

Sage 500 ERP

# Frequently Asked Questions for Sage Customers

Sage 500 ERP 2013

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The release of Sage 500 ERP 2013 is driven by the desire to deliver ongoing value to our customers while continually updating the software to maintain compatibility with current market needs. As such the new features delivered in this release are easily aligned to the needs of individuals within a typical ERP organization, either as they relate to their particular tasks or related to overall usability of the product.

## 1. What's new in Sage 500 ERP 2013?

- **Accounting and Finance Enhancements**

New functionality allows for the import of pending cash receipts and the ability to track miscellaneous cash receipts within Accounts Receivable. Sage 500 ERP 2013 also now includes options to lock down postings to sub-ledgers individually in preparation for period end closing, making it possible to manage period end closing more smoothly.

- **Credit Card Processing**

Sage 500 ERP 2013 introduces Sage Exchange for credit card processing. Sage Exchange is built on cloud-based technology that provides the integration between Sage 500 ERP and the Sage Payments Gateway. The adoption of Sage Exchange allows for the introduction of additional payment entry options to make payment processing easier and faster, including card swipe capabilities and mobile payments.

- **Connected Services**

Sage 500 ERP Sales Tax, by AvaTax--a hosted, web-based solution that automatically performs address validation and sales tax jurisdiction research, has been further improved to support taxing verification using longitude and latitude. And Sage 500 ERP 2013 now also includes Sage 500 ERP Shipping by SmartLine--a new web-based, fully scalable multicarrier shipping solution.

- **Customization**

The 2013 release of Sage 500 ERP includes enhancements to Customizer, making it easier to use and more powerful than ever. You can now check the syntax on customizer scripts before saving them with the new "Check Syntax" button, take advantage of additional custom controls, and even add custom tabs to an existing tab layout—all in a manner that will survive future upgrades.

- **Ease of Use**

The 2013 release includes a number of features and enhancements designed for this purpose, including: Visual Process Workflows, Multiple email recipients for document transmittals, Keyword replacement during document transmittals, and consistent posting across all modules.

- **Manufacturing**

Sage 500 ERP 2013 introduces enhancements specific to manufacturing operations, including new functionality that allows the use of non-inventory items in manufacturing routings and bills of material, the ability to backflush setup hours, and an option to delete or cancel work orders.

- **System Management**

The new enhancements in Sage 500 ERP 2013 make managing the ERP system easier than ever. Visual Process Flows reduce the learning period for new employees, while at the same time providing you with an editing tool so you can design your own processes. Updates to Sage Advisor provide new server-side statistical information, awareness and tracking of third-party add-ons, and notifications of pending updates available for download. And Sage 500 ERP 2013 also introduces SAP Crystal Reports 2011 (Version 14 for Sage 500 ERP), in addition to Crystal Reports Version 11.0 R2, to provide you with even more options.

## **2. Why should I upgrade to Sage 500 ERP 2013?**

1. Improve cash flow by processing and tracking cash receipts efficiently and accurately with new import and tracking capabilities.
2. Reduce errors with easier to use bank reconciliation tasks and sub-ledger enhancements that provide controls to lock down postings for period end closing and maintain reporting integrity.
3. Process credit card payments with ease and confidence – anywhere, anytime with Sage Mobile Payments.
4. Reduce fraud exposure storing sensitive cardholder data in the secure, cloud-based Sage Exchange Vault.

5. Experience increased access and flexibility to view payments information on the web through a tablet or desktop via the Sage Exchange Portal.
6. Perform updates faster and easier when cost factors or other parameters necessitate a global pricing change with new Global Price Base Change and Global Price Group Change features.
7. Ship cost-effectively and efficiently while improving delivery times with Sage 500 ERP Shipping, a new web-based, fully scalable multicarrier shipping solution.
8. Protect profitability and increase accuracy of accounting for setup hours with new features specific to manufacturing operations that include cost reminders and the ability to designate setup hours to backflush always, never, or manually.
9. Save time navigating business processes with Visual Process Flows by demonstrating the steps of a process in visual terms, but also include links to the various tasks along the way.
10. Protect customizations with new enhancements that make it easier to customize the screen and workflows, and to have those customizations survive future upgrades with Expanded Customer Controls.

### **3. When is Sage 500 ERP 2013 available?**

Sage 500 ERP 2013 has been released on November 28, 2012 and is available for download. Log onto the Customer Portal to download your copy of Sage 500 ERP 2013. DVD's are currently scheduled to be available for purchase in December 2012.

