



Team Up with Systems Experts

Sage 100 ERP Newsletter

Issue 5 - 2014

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SAGE 100 ERP INTELLIGENCE REPORTING

Answers To Your Frequently-Asked Questions (FAQs)

Many of you recently made, or are planning to make, a transition from FRx to **Sage Intelligence Reporting**. So here's a look at some Frequently-Asked Questions (FAQs) from our customers, along with a quick review of recent changes to Sage Intelligence Reporting for Sage 100 ERP 2014.

What Is Sage Intelligence Reporting?

It's an Excel-based reporting tool that pulls data from across your entire Sage 100 ERP system (any module) into a single location so you can slice, dice, and analyze the numbers in a familiar spreadsheet environment.

Do I Need to Build All New Reports?

No - in addition to an **FRx conversion tool** that will migrate your existing FRx reports, Sage 100 Intelligence Reporting also provides a nice set of **pre-defined report templates** that allow you to get up and running quickly without having to build new reports from scratch.

Resources:

[FRx Report Conversion Video](#)

[Sage 100 Intelligence Standard Reports](#)

How Does it Compare to FRx?

If you've been using FRx a long time, there are similarities that you'll feel comfortable with like the use of rows, columns, and reporting trees in Sage 100 Intelligence Reporting.

One point of distinction is that FRx only pulls financial data from your general ledger. However, Sage Intelligence looks **across your entire system** and can also access inventory, sales, customer data, and so much more.

And because Sage Intelligence works in Excel, you also have the advantage of crunching and analyzing the numbers using Excel-based features like charts, graphs, and pivot tables.

Resources:

[FRx to Sage Intelligence Comparison](#)

What's New in Sage Intelligence for Sage 100 ERP Version 2014?

Intelligence Reporting now **installs automatically** during the Sage 100 ERP 2014 workstation upgrade. In prior versions, Sage Intelligence Reporting required a separate installation. In addition, Intelligence Reporting is now listed in the Module Menus toolbar and Tasks tab in Sage 100 ERP 2014 making it easier to access.

Also introduced with the 2014 release was a new **Profitability Dashboard** for Sage 100 Intelligence Reporting that makes it easy to identify profitability of customers and products as well as your top-performing salespeople. Stunning charts and graphs provide visual queues to help you make informed decisions.

Can I Test Drive Sage Intelligence?

Yes - customers on a current business care plan receive one full Report Manager User License (free) to get started and test Sage Intelligence Reporting using your own live data.

Where Can I See and Learn More?

Your best bet is to contact us for guidance, discuss your specific reporting needs, and to get you started with the free user license.

But if you want to kick the tires a bit more, head over to the Sage 100 Intelligence Online Community where you'll find instructional videos, recorded webcasts, user guides, a discussion forum, and a wealth of other helpful resources to set you in the right direction.



[Sage 100 Intelligence Community](#)



Spotlight On: Sage CRM

How it Works With Your ERP System

In the past, we've explored how CRM software can organize and automate sales, marketing, and customer service in much the same way that Sage 100 ERP does for accounting, reporting, inventory, financial management, and more.

But in this article, we want to focus how Sage CRM works together with your Sage 100 ERP system to help you understand why companies are increasingly prioritizing an integrated approach to CRM and ERP.

Visibility: One Version of the Truth

Customers are at the heart of any business. But too often, customer data is spread across multiple systems which isn't good for accuracy, efficiency, customer service, or reporting.

When you combine Sage CRM with Sage 100 ERP, you have a single source for all customer data and transactions from contact details, shipments, and credit history to quotes, orders, and customer service requests. So whether someone from sales, accounting, or operations pulls up a customer record, they see one version of the truth.

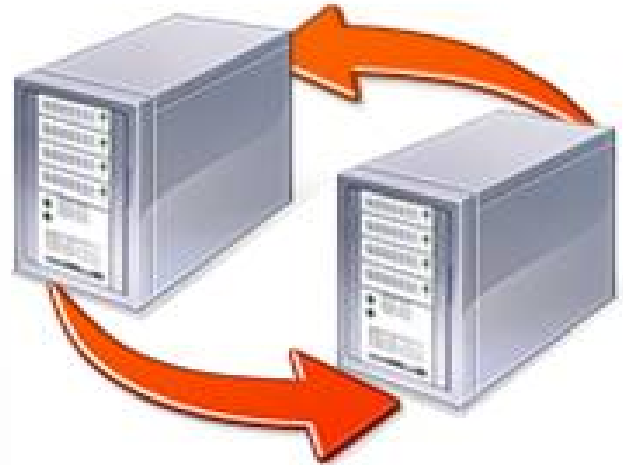
Sales or customer service can also check things like order status, credit history, or inventory availability while they are talking with the customer in real-time. No need to make the customer wait until accounting has a chance to run a report.

