

Sage 100 User Group



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Sherry Simerman at 260.423.2414**



Sage 100 User Group

September 2016



www.dwdtechgroup.com

Sage 100 User Group



If you would like CPE Credit please email
Shannon Barnhardt at sbarnhardt@dwdtechgroup.com

Please note in the Subject line “CPE Credit”

Agenda



- Introductions
- Sage 100 – What’s New...Today, Tomorrow, and Beyond
- Simplifying your Daily Tasks using Visual Process Flows
- How Sage Alerts Gives you a Heads Up of the Good, the Bad and the Ugly
- Ahh Reports....We Love Them and We Hate Them

Introductions



Mary Hildinger, CPA – Systems Consultant

Brad Prather, CPA – Systems Consultant

Chris Mengerink – Systems Analyst

Rick Hudelson – Systems Consultant

David Overholt – Project Manager

Mike Roth – Software Programmer

Bob Kohlmeyer, CPA – Director

Kons Skembos – Account Manager

About DWD Tech



- A division of Dulin, Ward & DeWald, CPAs
- Office Locations:
 - Fort Wayne
 - Marion
 - Indianapolis
- 10 Software Consultants
- 11 Network Engineers

Software Solutions



- Sage 100 (formerly MAS 90/200)
- Sage BusinessWorks
- Sage 50 (formerly Peachtree)
- MIP Fund Accounting
- Sage FAS Fixed Assets
- Sage HRMS
- Sage CRM



Authorized
Partner

Software Services

- Training, Support & Setup
- Software Upgrades
- Sage 100 Customizations
- Crystal & FRx Report Writing
- Data Conversion
- Systems Integration
- Bar Code Systems
- Web Integration
- Sage CRM



Network Services



- Custom Managed IT Services
- Data Backup Protection
- Network Support & Management
- Anti-virus & Security
- Microsoft Office 365



What's New in Sage 100 2016

Presented by:

Mary Hildinger, CPA, Systems Consultant

Global Enhancements

- **Updated Product Key – Payroll Subscription**
- **New User Interface**
 - Change Font Size for Desktop and Task Windows
 - Themes
- **Extended Item Descriptions for ALL Item Types**
- **Customizable User Settings**
- **Transfer Document to Different Batch**



Accounts Payable

- **Aged Invoice Report**
 - Electronic Payment Vendor Option
 - Larger Font Size Option
- **New 1099 Fields in Vendor Maintenance**



Accounts Receivable



- Reference Memos in Repetitive Invoice Entry
- Larger Font Size Option in Aged Invoice Report

General Ledger/Library Master



- **General Ledger**
 - Sage Payroll Services Integration and Activity Log
- **Library Master**
 - Expanded Email Server Password (up to 128 characters)
 - Theme Tab in Company Maintenance
 - Task Schedule Options
 - Print Reports
 - Run Visual Integrator Import/Export Jobs

Payroll

- **Updates for ACA Employer Maintenance**
- **Sage 100 Direct Deposit Service**

Sage transmits ACH file to your bank

New Activity Log

- Who initiated activity
- Time activity occurred

Sales Order



- Default Expiration Date for Quotes
- Additional Options When Promoting Quotes
- Use Default Order Date When Promoting Quotes
- Expanded Check Number Field (10 characters)

Credit Card Processing



- **Sage Payment Center**

View payment statistics – recent activity, weekly and monthly totals

Settle daily transactions

Search transactions by customer name, last four digits of card number, order number, etc.

- **New Visual Process Flow**

- **Updated Role Security Settings**

Custom Office



- Resizable Option for User-Defined Panels
- Object Positioning Options for Resized Windows

Fixed Assets

- Still LINKS Sage Fixed Assets with Sage 100, but by itself is NOT a Fixed Asset Program
- Options Simplified
- Customizable Asset Depreciation Report Task
- Grid Entry for Asset Account Maintenance

Support and Updates



| Sage 100 (Standard, Advanced, Premium) | 2016 | 2015 | 2014 | 2013 | 4.50 |
|--|-------------|--|--|--|------------------------|
| Release date | Nov 2015 | Apr 2015 | Feb 2014 | Dec 2012 | Aug 2011 |
| Phone Support (Retirement Date) | Yes | 9/30/2018 | 9/30/2017 | 9/30/2016 | 9/30/2015 |
| Year end IRD updates (AP and Payroll as needed to support State and Federal eFiling)* | Yes | 12/31/2017 (Use eFiling and Reporting)* | 12/31/2016 (Use eFiling and Reporting)* | 12/31/2015 (Use eFiling and Reporting)* | 12/31/2014 |
| Tax table updates (TTU) | Yes | 12/31/2017 (2018Q1) | 12/31/2016 (2017Q1) | 12/31/2015 (2016Q1) | 12/31/2014 (2015Q1) |
| Product updates | Yes | Jun 2016 | Nov 2015 | 10/31/2014** | 6/30/2013** |
| Hot fixes*** | Yes | Yes | 12/31/2016 | 12/31/2015 | 12/31/2014 |
| Online support knowledgebase | Yes | Yes | Yes | Yes | Yes |

Maintenance & Software Updates



Reasons to Stay Current with Your Maintenance Plan & Software Updates

- **Windows 10 Compatibility**
 - Sage 100 2015/2016 and higher
- **Availability of Product Updates**
 - ONLY Sage 100 2016 is receiving product updates
- **Sage Direct Deposit Service**
 - Sage 100 2015 PU4 and higher
- **Paperless Office Electronic Delivery**
 - Email password may now be longer than 14 characters

Questions?

What is Sage 100c?

- **New deluxe version of Sage 100**
Modernized user interface and personalization options
- **Offered as Subscription Plan Only**
 - Essentials**
 - GL/AR/AP/Bank Rec Advanced
 - Essentials plus SO, PO, Inventory
 - Complete**
 - Essentials and Advanced plus a la carte modules



Upgrading to Sage 100c

- For Customers on current maintenance plans who want to take advantage of the new features only available in Sage 100c, you can do so at no additional cost (by September 30, 2016).
- If you switch to Subscription from your Traditional maintenance and cancel your subscription plan, your software will become read-only.



The image shows two versions of the Sage logo. The top one is 'sage 100' and the bottom one is 'sage 100c'. In both, 'sage' is in a bright green color and the version number is in a light grey color. The logos are set against a light grey rectangular background.

What's In Store for Sage 100

2017.0 – Oct. 2016

- Multi-bin Warehousing
- Electronic Invoicing
- Sage CRM updates
- Sage Payment Solutions
ACH Receipts
- Updates to Sage Exchange Desktop
- Compatibility with Windows/SQL
Server 2016



What's In Store for Sage 100

2017.1 – Feb. 2017

- Global Search
- Office 365 Mobile Sales
- Payroll 2.0 controlled release
- In-product chat (with Sage Tech Support)



What's In Store for Sage 100

2017.2 – June 2017

- Office 365 Paperless Office
- Accounts Payable Automation
- Job Cost 2.0
- Work Order 2.0



What's In Store for Sage 100

2018.0 and Beyond

- Document Management
- Cloud Backup
- Bank Statement Automation
- Seamless CRM
- Fully-implemented Payroll 2.0



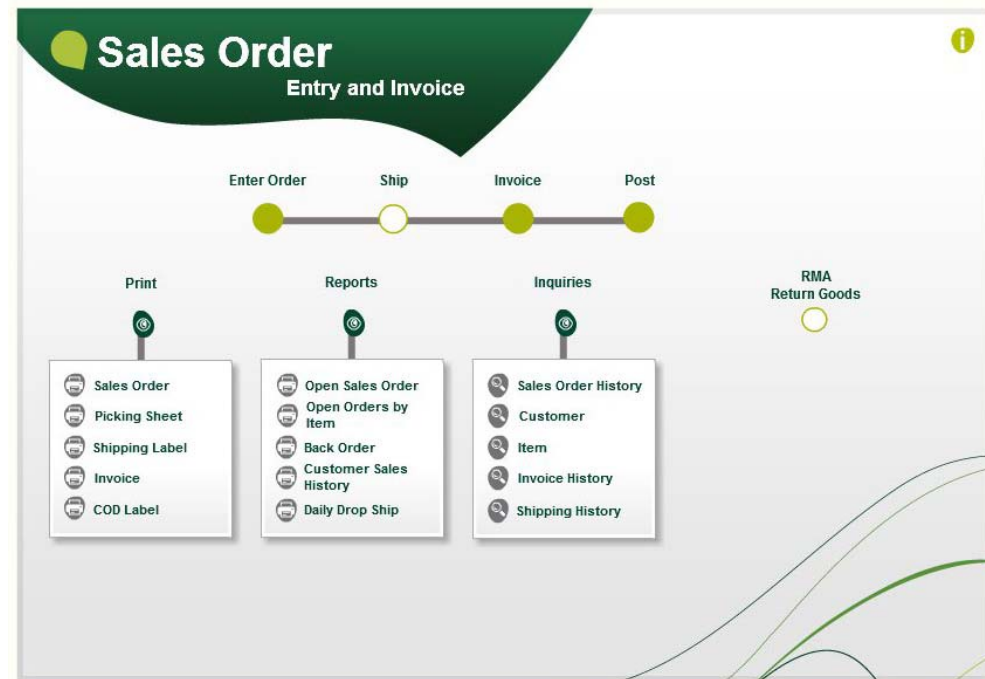
Questions?

