



Page 1

The Road Ahead for Sage 100

Page 2

ERP vs. CRM: What's the Difference?

Page 3

Sage Enterprise Intelligence (SEI) Now Available for Sage 100

THE ROAD AHEAD FOR SAGE 100

Sage recently hosted a presentation that provides us with a glimpse of what's ahead for Sage 100 in the near and mid-term. Here's a quick peek at what to expect for the rest of 2020 and beyond.

New in the Sage 100 Ecosystem

A couple of new add-on solutions are expected in the Sage 100 ecosystem including:

Sage Enterprise Intelligence - a powerful, web-based business intelligence (BI) reporting tool that converts massive amounts of data from across your entire Sage 100 system (not just your financial modules) into meaningful insight and powerful real-time reports. Refer to the full length article in this newsletter for a more detailed look at Sage Enterprise Intelligence ([expected in July 2020](#)).

Credit Hound - an accounts receivable collections management suite that helps reduce late payments and collect overdue invoices. Robust features include automated payment reminders, overdue customer reports, dispute management and more ([expected in Summer 2020](#)).

New Features and Product Updates

Here are some of the new or enhanced features that are expected for release later this year.

Sage 100 Payroll – a collection of updates and worksheets related to COVID-19 and tracking for Emergency Family and Medical Leave Expansion Act.

Partner-Requested Updates – a collection of enhancements requested by Sage Authorized Partners/Resellers including a new payments tab for **Invoice History Inquiry** (similar to the existing payments tab in Accounts Payable), a 'Net Balance' button for **A/P Invoice Data Entry**, and various **Visual Integrator** improvements.

Lot/Serial Traceability – continued "phase 2" enhancement of lot and serial number traceability that began in a previous release.

Sage Production Management – continued enhancements with emphasis on simplifying workflow and options related to creating work tickets from sales orders.

User Experience - various updates in response to user feedback including moving support chat to the main menu and better visibility and access to training resources and upcoming events.

It's worth pointing out that many of the new features mentioned are exclusive to the Sage 100cloud subscription platform. If you're still running the "classic" Sage 100 product, some of the new features in upcoming releases may not be available to you. Contact us if you're interested in or want to learn more about migrating from Sage 100 Classic to Sage 100cloud.



NOTE: statements about product development initiatives and new features may be modified, delayed, or abandoned without prior notice and before final release.

sage

Authorized Partner



SAGE CRM

ERP vs CRM: What's the Difference?

If you're reading this newsletter, you're probably already familiar with what ERP does. But as a relative newcomer to the business software landscape, some are still figuring out what CRM can do for your business and how it's different than the ERP system you already have. Let's explore.

What is CRM?

First things first ... CRM stands for Customer Relationship Management, and it's important to understand that CRM is both a tool and a philosophy for managing relationships with your current and prospective customers.

At its core, CRM software ties all of your customer-facing activities together. So, whereas ERP ties together "back office" functions such as accounting, purchasing, inventory, and operations, a CRM system ties together "front office" functions such as:

- Sales, Meetings & Calendars
- Company and Customer Contacts
- Customer Service & Support

In short, CRM connects and streamlines sales processes while providing better visibility and reporting on activities such as upcoming meetings, pending quotes, open orders, shipping status, paid/unpaid invoices, customer service & support issues, and much more.

How is it Different Than ERP?

While there are similarities between ERP and CRM - in particular when it comes to the goal of using technology to cut costs, drive revenue, and improve efficiency - the two solutions serve different purposes. Here are some of the **key differences** between an ERP system like Sage 100 and CRM software like Sage CRM:

CRM typically handles "front office" sales and customer data while ERP manages operational and accounting data.



CRM manages contacts, appointments, and sales opportunities while ERP focuses on key functional operations like invoices, payables, inventory, and manufacturing.

CRM is designed to help drive sales revenue and manage customer opportunities while ERP focuses on speeding up production and automating accounting.

CRM is primarily used by sales, marketing, and customer service teams while ERP is used by accounting, shop floor and warehouse teams.

ERP and CRM Are Better Together

Truth be told, CRM and ERP work better together. Like the old adage "the whole is greater than the sum of its parts," an integrated solution like Sage 100 and Sage CRM provides additional benefits like enabling sales people to convert quotes from CRM to orders in ERP, or to check inventory status without ever leaving the familiar interface of CRM and fumble around in the Sage 100 accounting application.

When you connect ERP with CRM, you gain 360-degree insight into your business from sales and marketing in the front office to accounting and operations in the back office.

Introducing Sage Enterprise Intelligence

SOON AVAILABLE FOR SAGE 100

Expected in July 2020, Sage Enterprise Intelligence (SEI) will soon be available for Sage 100cloud. Previously available for other Sage accounting products, Sage 100 now joins the lineup of ERP applications that seamlessly integrate with this powerful, enterprise-level BI reporting tool.

What is SEI?

Sage Enterprise Intelligence (SEI) is an intuitive, web-based reporting tool that helps you make faster, more informed business decisions. It does that by converting massive amounts of data from across your entire Sage 100cloud system (not just your financial modules) into meaningful insight and powerful real-time reports.

Plus, SEI provides data visualization tools such as gauges, charts, and dashboards that help you more easily spot trends, trouble spots, and opportunities.

Is it Different than Sage Intelligence?

In a nutshell, SEI is a more powerful and robust business intelligence (BI) platform featuring advanced capabilities not available in the current Sage Intelligence reporting tool.

If you've been using Sage 100 for a while, you probably recall that Sage Intelligence was chosen as a replacement for the retired FRx financial reporter. While Sage Intelligence goes far beyond what FRx was capable of, it still has roots in core financial reporting functions.

Sage Enterprise Intelligence, on the other hand, can help you get a clear picture of your whole business and develop collaboration across departments. Out of the box, it can be used to analyze inventory, sales and customer service, production, purchasing, budget management and more.



Easy to Use and Access

While SEI offers an optional Excel add-on, the product is natively web-based. For those less comfortable with Excel spreadsheets and formulas, you'll find that the drag-and-drop interface of Sage Enterprise Intelligence is easy to use with no special technical skills required. And because it's web-based, SEI can be accessed and shared using a variety of devices including your desktop, tablet, or mobile device.

Some key features of SEI include:

- Real-time data updates, fully integrated with Sage 100 (beyond GL/financial integration)
- Drill-down and drill-up to see transaction details
- Fast processing of large data volumes
- Ready-to-use KPIs and reporting templates
- Web-based interface with mobile capabilities

With Sage Enterprise Intelligence, you'll go beyond the limits of spreadsheets to unlock the true power of your data and transform it into actionable business insight.

Convergence Technologies, Ltd.

8475 E. US Highway 33, Suite J
Churubusco, IN 46723
(877) 483-0717

Denise Phillips

dphillips@converg-tech.com | www.Converg-Tech.com

