## Welcome!!

www.technology-integrators.com

---

## Today's Agenda

o Introduction
o Sage CRM Overview
o What's New in Version 4.50
o Sage Rebranding
o 15 minute break – Grab some refreshments!
o Open Forum – Q & A session
o Take in a movie!

---

## Sage CRM and SageCRM.com

**Overview Presentation**

**What's New in Sage 100 ERP Version 4.5**

## Accounts Receivable Enhancements

- *National Accounts* – Allows you to create relationships between a bill-to account and its sold-to customers.
- *Define Default Price Levels by Customer and Product Line* – Default price levels for the customer can be set up by product line only, a combination of product line and price codes, or product line and ship-to code.
- *Define Split Commissions by Customer* – You can now define default percentage values for distributing sales order and invoice commissions among salespersons on a per-customer basis.

## Sales Order Enhancements

- *Calculate Sales Commissions by Line Item* – This allows you to set up salesperson commission rates and amounts by combinations of salespersons, customers, inventory items, and effective dates.
- *Calculate Item Pricing by Total Quantity* – This allows you to combine the ordered quantity for multiple sales order and invoice lines when calculating quantity pricing discounts.
- *Distribute Lot/Serial Items from Sales Order Entry* – You now have the option to distribute lot and serial numbers when creating sales orders, similar to S/O Invoice Entry, and print the numbers on sales orders and picking sheets.
- *Generate Purchase Orders from Sales Orders* – You can now generate a PO by clicking the New Purchase Order button on the lines tab or by clicking the Generate PO button on the Totals tab.

### Inventory Management Enhancements

- *View Lot/Serial Distribution Information on the Cost Detail tab* – You can now view the committed quantities to various data entry tasks as well as the quantity available if the Lot/Serial Distribution feature in Sales Order Options is enabled.
- *A new Lot/Serial Detail window has been added to the drop-down menu in Item Maintenance/Inquiry* – This window displays the lot/serial quantities available, committed, to distribute and those distributed.
- You can now print lot and serial distributions on sales orders and picking sheets, and on the Stock Status and Open Sales Order reports.

sage

7

### Purchase Order Enhancements

- *View Sales Orders from Purchase Order Entry* – You can now click the new Sales Order button on the lines tab to access and view the sales order for the purchase order without having to open Sales Order Entry.
- *Set Up Additional Purchase Order/Auto Generate Options* – A new Generate tab has been added to Purchase Order Options which features additional options for automatically generating purchase orders from sales orders.

sage

8

### Payroll Enhancements

- *Recalculate Deductions in Payroll Data Entry* – You now have multiple options for recalculating deductions that are based on earnings after changing, adding, or deleting data entry lines.
- *Define Minimum Hours for Benefit Accrual* – This allows you define a minimum number of hours that must be worked per check before benefits will accrue.
- *Define Deduction Code Options* – Five new calculation methods are available in Deduction Code Maintenance.

sage

9

## Enhancements Included in PU's 4 - 7

- *Inactive Items* – Allows you to limit the ability to select an inactive item in certain data entry tasks.
- *New Accounts Payable Check Sorting Option* – You can now sort checks by either vendor name or vendor number.
- *Company-Specific Background Colors* – Allows you to more easily identify each of your companies.
- *Physical Count with Count Cards* – Allows you enter physical count information from individual count cards.
- *Expense Distribution Tables* – Use this task to set up tables with GL accounts and distribution percentage amounts.

sage

10