Streamlining Your Daily Tasks

Using Visual Process Flows to
Simplify Your Workflow

Visual Process Flows – 2013/2014

- Sales
- Customer Billing
- Inventory
- Purchases
- Vendor Payments



Visual Process Flows – 2015/2016

2015

- Customer Billing - Enhanced
- Inventory - Enhanced
- Manufacturing - NEW
- Period End - NEW
- Chart of Accounts – NEW

2016

- Credit Card Processing - NEW



Visual Process Flows

- Pre-defined
- Create-your-own (based on an existing flow template)

Modifying Visual Process Flows



- Most common tasks – helps define the source
- Visualize/sketch layout – helps with design
- Add/Link tasks – can come from any Sage module

Example – Visualize Layout



AP

- Invoice Data Entry, Manual Check and Payment Entry, Invoice Payment Selection, Print Checks

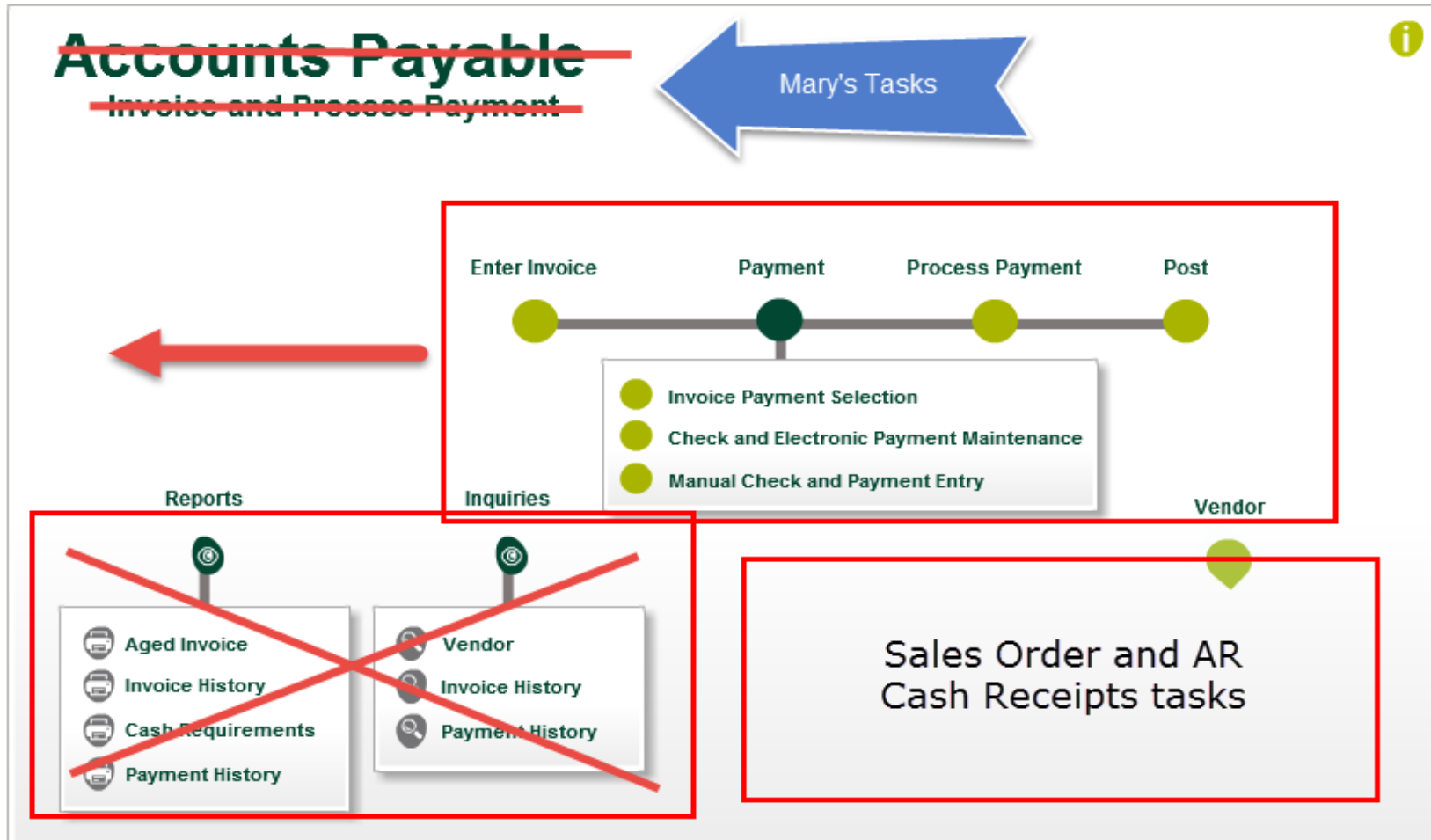
SO

- Sales Order Entry, Sales Order Invoice Entry

AR

- Cash Receipts Entry

Example – Visualize Layout

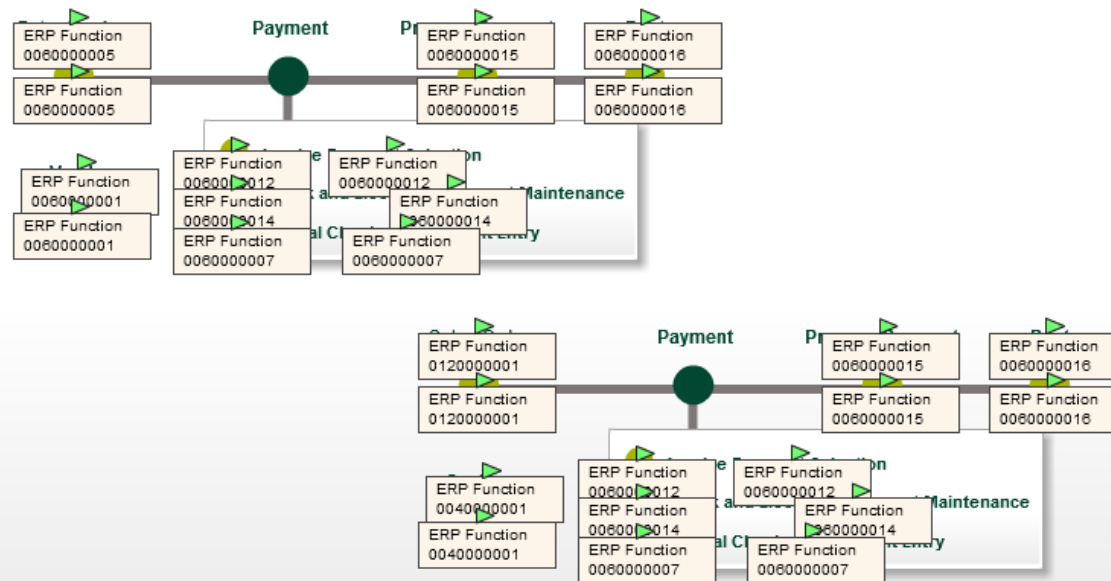


Example – Task Links

Mary's Custom Tasks

Quick Access to Daily Activities

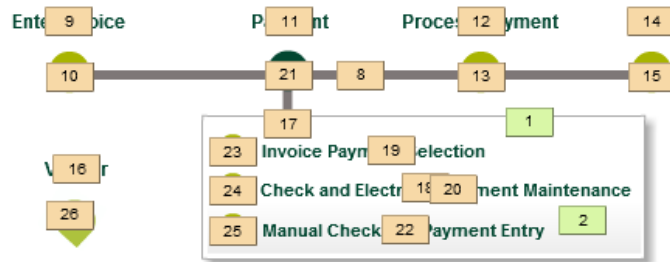
This process flow shows how many sources of functions can be combined in one Process Flow



