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# Sage 300 ERP Newsletter

## In This Issue:

Preview Sage  
300 ERP 2012

New Visual  
Process Flows

Sage 300 ERP  
Version 5.5  
Retirement

Using Saved  
Searches in  
Sage CRM

## A Preview of Sage 300 ERP 2012

Sage recently published a pre-release guide for **Sage 300 ERP 2012** (previously referred to as Sage ERP Accpac 6.1 before the [Sage rebranding](#)) which provides us with a sneak peek of all the new features and enhancements that are expected. Let's take a closer look at this upcoming release which is scheduled for availability in September 2012.

### Sage Advisor Technology

Sage Advisor is new technology that's designed to make software updates easy and efficient. Sage 300 ERP 2012 will include the first phase of the Sage Advisor rollout which will notify you of available updates and guide you through the download and installation process. In addition, information gathered by Sage Advisor will provide a basis for future enhancements based on how you use the system including personalized dashboards, "show me how" videos, and on-screen help.

### Order Entry and Operations Modules

With each release, Sage implements a number of the most popular customer-requested features submitted through the [Sage 300 Ideas Website](#). In Sage 300 ERP 2012, many of those enhancements found their way into the order entry screen. For instance, you can now create a purchase order directly from order entry without having to separately launch the PO module and enter all the details. You can also copy an order (or range of orders) from the main Order Entry screen without having to launch the copy orders task from the menu. A number of tracking fields have also been added like "Entered By", "Delivered By", and "On Hold Reason."

Sage 300 ERP Version 6.0 introduced the new web-based **Inquiry** which provided ad-hoc query templates for the core modules including GL, AP, and AR. With Sage 300 ERP 2012, Sage is adding query templates for the operations modules including Inventory Control, Order Entry, and Purchasing. Inquiry helps to minimize the need for modifying Crystal Reports to slice, dice and analyze data.

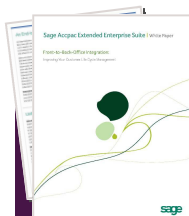
### Other Notable Enhancements

**Reverse GL Batches** - you can now reverse an entire General Ledger batch or just a single entry.

**Better Inventory Reporting** - inactive inventory items can now be excluded from the Inventory Reconciliation Report and IC Inventory Worksheet.

**Payment Processing Enhancements** - including credit card pre-authorization, a new Capture Payments with Invoice screen, new card swipe capabilities, and enhanced card security.

**Visual Process Flows** - this new feature provides Sage 300 users with a clear view of the steps and tools required to complete a task in Sage 300 using a graphical, process-oriented interface and workflow diagram. Learn more about this exciting feature on page 2 of this newsletter.



## SAGE 300 ERP 2012 PRE-RELEASE GUIDE

There are so many new features in Sage 300 ERP 2012, we can't possibly get them into a single article. But please feel free to [Contact Us](#) for a copy of the 37-Page pre-release guide that's packed with all the details!

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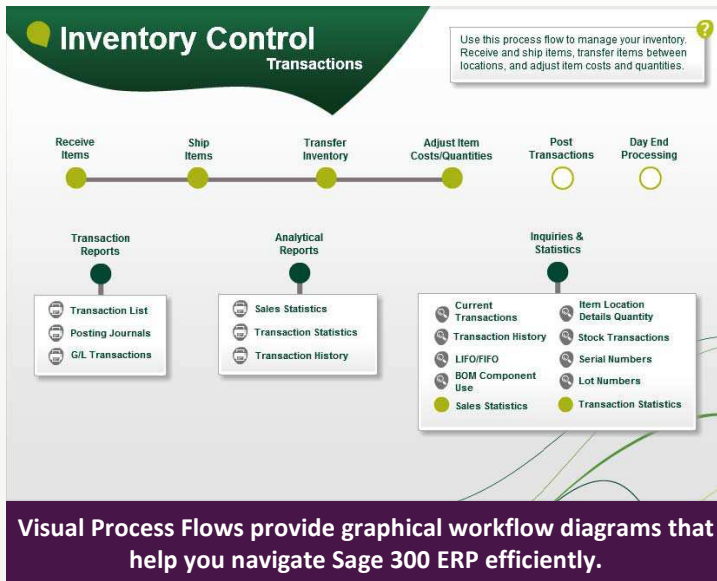
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# New Visual Process Flows

Sage 300 ERP 2012 will introduce new **Visual Process Flows** which provide graphical workflow diagrams that help you navigate the system and perform daily tasks. These customizable processes make it easy for new customers to learn Sage 300 ERP or help existing users complete tasks like year-end processing that are performed infrequently.

