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INTRODUCING SAGE 100 2020.1

The latest **Sage 100 2020.1** release is now available. Here's a quick look at what's new including continued enhancements to lot and serial number traceability in inventory, improvements to Fixed Assets tracking, and other popular customer-requested updates.

Accounts Payable and Receivable Changes

In Accounts Payable, a new '**Net Balance**' button is now available, making it easier to add any undistributed balance to the current line item. The new button is available in Invoice Data Entry Lines tab, Repetitive Invoice Entry Lines tab, and the General Ledger Distribution window accessed through Manual Check and Payment Entry.

In Accounts Receivable, a **Payments tab** has been added to Invoice History Inquiry and shows all payments applied to the selected invoice. You can click the Cash Receipts History button to view details about payments processed through Cash Receipts Entry or click the Payment Information button to view details about credit card and ACH payments.

Tracing by Lot and Serial Numbers

With Sage 100 2020.1, you now have multiple options to trace where items have been used. A new '**Where Used**' button added to the Lot/Serial Inquiry window (accessed from the Main menu or from Item Maintenance) displays where items from the current lot or with the current serial number were used as a component of a sales kit or a bill. The button is available when you select a Sales Order invoice with the type SI, or a Production Entry transaction with the type BI.

Certain changes were made to the Lot/Serial Inquiry window to accommodate the new Where Used functionality. In addition, a 'Print Where-Used Items' check box has been added to the Lot Serial Transaction History Report. Lastly, a new **Customer Recall Report** has been added to the Reports menu that displays a list of customers to whom you have sold or shipped lot or serial items that must be recalled.

Fixed Assets Enhancements

The posting book check boxes in the Period End Processing window have been replaced by a grid with Book Name and Close Book columns. The Close Book column contains check boxes that you can select for the books that you want to process for period end. The change was made to support the additional posting books added in Sage Fixed Assets version 2021.



Sage Is Listening!

Many new features in Sage 100 2020.1 were either suggested by existing customers via the [Sage 100 Ideas website](#) or solicited through feedback from Sage Authorized Partners on behalf of clients - so keep your great ideas coming!

[Contact us](#) for a copy of the detailed release notes or if you need help upgrading.



SAGE CRM

Back to Basics: What is CRM?

By now, all of us have heard about “Customer Relationship Management” (CRM). But not everyone understands what CRM software does or what it means for your business. So let’s go back to basics and explain what CRM is exactly.

The Definition

CRM stands for **C**ustomer **R**elationship **M**anagement. It encompasses both a philosophy and approach to managing all interactions with your current and prospective customers. While CRM is about MORE than just technology, it typically involves using CRM software to organize and automate your sales, marketing, customer service, and support activities.

The Function

The most common and critical functions of any good CRM system typically include:

Contact & Communications Management - one of the most important functions of CRM is to store information about all your contacts in a single database (like ERP stores all your operational data). Contact numbers, meeting notes, email communication, transaction history, and other critical sales and customer data is in one location rather than spread across stand-alone laptops or disconnected spreadsheets.

Lead/Opportunity Management - because all contacts and communication is stored in one place, your sales team can leverage the tools and features in CRM software to track and manage leads from first contact to customer acquisition.

Sales Force Automation - automate day-to-day sales process activities like follow up tasks, reminders, and meetings which results in more time interacting with prospects and less time with spreadsheets and administration.

Reports and Insight - CRM provides meaningful reports to help you make sense of all the data you’re collecting. KPIs and dashboards allow you to track leads, manage your pipeline, and measure sales performance. You can monitor



and analyze sales activities across your company so you can focus on opportunities that have the best chance to close.

The Benefits

At the end of the day, CRM software helps your sales and service teams become more efficient and effective. They’re spending less time managing routine administrative tasks and more time closing deals and generating revenue. And because all sales and contact data is stored in one place, your interaction with customers is more accurate and consistent. In addition to eliminating duplicate data and spreadsheets, management has a full picture of customer performance across all departments to help make critical decisions.

It’s also important to recognize that as a Sage 100 customer, you get the added benefit of a **real-time integration with Sage CRM**. That means data entered or edited in *either* system automatically updates the other.

Now That You Know ...

Now that you know what CRM is and how it benefits your business, feel free to [get in touch](#) if you’d like to learn more about how Sage CRM works hand-in-hand with Sage 100.



A Closer Look at Visual Integrator

The last couple of Sage 100 releases have included some nice updates to the **Visual Integrator** module. While it doesn't grab big headlines, it's an important integration tool for companies that manage multiple software applications. So let's take a closer look at Visual Integrator.

What is Sage 100 Visual Integrator?

As the name suggests, Visual Integrator is an integration tool that connects your Sage 100 database with other external applications. Many businesses that use Sage 100 also rely on other software to perform specific functions such as point of sale systems for retail stores or medical billing applications for the healthcare industry.

In the past, companies may have had to perform database gymnastics to manually move transactions from an external software application into Sage 100 for accounting, reporting, and other processing. But with Visual Integrator, you can set up a seamless and automated process to import (or export) data from any ODBC-compliant system.

All that without any need for manual intervention such as dumping data to Excel, massaging the spreadsheet for proper formatting, and then importing to Sage 100.

But Wait, That's Not All ...

While the process of importing or exporting data to and from Sage 100 is simplified with Visual Integrator, the REAL power lies in its ability to execute additional integration commands.

For example, Visual Integrator jobs can be scheduled to run at pre-determined intervals of any length. If you need to keep your Sage 100 customer data synchronized with an external prospect database, you can set the import to run automatically every day, every hour, or even every minute.



Plus, you can run additional commands, scripts, or other functions based on three events: before job start, on job success, or on job failure. What's more, validation logic is built into Visual Integrator to ensure that the data being imported conforms to Sage 100 data structure and rules.

Other capabilities that may come in handy depending on the complexity of your import/export needs include:

- Import/export user-defined fields
- Chaining of job sequences
- Nesting Logic criteria to select and skip records
- Test and preview of sample data before import
- Much more ...

Get Better Connected

If you're still performing manual import and export routines moving data back and forth with other applications, contact us to learn more about how Visual Integrator can get you better connected with Sage 100.

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