

Sage 100 ERP

Sage 100 ERP Version 2014 Now Available

On March 4th, Sage announced the availability of their latest Sage 100 ERP release, 2014. Sage ERP customers on a Sage Business Care plan can download a copy by logging on to the Customer Portal and then clicking on www.Sage100ERP.com/download2014.

What are the top new features and reasons for you to upgrade to Sage 100 ERP 2014?

- Connecting your business through the Sage Data Cloud enables you to easily expand your business with mobile and cloud solutions.
- Get paid faster and empower customers to pay invoices online through Sage Billing and Payment.
- Increase revenue per salesperson and impress customers using the Sage Mobile Sales app on your iPad.
- Reduce stock outs and excess inventory, and increase profitability with Sage Inventory Advisor.
- Connect your salespersons through an iPhone app and track sales with Windows 8 using Sage CRM.
- Sage Intelligence now installs during the Sage 100 ERP installation allowing you to access Sage Intelligence within the Sage 100 ERP module menus.
- At a glance see the profitability of customers, products, and salespeople using the Profitability Dashboard for Sage 100 ERP Intelligence Reporting.
- Find customers, vendors, and items quickly by name or description in customer number, vendor number, and item code entry fields with autocomplete for easier searching.
- Make custom reporting and Financial Reporting easier by keeping these report windows open after preview and print.
- Search easier when using the Search Grid window with improved column default settings.
- Find invoices easier with an invoice list button in Accounts Payable Invoice Data Entry, Accounts Payable Repetitive Invoice Entry, and Accounts Receivable Repetitive Invoice Entry to find invoices already entered but not yet posted.
- Payroll has been updated to include the ability to report up to 16 Box 12 codes on W-2s.

See our Sage Mobile Apps article for more information on the Sage Mobile Sales, Mobile Services and Billing and Payment apps.

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QUICK BYTES

Sage Customer Loyalty Survey

The Sage Customer Loyalty Surveys were emailed out earlier this month. If you've responded to the survey, thank you. If you haven't yet taken the survey, we asked that you take a few minutes to do so. The feedback we receive from these is invaluable to us.

Introducing the New Sage Mobile Apps



Sage recently unveiled 3 new mobile apps designed to help businesses improve customer service and cash flow. These new cloud-based solutions are affordable, easy-to-implement, and integrate directly with your Sage 100 ERP system via iPad, iPhone or the web. These apps were released for Sage 100 ERP version 2014, but are backward compatible with version 2013. They are not compatible with versions older than 2013.

Sage Mobile Sales

This native iPad app provides your sales team with the information they need to close a sale at the customer site. **Sage Mobile Sales** enables you to process quotes and orders, take payments, and collect signatures while out in the field. What's more, it automatically links to your Sage 100 ERP system so you can:

- Access real-time inventory availability anywhere and anytime
- Review recent orders with your customer and view/edit their information instantly
- Enter orders on-site and accept immediate payment using your iPad

Sage Mobile Service

With **Sage Mobile Service**, field technicians can use an iPhone to schedule work, optimize routes, access customer information (i.e. service history, work orders & approved estimates), take before and after photos, and even accept payments – all while on-site. With this new app, you can also:

- Email estimates and receipts so everyone stays informed
- Modify work orders for *actual* hours & work performed and get customer signoff onsite
- Access Sage 100 ERP information on the fly, get paid faster, and increase cash flow

Sage Billing and Payment

This new cloud-based app allows you to easily process electronic customer payments, reducing paper costs, data entry, and days to pay. This allows you the ability to email invoices and receive payments online. Payments can be processed by credit card or ACH, making it easier for customers to do business with you.

Sage Billing and Payment also provides your customers with a 24/7 web portal so they can manage their accounts and make payments online, on their own time. You also get an online dashboard with the ability to quickly re-send outstanding invoices and view invoice delivery history.

Sage Data Clouds: The Best of Both Worlds

All these new Sage Mobile Apps are connected through the Sage Data Cloud which is hosted in Microsoft Azure and connects to your Sage 100 ERP system. Sage Data Cloud is the glue that connects your on-premise ERP software with a world of add-on cloud applications without the need for configuring web servers or installing special hardware. The Sage Data Cloud is part of Sage Business Care and includes a free connector and unlimited data storage.

Contact us with your questions or go online to www.SageMobileApps.com to learn more about the new Sage Mobile Apps. The Sage Mobile Sales and Mobile Service apps are available in the App Store in iTunes. Pricing is based on a monthly subscription determined by the number of named users. There is a one-time setup charge for each app.

