completed all of the previous year's year-end processing and made backup copies of the data, you can run *Delete Inactive Records* to remove terminated employees and other obsolete information from your data.

Can I produce W-2s (U.S.) or T4s (Canada) after processing payrolls for Jan 1?

Yes. The program allows you to start processing payrolls for Jan 1 and later produce W-2s/T4s for the previous year without any additional procedures. When you produce W-2s/T4s, select previous year as the Payment Year.

Helpful Videos:

How to Download and Install Payroll Tax Updates

How to Print W-2 Forms (U.S.)

How to Print T4 Forms (Canada)

How to Change GL Accounts That Were Incorrectly Set Up

During year end processing, some companies discover that certain GL accounts were incorrectly set up using the wrong Account Type.

For instance if Income Statement accounts were set up as Balance Sheet accounts, these accounts would not close to Retained Earnings after running Create New Year. In other words, the accounts would still have a beginning balance in the new year.

If you find yourself in that situation, here's how to resolve it.

1. Ensure the option **Allow Posting to Previous Years** is selected.

2. Create a new GL account with the correct Account Type (Income Statement).

3. Create a GL entry to transfer the balance from the old account (Balance Sheet) and into the new Income Statement account.

4. Select period 12 and the fiscal year in which the entry is intended to be posted.

5. Mark the old Balance Sheet account as **Inactive** so no additional entries can be posted to this incorrect account.

6. Repeat steps 2 through 5 for each account that was set up incorrectly as a Balance Sheet account.

NOTE: Do not run the Create New Year function again. The system will recognize the entry is posted to a prior year and will update the Retained Earnings account.

Be sure to Contact Us if you need help with this or any other issue with your Sage 300 software.

LOCKING FISCAL PERIODS IN SAGE 300

Starting with Sage 300 Version 6.0, you have the ability to lock or unlock fiscal periods **individually for each module** (in versions prior to 6.0, you can only lock or unlock **all** modules at once).

This capability in Sage 300 makes it easier to lock down modules in the proper sequence and prevent unexpected errors during year end processing.

PREPARING to Lock Fiscal Periods

It's important to understand how transactions flow through Sage 300 **before you begin** locking fiscal periods for individual modules.

The Preparing to Lock Fiscal Periods video on YouTube provides important information that you should review prior to locking fiscal periods.

Locking Fiscal Periods

After you review the set up and workflow information, you're ready to use the fiscal calendar to begin locking and unlocking fiscal periods. Here are some general best practices to keep in mind:

1. Lock operations modules (OE, Inventory, etc.) *before* financial modules (GL, AP, AR, etc.).

2. When locking Bank Services, also lock modules that integrate directly with it including AR, AP, & Payroll.

3. Create and post all outstanding GL batches for a fiscal period before you lock it for GL.

Watch the Locking Fiscal Periods video on YouTube for step-by-step instructions.

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SAGE CRM
A Closer Look at Recent Enhancements

If you haven't updated your Sage CRM software in a while, you're probably missing out on some of the new features and product enhancements that were added during 2016. Here's a look at what you might be missing.

User Interface Enhancements

The user interface in Sage CRM has been updated to provide a consistent experience with other Sage applications that it integrates with like Sage 300. The changes include:

Main Menu - A new compact and responsive main menu that's easy to use and adjusts to any display (mobile device, laptop, tablet, etc).

Enhanced Tabs - Horizontal tabs now stay visible even when you scroll. With a new color scheme, active tabs are clearly highlighted, indicating your current location in Sage CRM.

Top Bar Icons - Notification, history, search, and my profile icons displayed in the top right corner of the screen are now bigger, more intuitive, and easier to use.

Companion Buttons - Action buttons on the right side of the screen now stay onscreen when you scroll, making it easier for you to perform the actions with less vertical scrolling.

Fonts and Spacing - More spacing between elements on Sage CRM screens, updated fonts, and better contrast rate improve the readability of information.

Updated MailChimp Integration

The release of Sage CRM 7.3 (Dec 2014) introduced the new integration with MailChimp. Product updates in 2016 built on that foundation, creating an integration that's even more powerful and connected.

As an administrator, you can now specify how often data synchronization occurs between Sage CRM and MailChimp including various settings in **Communications and Opt out requests** as well as synchronization of **Campaign Results**.

When adding new contacts to MailChimp from your Sage CRM database, helpful notifications now display the number of contacts with new or updated email addresses that were successfully sent to MailChimp, the number of contacts with missing email addresses, and the number of contacts that MailChimp couldn't process. Plus, the number of merge fields you can use in a MailChimp campaign has increased.

New Workflow Actions

A new **Create Appointment** workflow action has been created which prompts you to schedule an appointment as part of a workflow process. Alternatively, you can use the action to automatically create an appointment with pre-defined values (no user input required).

Sage also enhanced the existing **Send Email** workflow action to automatically (optional) file emails against corresponding entities including Person, Company, Case, Opportunity, Solution, and custom entities that have communications. The emails can then be viewed on the Communications tab.

Have Questions or Need Help?

Get in touch if you need help upgrading your Sage CRM software or if you'd like more detail about recent changes.

