



STAR-INFO

Newsletter for Sage 100 ERP

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Headline News

Sage offers free Web seminars designed to help you better manage your business. Current offerings include *Sage CRM Cloud: Expand Your Horizons*. Do you know who your best customers are and what they are buying? Join the Sage CRM experts as they discuss the benefits of a cloud-based CRM system. For the current Sage 100 ERP Webcast schedule, or to register, [click here](#).

Sage 100 ERP 2013 Release

New Credit Card Processing Adds Feature Rich Capabilities

The Sage 100 ERP 2013 release is scheduled for this fall. In our last issue, we covered the customer-requested enhancements added to the traditional modules, including Accounts Receivable, Accounts Payable, Bank Reconciliation, and Inventory Management, as well as enhancements to the integration with Sage CRM. In this issue we will cover new capabilities in Credit Card Processing and Paperless Office; highlight the benefits of the new cloud-based Sage Exchange technology and its Mobile Payments capability; and finally the enhancements to Sage Advisor.

Credit Card Processing

The Sage 100 ERP 2013 release includes new flexibility in accepting credit cards with the Sage 100 ERP software. It will leverage Sage Exchange for the integration to the Sage Payments Gateway.

Sage Exchange is a cloud-based technology that consists of three key elements: the Sage Exchange Vault, SageExchange.com, and developer tools that enable Sage Development Partners to connect to Sage Exchange. Sage Exchange technology includes connectivity to a secure vault for storing all sensitive credit card information outside of Sage 100 ERP.

Sage Exchange provides many new capabilities related to credit card transactions, including: card-swipe capabilities, charges for both regular and repetitive invoices in Accounts Receivable, mobile payments, improved cash flow management, reduced



fraud exposure, and a consolidated view of payment activity. Sage Exchange Support is automatically included when establishing a merchant account with Sage Payment Solutions.

SageExchange.com And Sage Exchange Vault

Fraud exposure will be reduced in the upcoming release by storing sensitive cardholder data in the secure, cloud-based Sage Exchange Vault. Customers migrating from previous versions of the software will be able to easily move their customers' credit card information from their current location into the secure Sage Exchange Vault. The process will be streamlined for customers who are already using Sage Payment Solutions. With Sage 100 ERP 2013 you will have the option

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of not saving credit card information for a one-time use of a credit card for a payment transaction.

SageExchange.com provides a user-configurable dashboard and flexibility to view payment information on the Web via a tablet or desktop, according to your preference. Pre-defined tabs can be used to assign access to SageExchange.com for your employees. You also can create customized coupons for use with specific credit card terminals, and easily make connections using tablets or mobile phones. Plus you will have 24/7 access to the Sage Payment Solutions customer support database.

New Credit Card Capabilities

Credit Card functionality will be enhanced in Sage 100 ERP 2013 to provide the ability to accept payments by credit card for services rendered at the time of Accounts Receivable invoice creation. This streamlines acceptance of credit cards for service-based companies, such as landscape architects and business consultants. You now will be able to apply credit card payments to recurring invoices for repetitive services such as membership dues or service fees.

New flexibility is included in Sales Order. At the time of Sales Order creation, you will be able to define the pre-authorization amount to use, whether it is a portion of the transaction, an amount over the transaction amount, or the entire amount owed. A confirmation of payment receipt is made possible by including the payment amount on the Sales Order invoice.

Card Swipe Capabilities

Sage Exchange will reduce merchant transaction fees when cards are present and speed the entry process when swiping credit cards using a Sage Payments recognized card-swipe device attached to the terminal. The new

card-swipe capabilities have been integrated so that payments processing is built into the normal Sage 100 ERP workflow. This is a nice upgrade from the disconnected card swipe capabilities many companies use.

Sage Mobile Payments

SageExchange.com will enable the delivery of many new payment features and functionality in the Sage 100 ERP 2013 release. SageExchange.com will allow payments to be collected anytime, anywhere, via smart phone. Ideal for cash sales, Mobile Payments will immediately capture the cash transaction information and send it to Sage Exchange, for secure transfer to Sage 100 ERP. Companies providing services and collecting fees in a mobile environment will find these features especially helpful.

