



Brochure

# Customization and Integration Tools in Sage 100



Sage

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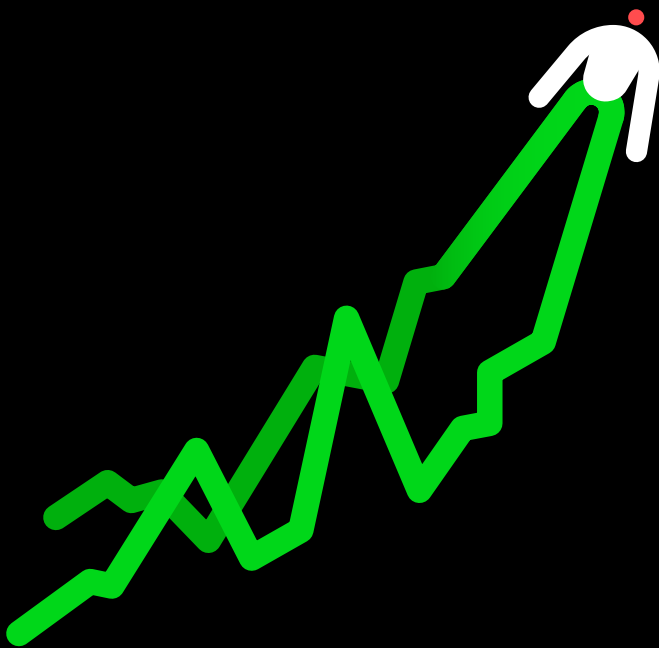
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# Overview

To stay competitive, you need your accounting software and business productivity software to work together and offer indispensable functions like graphical reporting, integration, customization, and drill-down functionality. Sage 100 offers several tools to assist you in ensuring you can make your solution work the way you work.

# Microsoft Office Link—Automation and Personalization Simplified

Automatically merge accounting information with Microsoft Word®, Excel®, or Exchange software to quickly create custom documents, messages, and attachments. The MS Office Link provides a direct connection between a Sage 100 task or record and the desired Microsoft Office application, it is perfect for one-time, one-record integration. You can launch the MS Office Link from a button on the appropriate screen.



A set of template documents is included for each Sage 100 module, such as letters in Word and standard email in Exchange software. The MS Office Link also allows you to access the template documents specific to the task displayed.

Customer maintenance automation:

- Create a welcome letter, credit limit advisory letter, and dunning letter.

Vendor maintenance automation:

- Create a price quotation.

Similarly, you'll have access to add and view attachments that are specific to the displayed data record. For Accounts Payable transactions, this might be a scanned-in image of the original invoice; in Inventory Management, it could be a picture of the item. Personalize each document with details directly from the Sage 100 records using merge fields.

# Custom Office— Adapt to Your Working Style

With Custom Office, you can change the appearance of your Sage 100 screens to match the way you prefer to work, helping to increase productivity by improving data entry speed and accuracy.

- Specify default values to reduce keystrokes. (Ex. default to your local area code in the phone number field)
- Customize the screen to ignore unused fields and change tab sequences.
- Change the screens to follow the exact order of the fields on an input form.
- Modify the default field labels. (Ex. In a medical practice, it may be more appropriate to use “Patient” than “Customer.”)

User-defined fields allow you to add your own data fields to master files, even if you have no programming skills. These fields can carry over seamlessly to your reports, orders, and invoices. For example, an extra field you’ve added for shipping information to your customer master file can be included on sales orders and invoices using the integration of SAP® Crystal Reports for Sage 100 software for printed forms. User-defined fields are also automatically available for reports created with the Business Insights Reporter.

Expand the functionality of your system by adding a button to screens that will launch application tasks or bring up the Microsoft Windows® calculator when you need to add a quick column of figures. You can even create a button with links to a VB script or J script, which can launch any third-party application such as Microsoft Word, and automatically produce a dunning letter with the customer’s name and address or perform any number of tasks. Your custom button can also play back sound annotations to the screen or display the current record.

## Areas for Customization

- Screens by company and user.
- Message prompts.
- Rules for validation logic.
- Tab sequences within screens.
- Text captions—add text fields.
- Tool tips.
- User-defined fields and tables.
- Dynamic Data Exchange (DDE) links to external programs or scripts.
- Location, size, and appearance of any screen or the objects.
- Default initial values.
- Folder tab labels.
- Fonts used on screens.
- Help references.
- Buttons for launching tasks, other Window applications, pop-up dialog boxes and more.

