

WHAT'S NEW IN SAGE 100 2015

Colleen A. Gutierrez, Senior Consultant II, BKD Technologies



WELCOME/INTRODUCTIONS



Colleen Gutierrez

- 19 years of experience in technology consulting
- Primarily distribution & manufacturing
- 18 years of experience with Sage ERP 100 & 500
- Certified in Sage ERP 100/ERP 500/Sage Intelligence



AGENDA

- Welcome/introductions
- Sage ERP 100 version updates
- What's new in 2015
- BKD upgrade methodology
- Support resources
- Other information
- Questions & answers



SAGE ERP 100 SUPPORTED VERSIONS

- 4.50.0.0 – 4.50.0.7
- 2013 PU 1 – 8
- 2014 PU 1 – 5
- 2015 PU 1



BKD SUPPORT

- BKD will support older versions
 - Not supported by Sage = No technical assistance if needed
 - Incurs extra effort & cost from BKD
 - More time to resolve issue



TOTAL NUMBER OF CHANGES: 98

- Library Master 9
- Accounts Payable 9
- Accounts Receivable 11
- Bank Reconciliation 4
- Bar Code 1
- Bill of Material 2
- Credit Card Processing 2
- Custom Office 1
- General Ledger 5
- Inventory Management 8
- Paperless Office 3
- Payroll 5
- Purchase Order 14
- RMA 1
- CRM 5
- Sage Intelligence 2
- Sales Orders 12
- Workflows 4



GLOBAL CHANGES

- New fields on user logon screen
- Module options for printing & exporting
- Company-specific color for windows frame only
- Lookup Wizard button added to Lookup windows
- Stay in current module when changing company
- Detailed activity log entries for changes to module setup options
- Option to install Canadian postal codes



ACCOUNTS PAYABLE ENHANCEMENTS

- Expanded Vendor Name field
 - Check forms
 - Standard forms & reports
 - Customized forms must be tested
 - Reports created with Business Insights Report Wizard must be modified
 - Labels
 - Windows & tabs
- Improved message for check printing
- Check total on invoice payment selection listing



ACCOUNTS PAYABLE ENHANCEMENTS

- Ability to reprint quick print checks
- Sort Report By field for vendor audit report
- Ability to sort by multiple columns
- Purchase vendor transfer invoice selection
- Print full comments selection retained when printing journals & registers
- Purge commission by pay date
- Automatically apply changes to repetitive invoices



ACCOUNTS RECEIVABLE ENHANCEMENTS

- Cash Receipt List button
- Sort Report By field for customer audit report
- Ability to sort by multiple columns
- Calculator button added to Finance Charge Applied field
- Ability to filter salesperson commission report by pay date
- Ship Via field added to Customer Ship-To Address Maintenance
- Print full comments selection retained when printing journals & registers
- Option to keep window open after print or preview



BANK RECONCILIATION ENHANCEMENTS

- Sample format in Positive Pay Export Wizard
- Remit to Vendor Name in Positive Pay Export File
- Ability to sort by multiple columns
- Print full comments selection retained when printing journals & registers



BILL OF MATERIALS ENHANCEMENTS

- Option to synchronize bill & item descriptions
- Print full comments selection retained when printing journals & registers



CREDIT CARD PROCESSING ENHANCEMENTS

- Level 3 credit card processing
 - Library master
 - Accounts receivable
 - Sales order
 - Customer purchase order number



GENERAL LEDGER ENHANCEMENTS

- “Out of Balance” message on Detail Report
- Sort Report By field for Account Audit Report
- One-click journal reversals
- Print full comments selection retained when printing journals & registers
- “Out of Balance” message on General Ledger Detail by Source Report



INVENTORY MANAGEMENT ENHANCEMENTS

- Module options for transaction types
- Copy From button in Product Line Maintenance
- Copy From options for Items
- Source Journal Zoom button in Item Maintenance
- Sort Report By field for Item Audit Report
- Access Bill of Materials Maintenance from Item Maintenance
- Security options for Item Vendor Maintenance
- Last Physical Count Date added to Item Maintenance