Paperless Office

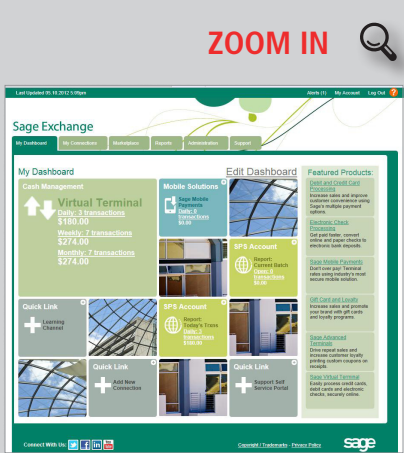
A big component of Paperless Office is the ability to email reports and forms as needed. With Sage 100 ERP 2013, Paperless Office will use SMTP authentication. As a result, you no longer will need to maintain your own email server, and will be able to securely send Paperless Office documents via mail services such as Google mail, Yahoo, AT&T, and Hotmail.

The use of Transport Layer Security (TLS) and Secure Sockets Layer (SSL) ensures communication between the client and server will be encrypted, thus protecting sensitive company information and ensuring you are communicating with the actual server.

Sage Advisor Update

Sage 100 ERP 2013 will update the Sage Advisor capabilities to provide you with self-service management of Product Updates and new software releases. You have the option to download installation components for manual installations, review current information

on maintenance and support entitlement and expiration dates, and to schedule an automatic check for updates. With Sage Advisor you can conveniently schedule when to check for updates, view available updates, and download hot fixes and updates.



The screenshot shows the Sage Exchange dashboard with a 'ZOOM IN' magnifying glass icon in the top right. The dashboard includes sections for 'My Dashboard', 'Edit Dashboard', and 'Featured Products'. Key widgets include 'Virtual Terminal' showing 7 transactions for \$193.00, 'Mobile Solutions' for Sage Mobile Payments, and 'Sage Account' for Virtual Terminal. There are also 'Quick Link' buttons for 'Add New Connection' and 'Support Self-Service Portal'. The bottom of the dashboard features social media icons and the Sage logo.

The SageExchange.com Dashboard provides a convenient place to view payment information and to manage your cash flow.

Technology Updates

A significant component of your software subscription fee is invested in keeping Sage 100 ERP compatible with current hardware and operating systems. This release includes a 64-bit ODBC driver, implementation of the MSI Windows Installer, and compatibility for Sage 100 ERP Premium with Microsoft SQL Server 2012.

Please call us with your questions, or to plan your upgrade. ✨

Tips And Tricks: Return Merchandise Authorization

Understanding RMA Statuses

The status of an RMA (Return Merchandise Authorization) is automatically updated as the RMA is processed as follows:

- When an RMA first is created, the status is *New*.
- After the customer RMA is printed, the status is *Open*.
- If it is not completely received, and documents are generated using Generate Transactions, the status is *Partially Received*.
- If it has been completely received, the status is updated to *Received*, and the RMA is removed from the RMA Entry file and is updated to the RMA Receipts History file.
- If the credit limit has been exceeded, the RMA will be manually placed on *Hold*.

Enabling Cross-Shipped Items

Cross-shipped items are replacement goods sent immediately to a customer while the customer is sending the original item back. The two items paths' cross in shipping. Cross-shipped items are invoiced at the customer's usual price. Credit memos for returned items are generated when the original item is received. To use the cross-shipped items feature:

1. Open Return Merchandise

Authorization /Main/RMA Entry, and click the *Lines* tab. For each line item you want to cross-ship, select *Replacement* at the Customer Action field and select the *CS* check box.

Note: To automatically select the *CS* check box for the selected line item, select the *Cross Ship* check box on the Return Merchandise Authorization Entry Header tab.

- ### 2. The *Xpress Sales Order* button opens the Sales Order Entry window, creating a new sales order using the information

entered in the RMA Entry window.

Note: If you have multiple cross-ship items, one sales order is created for all replacement items.

How Restocking Charges Are Calculated

Restocking charges are administrative charges that may be charged to the customer for return merchandise. If a restocking charge applies to the inventory item being returned, the restocking charge appears as a separate line on the credit memo and reduces the amount of the credit.

The restocking method and amount is based on the following:

- The *Restocking Charge Method* and *Restocking Charge Amount* fields on the Options tab in Inventory Maintenance.
- Charges assigned to the miscellaneous charge code selected in the *Restocking Charge Code* field in RMA Options.

Note: The miscellaneous charge code is set up in Miscellaneous Charge Maintenance in Sales Order.

