

Professional Software, Inc. Wins Sage Eagle Award for 2013-14

Sage Eagle Award 2013-2014

At the Sage Summit conference in July, Professional Software was awarded the prestigious Sage Eagle Award for the fourth year in a row for consistently delivering extraordinary customer experiences. Professional Software was also awarded the Sage Customer Excellence Award for the second year.

The Sage Eagle Award, part of the Sage Partner Advantage Awards that acknowledges partners for top performance and excellence, honors one Sage business partner for demonstrating the highest level of extraordinary customer experience as measured by top renewal rates and Net Promoter Scores achieved in the Customer Loyalty Program.

“For four years in a row, Professional Software has excelled, placing customer needs as a top priority and creating experiences for businesses to be successful and confident in their decisions,” said Donald Deshaies, vice president, channel strategy and management, Sage North America. “Congratulations to the entire team at Professional Software for this big win!”

Doug Jenkins, President of Professional Software, said, “We want to all thank all of our customers who took the time to participate in the Sage Customer Loyalty Survey. We place a high priority on customer service, so to be honored for this again on a national level is a great testament to our staff.”

These honors were presented at the Sage Summit 2014 conference, July 28, 2014, at Mandalay Bay in Las Vegas, NV.

JobOps Roadmap

The JobOps 2014 version was released on July 18th and work is proceeding on the 2014 R2 targeting for a November, 2014 release date. This R2 version will include:

- A SQL version.
- Time Tracker Parts Usage and Svc Ticket Billing Parts Entry to be rewritten as one.
- New fields for Source Journal and Registry Number will be added to the transaction file for

future enhancements to the WIP Reconciliation Report.

- Configurator and CEM will be enhanced to the Providex Data Dictionaries.

In the first half of 2015 an ACS MultiBin Integration will be available for an optional module charge.

All user manuals are being updated and when completed will be available as a pdf at no charge. Each version has a user guide. If you need or want user manuals, contact

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QUICK BYTES

Yearend Updates and 2015 Tax Table Updates

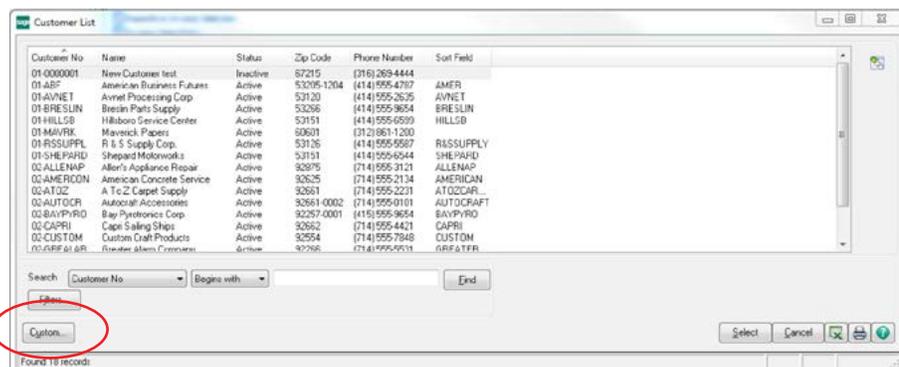
Yearend Updates and 2015 Tax Table Updates will be released after Dec. 25th. We should know specific release dates by mid-December.

Creating a Custom ALE (Advanced Lookup Engine)

By Mary Mays

Have you ever wanted to export some Sage 100 info quickly to Excel? Using the ALE custom feature allows you to create personalized data sets that can then be exported to Excel.

