August 2016

Sage 100 Newsletter

rkl LLC eSOLUTIONS

TOP 5 REASONS TO UPGRADE

Sage 100 Version 2016

Sage 100 Version 2016 was released in November of last year. Since then, there have also been two product updates that added additional features. If you're running an older version of Sage 100 and wondering whether the 2016 release is for you, consider these top 5 reasons to upgrade.

1. Outsourced Payroll Integration

Sage 100 2016 now features a direct integration with Sage Payroll Services - an outsourced payroll processing provider. You simply upload your general ledger account numbers and bank codes to Sage Payroll Services and then easily download payroll transactions right back into Transaction Journal Entry. In addition to saving tons of time manually rekeying payroll data into your general ledger, you also shift the burden and hassle of payroll processing, tax reporting, and compliance to experts who do all the heavy lifting - so you can focus on running your business.

2. Improved AP Reporting and Printing

A top customer-requested enhancement, the Accounts Payable Aged Invoice Report window now includes an Electronic Payment Vendors field so you can specify whether or not vendors who accept electronic payments are included on the Aged Invoice Report.

3. Affordable Care Act (ACA) Compliance

A collection of new settings, fields, and reports were added in Sage 100 2016 making it easier to manage new compliance requirements of the Affordable Care Act.

4. Easier Credit Card Processing

If you're using Sage Payment Solutions, managing and processing credit card transactions just got easier. Now you can apply, activate, and manage credit card transactions in the new Sage Payment Center right from within the Sage 100 software. No need to go to a website or launch a separate window. You can view payment activity, settle daily transactions, and search for records all without ever leaving Sage 100.

5. Simplified Everyday Tasks

Sage 100 2016 is packed with enhancements that collectively save you tons of time processing everyday tasks. Some of the popular enhancements include:

- Choose whether or not to automatically insert decimal points when entering quantities
- Allow for purchase order numbers up to 30 characters
- Schedule reports to automatically run or print using Task Scheduler
- Add, view, and edit customer memos in repetitive invoice entry
- Automate sales order expiration dates with new settings and defaults

Contact us with your questions or if you need help upgrading to Sage 100 2016.

IN THIS ISSUE:

UPCOMING EVENTS

Automated Budgeting for Sage 100

Date: Aug 17, 2016
Time: 2 PM Eastern

Manufacturing and Distribution Forum

Date: Sept 22, 2016
Time: 8:30 AM - 3 PM Eastern
Where: Double Tree Reading, PA

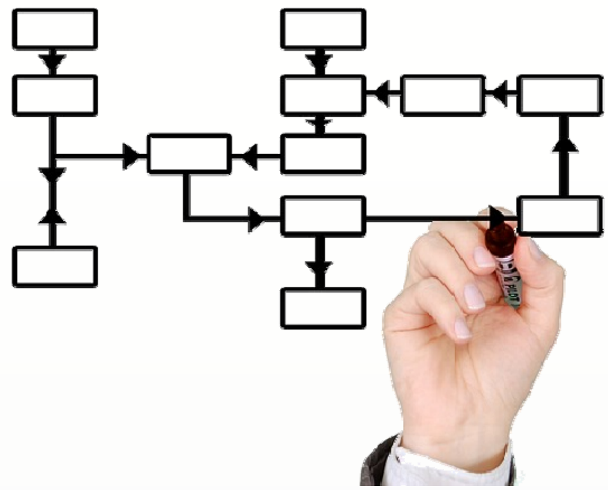
Registration & Details

SAGE CRM

Automating Sales & Service Workflows

When it comes to business, we all know that errors, manual processes, and redundancy waste valuable time and money. That's why it's important to implement pre-defined best-practices that everyone on your team adheres to.

And that's where the automated workflow engine in Sage CRM comes in, molding the software around your business so that every process is efficient, consistent, and repeatable.



Sales Workflow Automation

One of the most obvious places to start when discussing workflow in Sage CRM is the sales process. At a high level, Sage CRM Workflows provide a tightly controlled system for how sales-related tasks are managed and flow through your business. A well-designed workflow can help you to identify bottlenecks or redundant tasks that require attention.