Example – Task Actions

Mary's Custom Tasks

Quick Access to Activities

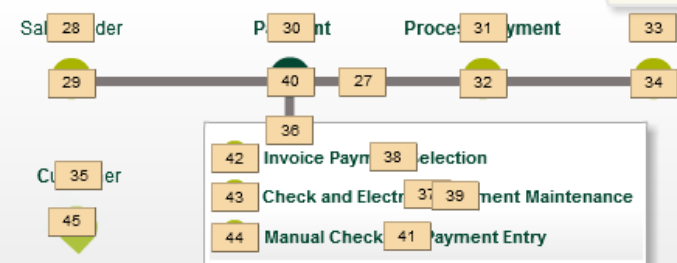


This process flow shows how many sources of functions can be defined in one Process Flow

6 show as tooltip 5,7

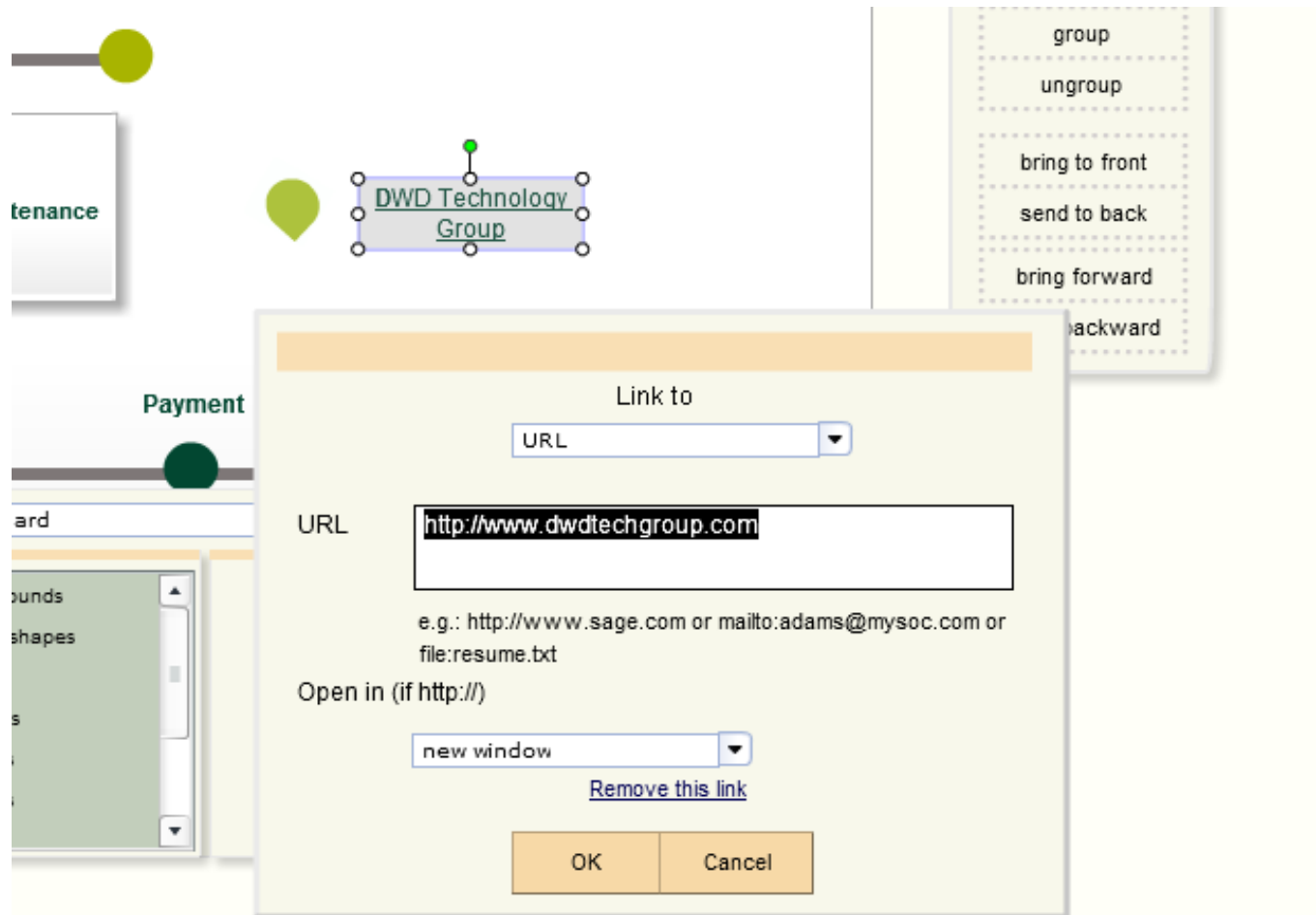
- no action ---
- no action ---
- show as mini menu
- lock/unlock mini menus
- show as tooltip
- show/hide
- show
- hide

OK X



- Show background
- Edit background
- Show drawing

Example – External Links



Questions?

Time For A Break!



Sage Alerts & Workflow

A Smoke Detector for Your Business

Presented by:

Brad Prather, CPA, Systems Consultant

Sage Alerts & Workflow

- **Business Activity Monitoring solution**
 - Monitor the Sage 100 database for what has happened as well as what hasn't happened
- **Identify and respond to critical business conditions**
- **Automatically generate and deliver unlimited number of Crystal Reports**
- **Can monitor multiple applications**



Sage Alerts & Workflow

- **Notification methods**

Email

Fax

Text

Pager

Instant Message

Twitter



Sage Alerts & Workflow

- **Out of the box alerts**
 - Open invoices overdue for payment
 - High balance customers
 - Customers over credit limit
 - Customers not buying recently
 - Employees with negative sick time



Sage Alerts & Workflow

DEMONSTRATION

Questions?

Ahh Reports...

