Sage 100 Newsletter

From Southeast Computer Solutions

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GETTING HELP IN SAGE 100
Using the Built-in Help System

Whether you're a Sage 100 newbie or seasoned pro, everyone gets stumped and needs a little help. Of course, you can always contact us to request phone or email support. But a lot of customers don't realize that they can often find the answers they're looking for built right into the software itself. Here's a quick look at using the built-in **Sage 100 Help Center**.

Getting Help While You Work

Several sources of information are available to you in the Sage 100 software that are generally broken into the following categories:

Feature Tours - articles and videos that walk you through a variety of product features.

Common Procedures - step-by-step guides that answer "how do I?" questions.

FAQs & Troubleshooting - answers to frequently-asked questions and common problems.

The Help system is useful when you want to learn about procedures for day-to-day processing, see detailed entry samples for fields, or troubleshoot common issues. In addition, you'll find flowcharts illustrating complex concepts.

Accessing the Help System

There are a few ways to launch the built-in help system including:

- From the Desktop, select **Help** > **Help Topics**
- Press **F1** at any field in the software to access Help for *that* field (context-sensitive)
- On the Standard Buttons toolbar *or* bottom-right corner of any window, click the **Help Button** to access either global or task-specific help topics, respectively.

Once you launch the Help system, the following tools guide you to the information you need:

Contents Tab - access to the table of contents for the Help system, organized by key topics. Note that when you first launch Help, the welcome screen appears and the Contents tab is hidden so you'll need to click the "Show" button at the top to reveal the various tabs and options.

Index Tab - next to the Contents tab, the Index tab allows you to search for a specific topic by entering related keywords.

A given Help topic may contain procedural information, overview information, or guidance about a particular feature. These can include tutorials, video walkthroughs, examples that illustrate a concept or task, and so much more.

Be sure to contact us for guidance or if you don't find what you need in the Help system.

SAGE CRM
Using CRM with Your Phone System

Did you know that Sage CRM can work hand-in-hand with your phone system? It's called Sage CRM CTI - short for Computer Telephony Integration - which extends core CRM functionality so that sales, customer service, and support reps are even more efficient and effective. Let's take a closer look at using Sage CRM with your phone system.

Sage CRM CTI Features

When you connect Sage CRM to your phone system using CTI, inbound calls are routed through your computer which allows you to leverage the following features:

- Automatic caller identification.
- Inbound calls provide clickable hyperlinks that instantly provide information from Sage CRM about that contact.
- You can click to go directly to the relevant Company or Person screen while the call is active.
- Quick and easy dial-out via hyperlinked phone numbers.

In short, everything your representatives need to know about a contact pops up onscreen without having to put them on hold and search for relevant records or history.

Taking Inbound Calls

When an inbound call is directed to your extension number, the CTI screen displays in a popup window in Sage CRM. If the number matches a company or person in Sage CRM, the contact is listed onscreen. If it matches more than one, all contacts are listed.

Once you click to answer or pickup the receiver, the call becomes active and additional screens and features are available. For instance if you are a sales person, you might see the New Opportunity screen popup which will gather context information so you can quickly log an interaction with the Sage CRM contact who just called.

Making Outbound Calls

Once CTI is enabled, all phone numbers in Sage CRM are displayed as hyperlinks. Even phone numbers in the context area of the screen are hyperlinks. To make a call, simply click on the linked phone number which then displays the Call screen as well as an Active call field. And of course, you can also make calls to numbers that are not stored in Sage CRM.

Sage CRM CTI Prerequisites

Naturally, you can't just connect Sage CRM with any old phone system. Here are just a few of the requirements that need to be met:

- A private PABX switch
- A telephony network and server
- A local area network (LAN) and LAN server
- Sage CRM CTI component installed on the server

Contact us for the full technical requirements documentation or if you'd like to learn more about connecting Sage CRM with your phone system.

What Do I Get with a Sage Business Care Plan?

Ever wonder why every year, you get a notice to renew your Sage Business Care plan as part of your Sage 100 software investment? Have you wondered what it includes exactly? In this article, we'll answer those questions and more.

What is "Business Care"?

Sage Business Care represents support and maintenance costs that every ERP software developer puts in place. This annual fee provides for ongoing research and development, product improvements, new version releases, and continued innovation so that Sage 100 keeps pace with broader changes in technology (in other words, helps to prevent Sage 100 from becoming obsolete).

Also depending on which Sage Business Care plan you choose (discussed later in this article), it also includes various levels of customer support.

Business Care Benefits

Here's a look at what's included in all Sage Business Care Plans:

Product Updates and Enhancements

Each year, Sage makes a significant investment in product development to incorporate new features, productivity enhancements, security updates, hardware compatibility, and product fixes & patches.

24 x 7 Knowledgebase Access

Each plan comes with unlimited access to the same problem-solving information used by Sage support centers which provides you with fast and searchable support knowledge.

Different Plans, Different Needs

Different Sage Business Care plan options allow you to choose the level of support you need based on your own in-house IT expertise.

Silver Plan - the base plan that includes the core benefits mentioned earlier, plus **5 Sage support cases** annually and 1 user for Sage Intelligence Reporting and Sage CRM.

Gold Plan - all the benefits of Silver, but with **unlimited** support cases *and* Anytime Learning courses through Sage University.

Platinum Plan - all the benefits of Gold, but with **2 users** for both Sage Intelligence and Sage CRM.

Note on Sage100cloud - with a Sage 100cloud subscription, Sage Business Care plans include additional features that are not available for Sage 100 Classic (perpetual license).

Contact us if you have questions about business care or need personalized support from our team of Sage 100 technical experts.

Solutions Made Easy

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