## How They Work

There will be a new "Sage Visual Processes" top level menu item on the Sage 300 Desktop, which contains the list of process flows that have been assigned (via Administrative Services) to a user. Version 2012 will include stock process flows for GL, AP, AR, PO, OE, and IC transactions along with flows for bank reconciliation and inventory management.



If you have the proper security rights, you can use the **Visual Process Flow Designer** to right click on an item in the tree and edit the process flow, including the ability to add your own custom graphics. That way, you can customize these flows to match your unique, company-specific processes and operational procedures.

## Improving Your ERP Experience

The primary goal of these Process Flows is to allow you to quickly identify your tasks and launch screens without searching through the giant tree of menu items and icons within Sage 300. And even though you can customize the tree of icons to limit what a user can see based on his/her role, usability studies conducted by Sage revealed that customers were still spending quite a bit of time searching for the correct screen to run.

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 1,000 hours of productivity. Keep your eyes open for this new feature with the release of Sage 300 ERP 2012 expected sometime in September 2012.

## SAGE 300 ERP VERSION 5.5 RETIREMENT

With the release of Sage 300 ERP 2012, a "90-120 day grace support period" will be extended for customers with an active Business Care plan that are running Version 5.5.

However, Sage 300 ERP Version 5.5 Payroll tax updates will retire after the Jan 31, 2013 update.

Contact Us if you need assistance with an upgrade to the current version of Sage 300 or would like to discuss extended support.

## CONTACT US ...

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# Working with Saved Searches in Sage CRM

Saved Searches are a simple but powerful feature of Sage CRM. They can spare you the time and effort of manually keying in filtering criteria time and again when running your most frequently-used searches. Here's a look at using this time-saving feature in Sage CRM.

## What Can I Save?

You can create a saved search against any of the main entities in Sage CRM including Companies, People, Opportunities, Orders, Quotes, Cases, Solutions, Leads, or Communications that match your search criteria. There is no limit to the number of saved searches you can create and save.

In addition to creating your own customized lists, Sage CRM comes with a number of predefined saved searches that you may find useful. For example, the My Companies saved search available from the Find Company screen is set up to return a list of all of the companies assigned to you.

## Saved Searches are Dynamic

Saved searches are dynamic which means they will always populate with the most up to date information each time you run the query. For example, let's say you want to search for all companies in Sage CRM that are located in San Francisco and have 50 - 100 employees. When you create a Saved Search based on this list, you're saving the **search criteria** as opposed to the actual list. So when new companies are added to Sage CRM and meet the search criteria, the Saved Search is automatically updated.

## Creating a New Saved Search

1. Click the **Find** menu button and select an entity (for example, Companies)
2. Select your required **Search Criteria** and click the **Find** button. Your search results are displayed

3. Click the **New Search** button next to the **Saved Search** drop down box.
4. In the Saved Search details box that displays, **type a name** for your saved search. For example: "San Francisco Companies – 50 to 100 Employees"

## Using Your Saved Searches

Now that you've got your favorite and most frequently-used searches saved, you'll also save a bunch of time performing common actions in Sage CRM like creating a mail merge to multiple recipients, sending email to a group of contacts, running reports, and more. In addition, saved searches can be selected from the list of available content to display in your personal Sage CRM [Interactive Dashboard](#).



Now that you know how, go ahead and start creating some of your favorite saved searches and be sure to contact us if you need help.

## SAGE CRM INTEGRATION 2012

With the upcoming release of Sage 300 ERP 2012, several enhancements for the Sage CRM / ERP integration are planned including:

- Support for Sage CRM Version 7.1 SP2
- Ability to enter sales splits for quotes and orders originating in Sage CRM
- Easier to add Sage 300 data to Sage CRM interactive dashboards via SData Widgets

Stay tuned for more information about integration enhancements once Sage 300 ERP 2012 is live.