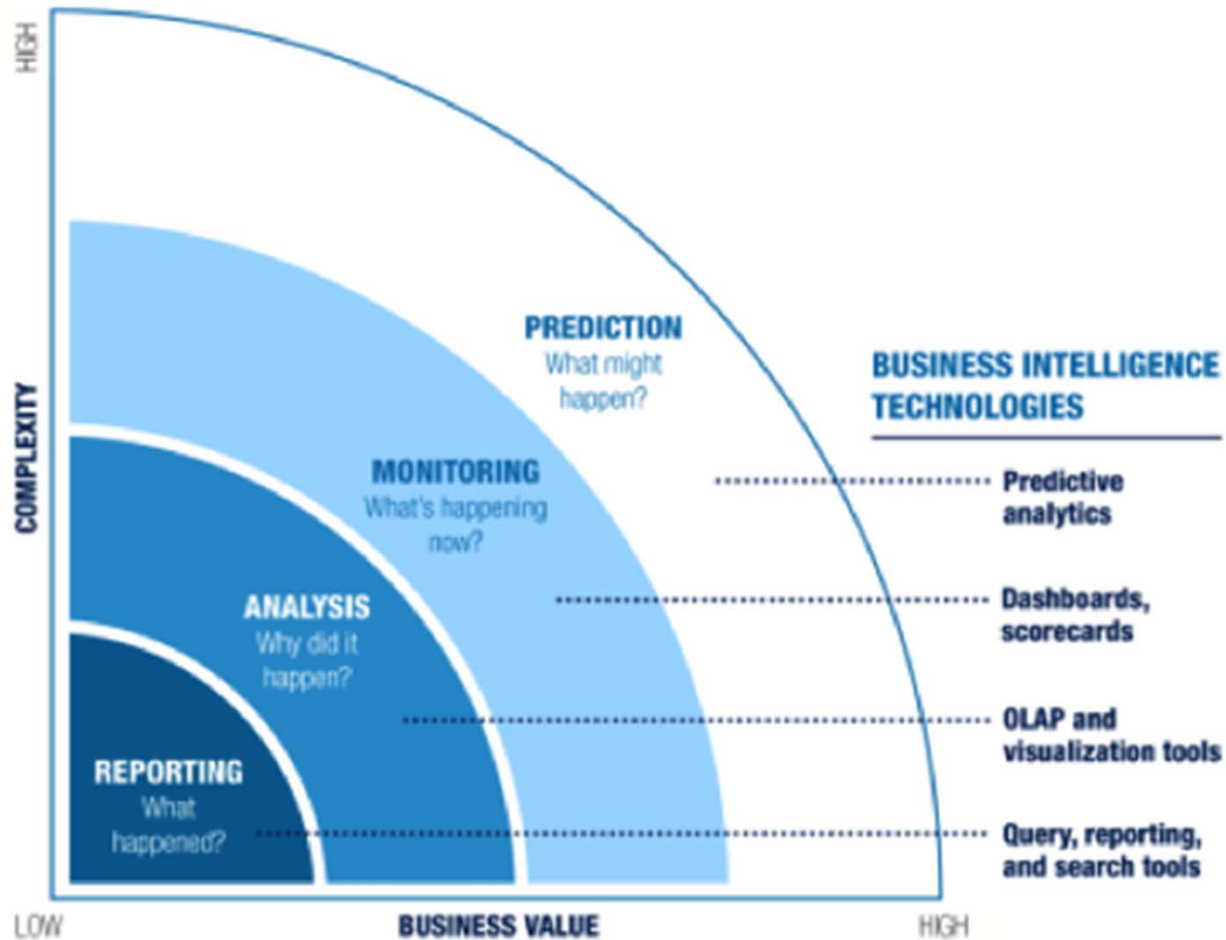
We Love Them and We Hate Them

Presented by:
Chris Mengerink, Systems Analyst

What Should We Call It?



4 Key Functions of Business Reporting



Where Do We Start?

1. Determine the department head related to
 - a) Sales
 - b) Purchasing
 - c) Inventory
 - d) Manufacturing Operations

2. What information is vital to each departments operations
 - a) Product line sales by rep with totals over a date range
 - b) Purchase order required date versus actual receipt date
 - c) Stock trend based off last 30 days sales average
 - d) Items and quantity produced last week.



Where Do We Start?

3. What data points do we need to see on the reports?
 - a) Open an Excel or Word document, layout what you would like to see.
 - b) Do you capture all the required data points to make the report you are requesting?

4. Which technology to use?
 - a) Often the hardest question, but always define the report you are after before deciding this. The goal is to select the solution that best fits your needs.
 - b) How and where do you need to be able to access the report information?
 - c) How often does the data in the report need to update?



Technology

Provided by Sage as options out of the box

1. Export lookup lists to Excel
2. Pre-built Crystal Reports available in all modules
3. Crystal Report Designer (create your own Crystal reports)
4. Business Insights Explorer
5. Sage Intelligence (2014 and newer, comes with the report manager)
 - a) Lets you run pre-defined views, data dumps to Excel.
 - b) Report designer is purchasable to create very custom intelligence reports.
6. Sage CRM
 1. Interactive dashboards
 2. Reports



Technology

Options available outside of the Sage product

1. SQL Server

1. Create views in SQL and link your Excel files directly to the data.
2. Create reports in Crystal Reports but harness the processing power and coding flexibility of SQL Server.
3. Create SQL Server Reporting Services reports. Browser based tool, reports external to Sage 100 and available thru the IE browser.






2. Power BI

1. Microsoft product, relatively new to the market, can create dashboards off databases and Excel files.
2. Available on mobile devices.




Sage 100 Export From List

* Customer Maintenance (ABC) 9/8/2016

Customer No.      Copy From...

Name

1. M  * Customer List

| Customer No | Name | AddressLine1 | City | State | Status |
|-------------|--------------------------------|---------------------------|-----------|-------|--------|
| 01-0000002 | 3G Homes | Popes Manor Suite 300 | BRACKNELL | | Active |
| 01-0000003 | Greater Group Ltd | Maple Court | WATFORD | | Active |
| 01-0000006 | A.T.M. Intercapital | Burmah Castrol House | SWINDON | | Active |
| 01-0000007 | Magnetic Software Ltd. | 435 Washington St #4 | Boston | MA | Active |
| 01-0000008 | Office Supplies Limited | Unit 3b | Dublin | | Active |
| 01-0000009 | Symbian Technology plc | Symbian House | Dublin | | Active |
| 01-0000010 | Everest Software Limited | 25 Wexham Road | Slough | | Active |
| 01-0000011 | L & F Guarantee | 789 | | | Active |
| 01-0000012 | Westland Helicopters | 15 Kinesealy Avenue | Dublin | | Active |
| 01-0000013 | T-Zone Chemicals Inc. | 725 E Santa Clara St #150 | San Jose | CA | Active |
| 01-0000014 | Interactive Information System | 60 The Avenue | Tadworth | | Active |
| 01-0000015 | Winston Enterprises Ltd. | East Point Ind. Park | Dublin | | Active |
| 01-0000016 | Flyaway Airways | Clanwilliam Square | Dublin | | Active |
| 01-0000017 | A Post | Suite 17 | LONDON | | Active |

Address

ZIP Co

City

Country

Reside

Salesp

Teleph

Fax




E-mail

URL A

Search Customer No Begins with Find

Filters... View City and State

Custom... Lookup Wizard...

Select Cancel   

Found 105 records

Sage 100 Export From List



A108 : [X] [✓] [fx]

| | A | B | C | D | E | F | G | H | I | J | K | L | M |
|----|----------------------|----------------------------|-------------------------------|-----------|-------|--------|----------|----------------|------------|---|---|---|---|
| 1 | Customer List | | | | | | | | | | | | |
| 2 | Customer No | Name | AddressLine1 | City | State | Status | Zip Code | Phone Number | Sort Field | | | | |
| 3 | 01-000002 | 3G Homes | Popes Manor Suite 300 | BRACKNELL | | Active | | 1344897 8791 | | | | | |
| 4 | 01-000003 | Greater Group Ltd | Maple Court | WATFORD | | Active | | (207) 348-3067 | | | | | |
| 5 | 01-000006 | A.T.M. Intercapital | Burmah Castrol House | SWINDON | | Active | | 1793885 2567 | | | | | |
| 6 | 01-000007 | Magnetic Software Ltd. | 435 Washington St #4 | | | | | | | | | | |
| 7 | 01-000008 | Office Supplies Limited | Unit 3b | | | | | | | | | | |
| 8 | 01-000009 | Symbian Technology plc | Symbian House | | | | | | | | | | |
| 9 | 01-000010 | Everest Software Limited | 25 Wexham Road | | | | | | | | | | |
| 10 | 01-000011 | L & F Guarantee | 789 | | | | | | | | | | |
| 11 | 01-000012 | Westland Helicopters | 15 Kinesealy Avenue | | | | | | | | | | |
| 12 | 01-000013 | T-Zone Chemicals Inc. | 725 E Santa Clara St #150 | | | | | | | | | | |
| 13 | 01-000014 | Interactive Information Sy | 60 The Avenue | | | | | | | | | | |
| 14 | 01-000015 | Winston Enterprises Ltd. | East Point Ind. Park | | | | | | | | | | |
| 15 | 01-000016 | Flyaway Airways | Clanwilliam Square | | | | | | | | | | |
| 16 | 01-000017 | A Post | Suite 17 | | | | | | | | | | |
| 17 | 01-000018 | Aaxxell Interavtive | Cheapside House | | | | | | | | | | |
| 18 | 01-000019 | AB McAlpine | 22-24 Worple Road | | | | | | | | | | |
| 19 | 01-000020 | Ace Solutions | Central House | | | | | | | | | | |
| 20 | 01-000021 | American Foods | PO Box 351 | | | | | | | | | | |
| 21 | 01-000022 | Advanstar Security | Langdale House | | | | | | | | | | |
| 22 | 01-000023 | Agresso Intelligence | Cockshot Hill | | | | | | | | | | |
| 23 | 01-000025 | Aeromatic Assurance | 50 Ludgate Hill | | | | | | | | | | |
| 24 | 01-000026 | Acal Domecq Ltd. | 33 Cavendish Square | | | | | | | | | | |
| 25 | 01-000027 | AFN Interactive | Greenside House | | | | | | | | | | |
| 26 | 01-000028 | Arnold Services Ltd. | Chelsea and Westminster Hospi | | | | | | | | | | |
| 27 | 01-000029 | Accantia Ltd. | Geoffrey House | | | | | | | | | | |
| 28 | 01-000030 | Talk Travel Ltd. | 15 Grafton Arcade | | | | | | | | | | |
| 29 | 01-000031 | Golden Corral Location 1 | | | | | | | | | | | |
| 30 | 01-000032 | Golden Corral Location 2 | | | | | | | | | | | |
| 31 | 01-000033 | Golden Corral Location 3 | | | | | | | | | | | |

* Customer Maintenance (ABC) 9/8/2016

Customer No.