Restocking charges are calculated only if **all** of the following conditions are true:

- The *Calculate Restocking Charges* check box is selected (RMA Options).
- A valid miscellaneous charge code is selected.
- Customer Action = Credit on the Lines tab in RMA Entry and/or RMA Receipts Entry.
- The *Apply Restocking Charges* check box is selected on the Header tab in RMA Entry.

Restocking charges are **not** calculated under the following conditions:

- Customer Action = *Replacement or Repair* on the Lines tab in RMA Entry or RMA Receipts Entry.
- The *DS* check box is selected on the Lines tab in RMA Entry or RMA Receipts Entry.

Restocking charges are automatically recalculated under the following conditions:

- The value changes at the *Return Qty* field on the Lines tab in RMA Entry or in RMA Receipts Entry.
- The value changes at the *Unit Price* field on the Lines tab in RMA Entry or in RMA Receipts Entry—and *Item Price* is selected in the Restocking Charge Method field in Inventory Maintenance.
- The value changes at the *Unit Cost* field on the Lines tab in RMA Entry or in RMA Receipts Entry, and *% Item Cost* is selected in the Restocking Charge Method field in Inventory Maintenance.
- The selection is changed in *Customer Action* field on the Lines tab in RMA Entry or in RMA Receipts Entry.

Restocking charges can be overridden under the following conditions:

- The user has appropriate permissions.
- The *Allow Changes to Restocking Charges* check box is selected on the Main tab in RMA Options.

Note: Override the restocking charges only after changing the values in the Return Qty, Unit Price, Unit Cost, and Customer Action fields on the Lines tab in RMA Entry or in RMA Receipts Entry. Changes to these fields recalculate restocking charges.

Restocking charges appear for each line item on the secondary grid on the Lines tab in RMA Entry. When documents are generated, the restocking charges appear on credit memos based on the item number. To consolidate restocking charges as a single miscellaneous charge in credit memos, select the Consolidate Restocking Charges During Generation check box in RMA Options.

Please call us for assistance with your RMA questions. ✨



IN THE SPOTLIGHT:

Sage 100 ERP Sales Tax By Avalara

Sage Connected Services are cloud-based solutions that can be very useful for Sage 100 ERP users. You likely have heard the term cloud computing; it is a paradigm shift in the way we use software technology to manage our businesses. Providers of cloud computing solutions deliver applications via the Internet. This is ideal for software applications where government regulations and calculations change frequently. Each of the Sage Connected Services connects directly into your on-premise system to enhance your solution. In this article we will focus on one of the services: Sage 100 ERP Sales Tax by Avalara.

Why Automate?

Sadly, the only reward for collecting and remitting sales tax is the avoidance of audits and not having to pay uncollected amounts out of your own pocket. Many organizations ignore the problem, hoping everything is okay and figuring they will deal with it if they get audited.

If you are still processing taxes manually and have yet to implement a solution, you may be paying a high price by not addressing the problem. Here are three ways manual processes impact your bottom line:

1. Audits - As anyone who has been through an audit knows, audits are time consuming and expensive. Not only will you pay on any assessments, but penalties and interest can be substantial. An automated solution not only speeds up the process and ensures accuracy, but auditors typically won't come back if they know your systems are bulletproof.

2. Incorrect Rates - If you have calculated tax rates incorrectly, you will either cost your organization money by undercharging or risk upsetting customers by overcharging.

3. Time-Consuming Manual Processing - With over 11,000 jurisdictions and thousands of rate, rule, and boundary changes every year, keeping up with tax rates can be burdensome. Increasingly, savvy companies are seeking to automate Sales and Use Tax calculation. They know that leaving it up to the experts ensures accuracy and reduces audit risk—and it frees them up to focus on their business.

Sage 100 ERP Sales Tax

Sage 100 ERP Sales Tax provides end-to-end sales tax compliance. And because it is a hosted, Web-service based solution, you don't need to dedicate more server space or IT resources.

Sage 100 ERP Sales Tax automatically performs address validation, sales tax jurisdiction research, and rate calculation—all on the fly within your Sage 100 ERP system, with no change to your existing workflow.

Fully detailed reports are at your fingertips, and returns are automatically pre-populated and generated.

Sage 100 ERP Sales Tax takes just minutes to download and install. Set up nexus and taxability, and begin accessing this professionally maintained tax engine over a secure internet connection to apply address, jurisdiction, and rate information to every transaction, all within the Sage 100 ERP order-entry or

customer set-up screen.

Please give us a call with your questions, or for assistance subscribing to Sage 100 ERP Sales Tax. ✨

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