At the task level, Sage CRM Workflows can create triggers and alerts that ensure everyone is following the same best-practices and repeatable processes. A few examples of what you can do with Sage CRM Workflows include:

- Automatically create and add a follow up call reminder in your calendar after sending a proposal
- Automatically send a thank you email following a sale
- Require sales people to enter certain information at defined stages in the sales process to standardize lead qualification and opportunity management
- Require sales people to attach a certain document before advancing to the next stage in Sage CRM
- Issue alerts to a manager when a new opportunity is entered that exceeds a threshold

The options are endless but the objective is the same ... to be more thorough, efficient, and consistent when it comes to managing opportunities, following up on leads, and communicating with customers and prospects.

Customer Service Workflow

Sage CRM workflow isn't just for sales. It's equally useful in helping customer service representatives take a systematic approach to processing information, escalating cases, and getting support issues resolved quickly. For example if a customer support case or service request remains unre-solved for longer than a predefined period of time, the Sage CRM workflow process can trigger an automatic escalation notification to the appropriate manager or supervisor.

Endless Workflow Possibilities

The way you leverage Sage CRM Workflow is completely up to you. You can modify the standard workflows that come "out of the box" or create completely new and customized workflows. The possibilities for workflow automation are endless … sales, marketing, customer service, contract management, service scheduling, time tracking and billing, and production are all areas of your operation that can benefit from consistent and repeatable workflow processes.

Need Help Getting Started?

Get in touch if you need help setting up or using Sage CRM workflow automation.

SAGE 100c ADDS INVENTORY FUNCTIONALITY

Now Includes Sage Inventory Advisor "Basics" at No Charge

It was recently announced that **Sage Inventory Advisor Basics** is now included with select **Sage 100c** bundles at no additional cost. Read on to learn about this enhancement to Sage 100c and what it means for inventory management.

What Is Sage Inventory Advisor Basics?

By now, you've probably heard about the Sage Inventory Advisor add-on – a cloud-based inventory optimization tool that works hand in hand with your Sage 100 software.

The newer "Basics" product is based on the "full" Sage Inventory Advisor suite, but without:

- Support for Bill of Materials
- Central Warehouse Consolidation
- Ability to Import Order Forecasts into Sage ERP

In short, it's a light version of the product that focuses on the most common inventory challenges while removing some of the complexity of more advanced functionality in Sage Inventory Advisor that not every company needs or uses. At the same time, it makes the product easier to implement, understand, and start benefiting from right away.

How is It Different Than the Core Inventory Module?

The core inventory functionality in Sage 100c is focused on processing and managing transactions. From there, Sage Inventory Advisor Basics then leverages that transactional data to help you make more informed decisions about how much inventory to stock, when to buy more, and many other strategic insights that the core inventory functionality isn't capable of. In short, they complement each other.

Here is a quick comparison of core Sage 100c inventory functionality versus Sage Inventory Advisor Basics:

Sage 100c Inventory	Sage Inventory Advisor
Creates and monitors inventory transactions	Analyzes inventory transactions and makes recommendations
Creates POs & purchase reports	Forecasts demand and purchase requirements using sales data
Tracks receiving stock	Identifies what to order and how much
Counts physical stock	Identifies when to expedite orders to prevent stock-outs
Tracks pick, pack, & ship	Recommends what inventory to reduce

Who Gets Sage Inventory Advisor Basics?

As mentioned earlier, Sage Inventory Advisor Basics will be included at no additional charge to customers running select Sage 100c bundles which include:

- Sage 100c **Advanced**
- Sage 100c **Complete**

The Sage 100c ***Essentials*** bundle – typically made up of "Financials Only" customers – is excluded.

In addition, customers running Sage 100c Advanced or Complete must be on a current **Gold** or **Platinum** level Business Care Plan. Customers on Silver level plans will not receive the free Sage Inventory Advisor Basics product.

Got Questions?

Contact us with your questions about Sage 100c or feel free to download the brochure and learn more about Sage Inventory Advisor.