Name

* Customer List

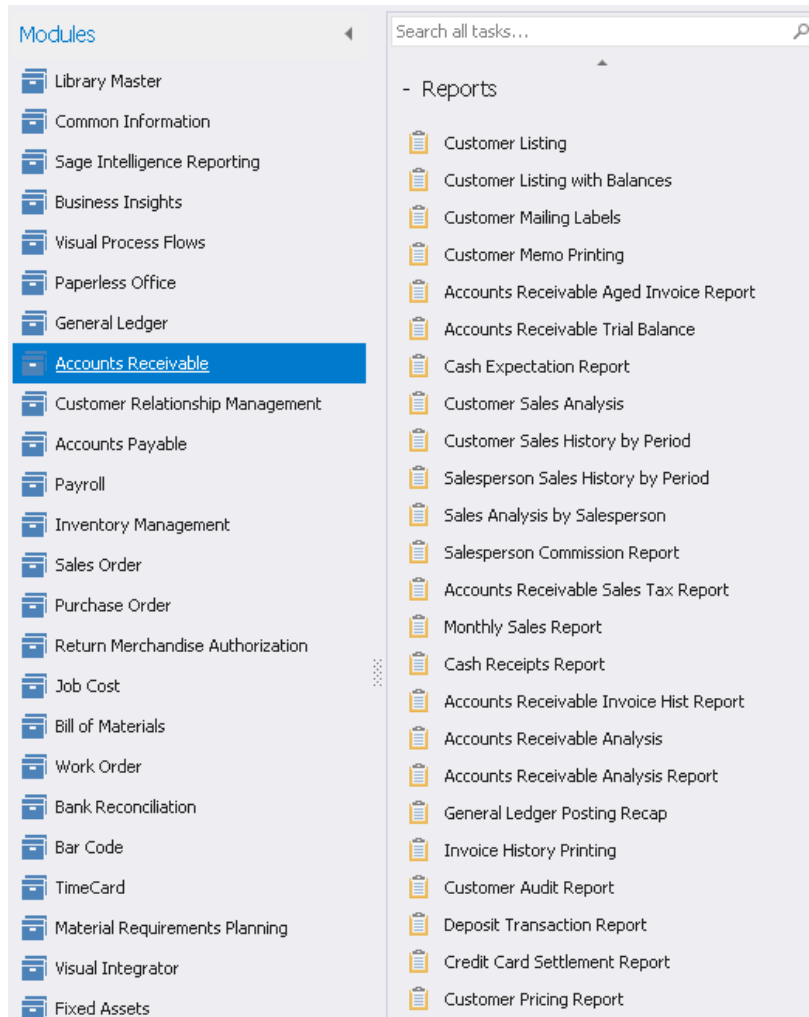
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|-------------|--------------------------------|---------------------------|-----------|-------|--------|
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| 01-000016 | Flyaway Airways | Clanwilliam Square | Dublin | | Active |
| 01-000017 | A Post | Suite 17 | LONDON | | Active |

Search Customer No Begins with

View City and State

Found 105 records

Sage 100 Pre-built Crystal Reports



Allows some basic modification of pre-built reports.

Sage 100 Crystal Report Designer



SAP Crystal Reports 2011 for Sage - [Salesperson Commission Report]

File Edit View Insert Format Database Report Window Help

WOScanTimeCardSummary.rpt Salesperson Commission Report

Design

| | |
|--------------------------|---|
| Report Header | |
| Page Header a | |
| Page Header b | Commission Report {Report Title} Pay Date: {@Start Date} - {@End Date} |
| Page Header c | |
| Group Header #1a: | Group #1 Name |
| Group Header #1b: | Invoice Deposits |
| Group Header #1c: | Cash Receipts |
| Group Header #2: | Group #2 Name |
| AR InvoiceHistorHeader.I | |
| Details | PayDate InvoiceNo InvoiceDate @CustomerID BillToName @Sales Amount AmountApplied DiscountAmt Commissionable CommissionRate Commission Amount |
| Group Footer #2: | Group #2 Name Invoice Total Payment Amount: [InvoiceAmountPaid] Amount Outstanding: [Amount |
| AR InvoiceHistorHeader.I | |
| Group Footer #1a: | Group #1 Name @Sales Amount AmountApplied DiscountAmt Commissionable Commission Amount |
| Group Footer #1b: | Total Salesperson: {SalespersonNo} [Sales Amount] Amount Given [Commissionable] Amount [Sales Amount] AmountApplied Amount Given Commissionable Commission Amount |
| Report Footer | Grand Total @Sales Amount AmountApplied DiscountAmt Commissionable Commission Amount |
| Page Footer | Printed: {Print Date} {Print Time} Page N of M |

Sage 100 Business Insights Explorer



Sage 100 Business Insights Explorer - History Orders

File Edit View Data Preview Explore Tasks Tools Help

Back Standard

Navigation Pane

Look For: Search In (All Columns) Find Next

History Orders

Data Grid Chart

Salesperson /

| Order | Order Date | Status | Div | Customer | Bill To Name | Ship To Name | Salesperson / | Terms | Tax Schedule | Customer PO | Last Inv Date | Last Inv | Order Total |
|-------------------------------|------------|-----------|-----|----------|---------------------------|----------------------|---------------|-----------------|--------------|-------------|---------------|----------|-------------|
| Salesperson : DWD (102 Items) | | | | | | | | | | | | | |
| 0000175 | 1/22/2013 | Quote | 01 | ABF | American Business Futures | American Business Fi | DWD | Net 30 Days | WI | 1234 | | | \$2, |
| 0000176 | 1/22/2013 | Quote | 02 | GREALAR | Greater Alarm Company | Greater Alarm Comp. | DWD | 2% Ten Days, CA | | | | | \$ |
| 0000177 | 1/24/2013 | Completed | 01 | 0000002 | 3G Homes | 3G Homes | DWD | No Terms | NONTAX | | 1/28/2014 | 0100092 | \$ |
| 0000179 | 2/7/2013 | Quote | 02 | GREALAR | Greater Alarm Company | Greater Alarm Comp. | DWD | 2% Ten Days, CA | | | | | \$ |
| 0000181 | 2/15/2013 | Completed | 01 | 0000006 | A.T.M. Intercapital | A.T.M. Intercapital | DWD | No Terms | CA LA | | 6/3/2014 | 0100111 | \$ |
| 0000183 | 3/11/2013 | Active | 01 | 0000002 | 3G Homes | 3G Homes | DWD | No Terms | CA OR | | 6/3/2014 | 0100113 | \$ |
| 0000184 | 3/21/2013 | Completed | 01 | 0000009 | Symbian Technology plc | Symbian Technology | DWD | No Terms | DEFAULT | | 6/3/2014 | 0100114 | \$ |
| 0000187 | 4/12/2013 | Completed | 01 | 0000002 | 3G Homes | 3G Homes | DWD | No Terms | NONTAX | | 6/3/2014 | 0100115 | \$ |

