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Headline News

Sage is Rebranding!

MAS 500 to be renamed
Sage 500

In January Sage will begin client
communications about the
product name changes that will
roll out towards the end of 2012.

[Read More about the Sage
Rebranding](#)

Sage MAS 500 Product Roadmap Update Including Product Update 1 And Upcoming Version 7.5

The Sage ERP MAS 500 Product Update 1 download now is available from www.sagesoftwareonline.com. This release includes useful enhancements, some of which are being made available for both Version 7.3 and Version 7.4. Here we cover the features of Product Update 1 and preview the recently updated product roadmap for Sage ERP MAS 500.

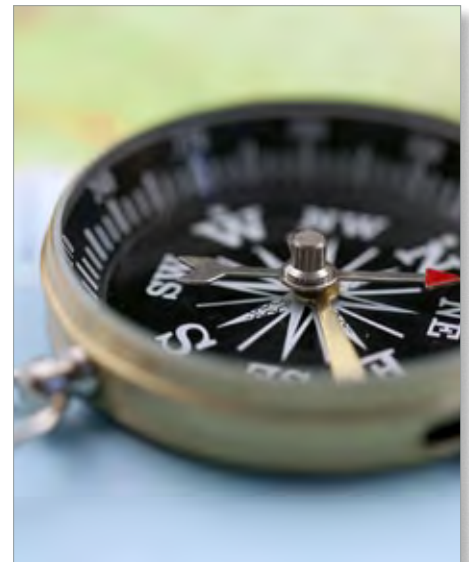
Product Update 1 Enhancements

Credit Card Processing

Product Update 1 gives you the capability to process a Credit Card Post-Authorization in excess of the Pre-Authorized Amount. This enhancement is included in the August 2011 Product Update for both Sage ERP MAS 500 Version 7.3 and 7.4.

Typically the pre-authorization is run when an order is received to verify available credit. When the order ships, the post-authorization is processed. This enhancement enables you to set a limit on how much the post-authorization amount can exceed the pre-authorization amount. The limit can be either a percentage or a dollar amount, and can be set separately for each customer.

When a post-authorization is processed, if the amount exceeds the pre-authorization and is within the limit, the transaction goes through using the original authorization code. If the amount exceeds the pre-authorization and falls outside the limit, the transaction fails and the user is prompted to contact the customer.



ACH Remittance Advice

Another new feature, Print ACH Remittance Advice, has been added for Version 7.4 only. A new task has been added to the Accounts Payable Activities menu. Once an ACH Remittance batch is successfully generated and posted, you can use this task to print the Remittance Advice, which is essentially a voided check with the remittance details. The ACH Remittance Advice provides an audit trail or file copy for those businesses whose processes require copies of vouchers to be filed with a check copy, or to be mailed to the vendor for reference.

Product Roadmap Update

Sage keeps customers up to date on the future development of the software by publishing a Product Roadmap. It is worth

(continued on page 2)

noting that Sage develops products using an Agile development methodology, so any of the milestones, features, release periods or versions can change, but here is the current plan.

The current roadmap extends to the end of 2012. Product Updates are scheduled to be released on a regular basis during this period, with the next big release, Version 7.5, scheduled for Q4 2012. Between now and then, there will be two releases for Sage MAS Intelligence.

Sage MAS Intelligence

Planned for release this quarter are reporting tree, report distribution, and performance enhancements for Sage MAS Intelligence (SMI). Reporting trees will add easy-to-learn organizational reporting, and include support for multi-company consolidations. Performance improvements are planned to focus on the areas of GL data loading and general report loading. Report distribution is enhanced as well, allowing you to easily set up and fully automate report distribution to all the stakeholders in your organization. Rich text e-mail distribution is supported, as well as conditional distribution based on report content. You will be able to publish reports in multiple formats (PDF, XLS, HTML) on local and networked locations, and create convenient Windows shortcuts for any report.

Sage also is working on a utility to convert Microsoft FRx reports to SMI, with a planned release date in early 2012. The utility will convert native columns like Actual/Budget columns as well as calculated columns that involve basic arithmetic. Reporting Trees and Catalogs are planned to be converted as well. Due to limited correlation between FRx and Intelligence row formatting, manual rework will likely be required post-conversion. No conversion is planned for multicurrency calculations.

