



Sage 100 ERP Newsletter

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sage

Authorized Partner

INTRODUCING VISUAL PROCESS FLOWS

For Sage 100 ERP

Thinking about upgrading to Sage 100 ERP 2013? The new release boasts an impressive array of enhancements that are designed to improve productivity, such as the new **Visual Process Flows**. These graphical, job-oriented diagrams provide a visual representation of your business processes, simplify system navigation, and help you perform daily tasks quickly. Let's take a closer look at this helpful new feature.

What Are Visual Process Flows?

Process Flows provide a visual representation of your workflow process, as well as a launching point for the screens and tasks required to perform each process in Sage 100 ERP. These workflow diagrams can be customized by department or for each individual user.

The Sage 100 ERP 2013 release includes a number of key pre-built processes as well as an easy to use tool that allows you to design your own custom workflows. Customizing Visual Process Flows makes it easy for new users to learn Sage 100 ERP and helps existing users complete tasks that are performed infrequently, such as year-end processing. They also allow you to model diagrams that reflect your unique business processes.

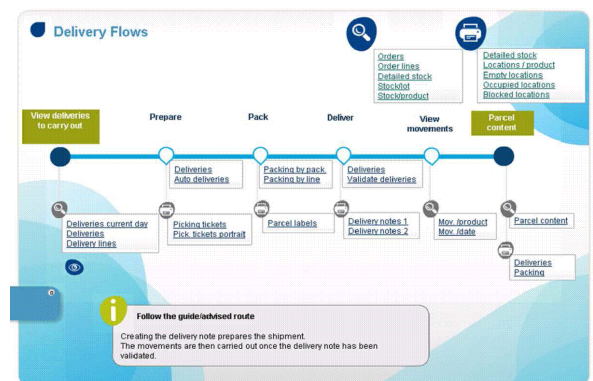
Improving Your ERP Experience

With some ERP systems, it's easy to lose yourself in the complicated web of menus, wasting valuable time searching for the tasks you need to perform your job function - but not with Sage 100 ERP 2013. The primary goal of the new Visual Process Flows is to allow you to quickly identify job-specific tasks and launch screens without searching through the tree of menu items and icons. Even though you can customize the tree of icons to limit what a user can see based on his or her role, usability studies conducted by Sage revealed that customers were still spending quite a bit of time searching for the correct screen to launch for a given task.

Process Flows also make it easier to visualize how individual tasks relate to the overall business process. So in this case, a picture is worth a thousand hours of productivity.

See It In Action

Visual Process Flows are ... well, a visual thing. So you might want to check out this [Visual Process Flows overview video](#) on YouTube to see exactly how it works. Even though the video is using Sage ERP X3 as the demo system, it's the same Visual Process Flow engine that's built in to Sage 100 ERP.



Need help figuring it all out? Be sure to contact us with any questions about Visual Process Flows or upgrading to Sage 100 ERP 2013

New to Sage Intelligence Reporting?

Since support for FRx has officially ended, a lot of Sage 100 ERP customers are using Sage Intelligence for the first time. So we wanted to provide you with a summary of all the important enhancements added over the last several months, along with some online resources, user guides, and demo videos that are handy for both Sage Intelligence "newbies" **and** experienced Sage Intelligence users.

More Intelligence in Sage 100 ERP

Over the last year, we've seen significant new features and enhancements to Sage Intelligence including additions like Reporting Trees, Report Distribution, and the Report Designer Add-in.

Reporting Trees allow you to create a visual model of your company reporting structure without changing any underlying financial data. It's perfect for companies that have a hierarchical structure in which departments (or other business units) report to one or more higher level units.

New **Report Distribution** provides fully unattended scheduling and report delivery to a file, ftp site, or email address.

Lastly, the recently-introduced **Report Designer Add-In** gives you even more control over all aspects of report design and layout for companies that have complex, customized reporting requirements that can change on the fly. The add-in features simple drag-and-drop Excel financial formulas.

Additional Sage Intelligence Resources

There are a variety of free resources available online to help you take full advantage of the built-in business intelligence

reporting features in Sage 100 ERP. Here are just a few:

Sage Intelligence Knowledgebase

A collection of helpful articles and downloadable resources to help resolve any support issues.

[Access the Knowledgebase >>>](#)

Tips & Tricks

Subscribe to Sage Intelligence Tips and Tricks and get helpful report writing and Excel tips along with useful how-to articles delivered right to your inbox on a monthly basis.