### **4. Which improvements have been made to Cash Receipt management?**

New functionality in Sage 500 ERP 2013 allows for the import of pending cash receipts and the ability to track miscellaneous cash receipts within Accounts Receivable.

The increased use of electronic funds transfers, lock boxes, third-party webpages, and alternative collection methods means that manual entry and application of customer checks against invoices is often no longer sufficient. To address this need, a new import entity has been added to the "Maintain Import Job" task in Data Import Manager.

Miscellaneous Cash Receipts are not always easily tracked and can cause issues to arise in accounts receivable and cash management when it comes time to perform reconciliations. Sage 500 ERP 2013 now includes enhancements to standard reports and views that include miscellaneous cash receipts, saving time, and increasing visibility.

## **5. Does Sage 500 ERP 2013 provide mobile payment entry options?**

Sage 500 ERP 2013 allows payments to be collected anytime, anywhere, by smart phone. Ideal for cash sales, Sage Mobile Payments immediately captures the cash transaction information and sends it to Sage Exchange, for secure transfer to Sage 500 ERP 2013.

## **6. What is new in Sage Exchange for Sage 500 ERP 2013?**

Sage Exchange is the technology which integrates Sage 500 ERP with Sage Payments Gateway so that all forms of payment (credit, debit, checks) can be accepted and integrated into an accounting package. It consists of two key elements: the Sage Exchange Portal and the Sage Exchange Vault.

The Sage Exchange Portal provides a configurable dashboard and flexibility to view payments information on the web through a tablet or desktop. This dashboard can be customized to gain access to the information that is important to you.

The Sage Exchange Vault is a secure, cloud-based data center for storing all sensitive credit card information outside of Sage 500 ERP, as well as for processing credit card transactions. For added cardholder security, Sage 500 ERP 2013 will also allow a one-time use credit card for a payment transaction without saving credit card information.

## **7. What are the sales and pricing enhancements in Sage 500 ERP 2013?**

Sage 500 ERP 2013 includes enhancements that improve the pricing of items, processing of orders, accuracy of tax calculations, and the assignment and tracking of freight charges. New features in this area include Global Price Changes, Longitude/Latitude Support for Sage Sales Tax, Copy Order/Quote to New Customer, and the introduction of Sage 500 ERP Shipping by SmartLinc.

## **8. Is there a solution for my shipping needs in Sage 500 ERP 2013?**

Sage 500 ERP Shipping by SmartLinc is our new web-based system that helps get your products in the hands of customers quickly and efficiently. Shipping offers easy and secure methods to use the best rates to deploy quickly, either on-premise or in the cloud, and manage your shipping processes all the way to the printed labels, and originate shipments from the USA or Canada.

## **9. Does Sage 500 ERP 2013 offer Sales Tax capabilities?**

Sage 500 ERP Sales Tax, Powered by AvaTax, will remain compatible with the 2013 release, simplifying the sales tax payments process for any business. This hosted, web based solution automatically performs address validation, sales tax jurisdiction research, and rate calculation—all on the fly within your accounting application, with no change to your existing workflow.

## **10. What are the improvements for manufacturing in Sage 500 ERP 2013?**

Setup hours may occur at various times throughout a shift. In most cases this occurs at the beginning of a shift, but this is not always the case. Changing settings or tooling on a machine or workstation may be required as a new work order is processed for a different intermediate or finished good. Sage 500 ERP 2013, makes it easier to remember to include these costs by allowing backflush for these hours. You can designate setup hours to backflush always, never, or manually.

## **11. How will Visual Process Flows improve the user experience in Sage 500 ERP 2013?**

The new Sage 500 ERP 2013 Sage Visual Process Flows provide a graphical process-oriented interface which will help users reduce their navigation time. The pre-defined processes provide a clear view of the steps and tools required to complete a task. Use the Visual Process Flow Designer to easily create custom flows for unique needs and specific roles. These customizable processes will make it easy for new users to learn Sage 500 ERP or existing users to complete tasks which are only occasionally performed.

## **12. Which Pre-Defined Visual Process Flows will be included in Sage 500 ERP 2013?**

- Credit Card
- Sales Order and Customer Return
- Purchase Order and Vendor Return
- Process Period End
- Manufacturing

## **13. Can you customize the predefined Visual Process Flows?**

Yes, the predefined Visual Process Flows can be customized to customer's business needs and by specific user roles.