Version 7.5

Planned for Q4 2012, Sage ERP MAS 500 Version 7.5 enhancements will fall into several areas including: productivity, manufacturing, upgrades and customization, and Sage Exchange.

Productivity Enhancements

The planned productivity enhancements focus on feedback from customers. The following features are under consideration for the release:

- » Multiple e-mail recipients for document transmittals
- » Means to perform mass pricing updates
- » Reversal of Credit Memos applied to Debit Memos and Invoices
- » Hard close of sub-ledger fiscal periods
- » Track miscellaneous cash receipts in AR
- » Import pending cash receipts
- » Batch authorization for recurring credit card transactions

Manufacturing Enhancements

Sage is focused on improving workflow and usability in the manufacturing modules. Features under consideration include:

- » Batch entry of material issues
- » Add scrap factor to material step to allow for shrinkage
- » Support use of non-inventory items
- » Backflush setup hours option
- » Easily cancel work orders created in error

Customization Enhancements

Sage continues to work to ensure customizations survive upgrades. In addition, the following new customization capabilities are under consideration:

- » Base form fields available in the form chooser
- » UDF data flow from one module to another
- » Call control events within Customizer

- » Script Editor
- » Customize grid lines in Enter Sales Order
- » Additional APIs to isolate custom work

Upgrade Enhancements

Sage has an ongoing commitment to reduce costs associated with upgrades and updates. Under consideration in this area are:

- Smart Install of Customization Report
- Smart Install Comparison Tool
- Auto Update Tool

Sage Exchange

It is planned that Version 7.5 will take full advantage of the features of Sage Exchange. The Sage Exchange integrated payment solution platform provides a PA-DSS certified environment that facilitates the exchange of payment data. Sage Exchange connects to a new Sage Exchange Virtual Terminal with card swipe capability, and new best-in-class encrypted point-of-sale terminals

Retirements

Support for Sage ERP MAS 500 version 7.05 and 7.2 ended September 30, 2011. If you are still using either of these versions, it is time to start planning your upgrade. Give us a call for assistance or with your questions about the product update.

There are so many aspects of what makes employees productive and countless little things that make your people loyal and dedicated employees. A decade ago many organizations were just figuring out how they were going to approach technology and now most of us feel like a slave to it. The reality is that for most company's employee retention is high on their priority list but few take into account how their employees use technology and its impact on the psyche of their front line personnel. Customer Relationship Management (CRM) is one of the tools that can make a huge difference in those efforts.

CRM Defined

If you ask twenty people you would probably get twenty different definitions for CRM. In simple terms a CRM system helps you find new customers, enables sales people to work through the acquisition process, and then enables your customer service teams to keep your customers happy so that you can expand your business relationship. In software publisher terms CRM is a 360 degree view of your customers and prospects from a Marketing, Sales and Customer Service perspective. In the real world a CRM system can be the operational heartbeat of your company and a centralized place that holds everything you know or want to know about your customers. More importantly, it can also handle many of the critical handoffs and processes between various departments.

The Information Superhighway

One of the most frustrating parts of any job is not having the right information at the right time in order to do the job you were hired to do. With the speed of business and customers expecting things in "Internet time" the pressures of performing have been taken to a new level. This is where CRM can help alleviate stress and bottlenecks in your organization. If people

have access to the information they need (even if they don't know they will need it) then job satisfaction and morale can stay high. Add to the mix the fact that so many employees work as remote employees or are always on the run at client sites or meeting with prospects, then you will see why access to information has become more important than ever before.

Practical Customer Approach

One of the most often asked questions is how should you approach CRM considering there are so many aspects of how the technology works and what it can be used for. The answer to the question is usually as unique as your individual customer environment. The best practice to figure out what people need is to pull them into a room and ask them directly. Find out what are the most common pain points in either trying to marry Sales and Marketing or the most common requests that come between Sales and Operations or Service to understand your high priority items. Then, come up with a plan to address a few issues at a time while building an evolving plan for what your CRM environment should look like.

