STAR-INFO

Newsletter for Sage 100 ERP

Headline News

Registration opened April 19th for Sage Summit 2012. This year's conference will be held August 14-17 at the Gaylord Opryland Resort and Convention Center in Nashville, TN. At Sage Summit you can learn how to get more out of your Sage solution, solve real business problems by interacting with peers in your industry, and see what's next in business technology. Early-bird discounts are available. [Click here] to learn more.

Sage 100 ERP Roadmap

What's Coming For Your Sage ERP Solution

S age publishes a product roadmap to provide customers with an understanding of the future direction of their Sage ERP product line. The product roadmap for Sage 100 ERP (formerly known as Sage ERP MAS 90 and 200) was recently updated. Here we provide an overview.

New Names

In order to best reflect the scalability of the software, Sage ERP MAS 90 and 200 will be renamed as follows:
- Sage ERP MAS 90 becomes Sage 100 Standard ERP
- Sage ERP MAS 200 becomes Sage 100 Advanced ERP
- Sage ERP MAS 200 SQL becomes Sage 100 Premium ERP

Roadmap Overview

The roadmap represents the current Sage view of product direction. The roadmap is intended for use as a guideline; any of the milestones, features, release periods, or versions can change. The focus is on adding features designed to simplify business processes and help you stay connected. As in the past, new functionality will be provided both in Product Updates, the mini releases that deliver enhancements with minimal business disruption, and in major releases.

Future major releases will be designated by year. For example, the next major release, scheduled for calendar Q4 2012, will be Sage 100 ERP 2013. This would correspond to Version 5.0 using the old version naming convention.

Recently available is an FRx conversion utility that we can use to help you convert your FRx reports to Sage Business Intelligence. Also planned this year: a new web-based shipping solution from SmartLinc and a SQL Payroll module for Sage 100 Premium ERP.

A Product Update is planned for Q1 2013, and the next major release, Sage 100 ERP 2014 is currently targeting availability for Q4 2013.

FRx Conversion Utility

The FRx Conversion Utility is a tool that can help speed the process of converting your FRx reports to Sage Business Intelligence. The utility will convert native columns like Actual/Budget columns, as well as calculated columns involving basic arithmetic. It also will map limited row formats to Report Designer row structure.

Sage 100 ERP Roadmap

(continued from cover)

The utility can convert Reporting Trees to the reporting tree structure implemented in the Report Designer for Version 4.5, and also convert Catalogs to layouts in the Report Designer if the Catalog column layout and the row format can both be converted.

SmartLinc Shipping Solution

A new shipping solution from SmartLinc will be available this quarter. This web-based solution offers complete carrier support for the US and Canada. It integrates tightly with Sage 100 ERP using the Business Object Interface.

SQL-Based Payroll

Scheduled for Q3 2012, this stand-alone payroll for Sage 100 Premium ERP will integrate with the General Ledger. The software includes standard tax tables and electronic media reporting for all states, as well as unlimited direct deposit accounts and automatic ACH file creation. The system utilizes Sage Payroll Tax Forms and eFiling by Aatrix®.
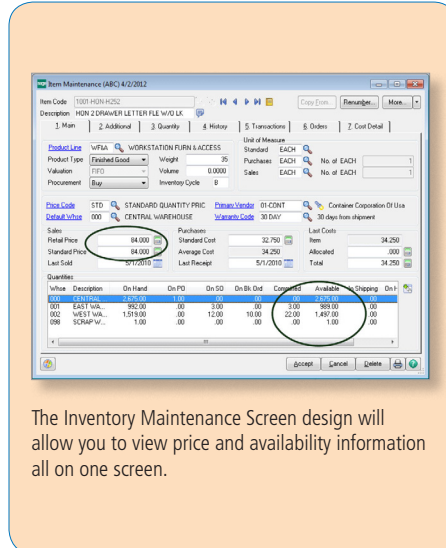
Sage 100 ERP 2013

The 2013 release is planned to include many enhancements that will help you stay connected, as well as top enhancements inside the modules that have been requested by customers. Here we touch very lightly on each.