Sage 100 ERP Tips

New Utility Available to Modify Sage 100 eFiling and Reporting Data

Included in the 2013 Yearend IRD is a utility that allows users to correct certain items at the check level in the PR_40 eFiling and Reporting file. Data captured in this file include hours worked, gross earnings, FICA/Medicare wages, state and federal withholding and unemployment wages and withholding tax amounts. You must know the exact check date of the data that needs to be changed. If you find you have the need for this feature, give us a call and we can give you instructions on how to access and use this utility.

Setting the Vendor or Customer Status to Inactive

With the 2013 Sage 100 ERP version, users have the ability to set a Vendor or Customer status to Active

(default status), Inactive or Temporary in Vendor or Customer Maintenance on the Additional screen. Inactive vendors or customers are those that you no longer do business with, but you still want to keep their information and history. If Inactive is set as the status then an Inactive Reason Code can be assigned to the vendor or customer. Inactive Reason Code Maintenance on the AP or AR Setup menu allows users to specify why the vendor or customer has an Inactive Status. If a vendor or customer has outstanding invoices with balances, a message will pop up telling the user that when the status is changed, but it will allow you to still change the status to Inactive. If the vendor is listed on open Purchase Orders or listed as a vendor on an Inventory item, you cannot change the status to Inactive. Vendors or customers with a Temporary status with a zero balance due will purge during period-end processing depending on how many days your system is set to retain paid invoices.

2014 941 Form

The IRS 941 form for 2014 is different from the 2013 form and has been updated for those changes. The IRS requires that businesses file with the correct year's form. If you use last year's form, you will receive notification that you are using the incorrect form. As previously announced, Federal and State eFiling and Reporting by Aatrix has replaced the Electronic Reporting module and the W-2, 1099, and 941 form printing tasks. You will need to have the Federal and State eFiling Reporting installed at your workstation in order to access this feature. When eFiling updates are released, you will be prompted to install an automatic update to ensure you have the latest federal and state tax forms. The 2014 941 form is now available, so once you do the automatic updates you will have the new form. Sage will not be issuing a 2014 update to the standard 941 form printing on the Payroll period end menu. You will be required to print the 2014 941 form through Federal and State eFiling and Reporting on the Payroll Period End menu.

For those of you unfamiliar with the Federal and State eFiling and Reporting, this feature includes 250+ federal and state forms, such as W-2, W-3, 941, 1099, Unemployment, Withholding, and New Hire forms, to

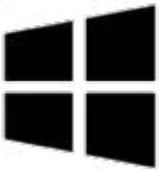
facilitate filing payroll and accounts payable tax forms. Companies will be able to print and/or eFile signature-ready state and federal tax forms from within the Sage 100 ERP. You only incur fees for the forms you choose to eFile electronically using Aatrix. There are no sign up or subscription fees.

If you receive the message that the Federal and State eFiling has not been installed at your workstation and you are responsible for tax form filing, give our office a call and we can install this at your workstation. If you are on Sage 100 version 4.4, we will need to install this from your installation CD. For versions 4.5 and 2013, this is installed from the Sage 100 download files. Note: the 941 form printing within the Federal and State eFiling can be printed anytime. Unlike the standard printing that required you to print the 941 prior to closing your quarter, the eFiling option uses different files and the data in those files are not purged during quarter or year-end processing.

All other quarter end payroll reports must be printed prior to closing the quarter. The data for all other payroll reports is cleared on a quarterly basis during quarter end processing.

Windows Shortcut Tips

By Jeshua Watley



Many people have taken the proverbial plunge and begun using Windows 8.1. If you haven't already installed 8.1 from the Windows Store, you are missing out on some great interface improvements. This update to the latest Windows OS has made it easier and faster to navigate. Here are some shortcuts and tips that will make you look like a pro.

First, make yourself familiar with the Windows logo key: It's on the lower-left of the keyboard and most don't know it's there.

(Depending on when your keyboard was made, it may also appear as: or)

- The +D key combination brings you to the Windows desktop as you know it. This is where people go to collect their thoughts and really start their work.
- Furthermore, +M will similarly minimize all open windows.
- +X shows a list of options in the bottom left corner of your screen. At a glance it looks like the old Start menu, but it's not. However, it has a number of familiar applications that you may have used in previous versions.
- The “Charms” are a new feature of Windows 8 and +C will eliminate time wasted hovering on the right edge.
- Speaking of charms, +I opens the Settings charm, saving further time by skipping the previous shortcut.
- Need to leave right now? You can skip the Windows three-finger salute (Ctrl+Alt+Del), because +L will lock your desktop. Use your password to unlock again, like old times.
- Make the most of your large or widescreen display by viewing 2 windows at once. Press + → (right arrow key) or + ← (left arrow key) to snap the current window to the right or left half of your screen.

The following shortcuts have been around for a while, but they are so useful that everyone should know them.