Case in Point

Many of our customers are focused on trying to build their businesses with limited resources and many do not have full time marketing teams. If this is the case a CRM system can help you build the business by enabling your sales team to receive leads quickly and give marketing people feedback on what works and doesn't work when trying to attract new customers or business from existing customers. Other customers are more focused on the process for onboarding new clients utilizing a systematic process for workflow and notifying team members at key points in the sales process - which CRM can help with by automating your sales cycles. Lastly, when a

customer say "Yes" and needs to move into your financial system or have orders placed, most CRM products now have integrations to your back office that can reduce or eliminate duplication of efforts. All of these scenarios can help you make the organization healthy and happy. More importantly, you can realize lower training and recruiting costs and realize more productivity per employee.

Food For Thought

If you have already employed a CRM system or what you have tried in the past doesn't seem to have the effect that you want it to have, then maybe it is a good time to engage in people that specialize in CRM. It's always a good idea to take what you know and get a second opinion. In many instances we have found that there are simple tweaks to an existing system or small enhancements that go a long way towards CRM adoption. If you are a neophyte in the world of CRM a consultant can also educate you on many of the pitfalls and how to avoid them so that your CRM system becomes meaningful and critical to your success. Whether or not you rely on external experts to help with your CRM, it is very important that you establish a feedback loop with your most important assets...your people. As the marketplace is constantly evolving your CRM platform will never be "finished" but more likely move from phase to phase as you adjust to what the market demands.

Sage MAS Intelligence Tips And Tricks

Sage MAS Intelligence (SMI) is a powerful new tool in Sage ERP MAS 500 that was primarily adopted to replace Microsoft FRx, which is being retired by Microsoft. Naturally there is a learning curve associated with getting the most out of any new tool. Here we provide some tips on getting started with creating custom financial reports in the SMI Report Designer.

Excel Friendly

The SMI Report Designer sensibly starts with Microsoft® Excel®, a tool with which most accountants are very familiar, and adds functionality. The Report Designer requires Microsoft Excel 2007 or above, and gives you flexible report design capabilities from raw data in Excel.

Report Templates

Currently, the Report Designer functionality is available for two reports, one for single-company financial reports and one for consolidated financial reports for multiple companies. You can start creating your custom report by copying these reports to use as templates and then modifying them. After you design a new report format, remember to create and link the template back to the copy of the report you made.

Getting Started

To access the Report Designer, run the desired report. When Excel opens, access the Report Designer using the BI Tools tab. Once Intelligence is installed, the Add-Ins and BI Tools tabs will always show in your Excel workbooks.

Mapping Accounts

You may need to map the Report Designer reporting groups to your system accounts. This is done within the individual report.

We recommend that you copy the Financial Reports Designer report and rename it to Mapped Designer Template. Map the accounts as follows:

1. Select the report.
2. On the Parameters tab, set the **Fiscal Year default** to *2010* and the **Budget Code default** to *Original*. To do this, right click on the field and select Properties. After selecting the default, click OK.
3. Select the **Mapped ABX Designer Template** and run the report. Select **OK**.
4. Map the UnMapped System Categories into Reporting Groups. First select a reporting group in the right most column and then select the unmapped category in the left most column. Select **Add**. Select **OK** when all categories have been mapped.
5. Click **OK** to the message about successfully mapping your categories.
6. Minimize Excel and right-click on the Mapped ABX Designer, select to create and link the template.
7. Click **OK** to select the Mapped ABX Designer Template Workbook.
8. Click **Yes** to clear the contents of worksheet 2.
9. Click **OK** to accept the template name. By default the template name is the same as the report name. It is recommended that you keep the template name and the report name the same.
10. Select **Yes** to replace the existing template.
11. Select **OK** to accept that the template was created successfully.

Working With Report Designer

Here is an example of creating a rolling three month report for January (assuming a calendar fiscal year) using the Mapped Designer Template. We will remove the

budget columns and add in the appropriate period columns.

