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SAGE 300 ERP INTELLIGENCE REPORTING

Answers to Your Frequently-Asked Questions (FAQs)

The popularity of business intelligence (BI) reporting has been on the rise - and for good reason. The graphs, charts, and number-crunching power that BI tools provide help you get the upper hand on all that data stored in your ERP system so you can make "intelligent" business decisions.

Many of you have already made, or are planning to make, a transition from the older **Financial Reporter (FR)** over to the new **Sage Intelligence Reporting** in Sage 300 ERP (Accpac). So here's a look at some of the frequently-asked questions about Sage Intelligence.

What Is Sage Intelligence Reporting?

It's an Excel-based reporting tool that pulls data from across your entire Sage 300 ERP system (any module) into a single location so you can slice, dice, and analyze the numbers in familiar spreadsheet environment.

Resource: [Sage 300 Intelligence Brochure](#)

How Does it Compare to FR?

When it comes to financial reporting, Sage Intelligence is comparable to Financial Reporter (FR) in functionality. But as the name suggests, FR is designed primarily for financial reporting on numbers in your GL.

Sage Intelligence, however, looks across your entire system so you can run Excel-based graphical reports on sales, inventory, customers, non-financial data, and so much more.

Do I Need to Build All New Reports?

No - Sage 300 Intelligence Reporting comes with a number of ready-to-use reports for finance, inventory, products, customers, sales, and more.

You can use the standard reports 'as is' to get up and running quickly for immediate insight into your business. Or customize these pre-built templates to your liking.

Resource: [Sage 300 Standard Reports](#)

Can I Convert My Existing FR Reports?

While FR report specifications are not natively compatible with Sage Intelligence, a guide is available that walks you through the process of converting FR specs into Sage Intelligence Financial Report layouts.

Resource: [FR to Sage Intelligence Conversion](#)

Does Sage Intelligence Work with Microsoft® Excel® 2003?

No - Sage Intelligence only works with Excel 2007 or higher because it uses embedded XML files, the Excel ribbon, and other functionality that's not supported in version 2003.

Where Can I Learn More?

If you want to do some digging around and get to know Sage Intelligence a little better, head over to the **Sage 300 Intelligence Online Community** where you'll find instructional videos, recorded webcasts, user guides, a discussion forum, and a wealth of helpful resources to set you in the right direction.

[Sage 300 Intelligence Online Community](#)



Got More Questions?

Contact us with questions about Sage Intelligence or to discuss your specific reporting needs.



Spotlight On: Sage CRM

How to Shorten Your Sales Cycle

With the recent release of [Sage CRM Version 7.3](#), Sage rolled out a bunch of new tools and reports that can help you accelerate your sales cycle and make the most of every opportunity. Let's take a look at these new **sales accelerators**.

New Management Dashboards

Two new ready-to-use Management Dashboards are available to provide owners, managers, and decision-makers with the insight and metrics to close more sales - faster. Each dashboard includes configurable gadgets that use Sage CRM data from across your entire organization.

Sales KPI for Managers displays key performance indicators (KPIs) to help you identify and measure your organization's successful activities ... as well as those that aren't performing so well. Metrics include monthly sales trends, actual vs. target, opportunities pipeline, open activities, at-risk opportunities, and closed deals leader board by sales rep.

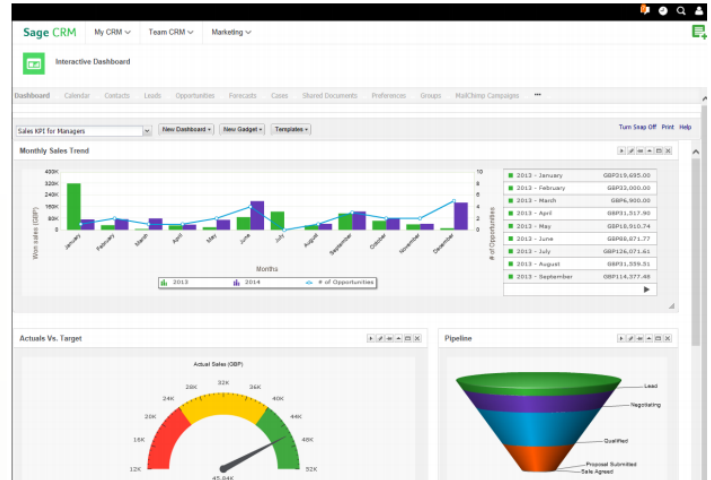
Sales Metrics for Managers helps you measure progress toward organizational goals. Metrics include leads generated by source, deals lost to competitors, won vs. lost deals, average deal close rate, cross-sell deals, and top open deals.

These new dashboards provide important visual queues that help you quickly spot areas that require your attention. Then you can take action or run more detailed analysis to close deals faster or save opportunities that are slipping.

Quicker Quotes, Orders, and Workflow

The new **Quick Sale Workflow** is a predefined workflow with fewer stages than the standard 'Opportunity Workflow'. It's perfect for products that don't require a complex sales cycle and can be sold in just a few simple steps. Your sales people can focus more on getting the deal done quickly and less on system setup and administration.

In addition, you can now generate **Quick Quotes and Orders** using a new default template that's merged with details



New ready-to-use Management Dashboards provide metrics and insight to close more deals - faster.

from an existing record. That way, you just pull in a quote or order from another similar opportunity and simply change a few details rather than starting from scratch.