The F keys are located at the top of your keyboard, and rarely get attention. Click on a file and press the “F2” key to rename it. Also, F3 is search, F5 is Refresh, and F11 will make your web browser full screen; these work in web browsers and some windows.

This next set is lined up and ready for speed. Get comfortable using these one-handed and cut time editing: **Ctrl+X** : Cut, **Ctrl+C** : Copy, **Ctrl+V** : Paste. Most importantly, in this set is **Ctrl+Z**, which will undo your last action in almost any program or window.

Lastly, webpages can be difficult to read sometimes and most browsers have a “zoom-in” feature. If you're lucky enough to have a wheel between your mouse buttons, hold Ctrl on your keyboard and **scroll up** to make it all larger and **scroll down** to make it smaller.

Used correctly, these tips make Windows faster, easier, and more comfortable.

APC Surge Protector Device Recall



8 Series Surge Strip



Many of us don't consider replacing our surge protectors until they actually stop working. We have seen many old models still being used and wanted to alert everyone to this recall. More than 15 million units were sold in the affected manufacturing date range. On devices manufactured before 2003, some surge protectors can overheat, posing a possible fire risk. Pictured to the right are the recalled products.

Refer to the APC web site for a complete list of affected model numbers and to submit a claim and receive a replacement. <http://recall.apc.com/en>

The End is Here for Windows XP and Office 2003

By Mary Mays



As we addressed in our 2013 fall newsletter, April 8, 2014 is the last day of Microsoft support for Windows XP and Office 2003, which means the end of all security patch updates and technical support for these two products. While many of the major antivirus manufacturers still plan to support XP for another 2 years, without regular Microsoft updates criminals will definitely take advantage of the XP user base and it will not be safe to continue to run it. Already XP users aren't able to upgrade to the safer Internet Explorer browser versions higher than 8. Most hardware manufacturers and software vendors will stop supporting XP, too. For example, if you purchase a new printer, XP drivers will not be available for that new printer.

Businesses should plan now to replace XP computers with new ones running either Windows 7 or Windows 8. We don't recommend upgrading your XP workstations because most of these PC's are well over 5 years old. By the time you purchase the Windows product license and pay someone to perform the upgrade, you would receive a better return on your investment by purchasing a new computer. Microsoft has made it easy for you to determine if you are running XP or not. Visit this web site: <http://amirunningxp.com> and it will tell you if your workstation is running XP.

HIPAA Compliance

Any health organizations still running Windows XP will be noncompliant with HIPAA and with HITECH.

According to HIPAA Security Rule section 164.308(a)(5)(ii)(B), organizations with sensitive personal health information must ensure:

(B) Protection from malicious software (Addressable). *Procedures for guarding against, detecting, and reporting malicious software.—HIPAA*
On April 8, when it will be no longer possible to update the operating system software, it will be impossible for health organizations to comply with this HIPAA Security Rule specification.

From the Department of Health and Human Services, 45 CFR parts 160, 162, and 164 of the Health Insurance Reform Security Standards, Final Rule:

Section 1173(d) of the Act provides that covered entities that maintain or transmit health information

are required to maintain reasonable and appropriate administrative, physical, and technical safeguards to ensure the integrity and confidentiality of the information and to protect against any reasonably anticipated threats or hazards to the security or integrity of the information and unauthorized use or disclosure of the information. These safeguards must also otherwise ensure compliance with the statute by the officers and employees of the covered entities.—HHS.gov

Any organization that continues to have Windows XP machines on its network—even if it's just one machine—is on very shaky legal ground come April 8. In the event of a breach, it will be very hard for legal counsel to argue that hospital/clinic administrators took “reasonable and appropriate” measures to protect private health information if the system was attacked via an unpatched, unsupported 12-year-old operating system. (Source: Laura Hamilton, Additive Analytics Blog, 12/23/13)

Crystal Reports - Tips & Tricks

Displaying Multiple Parameter Selections

By Tom McElroy

When filtering data, it is sometimes necessary to allow the user to select random values from a parameters list rather than a range or a discrete value. It is a good practice to display the user's selection on the Page Header of a report. This can be accomplished by a formula that is placed in the Page Header:

Example: User selects departments 11, 12 and 21. To display the selections on one line separated by a comma, create this formula:

Note: **{?department}** is the name of the parameter field.

Crystal Syntax:

join({?department},",")

Basic Syntax

formula = join({?department},",")

result 11,12,21

To display the selections vertically:

Crystal Syntax:

join({?department},",")

Basic Syntax:

formula = join({?department},",")

To display the selection vertically, create this formula:

Crystal Syntax:

join({?department}, chr(10) & chr(13))

Basic Syntax:

formula = join({?department}, chr(10) & chr(13))

result 11

12

21

Note: chr(10) is the value for a line feed (LF) and chr(13) is the value for a carriage return (CR).