<Filter is Empty>

History Order Items

| Item Code | Item Code Description | Whse | UOM | Orig Qty Ord | Revised Qty Ord | Qty Shipped | Orig Unit Price | Last Unit Price | Last Extension | Line Disc | Tax Class | C |
|----------------|------------------------------|------|------|--------------|-----------------|-------------|-----------------|-----------------|----------------|-----------|-----------|---|
| GB-EL04M5-25 | RJ-11 4 WIRE MOD CABLE 25 FT | 001 | EACH | 15.00 | 15.00 | 15.00 | \$4.61 | \$4.61 | \$69.15 | 0.000% TX | Ye | |
| GB-EQ380-10-MF | CENTRONICS CABLE 10 FT M/F | 001 | EACH | 5.00 | 5.00 | 5.00 | \$33.47 | \$33.47 | \$167.35 | 0.000% TX | Ye | |
| GB-EQ380-10-MM | CENTRONICS CABLE 10 FT M/M | 001 | EACH | 10.00 | 10.00 | 10.00 | \$32.09 | \$32.09 | \$320.90 | 0.000% TX | Ye | |
| GB-EQ380-5-MF | CENTRONICS CABLE 5 FT M/F | 001 | EACH | 10.00 | 10.00 | 10.00 | \$28.13 | \$28.13 | \$281.30 | 0.000% TX | Ye | |
| GB-EQ380-5-MM | CENTRONICS CABLE 5 FT M/M | 001 | EACH | 10.00 | 10.00 | 10.00 | \$28.13 | \$28.13 | \$281.30 | 0.000% TX | Ye | |
| GB-MD791 | MODEM 9600 FAST POLL | 001 | EACH | 5.00 | 5.00 | 1.00 | \$1,895.25 | \$1,895.25 | \$9,476.25 | 0.000% TX | Ye | |

Sage Intelligence

The screenshot displays the Sage 100 ERP Intelligence Reporting 2015 - [Report Manager] interface. The main window has a ribbon with tabs for File, Home, Tools, and Help. The Home tab is active, showing a ribbon with various actions: Copy, Move To, Paste, Add Folder, Add Report, Refresh, Run, Design, Save Excel Template, Create Shortcut, Lock/Unlock, Run Sample, Check/Test, and History. Below the ribbon is a tree view on the left showing a folder structure: Home, Consolidation Report Designer, Dashboards, Demonstration Pack, Financials, Inventory, Purchases, and Sales. To the right of the tree view is a Properties pane with the following fields: MetaData Repository Location (\\chrismergenink\SageIntelligenceTemplate\), Auto Connect Server (C:\Sage2016\Sage 100 Advanced\MAS90\), Auto Connect Catalog (ABC), and Auto Connect User (dwd). The bottom right corner of the window shows '8 Objects'.

Sage Intelligence



ABC - Summary Income Statement

Company: ABC
Fiscal Year: 2010
Fiscal Period: 05

| | Actual YTD | Original Budget YTD | Revised Budget YTD |
|-----------------------------------|------------|---------------------|--------------------|
| Net Sales | 2,164,415 | 1,775,900 | 1,775,900 |
| Cost of Sales | 996,949 | 842,400 | 842,400 |
| Gross Profit | 1,167,466 | 933,500 | 933,500 |
| Expenses | 895,386 | 871,575 | 903,725 |
| Total Expenses | 895,386 | 871,575 | 903,725 |
| Net Income from Operations | 272,080 | 61,925 | 29,775 |
| Other Income & Expenses | (76,787) | (30,400) | 0 |
| Earnings Before Income Tax | 348,867 | 92,325 | 29,775 |
| Income Tax | 67,050 | 27,600 | 0 |
| Net Income (Loss) | 281,817 | 64,725 | 29,775 |

ABC - Balance Sheet

Company: ABC
Year: 2010
Period: 05

To customise this layout, replace the Demo Company account numbers and account descriptions with your company account numbers and account descriptions in the relevant financial categories.

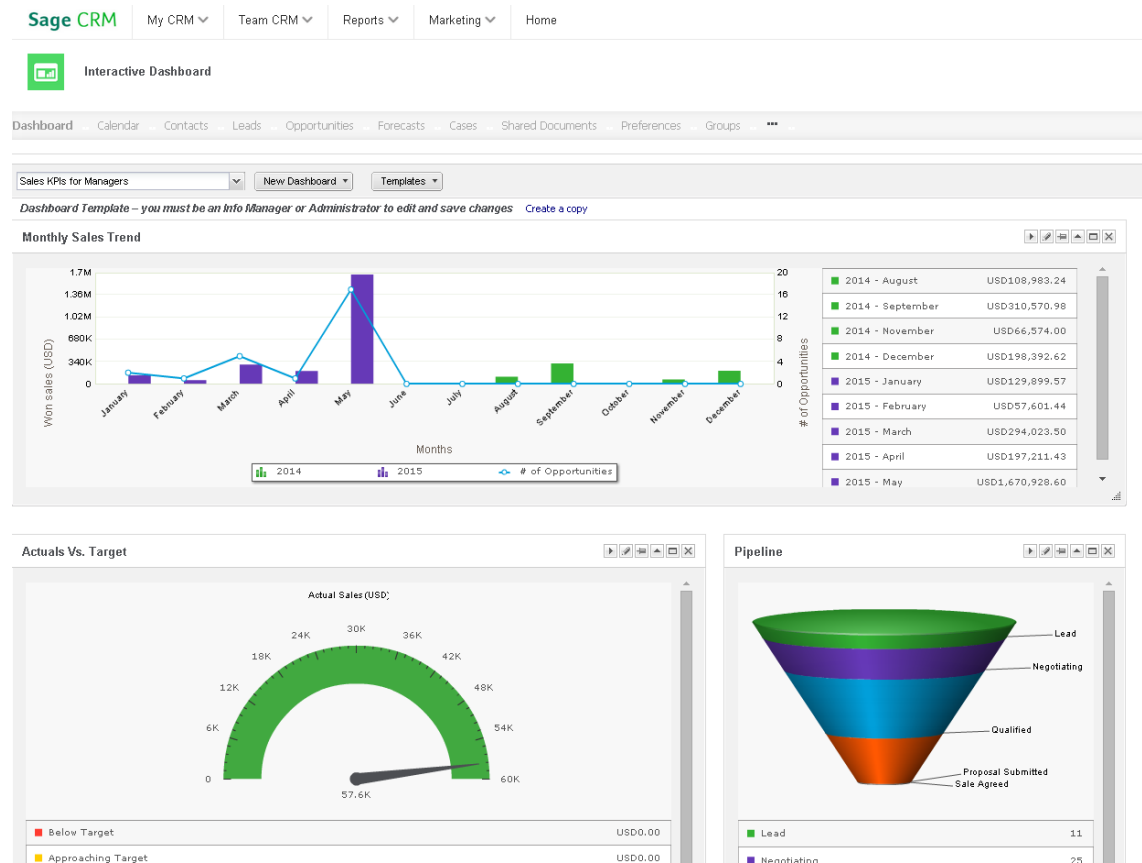
| | Opening Balance | Quarter 1 3 | Quarter 2 6 | Quarter 3 9 | Quarter 4 12 | Current Month | Year to Date |
|-------------------------------------|-----------------|----------------|----------------|----------------|-----------------|---------------|--------------|
| Fixed Assets | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Current Assets | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Other Assets | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Assets | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Current Liabilities | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Long-Term Liabilities | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Liabilities | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Equity | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Equity and Liabilities | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Sage CRM Reporting