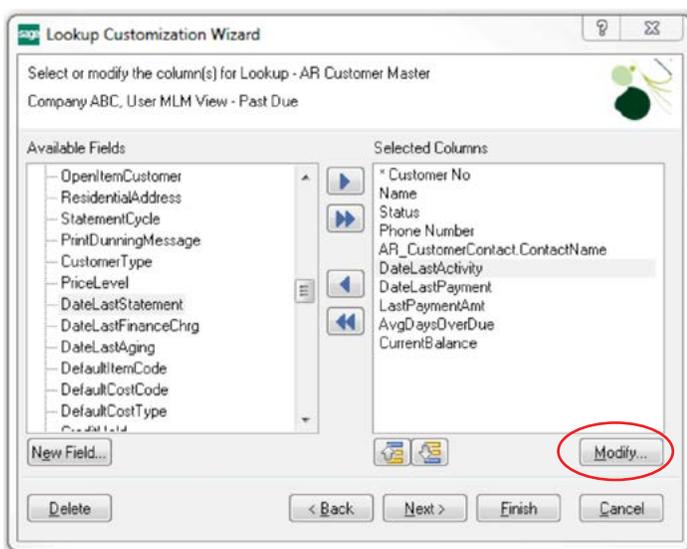
In any module, click the magnifying glass 'lookup' button to bring up the lookup screen. The default lookup is called Standard. We will be using AR Customer lookup to create a 'customer balance due' list for the examples in this article. **Click the Custom button** in the lower left corner (if the Custom button is not available then the lookup is universal and is not available for customization).



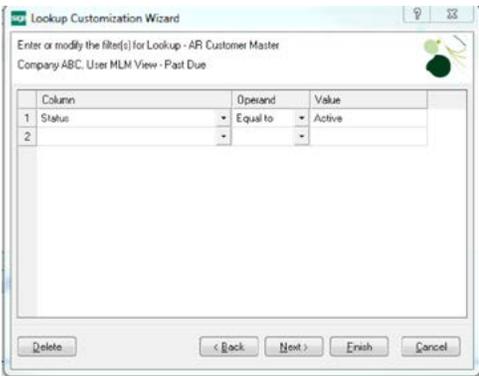
Give your lookup a description and if you want the new lookup to become your default lookup view, click the Default View box. This can be changed later by editing the ALE. Click Next.

You'll see a screen to select or deselect the info that can be included in your lookup. The first item under Selected Columns that has the * next to it CANNOT be removed, but it can be modified.

Remove zip code and sort fields by highlighting the item on the right side and clicking the single arrow pointing left. These items then go back to the Available Fields list. If you scroll down the Available Fields you will see there are many items to choose from, including any user defined fields. Highlight the field you want then click the single arrow to move it over to the Selected Columns side. I will add a contact name, date of last payment, date of last activity, last payment amount, average days overdue and current balance. If you want to change the order of the fields under Selected Columns, highlight the field and click on the move up/move down arrows located at the bottom of the panel.



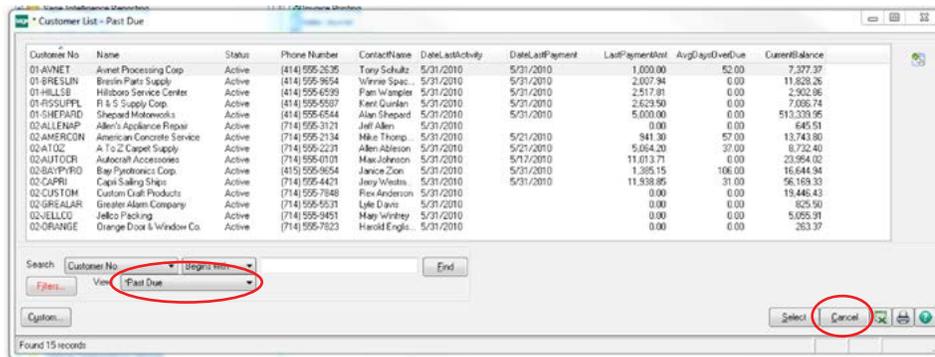
Use the **Modify** button to control what will display for the column heading information and whether the info is center, right or left justified and the numeric mask if numeric field. Choose New Field button to create your own calculated field using a selection of the Available Fields on the left.



Click Next and choose any filters. For this example I will select only active customers. Under Column, click the pull down arrow to display available choices; under Operand choose Equal to and for Value choose Active.

You can add additional filters, for example CurrentBalance Greater than 100.00. After making all filter selections click next and change the Title that will display in the upper left corner of the lookup. You can also change the Default search Column.

Click Finish and the lookup will be displayed.