# Paperless Office—Sustainable Change

Save time, money, and the environment by using the paperless office capabilities provided to you in Sage 100. Improve communications and save postage by efficiently emailing and faxing documents to your customers, prospects, vendors, resellers, and employees in the same office or remote locations.

Support a sustainability strategy by utilizing the powerful paperless office features—you'll reduce paper costs and help the environment by eliminating the need to use stacks of paper, print lengthy reports, and waste precious office space for storage. With Paperless Office, you can quickly and easily find files, view reports and forms, and print only the pages you want. And, when you need them again, retrieve them from the archives using intuitive search and sort tools, reducing the time you and your employees spend searching through old files and reports.

Paperless Office can extend the reach of documents to multiple people in separate locations, where they can be accessed quickly and simultaneously. In addition, the powerful electronic forms delivery capabilities allow Sage 100 users to email or fax documents on a timely basis to vendors and customers, which ultimately improves business-to-business communications.



## Benefits

- Sustainable strategy—save time, money, and the environment.
- Improve communications with immediate electronic delivery by email or fax.
- Save postage costs by distributing electronically.
- Increase efficiencies with easy access to archived files.
- Enhance document security.
- Reduce the possibility of loss or damage to printed records.

# Document Management Features

## **Journals and Registers**

Convert journals and registers to PDF format—eliminate paper waste, locate and archive items with ease, minimize storage, save time and money. View all journals and registers from one location with the ability to determine the last update. Quickly email documents to your auditors, print hard copies, and specify pages, archive the last copy or all previous versions.

## **Period-End Processing**

Using period-end reports in PDF format saves on paper costs; plus, you can archive reports in a secure and searchable digital format. Automatically name and save PDF files, eliminating the risk of accidental overwrites. Documents are also available for electronic retrieval through the PDF Viewer — allowing you to specify any combination of company codes, modules, and documents to view.

## **Report Viewer**

All standard reports are available in PDF format from the Paperless Office Report Viewer.

## **Sales Orders and Sales Order Invoices**

Save sales orders and invoices as PDFs and send a copy to the customer. Save postage costs by distributing electronically. Resend customer invoices with the click of your mouse. Users can view these forms by date, source, user ID, and file name. You can see if the form still exists and whether it was sent electronically as well. You also may choose to archive the last copy of the invoice or all previous versions.

## **Accounts Receivable Invoices**

Convert Accounts Receivable (AR) invoices to PDF format, print a copy to send to a customer, and save a copy electronically — all in one step. View invoices by invoice date, invoice source, user, or file name. It's also possible for you to see whether an invoice still exists and whether it was sent electronically and decide whether to archive the last copy of the invoice or all invoices.

## **Job Cost Invoices**

View and reprint Job Cost invoices by date, source, user, and file name. Also, you can see if an invoice still exists and whether it was sent electronically and decide either to archive the last copy of the invoice or all invoices. Recalling and printing PDF files can be done on either a customer or job basis.



# Document Management Features continued



## **Purchase Orders**

Save purchase orders (POs) as PDFs and send email copies directly to the vendor within the same process, improving turnaround time and communication with your vendor. You can retrieve archived POs by date, source, user ID, and file name. You also may choose to archive the last copy of the PO or all previous versions.

## **Payroll Direct Deposit Stubs**

Gain easy access to Payroll direct deposit stub information, such as how benefits were recorded (sick time, vacation, and more). The Direct Deposit Stubs application allows you to save all your stubs in PDF format. Reprint and quickly retrieve exact copies of stubs and never again run a report to approximate stub data. All PDFs are available for electronic retrieval using the Direct Deposit Stubs Viewer — enabling you to view and sort records by check date, employee number, check entry number, stub number, sequence number, user ID, run date/time, sent-to email address, path, and document name, plus whether the record exists, was updated, and sent by email. You also have the option to make the Stub Viewer available to all employees. Individual stubs are secured with employee-specific passwords that can be randomly generated, employee created, or defaulted from the employee's social security number.