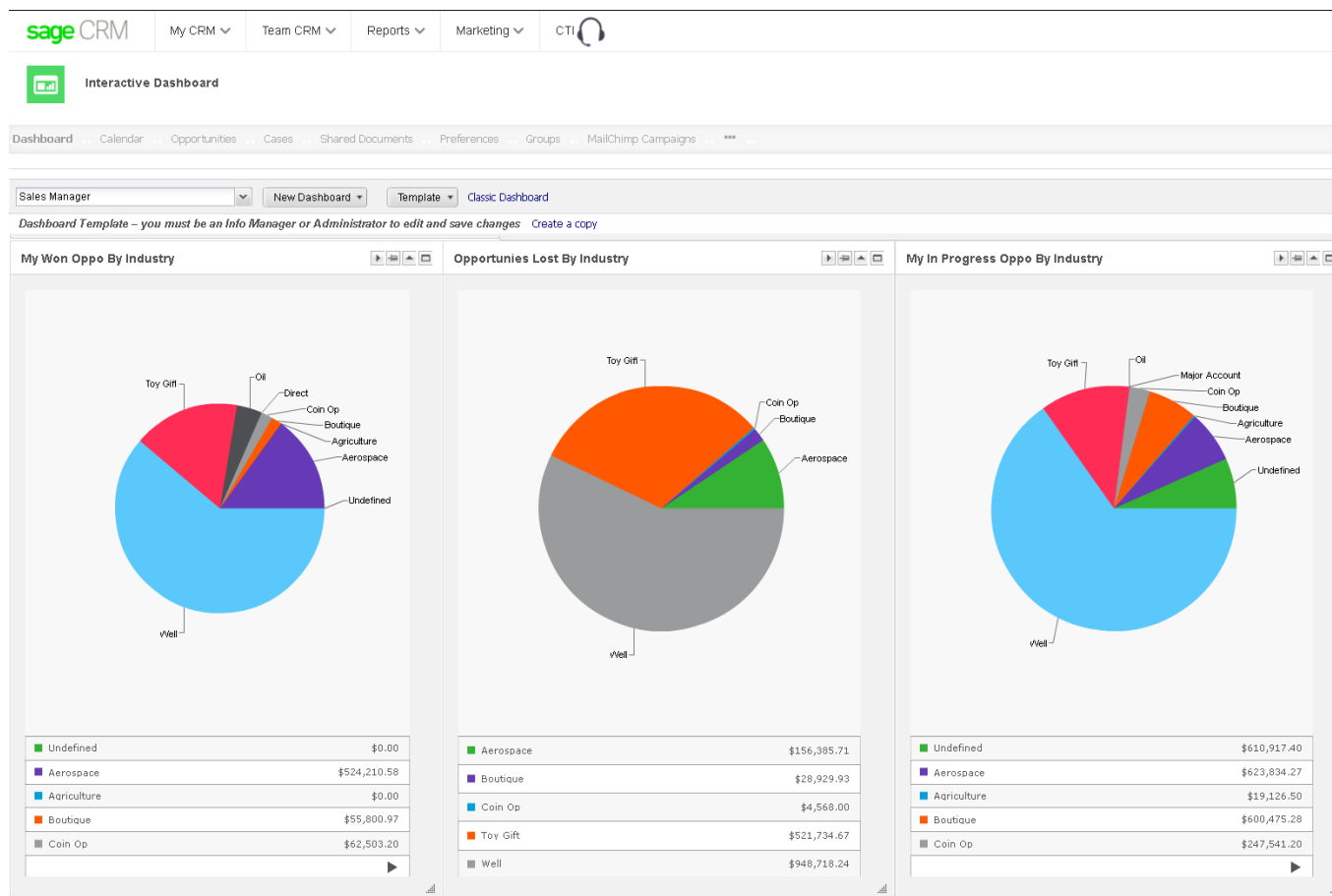
Sage CRM provides detailed business insight data as well as graphical interpretations on the state of the business at any moment in time.

This allows businesses to strategically plan and gain insights on future performance.



Sage 100 Customized Dashboard

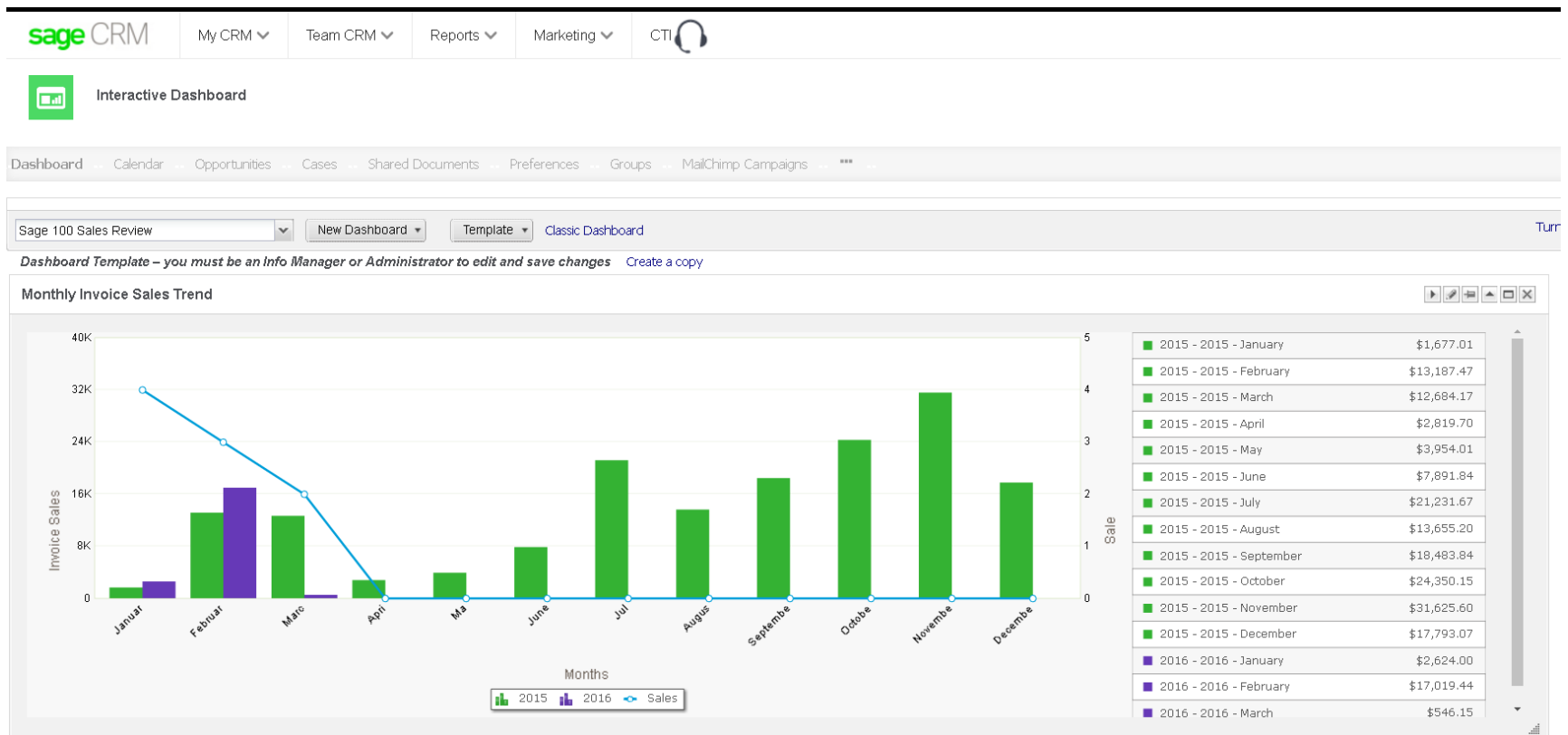
Get an overview of Sage CRM data in a glance!