No More Duplicate Data Entry

When you connect CRM and ERP, you create a seamless workflow that totally eliminates the hassle and inefficiency of entering the same data in multiple systems.

When a sales person enters a quote or order in Sage CRM, the data is automatically transferred into Sage 100 ERP. Accounting no longer has to re-enter the same order data from hand-written notes or printed reports from sales.

Sales and accounting can both enter transactions or change customer records and have the data update system-wide without duplicate data entry or ever leaving the familiarity of their respective Sage CRM or Sage 100 ERP systems.



Data Integrity and Consistency

It's no surprise that if multiple departments enter data into multiple disconnected systems and spreadsheets, you're likely to end up with data that's inconsistent and unreliable.

Integrated CRM and ERP eliminates that problem so you no longer waste time reconciling reports, tying out balances, and piecing things together. Integrated CRM and ERP provides consolidated reports and a 360 degree view of your business that's accurate and reliable.

Not Your Grandfather's CRM

A lot has changed over the years - Sage CRM is no longer a narrowly-focused departmental tool used only by sales and marketing. Integrated CRM and ERP is all about bridging gaps between departments so everyone across your company is working from the same system and data for better efficiency, profitability, and customer service.



CRM Across Your Business

Request a copy of this free eBook to learn more about extending the power of CRM across your entire business.

Sage Inspire Tour Back on the Road: Coming to a Town Near You!

It all began last year when a group of Sage Executives went out on the road - touring North America in an RV - to gain a perspective about what customers like you need and want out of your Sage business software.

The Sage Inspire Tour in 2013 was a fantastic success.

So starting in Fall of 2014, the Sage Inspire Tour goes back on the road with current plans to stop in about 14 major cities in the U.S. and Canada.

At each stop, Sage will host a series of discussions where you'll have an opportunity to connect with your peers and talk about the challenges you face in your business. **It's not just a day of presentations or product demos** - the Sage team wants to hear from customers like you and learn how technology can help you achieve your business goals.

Go online for more info, locations, and registration:
<http://go.na.sage.com/sageinspiretour2014>

Sage 100 Supported Versions Update

With the release of Sage 100 ERP Version 2014 earlier this year, it's important to take note of the currently supported versions as well as which products have been retired in case you're running an older version.

As a reminder, the standard Sage policy is to support the current version (2014) plus two versions back (in this case, Versions 2013 and 4.50).

Refer to the following snapshot (image below) for a quick glance at currently supported versions of Sage 100 ERP or click download the [Supported Versions Detail in PDF](#).

Sage 100 ERP (Formerly Sage ERP MAS 90, 200, 200 SQL)	2014	2013	4.50	4.40
Release date	Feb-14	Dec-12	Aug-11	Feb-10
Phone and web case support (Retirement date)	Yes	9/30/16	9/30/15	9/30/14
Quarterly and year end updates (AP and Payroll as needed to support State and Federal eFiling)*	12/31/16 (Use eFiling and Reporting)*	12/31/15 (Use eFiling and Reporting)*	12/31/14	12/31/13
Tax table updates (TTU)	12/31/16	12/31/15	12/31/14	12/31/13
Product updates (Formerly service updates)	Yes	Yes	6/30/13	No
Hot fixes**	Yes	12/31/15	12/31/14	12/31/13
Online support knowledgebase	Yes	Yes	Yes	Yes

Sage 100 ERP Supported Versions Matrix

Sage 100 ERP (aka MAS 90 / MAS 200) Version 4.4 Retirement 9/30/14

In accordance with standard Sage support policy, product support for Sage 100 (aka MAS 90 or MAS 200) **Version 4.4** is officially retired as of **September 30, 2014**.

Note: Final tax table and year-end updates are provided in the year **prior** to retirement - December 31, 2013 in this case. Therefore, Payroll tax table and year-end updates for Version 4.4 will **NOT** be available for December 31, 2014.

[Contact us](#) if you'd like to plan for, discuss, or begin an upgrade to a currently-supported version.



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Serving the Greater Los Angeles Area | info@mbsg.net | (818) 865-1373 | www.mbsg.net