Sage 300 ERP 2012
Frequently Asked Questions

PRODUCT

1. What's new in Sage 300 ERP 2012?

Sage 300 ERP 2012 enhancements simplify and improve your experience with easier access to information, streamlined processes, and increased mobility. Additional new customer-requested features will help you complete transactions more efficiently such as Entered By, On Hold Reason, and Requested By fields in Order Entry, copy order and create PO directly from Order Entry, and reverse GL batches. Enhanced Intelligence Reporting and Sage CRM functionality help your teams stay connected, collaborate successfully, and you reach your business goals by improving visibility across your business, simplifying your forecasting, and mobilizing your workforce. For more detailed information please go to www.Sage300ERP.com/2012release.

2. What are the top ten reasons to upgrade to Sage 300 ERP 2012 from previous versions?

The top ten reasons to upgrade to the Sage 300 ERP 2012 release are:

- Save time using Visual Process Flows, a new graphical interface tool for navigating through your system, which you can customize to your business processes and specific user roles
- Improve productivity with enhancements throughout the system inspired by customer requests, such as: Entered By, On Hold Reason, and Requested By fields in Order Entry; copy order and create PO directly from Order Entry; and reverse GL batches
- Enhance usability with easier to read tables, an improved Finder, and improved end-user documentation
- Get the information you need, faster! New Inquiries for operations modules facilitate quick access to customized lists, which provide the answers you need and lower custom reporting costs
- Simplify update processes using the new Sage Advisor Update
- Save time when processing payments—capture a single pre-authorized payment during shipment entry or invoice entry, and capture and invoice multiple pre-authorized payments in a single batch
- Make informed decisions with comprehensive reporting utilizing the new Sage Intelligence Reporting financial report designer and reporting tree capabilities
- Expand customized reporting capabilities with the updated SAP Crystal Reports® runtime engine for .NET Framework 4, and new options in several standard reports
- Accelerate your growth and stay connected with Sage CRM enhancements that improve information flow between the front and back offices
- Efficiently and cost effectively manage the shipping process, and rate shop with an optional service that streamlines shipping and reduces costs

3. **When is Sage 300 ERP 2012 available?**

Sage 300 ERP 2012 is now available by download for customers active on a Business Care Plan. **Sage recommends that you check with your certified solution provider to assist with your upgrades, and applying updates.** You can access your copy by first logging onto http://customers.sagenorthamerica.com using your credentials, click on the following to go to the Sage 300 ERP 2012 download page www.Sage300ERP.com/download2012.

4. **How do Visual Process Flows improve my experience in Sage 300 ERP 2012?**

New Sage 300 ERP 2012 Sage Visual Process Flows provide you with a graphical process-oriented interface which will help you reduce your navigation time. The out-of-the-box predefined processes provide you with a clear view of the steps and tools required to complete a task. Easily create custom flows to meet your unique needs and for specific roles in your business using the Visual Process Flow Designer. These customizable processes will make it easy for your new users to learn Sage 300 ERP or for your team members to complete tasks which are only occasionally performed, such as year-end.

5. **What Pre-Defined Visual Process Flows are included in Sage 300 ERP 2012?**

Version 2012 includes predefined process flows for:

- GL, AP, AR, PO, and OE transactions
- Bank Reconciliation
- IC transactions and Inventory Management

6. **Can you customize the predefined Visual Process Flows?**

Yes, you can customize the Sage 300 ERP 2012 pre-defined Visual Process Flows for your business needs, and for your specific user roles.

7. **What customer-requested enhancements are included in the Sage 300 ERP 2012 release?**

Many of the top customer-requested enhancements from www.Sage300ERP.com/feedback are included in the Sage 300 ERP 2012 release. They include expanded Inquiry functionality to support customer queries and smart lists for operational data, and the ability to reverse an entire General Ledger Batch. Within Sage 300 ERP 2012, only one user license will be used when accessing multiple companies within the product on the same computer by the same user. Many enhancements are in Order Entry, which are detailed in the following answer.

8. **What are the Order Entry Improvements included in Sage 300 ERP 2012?**

The Order Entry Improvements include:

- ‘Entered By’ field allows you to capture who created the order
- ‘On Hold Reason’ allows you to understand why an order is on hold
- ‘Deliver By’ date field added
- ‘Ship Via’ and ‘Tracking No’ fields moved to Order tab
- Easily create a PO directly from OE

- Save time by creating a copy of the current Order
- Easily print OE Invoice from the AR Inquiry screen

9. What is Sage Advisor, and what are the benefits in Sage 300 ERP 2012?

Sage Advisor is new technology that will be implemented across all Sage products in phases to help ensure you are getting the most out of your Sage solution. The first phase of Sage Advisor will help you perform software updates more efficiently, as well as to gather information on how you interact with your solution so we can 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 your Sage Business Care account status. Sage recommends that you check with your certified solution provider to assist with applying updates and upgrades.

10. 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 your 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.

11. What value will the Product Updates for Sage 300 ERP 2012 bring to the product?

The Sage 300 ERP 2012 Product Updates will include new functionality and enhancements, along with hot fixes and patches that will increase the functionality of your product. In order to access and use the new features you are required to be current on your Business Care plan. The first Sage 300 ERP 2012 Product Update is scheduled for December 2012.