Sage 100 Advanced Customized Dashboard



Requires integration with Sage 100 and invoice integration modification



Sage 100 Advanced Customized Reports



sage CRM My CRM Team CRM Reports Marketing CTI

Reports > Advanced Find > Top 25 Customers PY

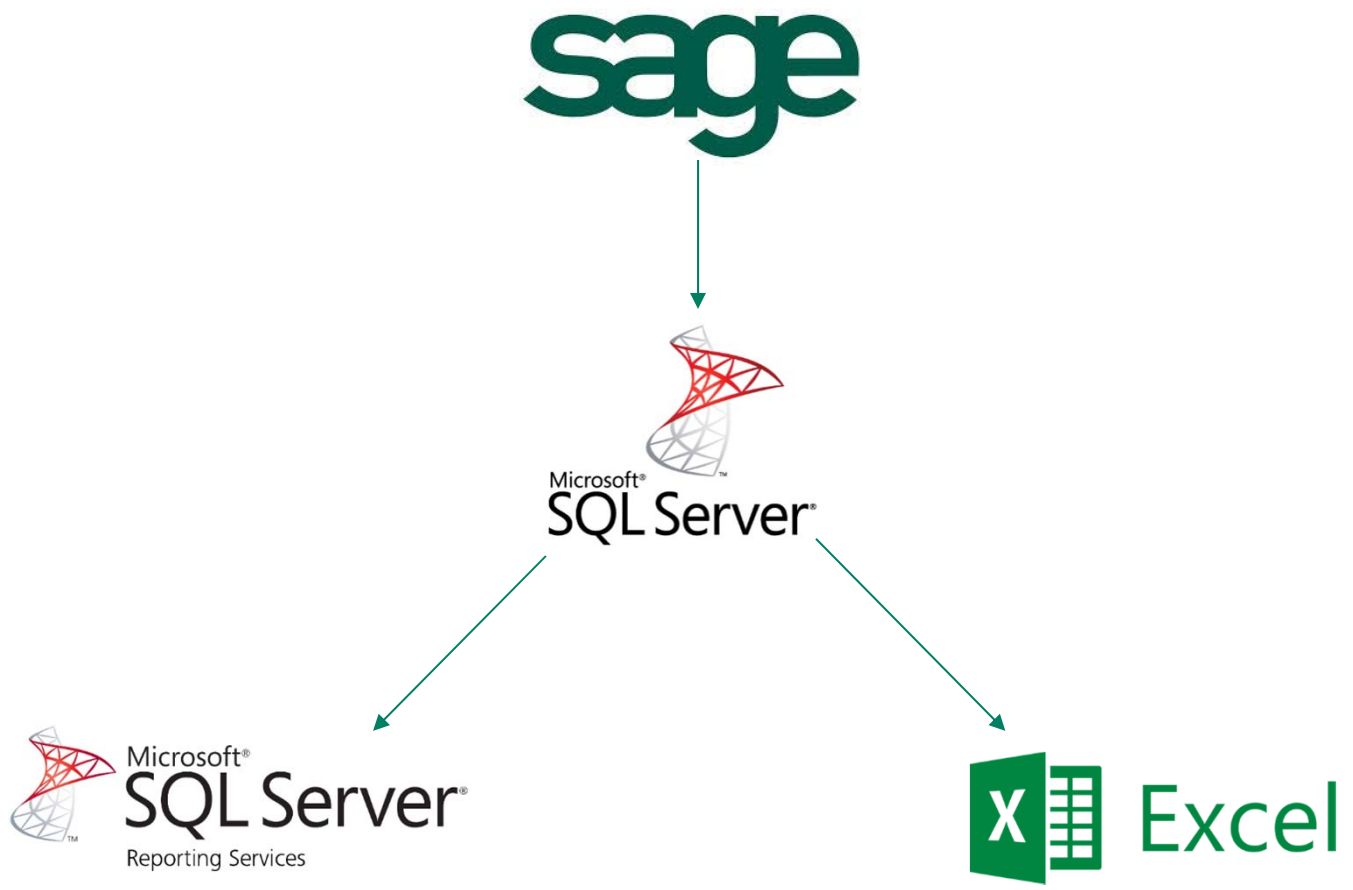
Display Options

Screen Export to PDF A4 Portrait Export to XLSX

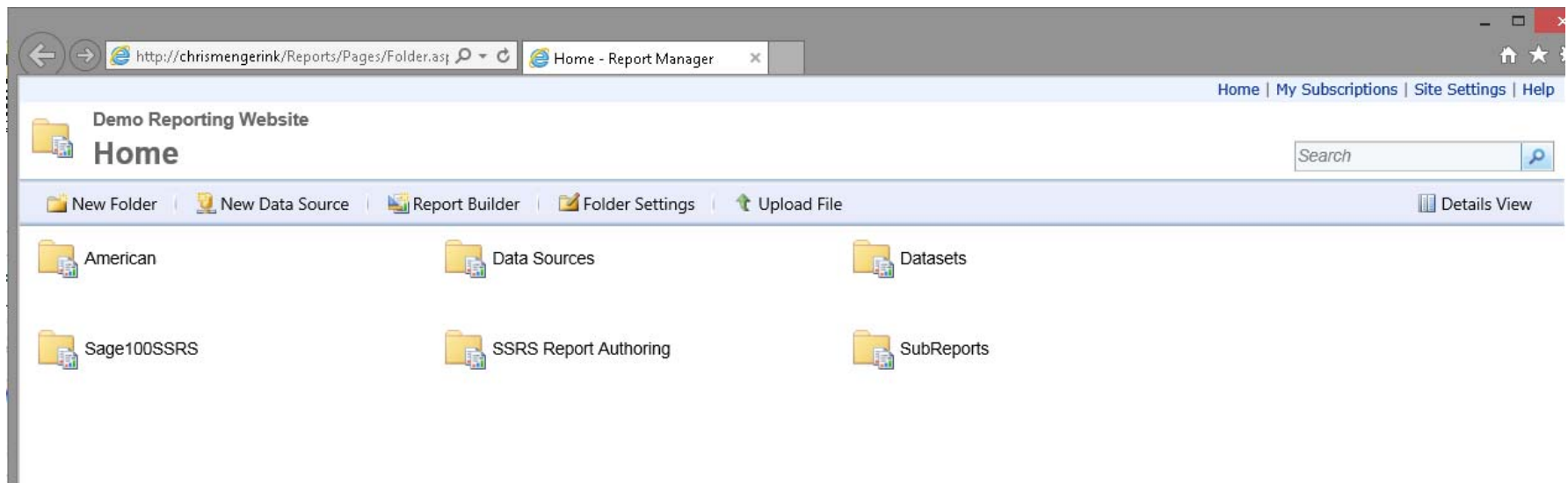
| Customer Rank | Company Name | Current YTD Sales (\$) | Previous Year Sales (\$) | Salesperson Number | Last Invoice Date | Last Date of Contact |
|---------------|--------------------------------|------------------------|--------------------------|--------------------|-------------------|----------------------|
| 1 | American Business Futures Corp | 15,520.85 | 45,484.50 | DWD | 03/01/2016 | 01/13/2016 |
| 2 | 3G Homes | 0.00 | 29,813.07 | 0300 | 03/03/2016 | 06/16/2015 |
| 3 | Shepard Motorworks | 543,339.95 | 28,500.00 | DWD | 11/30/2015 | 04/25/2013 |
| 4 | Autocraft Accessories | 39,574.91 | 25,930.50 | 0300 | 10/01/2015 | 05/15/2015 |
| 5 | Breslin Parts Supply | 19,901.80 | 11,402.02 | 0100 | 02/19/2016 | 02/19/2016 |
| 6 | Custom Craft Products | 19,329.25 | 6,916.30 | 0300 | 12/15/2015 | 12/15/2015 |
| 7 | Allen's Appliance Repair | 1,046.15 | 5,525.04 | 0400 | 07/03/2015 | 07/03/2015 |
| 8 | American Concrete Service | 14,757.71 | 2,970.50 | 0400 | 07/03/2015 | 04/30/2013 |
| 9 | R & S Supply Corp. | 13,216.24 | 2,493.75 | 0200 | 06/03/2015 | 05/15/2015 |
| 10 | Greater Alarm Company | 825.50 | 2,466.43 | DWD | 11/30/2015 | 03/15/2013 |
| 11 | Amet Processing Corp | 9,523.25 | 1,935.25 | 0200 | 12/21/2015 | 05/15/2015 |
| 12 | Maverick Papers | 0.00 | 1,457.01 | 0300 | 01/03/2015 | 05/29/2014 |
| 13 | Magnetic Software Ltd. | 0.00 | 943.32 | DWD | 02/01/2016 | 03/23/2016 |
| 14 | Orange Door & Window Co. | 263.37 | 923.82 | 0300 | 11/30/2015 | 11/30/2015 |
| 15 | Symbian Technology plc | 0.00 | 808.10 | DWD | 05/03/2015 | 04/17/2013 |
| 16 | Everest Software Limited | 0.00 | 348.00 | DWD | 05/03/2015 | 05/16/2014 |
| 17 | Bob's Smokehouse and Ribs | 0.00 | 303.00 | DWD | 05/04/2015 | 05/04/2015 |
| 18 | The Cleaners | 0.00 | 192.00 | DWD | 04/10/2015 | 12/04/2014 |
| 19 | A.T.M. Intercapital | 0.00 | 177.75 | DWD | 06/03/2015 | 12/04/2014 |
| 20 | Office Supplies Limited | 0.00 | 174.00 | DWD | 09/12/2015 | 07/31/2014 |
| 21 | A To Z Carpet Supply | 13,796.60 | 171.17 | 0400 | 09/12/2015 | 01/23/2013 |

Requires integration with Sage 100 and sales statistics modification

SQL Server



SQL Server Reporting Services



- Browser based
- Does not require a Sage 100 license
- Controlled thru windows authentication

Power BI – New and Exciting



Can We Automate?

Sage Alerts and Workflows

1. Automated Report
2. Alerts

Visual Cut

1. Automated Reports (Excel, PDF)

Let's Actually Look At Solutions!





Lunch Time



Sage 100 User Group



If you would like CPE Credit please email
Shannon Barnhardt at sbarnhardt@dwdtechgroup.com

Please note in the Subject line “CPE Credit”