Proactive Alerts and Escalation Rules

There are also new ready-to-use **Alerts and Escalation Rules** designed to notify your team of critical event triggers related to leads, quotas, or opportunities. These proactive alerts are sent to managers and/or sales users so your team can take quick and decisive action rather than waiting until after the fact when it may be too late to close or save a deal.

Together, this collection of new features will help you close sales faster and drive more revenue.

Ready to Upgrade?

Sage CRM 7.3 is **integrated with Sage 300 ERP 2012 and 2014**. In addition to a separate integration component, you may need to install a product patch or update depending on your version of Sage 300 ERP. [Get details here](#).

[Contact Us](#) if you need help upgrading.



Spotlight On: HRMS

Payroll Changes in Sage HRMS 2015

There were quite a few new features along with a collection of improvements added to the Payroll product in Sage HRMS 2015. Let's take a look at these changes to both U.S. and Canadian payroll.

The Gross Up Calculator

[Sage HRMS Payroll](#) (both U.S. and Canadian versions) now offers a **Gross-Up Calculator** that can be accessed from the Quick Launch Toolbar.

Override	Description	Amount
<input checked="" type="checkbox"/>	California Income Tax (CASIT)	\$39.75
<input type="checkbox"/>	California Unemployment Tax (CASUTA)	\$0.00
<input type="checkbox"/>	Medicare Tax (USMED)	\$20.23
<input type="checkbox"/>	San Francisco CT Regular IT (CA0001)	\$0.00
<input type="checkbox"/>	Social Security Tax (USSS)	\$86.51
<input type="checkbox"/>	US Federal Income Tax (USFIT)	\$349.83

After entering the **Desired Net Pay**, you can choose the employee earnings, taxes, and deductions. Next you can override amounts as needed and the calculator determines the gross amount to pay. Once you have the right configuration, you can generate a timecard with the calculation to be used directly in your standard payroll processing.

Extended Support for GL Segments

If you have selected to **Use Cost Center Overrides** in Payroll G/L Integration, the General Ledger segments can now post with **six segments** for earnings, deductions, and taxes set up with cost center override. Prior to this enhancement, only three segments could be assigned. This change means payroll can use the segments from the employee-level setup or the time card if they use the Regular Expense account. In order for the segments to post to your G/L, you must select the checkbox **Cost Center Override Allocated Based on Calc Base** on the Earning/Deduction or Tax code setup.

Other Payroll Enhancements

- New Earnings Distributions Notifications Onscreen (U.S.)
- Update Local Taxes Audit Report (U.S.) - new option to audit and review a summary of tax changes.
- New CPP/QPP and EI Balancing Report (Canadian)
- New T4A and RL-2 Reporting Options for Earning/Deduction Codes (Canadian)
- New T4A and RL-2 Summary Report (Canadian)

The payroll enhancements included in Sage HRMS 2015 make an already great product even more flexible so you can customize the system to handle payroll your way.

[Contact us](#) if you have questions about Sage HRMS or want to discuss an upgrade to Version 2015.



Sage HRMS 2015 Release Notes

[Click to download](#) the Sage HRMS 2015 Release Notes for the full collection of upgrades.



www.ADSSGlobal.net

Calling All Customers! Share Your Ideas



Did you know that Sage 300 ERP (Accpac) has an **Ideas Portal** where customers can submit ideas and new feature requests directly to Sage product management?

The Ideas Portal allows you to submit new ideas, vote on existing ideas from fellow customers, review new features that are planned for upcoming releases, and collectively help to shape the future of your Sage 300 ERP software.

As of the publishing of this newsletter, the Sage 300 Ideas Portal has over 1,700 new ideas, 18,000 votes on existing ideas, and 2,400 comments from customers like you.

Let Your Voice be Heard:

[Visit the Sage 300 Ideas Portal Now!](#)

Sage 300 ERP 2014 Product Update 3 (PU3) Now Available

Product Update 3 for Sage 300 ERP 2014 is now available for download. In addition to the bug fixes that are typically included in product updates, PU3 also includes a number of new features and enhancements in Accounts Receivable, Accounts Payable, Purchase Orders, and Inventory Control.

In particular, a new **Optimize Inventory** screen helps you calculate optimal inventory levels based on your sales and automatically updates item reorder quantities. Also, new options related to the Optimize Inventory screen have been added to other screens including an **Optimizer** tab on the Options screen and a **Seasonal** option on the Items screen.

[Review the Full Release Notes for Product Update 3](#)

[Review All Available Sage 300 Product Updates](#)

Windows Server 2003 R2 Support Ending July 14, 2015

As a reminder, [Microsoft has announced](#) they will no longer support Windows Server 2003 R2 beginning **July 14, 2015**.

Now is the time to start planning an upgrade to a supported version of Microsoft Windows.



[Contact Us](#) if you are still running Sage 300 ERP (Accpac) on Window Server 2003 R2 and want to discuss migration options.



This year [Sage Summit](#) is headed to New Orleans for the annual gathering of Sage customers and partners which will take place **July 27 - 30, 2015**.

Recently-announced "Featured Speakers" Include:

- Tony Hawk - Entrepreneur and Pro Skateboarder
- Chad Hurley - Co-founder of YouTube
- Jane Seymour - Award-winning Actress
- Matthew Weiner - Executive Producer of Mad Men

Sage 300 Sessions and Agenda

Sage has also published conference sessions, product lessons, and deep-dive learning opportunities broken out by product categories. Click below to see what's in store for you at Sage Summit 2015:

[Browse Sage 300 \(Accpac\) Product Sessions >>>](#)

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