Top Customer Enhancements

Based on feedback from customers, module enhancements planned for 2013 include:
- Accounts Payable invoice number expansion
- Ability to Inactivate Customers and Vendors
- Ability to view Cleared Checks in Vendor Maintenance
- Redesign of Inventory Maintenance Screen

The Inventory Maintenance Screen design will allow you to view price and availability information all on one screen.

Sage CRM

Sage 100 ERP 2013 will include integration and workflow enhancements for Sage CRM. You will be able to map multiple companies to a single Sage CRM system and synchronize user-defined fields between ERP and CRM. Workflow improvements are planned for the quote-to-order process, and Sage CRM users will gain the ability to look up inventory, customer purchase history, and other customer data stored in the ERP system.

Sage Exchange

With this release, the Credit Card Processing module will run on the Sage Exchange payment processing platform. Sage Exchange helps reduce fraud exposure and PA-DSS compliance costs by storing cardholder data in the secure, cloud-based Sage Exchange vault. There are many enhancements planned to credit card processing functionality as well, such as the ability to preauthorize an amount that is different from the sales order. Sage Exchange also allows you to use your smart phone to collect payments anywhere, any time, and then feed transaction data into the system.

Sage Advisor Update

Sage Advisor Update works similarly to software updates you receive for other programs such as Microsoft Windows, with you in control. A new Sage Advisor Update program will be added to your menu. This will give you access to all the updates available for all your Sage products installed on your computer. From this program you then can download, and optionally install, the update.

Product Update 2013

The Product Update in 2013 is planned to offer more capabilities in the integration of Sage Exchange. These include using Exchange to process ACH payment to vendors, and accepting more than one credit card per invoice from customers.

Sage 100 ERP 2014

Looking further ahead, Sage plans to focus on the distribution modules for enhancements in 2014. There also will be a focus on mobile applications and the implementation of Sage Advisor.

Version Retirements

Please note that support ended for Version 4.45 (SQL) on March 30, 2012, and support will end September 30, 2012 for Version 4.2.

Give us a call with your questions.

Working With Sage Business Intelligence

Sage Business Intelligence (formerly Sage MAS Intelligence) is a powerful tool in Sage 100 ERP that was adopted primarily to replace Microsoft FRx, which has been retired by Microsoft. Naturally there is a learning curve associated with getting the most out of any new tool. Here we provide some tips on getting started with creating custom financial reports in the Sage Business Intelligence (SBI) Report Designer.

Excel Friendly

The SBI Report Designer starts with Microsoft® Excel®, a very familiar tool for most accountants, and adds functionality. The Report Designer requires Microsoft Excel 2007 or above, and gives you flexible report design capabilities using raw data from Excel.

Report Templates

Currently, the Report Designer functionality is available for two types of reports, one for single-company financial reports and one for consolidated financial reports for multiple companies. You can begin creating your custom report by copying these reports to use as templates and then renaming and modifying them. After you design a new report format, remember to create and link the template back to the copy of the report you made.

Getting Started

To access the Report Designer, run the desired report. When Excel opens, access the Report Designer using the *BI Tools* tab. Once Intelligence is installed, the Add-Ins and BI Tools tabs will always show in your Excel workbooks.

Mapping Accounts

You may need to map the Report Designer reporting groups to your system accounts. This is done within the individual report. We recommend that you copy the Financial Reports Designer report and rename it to Mapped Designer Template. Map the accounts as follows:

1. Select the report.
2. On the Parameters tab, set the Fiscal Year default to *2012* and the Budget Code default to *Original*. To do this, right-click on the field and select Properties. After selecting the default, click *OK*.
3. Select the Mapped ABX Designer Template and run the report. Select *OK*.
4. Map the UnMapped System Categories into Reporting Groups. First select a reporting group in the right-most column and then select the unmapped category in the left-most column. Select *Add*. Select *OK* when all categories have been mapped.
5. Click OK to the message about successfully mapping your categories.
6. Minimize Excel and right-click on the *Mapped ABX Designer*, select to create and link the template.
7. Click OK to select the Mapped ABX Designer Template Workbook.
8. Click *Yes* to clear the contents of worksheet 2.
9. Click *OK* to accept the template name. By default the template name is the same as the report name. It is recommended that you keep the template name and the report name the same.
10. Select *Yes* to replace the existing template.
11. Select *OK* to accept that the template was created successfully.