12. What are the features of the new Report Designer in Sage 300 ERP 2012 Intelligence Reporting?

A new graphical interface Report Designer in Sage 300 ERP 2012 Intelligence Reporting provides simple drag and drop of column capabilities, and includes pre-defined calculations on financial reports with multi-level groupings. The “Formula Builder” features provide the option to create additional calculated fields. In addition, the “What If Analyzer” allows use of a sliding scale to dynamically change amounts on the report, which will assist in forecasting and budgeting or creating projections. It also allows column and page level groupings by any field such as Segments, Companies, or Regions. The Consolidated Financial Report Designer supports multi-company consolidation. Eight predefined layouts are provided with the Report Designer for the easy generation of customized income statements and balance sheets.

13. What are Reporting Trees in Sage 300 ERP 2012 Intelligence Reporting?

A reporting tree allows modeling of a very sophisticated reporting structure, and the ability to easily view your organization in many different ways. Intelligence Reporting will meet your company needs, whether you have very complex corporate hierarchies and require hundreds of tree units, and if you have simple hierarchies that require fewer tree units. Sage Intelligence Reporting offers the ability for you 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.

14. What is Report Distribution in Sage 300 ERP 2012 Intelligence Reporting?

Report Distribution is a powerful time- and effort-saving feature that will automatically distribute your reports to a file, an FTP site, or by 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 you 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.

15. What is Sage E-Marketing for Sage CRM?

Sage E-Marketing for Sage CRM enables you to execute high-quality targeted email marketing campaigns, create drip marketing campaigns quickly and easily, and automatically deliver your email communications. Open, click, and bounce rates are automatically tracked, enabling your marketers to calculate accurate ROI and deliver hot leads to your sales team.

16. What changes have been made to the Mail Merge in Sage CRM?

Sage CRM mail merge is now a server-side feature. With this new update, Microsoft Word does not need to be installed on your client machine and no plug-ins are required. In the new release HTML templates can be created from within Sage CRM regardless of which web browser you use. Mail Merge can now be run against any custom entity that has a Documents tab.

17. What Sage CRM enhancements have been made for attaching documents?

The following enhancements have been made to document attachments in Sage CRM:

- Works across popular browsers
- Select and upload multiple files in a single transaction (Chrome and Firefox)
- Attach multiple files to a single task
- View attachments drill-down from document and task lists
- Pre-upload screening of file quantity, size, and type including the ability to exclude specific document extensions and to limit files by size (Firefox, Chrome and Safari)
- Intuitive drag-and-drop zone for attaching files into Shared Documents (Chrome and Firefox)

18. What Quote to Order enhancements have been made in Sage CRM?

In Sage 300 ERP 2012, you now have the ability to split commissions by sales person in the Quote to Order workflow within Sage CRM. Sales Split allows you to view, update, or change the salesperson of record and do commission splits from within CRM, and the specific order.

19. Does Sage 300 ERP 2012 offer Sales Tax capabilities?

New for 2012, Sage 300 ERP Sales Tax by Avalara is a web-based solution that automatically performs address validation, sales tax jurisdiction research, and rate calculation on the fly. The integration is seamless with Sage 300 ERP and all sales tax jurisdictions in Canada and the USA are covered.

20. Is there a Sage 300 ERP 2012 solution to help with my shipping needs?

Sage 300 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 Canada or the USA.

21. What is Sage 300 ERP Alerts and Workflow?

Sage 300 ERP Alerts and Workflow by Vineyardsoft is a new connected service that's like an invisible assistant, monitoring a business for events and conditions that require awareness and immediate response. Alerts and Workflow is optionally available to customers using Sage 300 ERP 2012.

22. What version of Crystal Reports is compatible with Sage 300 ERP 2012, and what enhancements have been made?

SAP Crystal Reports® 2011 is compatible with Sage 300 ERP 2012 to provide access to data formatting and delivery as meaningful information, both inside and outside of the organization. Enhancements to the Crystal Reports 2011 release include:

- A .NET runtime engine component
- The ability to export directly to Excel .XLSX format
- Adobe Flash integration
- Built-in bar code support
- New .RPTR format that is tamper proof for customized reports
- Improved report grouping, sorting and filtering
- Enhanced Report Designer features

23. What are the technology and database updates for Sage 300 ERP 2012?

Several technology and dataset updates have been made in the Sage 300 ERP 2012 release including support of Microsoft Hyper-V, Citrix Xen Apps and VMware ESX. Microsoft Windows Server 2012 is compatible, and Windows 8 is expected to be compatible when it's released. Microsoft SQL Server 2012 and Pervasive 11 are also compatible. For the latest information on compatibility and more details, please refer to the Customer Portal, http://customers.sagenorthamerica.com.

LICENSING AND PRICING

24. Are there any pricing changes with the release of Sage 300 ERP 2012?

There are no Sage 300 ERP pricing changes related to the 2012 release.

25. Does Sage 300 ERP 2012 still use one user license per company opened?

In Sage 300 ERP 2012, multiple companies can be accessed within Sage 300 ERP 2012 on the same computer with only one user license (Lanpak) used versus one license per company opened.

SAGE UNIVERSITY

26. What type of training is available for Sage 300 ERP 2012?

A "What's New in Sage 300 ERP 2012" Anytime Learning course is available on Sage University where you can learn all the new features through self-paced recorded topics, quizzes, and a step-by-step activity guide. This course is available to Sage 300 ERP customers at no charge. Visit www.SageU.com/Sage300ERP to register and for all your training needs.