1. Copy the Mapped ABX Designer template and paste it into the **Financials** folder. Right click on the copied report to rename it to *Three Month Report*. Click **OK** to assign the new template name.
2. Select the report and click the Parameters tab. Select the Budget parameter and click **Remove**. Click **Yes**.
3. Run the report using the default parameters.
4. From the BI Tools tab, click **Launch**.
5. Click **Load Layout**. All of the available layouts for the report are displayed. Click **Copy** for the row **IS - Actual vs Prior**.
6. Enter January Report – 3 month as the new layout name and click **Next**.
7. In the report designer, note the columns area in the top right section. Click **Clear All** to remove the existing column definitions, then select the columns you need from the green Columns Tab in the center of your screen. Select columns for **ActivityPeriod01**, **PYActivityPeriod12**, and **PYActivityPeriod11** in that order. Click **Add Spacer** to make spaces between the columns.
8. Click **Generate Layout** and click **OK** when the layout has generated successfully.
9. Change the headings from Periods 01, 12, and 11 to January, December, November.
10. Minimize Excel and create and link the template to the Three-Month Report report.
Give us a call with any questions or for assistance with the SMI Report Designer.

Keys to Selecting An In-house Payroll System

Choosing the right payroll system for your organization is a big decision. Should you process payroll in house or should you outsource? What features and options does your company require? If you are thinking of making a change to your payroll processing, now is the time to plan and implement it, so you can be ready to start fresh in the new payroll year. In this post, we discuss 10 key factors to consider when selecting an in-house payroll software solution.

10 Key Factors To Consider

When selecting a payroll processing solution, you will want to think about the features that are important to your company and develop a Request for Proposal (RFP). This will make it easier to evaluate the products available and choose a solution that meets your needs within your budget. You will need to consider who will be on your evaluation team, your functional requirements, the vendor qualities you value most, hardware required, and how you plan to implement your new solution.

1. Evaluation Team

It is advisable to create an evaluation team to provide requirements and evaluate options. Make sure your team includes representatives from every department that is a stakeholder in the payroll process. Your team may include human resources (HR), information technology (IT), accounting, and the executive team. This helps to ensure buy-in from all departments and that you select the best product for your organization as a whole.

2. Payroll Tax Management And Reporting

When evaluating software vendors, check into their process for updating tax table information. It is preferable to receive updated tax table information automatically at regular intervals, such as once a quarter. In addition to federal, state,

and local tax table updates, the software should support supplemental tax tables, pre-tax deductions, EFTPS (Electronic Federal Tax Payment System), and electronic media reporting for all jurisdictions.

3. Security

Obviously, your payroll system contains extremely sensitive data, including employee social security and bank account numbers, as well as your company's payroll accounts. It is absolutely essential that any payroll solution you select be protected by a comprehensive, yet easy-to-configure security system. Rules should govern who can view, modify, approve, report, or otherwise access information.

4. Payment Flexibility

Offering employees flexible payment methods empowers them to better manage their finances and affords your company the opportunity to save on payroll costs. Direct deposit and payroll cards both cost less than printing paper paychecks. And these methods reduce the risk of check fraud and eliminate the cost of replacing lost or stolen checks. The ability to support all three types of payment allows your organization to be much more flexible on payday.

5. Employee Self Service

A paycheck is an employee's most important benefit, so it is not surprising that payroll generates many employee questions. Choosing a system that supports employee self service allows employees to access their own payroll information themselves and reduces the volume of questions coming into your payroll or HR departments.

6. Integration Capabilities

Evaluate the ability of the payroll software to integrate to your existing HR

and general ledger software, as well as other related applications, such as timekeeping. Can the system or service easily exchange data with other software applications? There are many benefits of having integrated HR, payroll, and general ledger systems, including:

- » No duplicate data entry eliminating errors and saving time.
- » Less paperwork. When payroll, HR, and accounting data are integrated, you can reduce unnecessary paperwork.
- » Integrated reporting. Consolidated reporting is valuable to management, and is greatly simplified with integrated databases and reporting tools.

7. Vendor Reliability

There is no room for error when it comes to providing employees with their paychecks. When choosing a payroll solution, select a vendor with a proven track record in offering excellent payroll products and support. Note how long the company has been in business and the number of clients that use the software. Check references from other companies using the system. To get the most applicable information, ask the vendor to provide reference information for companies similar to yours.

8. Hardware

Hardware requirements are an important consideration when selecting a new solution for processing your payroll. Will the IT department have to purchase any additional equipment in order to support an in-house software solution, or does the software run on operating systems and hardware that the company already owns? This is a key area to consider, especially when deciding whether to replace an outsourced payroll solution with an in-house payroll software solution.