[Intelligence Tips Delivered to your Inbox >>>](#)

Quick Reference Guide

Everything you need to know about Sage Intelligence in one convenient place.

[Download the Quick Reference Guide \(PDF\) >>>](#)

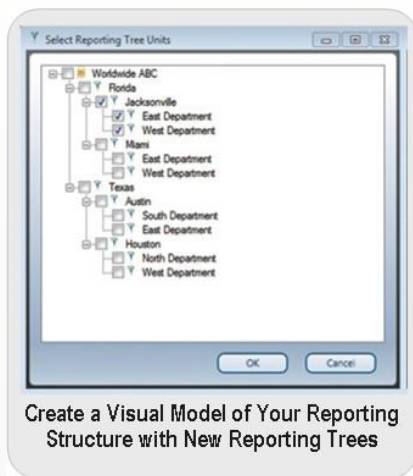
Report Designer How To Series

Learn all about the new Sage Intelligence Report Designer in this series of helpful how-to videos on YouTube.

[Launch the Videos >>>](#)



[Contact us](#) with questions or if you need help getting started with Sage 100 Intelligence Reporting.



Create a Visual Model of Your Reporting Structure with New Reporting Trees

WHAT'S NEW IN SAGE 100 ERP 2013?

Everything you need to know to determine whether an upgrade to Sage 100 ERP Version 2013 is right for you is all in one place at www.sage100erp.com/2013release.

The website includes clickable interactive product highlights, pre-recorded webcasts, downloadable spec sheets, brochures, and a summary of the top new features. Click below or contact us with your questions.

www.Sage100ERP.com/2013release

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CONTACT US:

Info@Technology-Integrators.com

| (763) 971-4800

| www.Technology-Integrators.com

In the Cloud or On-Premise: You Have Options with Sage CRM

If you've been considering Sage CRM but still wondering which version is right for you - in the cloud or in your server room - this article can provide some helpful insight.

Sage CRM Cloud

Sage CRM Cloud is ideal for companies that want to get up and running quickly or have limited in-house IT expertise. Since it's in the cloud you don't have to worry about managing servers and workstations, and nightly database backups are performed automatically.

On the financial side, there is no hardware or software to purchase so the up-front costs are minimal. Essentially you're "renting" Sage CRM, paying monthly for the use of software-as-a-service (SaaS).

One aspect of Sage CRM Cloud to consider is that it **does not integrate** with your Sage 100 ERP system. Therefore, you wouldn't experience the workflow and data sharing benefits we've discussed in previous newsletters of connecting your sales and marketing activities with back-office accounting and operations in one single system and database.

Sage CRM On-Premise

Implementing Sage CRM On-Premise is all about control, ownership, and integration. Not only do you benefit from the built-in integration between Sage CRM and Sage 100 ERP, you also have the flexibility to integrate Sage CRM with other software applications you might be using to run your business like Microsoft Exchange Server, a computer telephony system for customer support, an e-commerce shopping cart, industry-specific or 3rd party applications, and more.

While Sage CRM Cloud has *some* customization capabilities, Sage CRM On-Premise provides **advanced customization** that allows you to modify the software to conform to your processes and work exactly the way you need it to.

Lastly since you purchase and own the software, your up-front costs are higher while the total cost of ownership over time is lower. Plus, some companies prefer to maintain control of sales and customer data at their own location.

The Power of Choice

While Sage CRM offers two very different deployment options, both offer the full range of modules including sales, marketing, and customer service. In fact, the features and functions are nearly identical. And no matter which route you choose, rest assured that you won't be locked in because you can migrate between cloud-based Sage CRM and on-premise Sage CRM at any time!



Be sure to [contact us](#) with your questions or to discuss using Sage CRM at your company.

USING SAGE CRM AND DROPBOX

[Dropbox](#) is a free online service that lets you save and share files and documents "in the cloud." Any file you save in your Dropbox is synchronized and available across your computer, tablet, and mobile device. It has become popular in the workplace, allowing you to easily share documents with your professional network without emailing huge files.

And now, you can **view Dropbox events** (uploads, downloads, changes) **within Sage CRM**, making it easier to track things like brochures and price sheets that you've shared with prospects. Click below to learn more:

[Using Dropbox in Sage CRM >>>](#)