## **14. What about my customizations?**

One of the primary strengths of Sage 500 ERP is the ability to customize the software to work the way each individual business works. In the past, an ongoing concern has been the need to reapply or reinstall customizations with each upgrade applied. The 2013 release includes enhancements that make it easier to customize the screens and workflows, and to have those customizations survive future upgrades - without the need to reapply or reinstall them.

## **15. What value will the Product Updates for Sage 500 ERP 2013 bring to customers?**

The Sage 500 ERP 2013 Product Updates will include new functionality and enhancements, along with hot fixes, updates, and patches that will increase the functionality of Sage 500 ERP. Customers will be required to be current on Business Care plan in order to access and use these new features.

## **16. What are Reporting Trees in Sage 500 ERP 2013 Intelligence Reporting?**

A reporting tree allows modeling of a very sophisticated reporting structure, and the ability to easily view the organization in many different ways. Intelligence Reporting will meet the

needs of companies who have very complex corporate hierarchies and may require hundreds of tree units, as well as companies who have simple hierarchies that require fewer tree units. Sage Intelligence Reporting offers the ability to easily add or change reporting units without requiring a change to your financial data. After saving a Reporting Tree, simply link it to one or more Report Designer layouts that are saved within a workbook.

### **17. What is Report Distribution in Sage 500 ERP 2013 Intelligence Reporting?**

Report Distribution is a powerful time- and effort-saving feature that will automatically distribute reports to a file, FTP site, or email in a number of standard formats. Ideal for sending monthly or weekly reports out to line managers, or providing corporate management with tailored reports, it will help keep everyone informed on critical KPIs automatically. Report Distribution provides the ability to choose the reports, and who will receive them, as well as the flexibility to customize each email format using an existing MS Outlook profile and address book.

### **18. What are the benefits of Sage Advisor in Sage 500 ERP 2013?**

Sage Advisor is new technology that will be implemented across all Sage products in phases to help ensure customers are getting the most out of their Sage solution. The first phase of Sage Advisor will help you perform software updates more efficiently, as well as gather information on how users interact with their solution that will be used to develop future enhancements. The Sage Advisor Update tool console can be used to set notification options, review information, download and install available updates, and monitor Sage Business Care account status. Sage recommends that customers check with their certified solution provider to assist with applying updates and upgrades.

### **19. Does the Sage Advisor Update tool follow security rules and can it detect customizations?**

The Sage Advisor Update is aware of client/server type installations as well as security requirements for installation rights (such as Administrator roles). However, Sage Advisor is not automatically aware of any customizations, such as customized Crystal Reports or Third Party applications. Certain updates can impact or overwrite customizations or integrations, which is why they are not automatically installed.



## **20. What is Sage E-Marketing for Sage SalesLogix (SLx)?**

Sage 500 ERP will continue to use ERPLink for the integration to Sage SalesLogix. We anticipate the ERPLink will be available in a compatible version concurrent with the 2013 release.

## **21. What version of Crystal Reports is compatible with Sage 500 ERP 2013, and what enhancements have been made?**

Sage 500 ERP 2013 introduces the use of Crystal Reports 2011, in addition to Crystal Reports Version XI R2. Technology changes in the Crystal Reports tool between the newer version and Version 11.0 R2. Both Crystal XI R2 and 2011 runtimes from Client install need to be installed. Existing reports continue to work without any changes.

## **22. What are the technology and database updates for Sage 500 ERP 2013?**

Several technology and dataset updates have been made in the Sage 500 ERP 2013 release including support of Microsoft Windows Server 2012 Hyper-V, Citrix XenServer 5.0 or newer, VMware Server ESXI 4.0 or newer, VMware Workstation 6.0 or newer. This release supports Microsoft Windows Server 2012, Windows 8 and Microsoft SQL Server 2012. For the latest information on compatibility and more details, please refer to the Partner Portal, <https://partners.sagenorthamerica.com/>.

## **23. What is Sage ERP Subscription Licensing?**

Our new pay-as-you-go subscription licensing plans for Sage ERP solutions eliminate large upfront costs in favor of small monthly payments. Pay-as-you-go plans enable you to get the rich functionality and data security of on-premises Sage ERP solutions, for an affordable monthly financing option. Plus, customers get the added peace of mind that comes with unlimited technical support through a Sage Business Care Gold plan—our highest level of support.

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