Keys to Selecting An In-house Payroll System

(continued)

9. Data Transfer And Conversion

Consider how data from your existing system will be entered into the new system. Will the data need to be manually entered or can it be imported? It is particularly convenient if the vendor offers an easily customizable link to transfer data from one system to another. This link often involves setting up translation tables that equate fields in the old system to fields in the new system. Once the data is transferred, you must verify that all information is correct. A good way to do this is to run reports from both systems and compare the results.

10. Implementation Resources

Keep in mind the amount of manpower typically required during a software implementation. Estimate the amount of time and resources you will need to ensure an accurate transition from your old payroll system to the new system. Consider your staffing requirements for any additional data entry or for analyzing reports for accuracy while performing side-by-side processing of your new and old payroll systems.

After the implementation of the new system is complete, consider running both the old and new payroll systems in parallel for a period of time to ensure the accuracy of your new system. This period is up to the discretion of the company it can be one payroll run, a month, or three months. Accuracy of data can be determined by running the appropriate reports. In particular, cross-referencing the numbers on payroll history, check history, earnings, deductions, and tax reports is a good way to determine if everything is set up correctly in the new system.

Conclusion

When selecting and deploying a new payroll processing solution, there are many factors to take into consideration. One of the most important of these is choosing a software vendor known for experience in the payroll software industry with a reputation for reliable business solutions and world-class customer support. Sage has been an industry leader in mid-market Payroll and HRMS systems for 20 years. Call us to discuss your payroll solution needs.

Understanding The Section 179 Tax Deduction:
Why You Should Consider Software or Hardware Before Year End
[Learn More](#)

UPCOMING WEBINARS

Did You Know Sage MAS 500 Could Do That?
November 9, 2pm ET

Understanding The Cloud & Managed Services Trend in IT
November 10, 2pm ET

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IN THE SPOTLIGHT:

New User Blog And Virtualization With Sage ERP MAS 500

New User Blog And Customer Roundtables

Sage ERP MAS 500 customers now have additional sources of information about the product and Sage activities—a new user blog begun by Product Manager Linda Cade. In a recent post she wrote, “My wish is for this blog to be a vehicle to build the Sage ERP MAS 500 user community as we share news and experiences about the software and about how each of you are using it in your business.”

You can log onto the blog at: <http://sageerpmas500users.wordpress.com>. Topics covered on the blog include news about upcoming features, highlights of existing features, thoughts on feedback from customers, news from Sage, and shared experiences as Linda Cade talks with Sage ERP MAS 500 customers.

Linda Cade also has instituted a series of Customer Roundtables on various product-related subjects. The first in the series centered on Business Insights and took place on August 24, 2011. Approximately 32 customers were in attendance. These informal sessions typically will open with a brief demonstration of a particular software feature followed by a peer-to-peer discussion on how customers are using the feature, and how to get the most from it. Linda anticipates these sessions will be held quarterly on various topics as proposed by the group.

If you would like more information about the blog, the round tables or just want to connect with Sage, you can reach Linda Cade in the following ways:

- » Facebook: [linda.cadeSagePM](#)
- » LinkedIn: [Linda Cade](#)
- » Twitter: [@LindaCade1](#)
- » YouTube: [lscade](#)
- » e-mail: linda.cade@sage.com
- » Subscribe to the blog: <http://sageerpmas500users.wordpress.com>

Virtualization With Sage ERP MAS 500

Virtualization allows you to allocate hardware resources among multiple virtual environments all running on the same machine. Application virtualization is the use of software to allow multiple application images (such as Sage ERP MAS 500) to run on the same hardware at the same time. The benefits of Server Virtualization include the ability to parallel process on the previous and new software versions during an upgrade, as well as take advantage of the full CPU capabilities of an under-utilized physical server.

On the workstation side, benefits include the ability to run multiple virtual machines on a single PC, and quickly deploy and reconfigure physical machines. In both cases, you easily can roll back and restore a virtual machine. The main drawback is that you may experience a 12% to 15% performance degradation when running in virtual environments. The hardware and software minimum requirements for a virtual environment are the same as for a normal physical environment.

In general, Sage ERP MAS 500 supports Citrix, VMWare, and Microsoft Terminal Services virtual environments. Microsoft

Hyper-V only is supported on Windows 2008 server. Call us for more specifics on supported environments if you would like to deploy a virtual server and/or client environment.

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