Working With Report Designer

Here is an example of creating a rolling three-month report for January (assuming a calendar fiscal year) using the Mapped Designer Template. We will remove the budget columns and add in the appropriate period columns.

1. Copy the Mapped ABX Designer template and paste it into the Financials folder. Right-click on the copied report to rename it to *Three Month Report*. Click *OK* to assign the new template name.
2. Select the report and click the Parameters tab. Select the Budget parameter and click *Remove*. Click *Yes*.
3. Run the report using the default parameters.
4. From the BI Tools tab, click *Launch*.
5. Click *Load Layout*. All of the available layouts for the report are displayed. Click *Copy* for the row *IS – Actual vs Prior*.
6. Enter *January Report – 3 Month* as the new layout name and click *Next*.
7. In the Report Designer, note the columns area in the top-right section. Click *Clear All* to remove the existing column definitions, then select the columns you need from the green Columns Tab in the center of your screen. Select columns for *ActivityPeriod01*, *PYActivityPeriod12*, and *PYActivityPeriod11* in that order. Click *Add Spacer* to make spaces between the columns.
8. Click *Generate Layout* and click *OK* when the layout has generated successfully.
9. Change the headings from Periods 01, 12, and 11 to *January, December, November*.
10. Minimize Excel and create and link the template to the Three-Month Report report.

Sage has posted a number of videos on the YouTube website to give you a visual of working with SBI. To view them, go to: http://www.youtube.com/user/SageUERPLearning/videos?query=Intelligence

Please give us a call with any questions or for assistance with the SBI Report Designer.

IN THE SPOTLIGHT:

Bill Of Materials—Not Just For Manufacturers

The Sage 100 ERP (formerly known as Sage ERP MAS 90 and 200) Bill of Materials module is not just for building component lists for manufactured products—it can help you to do much more than its name implies. Here we provide an overview of this module and suggest ways it can help you create efficiencies and assist with accurate cost tracking.

Here are some examples of interesting ways customers are using Bill Of Materials:

- Recording production costs without a huge amount of data entry
- Assembling gift baskets
- Building custom tool kits
- Creating a custom fixtures list for a bathtub or sink
- Cutting fabric, PVC pipe, wood, or glass into specific lengths or sizes to put in stock

Do these examples have you thinking about how Bill of Materials could be put to work in your organization? Here is a quick overview of the major features, which may give you a few more ideas.

Production Entry

For operations with simple production processes, Production Entry allows you to record the completion of a batch after the fact. When the Production Entry register is updated, the system removes raw materials from inventory and adds the finished goods to inventory with the proper total cost.

Disassembly Entry

Disassembly Entry can be used to record a different kind of operation. If you buy a product, such as a bolt of cloth, and cut it into various lengths to stock in inventory, you can use Disassembly Entry to quickly and easily remove the bolt from inventory and enter it back in as the individual pieces.

Engineering Change Management

When products are redesigned and components are changed, Engineering Change Control allows you to make changes as of a certain date, and keep a history of the changes.

Sales Kits And Kit Options

While you can create sales kits in Inventory Management, building them in Bill of Materials provides additional capabilities. You can take advantage of the Option Bill capability to configure products at the time a customer places an order. For example, a set of golf clubs might be sold with different grades of golf bags. Or a chair can be sold with a choice of slipcovers. The options available for each kit can be selected during Sales Order Entry and Invoice Data Entry, and each option can have a price associated with it.

Usability Enhancements

Beginning with Sage 100 ERP Version 4.4, the Bill of Materials data entry screens have customizable dual-grid entry options that come with the Business Framework. The *Bill of Materials Inquiry* and the *Where Used Inquiry* screens were enhanced so that you can see everything related to the bill, such as its subassemblies or components, without going to another window. When using the *Indented* option, the tree view allows you to see at a glance the relationship of the component parts.

We hope this article has prompted you to think of new ways the Bill of Materials module could be put to use in your organization. Please call if you have questions or would like more information.

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