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# Sage 100 ERP Newsletter

From Walpole Information Technology Solutions

## “What’s New” Guide for Sage 100 ERP 2015

If you've been holding off on an upgrade to Sage 100 ERP 2015, it's understandable. There hasn't been a lot of detail about what's included in this newest release - **until now!** Sage just published a 60-page “What’s New” guide that should provide everything you need to know to determine whether an upgrade is right for your business. Let's take a quick look at some of the highlights.

### Over 60 Customer-Requested Enhancements

You asked and Sage listened. This latest release includes over 60 enhancements that were submitted and voted on by customers like you through the [Sage 100 ERP Ideas Portal](#). The Ideas Portal provides you with an opportunity to shape the future of Sage 100 ERP by submitting new ideas or voting on existing ideas from your fellow customers. The 60+ customer-requested enhancements in Sage 100 ERP 2015 span GL, accounting, inventory, sales, purchasing, security, and more.

### Managing The Basics: GL, AP, and AR

Managing finances, paying vendors, and invoicing customers is a cornerstone of any business. Here are just a few of the new features added to “core” modules like GL, AP, and AR:

- One-click automatic journal reversal for speed and simplicity (GL)
- Automatic Out-of-balance message in bold print on the GL detail report (GL)
- Expanded vendor name to 50 characters - popular customer request (AP)
- Ability to reprint “Quick Print” checks (AP)
- Cash Receipts list button added so you can find open, un-posted receipts easier (AR)
- Sort options added to customer audit report for easier change tracking (AR)

### Sales, Purchasing, and Inventory

Some of the new features for purchasing, order processing, and inventory control include:

- Retain Purchase Order History now available, similar to the Sales Order history feature (PO)
- Purchase Order “Copy From” functionality added to easily replicate a previous order (PO)
- New option to synchronize Bill and Item Description (BOM)
- Drill into GL Source Journal from Item Maintenance Transactions Tab (IM)
- Additional Customer Memo button in screen header for easy access everywhere (SO)
- Calculator and Calendar buttons with drop-down added to multiple order entry fields (SO)

**Get the Whole Scoop:** We've just scratched the surface. Click below for the entire 60-page guide.



## Sage 100 ERP 2015 - What's New Guide

[Contact us](#) to request a copy of this newly-released 60 page guide that details all the new features in Sage 100 ERP 2015.



# Spotlight On: Sage CRM

## Taking Sage CRM On the Road

Perhaps more than any other department in your company, sales people spend as much time on the road as they do in the office. To stay productive, they need access to data, transactions, and customer information wherever they are. That's why [Sage CRM 7.3](#) continues to add functional improvements to the mobile CRM component.

### More Than Gee Whiz Technology

Before we examine mobile features in Sage CRM, it makes sense to point out that the ability to access CRM on a mobile device is about more than just flashy features or gee whiz technology. There's real business benefit in making sure that CRM is easy to access and use.

By improving convenience and access, you also improve user adoption which is critically important to a successful CRM strategy. It's not uncommon for sales people to continue "doing things the old way" because the new CRM software is hard to use or requires them to be in the office to update the system. Simply put, your employees will **actually use** mobile CRM and not view it as an unnecessary administrative burden that ties them to their desk.

### Mobile Enhancements in Sage CRM 7.3

#### All Devices Welcomed

Sage CRM 7.3 consolidated styles into a single mobile theme that looks and works the same way on an iPhone, Android, or tablet so you get a consistent experience across devices. The enhanced mobile theme also features a new user interface with a cleaner layout, rearranged slide-out menus on every page, and the new "flat" design that has been made popular on newer mobile operating systems.

You can track customer and prospect communications, schedule appointments or follow up tasks, update customer records, manage meetings, and so much more - all while you're on the go. You can also import Android or iPhone contacts as a new lead or "Person" in Sage CRM without fumbling around with data files or exports.



Use a Single Mobile Version of Sage CRM on All Modern Devices

### Sage CRM Mobile Features

A few of the noteworthy features in Sage CRM Mobile:

- Work offline and still access customers, contacts, and opportunities when out of coverage area.
- Integration with maps to plan sales appointments.
- Customize screen colors to identify different types of records at a glance.
- Add custom fields to Person or Opportunity records.
- New calendar rearranged in a journal view making it easier to scan your schedule.
- Import phone contacts as new Sage CRM Person.

**Note:** the new [Sage CRM for iPhone](#) app replaces the old app which was called "Sage CRM Sales Lite."

### Helpful Resources

Download the [Sage CRM 7.3 Mobile Guide](#) for full details about how to set up and work with the Sage CRM Mobile components.

Or [Contact Us](#) if you need help.



# NEWS YOU CAN USE

## Sage 100 Supported Versions Update

With the release of Sage 100 ERP 2015, Sage has updated the supported versions matrix as follows:

Sage 100 ERP (Standard, Advanced, Premium)	2015	2014	2013	4.50
Release date	15-Apr	14-Feb	12-Dec	11-Aug
Phone and web case support (Retirement date)	Yes	Yes	9/30/2016	9/30/2015
Quarterly and year end updates (AP and Payroll as needed to support State and Federal eFiling)*	12/31/17 (Use eFiling and Reporting)*	12/31/16 (Use eFiling and Reporting)*	12/31/15 (Use eFiling and Reporting)*	12/31/2014**
Tax table updates (TTU)	12/31/2017	12/31/2016	12/31/2015	12/31/2014
Product updates	Yes	Yes	10/31/2014	6/30/2013
Hot fixes***	Yes	Yes	12/31/2015	12/31/2014
Online support Knowledgebase	Yes	Yes	Yes	Yes

It's worth noting that phone and web support for Sage 100 ERP Version 4.5 will be ending **September 30, 2015**. Sage has already issued the final payroll, quarterly, and year-end updates for Version 4.5. [Get full details here.](#)

[Contact us](#) if you need to discuss an upgrade to a currently-supported version.

## Sage CRM 7.3 Now Integrated with Sage 100 ERP

Integration with the latest release of Sage CRM 7.3 is now available for Sage 100 ERP Versions 2014 and 2015.

When you integrate Sage CRM with Sage 100, your entire business benefits from sales and marketing to accounting and operations - where each department works with the same information and communicates in the same way.

The latest [Sage CRM 7.3 Release](#) features an entirely new "clean" and contemporary design, alerts and accelerators that help you manage and close deals faster, a range of new analytics and reports, and integration with Mailchimp for more effective email marketing. [www.SageCRM.com/7.3](http://www.SageCRM.com/7.3)

## Windows Server 2003 R2

### Support Ending July 14, 2015

As a reminder, [Microsoft has announced](#) they will no longer support Windows Server 2003 R2 beginning **July 14, 2015**.

Now is the time to start planning an upgrade to a supported version of Microsoft Windows.



[Contact Us](#) if you're still running Sage 100 ERP (MAS 90 / MAS 200) on Window Server 2003 R2 and want to discuss migration options.



This year [Sage Summit](#) is headed to New Orleans for the annual gathering of Sage customers and partners which will take place **July 27 - 30, 2015**.

#### Recently-announced "Featured Speakers" Include:

- Tony Hawk - Entrepreneur and Pro Skateboarder
- Chad Hurley - Co-founder of YouTube
- Jane Seymour - Award-winning Actress
- Matthew Weiner - Executive Producer of Mad Men

#### Sage 100 Sessions and Agenda

Sage has also published conference sessions, product lessons, and deep-dive learning opportunities broken out by product categories. Click below to see what's in store for you at Sage Summit 2015:

[Browse Sage 100 ERP Product Sessions >>>](#)

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