LIBRARY MASTER ENHANCEMENTS

- Pre-existing Codes in Country Code Maintenance
- State Code Required option



PAPERLESS OFFICE ENHANCEMENTS

- Access Report Viewer directly from Report Task windows
- Updated PDF printer driver
- Paperless Office feature added to Reports & Registers



PAYROLL ENHANCEMENTS

- New fields added to Tax Status Window
- Perpetual payroll history retained by default
- ACA menu
- Seasonal Employee checkbox
- 1095-C Electronic Consent Signed checkbox



PURCHASE ORDER ENHANCEMENTS

- Copy purchase order information
- Purchase order history
- Sort option for auto-generated purchase orders
- Use data entry email address for Paperless Office delivery
- Option to keep window open after print or preview
- New Vendor Memo button
- Receipt history inquiry
- Calculator button for Landed Cost Amount field
- Document & batch number added to PO Entry message



PURCHASE ORDER ENHANCEMENTS

- Fields added to Ship-To Address Maintenance
- Print full comments selection retained when printing journals & registers
- Redisplay source document after quick printing
- Purge Purchases History task renamed to Purge Purchases History by Item and Vendor
- Years to Retain Purchase History field renamed to Years to Retain Purchase History by Item and Vendor
- Copy from History when creating return



SALES ORDER ENHANCEMENTS

- Ability to reauthorize credit card transactions
- New Customer Memo button
- Batch number added to Sales Order Entry message
- Ability to omit order on hold when printing
- Calendar button added to PO Req. Date field
- Calculator button added to Tax Amount field



SALES ORDER ENHANCEMENTS

- Message appears if quantity packed does not match quantity shipped
- Option to keep window open after print preview
- Changes to Additional Fields Information
- Print picking sheet for order when customer is on credit hold
- New way to access alternative Item Selection window
- Quote Promotion Date added to Task windows



BKD UPGRADE METHODOLOGY

- Compatibility matrix is checked against the server & individual workstations
- BKD technical document identifies
 - Version to be upgraded from & to
 - What products including enhancements to be upgraded
 - Server detailed information necessary for upgrade
 - Workstation detailed information necessary for upgrade
 - Custom reporting & custom forms
 - Imports & exports currently in use
 - Custom Office changes



BKD UPGRADE METHODOLOGY

- BKD technical document
 - Companies to be upgraded
 - Backups are performed
- Create Work Orders for Client Signature option is provided
- Date scheduled for the upgrade
- Upon completion of the upgrade, a summary of work performed during upgrade is sent to client for approval
- Training on new features



SUPPORT RESOURCES

- BKD Technologies
- Information Center
- Resources
- Tutorials
- Help files
- Sage software online



QUESTIONS?



FOR MORE INFORMATION

For a complete list of our offices and subsidiaries, visit bkd.com.



CONCLUSION

- If you need any assistance, call your primary BKD consultant to get time scheduled
- If you need to know who your primary BKD consultant is, email me & I will find out for you
- If you have any questions, please email me at cgutierrez@bkd.com or Robin Reeder at rreeder@bkd.com



BKD TECHNOLOGIES SUPPORT CENTER

- Sage Support Center
 - 866.832.4253 or SageSupport@bkd.com
- Monday - Friday, 8 a.m. - 5 p.m. Central time
- BKD is closed the following days for July 4 holiday
 - Thursday, July 2, 2015
 - Friday, July 3, 2015



WHERE TO DOWNLOAD SLIDES & WEBINAR ARCHIVE

- Today's presentation slides are available at www.SageERPInsights.com/webinars
- Recorded copy of webinar will be available on SageERPInsights.com next week
- You will be receiving a short survey following webinar
 - Complete this survey so we may improve upon future webinars



SAGE ERP INSIGHTS BLOG

- Check out our Sage ERP Insights blog at www.SageERPInsights.com
- Follow us on Twitter [@SageERPInsights](https://twitter.com/SageERPInsights)



THANK YOU!

Colleen Gutierrez

Senior Consultant II

314.236.5248

cgutierrez@bkd.com



FOR MORE INFORMATION

For a complete list of our offices and subsidiaries, visit bkd.com.

BKD^{LLP} Technologies
CPAs & Advisors