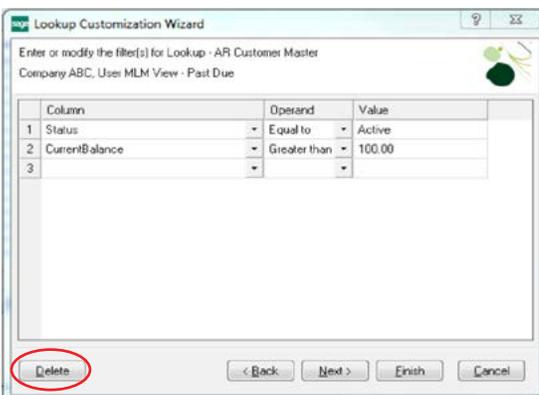


Notice the Filters button displays in **RED** indicating you have filters selected. You can click on any of the column headers to change the sort order of the list. If you want to change the fields, click on the Custom button and click Next to go back to add or remove any fields. You can add or delete any of the filters. When satisfied with the data, click the

Excel button on the lower right of the screen to export the info and open Excel.

Any of the ALE's you create along with the default will be available and listed in the drop down next to View.

If no data displays in your lookup, it is possible the Filter is wrong. Simply click the Custom button and go back through the screens. You can delete the filter by setting the Column back to None. **DO NOT click the Delete button here** as it will delete the entire lookup, unless you want to start over with a new lookup.



If you are unsure what your Value should be in a Filter, create your lookup first and look at the data under the column for the correct value choice, then edit the lookup. Once you have created a Custom lookup, to create another in the same program click Create new view next to View.

Custom lookups are a useful way to create a data set that can be exported to Excel without any custom programming. If you're a new user, start with something simple and then spread your wings with more complicated ALE's. Contact PSI if you have any questions.

Some additional suggestions for custom lookups:

- In PR Employee maintenance create a listing for hire date.
- Payrate listing to Excel to use a calculation for a % pay increase.
- Add account type or CashFlowsType to GL Account Maintenance lookup
- Add source to Invoice History Inquiry lookup to see whether the invoice comes from A/R or S/O; in AR Customer add salesman and commission rate.
- Employee, Customer or Vendor address listings for mailings.

Sage 100 ERP Supported Versions

Sage is no longer providing product updates, yearend updates or Tax Table updates for the 4.3 or 4.4 versions. This can become a critical issue for those of you with payroll on one of these versions at yearend, particularly if you are required to file electronically to the federal or state government. There are changes to the electronic reporting format this year and you will be required to upgrade to a newer version prior to the end of this year in order to be able to file electronically. All W2 printing and electronic filing will be done through the Federal and State e-Filing Module from now on.

December 31st will be here before you know, so prior to December, clients running on these older versions will need to be upgraded. Below is the support timeline for each version.

Sage 100 ERP (Formerly Sage ERP MAS 90, 200, 200 SQL)	2014 (Standard, Advanced, and Premium)	2013	4.50	4.40
Release date	Feb-14	Dec-12	Aug-11	Feb-10
Phone and web case support (Retirement date)	Yes	9/30/16	9/30/15	9/30/14
Quarterly and year end updates (AP and Payroll as needed to support State and Federal eFiling)*	12/31/16 (Use eFiling and Reporting)*	12/31/15 (Use eFiling and Reporting)*	12/31/14	12/31/13
Tax table updates (TTU)	12/31/16	12/31/15	12/31/14	12/31/13
Product updates (Formerly service updates)	Yes	Yes	6/30/13	No
Hot fixes**	Yes	12/31/15	12/31/14	12/31/13
Online support knowledgebase	Yes	Yes	Yes	Yes

*As previously announced, the Electronic Reporting module has been retired this year. Even though Sage will no longer be updating the standard preprinted payroll and accounts payable tax forms (W-2, 941, and 1099) and the Electronic Reporting module for all versions as of tax filing year 2014, you will still have the ability to print all of these forms and many more using the Federal or State eFiling menu tasks. You will be able to print and/or electronically file W-2, 941, 1099, plus 250+ signature-ready federal and state tax forms to plain paper. There is no cost to print, but there is a minimal cost to eFile.

To schedule an upgrade, please call our office – (316) 269-4264.