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Time collection and payroll calculations are an important part of any business given that for many companies, labor costs represent the single biggest expense. For companies that track time and attendance manually, the process can be cumbersome, time-consuming, and costly. There are a multitude of errors that can occur when data is collected manually, keyed into a spreadsheet, and re-entered into a payroll system.

If this all sounds painfully familiar, then read on to learn more about the benefits of automating time and attendance tracking and payroll processing.

Humans Make Mistakes

Before we talk about the benefit of automation, it's helpful to examine the pitfalls of a manual process. Consider the cost of purchasing and storing paper time cards and the labor involved in distributing and collecting those cards. If you're using an old punch clock, it's not uncommon to spend hours reconciling information from missed or duplicate punches and illegible cards.

Then there's "time creep" that can cost a business money… those are the bits and pieces of time lost from late arrivals, early departures, and extra long lunches that are rarely accounted for in a manual system.

That's just the beginning. Now it's time for the payroll clerk to add up the time cards and manually calculate pay rates, taxes, and benefits which opens things up for calculation errors and mistyped data.

The Benefits of Technology

Replacing your manual process with an automated system consists of using a digital time clock and sophisticated time and attendance software. The digital clock replaces time sheets and time cards with ID badges that employees simply swipe through the reader to record their in/out time automatically. Software that's connected to the digital clock is already programmed with employee information and automatically performs payroll calculations, benefit accruals, tax liabilities, and much more.

That information is then easily transferred to your payroll system or outside service provider. No more tedious calculations, typing errors, and hours of reconciliation. In many cases, a full-time payroll clerk is no longer necessary.

Introducing Sage Time

Sage Time is an intuitive, web-based "cloud" solution that completely automates time and attendance management. Beyond simply collecting attendance data, this full-featured suite also provides accrual tracking, a time off request tool, employee and manager self service, reporting dashboards, customizable process workflow, and so much more. Plus, Sage Time is integrated with Sage HRMS and Sage Payroll so it works with the employee data you already have.

Get In Touch if you'd like to learn more about automating your time and attendance tracking with Sage Time.

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Three Fundamental Truths About Inventory Planning

Inventory experts share what they've learned over decades of working on the problems of optimal replenishment. After working with thousands of companies over decades, the team behind Sage Inventory Advisor has learned these three fundamental truths about inventory planning which we share in this article.

1. Balance is the Goal

First, all inventory-based companies - distributors, manufacturers, and retailers - are challenged by the competing goals of having just enough stock on hand to meet demand, while avoiding warehouses full of excess product. Achieving a balance is critical.

2. Time is Being Wasted

Second, the buyers and inventory planners who are stuck in the middle of those competing goals inevitably spend too much time, effort, and stress managing the mountains of data required to truly optimize their inventory levels. Putting out fires all the time is simply not an efficient use of time.

3. Outdated Tools Hurt Profits

Third, most small and medium business are using outdated tools and processes - and profits are suffering as a result. These are tools like spreadsheets, custom reports, and worse. It is alarming how commonly these ill-fitting solutions are used for inventory management and replenishment.

Ignoring These Truths Comes with a Cost

Profit is negatively impacted by the hidden costs of excess inventory for some items. That excess means working capital is unnecessarily tied up in the warehouse, when it could be used for other profit-driving activities in the business. And that excess stock also incurs very real carrying costs, which can be substantial.
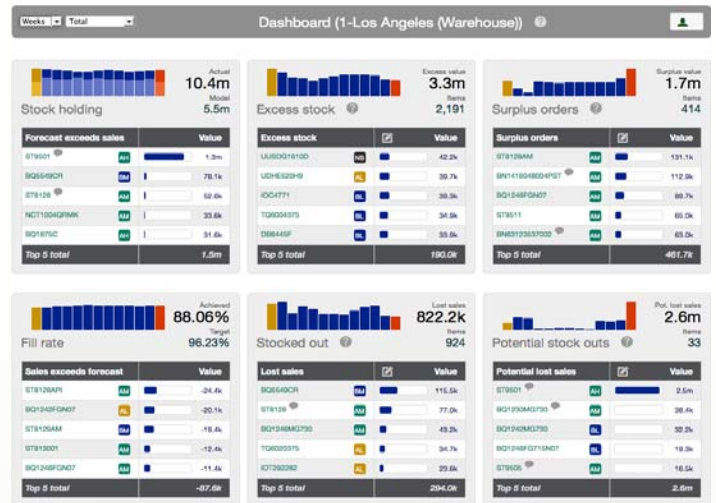
More obvious is the impact of not being able to fulfill customer demand on a timely basis. Maybe that means the sale is only delayed, but there are many other times when the sale will be lost for good. And if this happens often enough, it can mean a lost customer.

What's the Solution?

Businesses that manage inventory are more than familiar with this challenge, and many of them try to get by with an inventory spreadsheet. That's a task it is simply not cut out for, and the result is hurting the bottom line. What's required is a true Inventory Management System - a user-friendly app like **Sage Inventory Advisor** (SIA).

SIA is a game changer for mid-sized companies that manage inventory. It is extremely cost effective, easy to deploy, easy to use, and specifically designed to help solve the problems of excess inventory and stock-outs once and for all.

To learn more about how Sage Inventory Advisor can help you optimize inventory, watch this quick demo video, or contact us for more information, to request pricing, or to schedule a personal demo.

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