Yearend Planning



It's never too early to start planning for your yearend processing of W-2s, 1099s, and the electronic filing of these forms. As Sage announced last year, 2013 yearend was the last update they would be providing to the standard W-2 and 1099 form printing and to the Electronic Reporting module. This doesn't mean that the standard W-2 and 1099 form printing won't work, but it does mean that if there are form changes, Sage won't be providing updates to accommodate any form changes.

For the 2014 filings there aren't any W-2 form changes for 2014 so you will still be able to print on the preprinted 2 per page or 4 per page W-2 forms. The 2014 1099 form does have 2 field changes. The foreign country and foreign tax fields have been removed and are now blank fields. W-2 and 1099 forms printed through the Federal and State eFiling module must be printed on perforated plain paper sheets not on the preprinted forms that you usually purchase. These perforated plain paper forms can be purchased online from Sage Forms or Deluxe Forms. I have not found these plain paper forms at Office Depot stores.

The W-2 and 1099 electronic formats have changes for the 2014 tax year. Since the Electronic Reporting module is no longer supported, the only yearend updates for filing electronically will be to the Federal and State eFiling module. If you create your file using the Electronic Reporting module, it will not be accepted at the Social Security filing site. You will need to file electronically through the third party processor Aatrix. I've been told by Aatrix that there will not be a charge to file federally through their system, but there will be a charge to file electronically to state. We'll have more details closer to yearend.

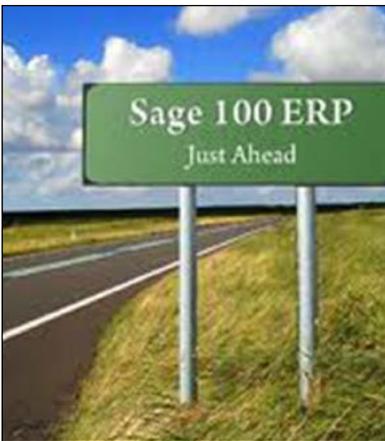
Aatrix does have W-2 package pricing at www.Aatrix.com. See below for the complete W-2 eFile Service pricing and what's included. For \$1.89 per employee, Aatrix will take care of everything.

Complete W-2 eFile Service only \$1.89/employee!

The Complete W-2 eFile Service includes:

- W-2s are printed & mailed to your employees.
- W-2s are hosted online for your employees to access at any time – no more reprinting lost W-2s.
- File your Federal W-2s & W-3.
- File your State W-2s & required reconciliation form.
- Print your employer W-2s.

Sage 100 ERP Roadmap



At the 2014 Sage Summit conference in July some of the potential new features and enhancements for future versions were revealed. Some features are still in the research phase and others are at the point that they are listed as part of the upcoming 2015 version release.

The Sage Data Cloud along with mobility seemed to be the big focus of the conference. The Sage Data Cloud feature allows web Connected Services such as Sage Mobile Sales and Mobile Services to run on a cloud platform and integrate to an on-premises ERP system. Two new cloud options for the 2015 version that were previewed were Sage CRM online and Sage Time. We'll have more information on these at a later date.

Some enhancements currently in the works for the 2015 version are:

- Vendor name expansion
- Addition of Purchase Order History (similar to Sales Order History)
- Ability to copy from an existing Purchase Order to create a new PO
- Keep Open for PO/SO forms
- AR Cash Receipts flashlight lookup
- Reporting for Affordable Care Act for over 100 employees
- The possibility of allowing for a limited number of approved third party credit card processors to be used with the Credit Card Processing module

Enhancements being considered for the 2016 version are:

- Easier completion of Purchase Orders
- Expansion of AR Data Fields
- Ability to inactivate, delete or renumber warehouses
- Receipt of multiple orders on an invoice for PO & SO
- Paperless Office email log

All of these listed potential features are tentative. We won't know for sure until the final 2015 version of Sage 100 ERP is released either at the end of 2014 or the first part of 2015 which features will be included.

Tech Corner

By Tom McElroy

Google Alerts is a free online tool that will search the Internet for any topic that you designate and then email you the results whenever something new on the topic is found. You do need to have a Google account in order to create alerts.

Go to <https://support.google.com/alerts/> for information about creating an alert. Or go to www.youtube.com and search for "Google Alerts" for tutorials on this feature.