## **Electronic Forms Delivery**

Use Electronic Delivery of Forms to speed up communications and eliminate the need to print on letterhead, stuff envelopes, and pay postage costs. Select the delivery method for your documents: Print and mail, email, or fax. Documents that can be sent electronically include:

- AR Statements
- AR Invoices
- Payroll Direct Deposit Stubs
- Purchase Orders
- Sales Orders
- Sales Order Invoices
- Job Cost Invoices
- Customer Return Merchandise Authorizations (RMAs)

Forms can be sent to multiple email addresses.

# Visual Integrator— Integrate with Ease



“Open architecture” has been the catch phrase for business application software and databases for years. Businesses have moved beyond the obligation to perform software gymnastics to obtain integrated reporting—these products must work together. To facilitate this process, an industry standard known as open database connectivity (ODBC) was developed.

Visual Integrator (VI) has been designed to facilitate seamless integration between Sage 100 data and other business applications. Visual Integrator can import from (or export to) any ODBC-compliant source, without the need for an intermediary data file such as ASCII delimited or Microsoft Excel. If you regularly perform imports from a custom or vertical software package, you’ll find you can use VI to make the integration virtually seamless.

The power of VI, however, lies in the additional integration commands that are available.

- Schedule jobs to run at prescribed intervals of any length.
- Flexibility to synchronize Sage 100 customer master files with a prospect.

For example, VI jobs can be scheduled to run at prescribed intervals of any length. Data can be synchronized between two file sources and with custom auto runs. Imports can be chained together so that an invoice import automatically follows a customer import. You can even instruct the program to run a script file automatically upon successful completion of an import.

Visual Integrator for Sage 100 can tie all your business software into one seamless application.

# Visual Integrator Features

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<b>Scheduling</b>	There are multiple methods of scheduling Visual Integrator jobs. You can place a job on the Integrator job menu for easy access and then run the job manually. Jobs can also be run by using Windows® scheduler or an external Windows program or script file. You can also set a schedule or cycle within Visual Integrator to run once a day, once an hour, or once a minute.
<b>Automatically Perform Subroutines</b>	Run additional commands, scripts, or other functions based on three events: before job start, on job success, or on job failure. Subroutines can also be added before and after each record write and before and after assigning data fields.
<b>ODBC Connectivity</b>	Link multiple ODBC tables together, and point and click to select fields for importing. Visual Integrator then automatically generates the SQL statement for import or export, and Visual Integrator permits editing of the SQL statement for advanced users. A test button provides an instant visual check of data to be imported.
<b>Validation Logic</b>	Validation logic is built into Visual Integrator to assure that the data being imported conforms to Sage 100 ERP rules. Validations performed by Visual Integrator are automatically listed and may be removed if not required for the import. New validations may also be created for specialized requirements (for example, do not permit import of future-dated invoices).
<b>User-Defined Fields</b>	If you have created user-defined fields in Sage 100 ERP, these fields appear automatically for selection when Visual Integrator operates on the entity to which they are attached (for example, customers).
<b>Passwords</b>	Each import or export job can be assigned a password, which is then required before the job can be run.
<b>Chaining of Job</b>	Jobs can be set to run in sequence (for example, import invoices immediately following a customer import).
<b>Run-time Assignment of Values</b>	If a value needs to be uniquely assigned each time a job is run, such as today's date for the invoice date, the job can be configured to prompt the user when the job is run.
<b>Selection and Skip Record Criteria</b>	Multiple selection criteria for picking certain records can be specified, using standard "nesting logic" criteria, (such as and, or). Multiple criteria for skipping records can also be defined.

# Visual Integrator Features continued

<b>Import Field Conditionally</b>	Conditional importing allows a field to be assigned based on the value of another field. For example, the sales tax code can be assigned based on the state field in the customer address.
<b>Job Definition Export</b>	Jobs can easily be prepared for transporting to another computer at a remote location.
<b>Export Jobs</b>	Data from any Sage 100 ERP file may be exported to ODBC databases or ASCII delimited files, using all the same logic and selection criteria available for import jobs.
<b>Test and Preview Buttons</b>	The Test button permits easy viewing of sample data. You also can sample an entire file and print or display import log statistics (number of records imported, and more).
<b>Job Import</b>	Jobs that were created at another location can be easily imported and run.

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# Sage Partner Cloud

If you've been thinking about a cloud option, we have a solution.

Sage developed the Sage Partner Cloud—so you can still benefit from the vast suite of in-depth features, cost effectiveness, and adaptability of Sage 100. You can deploy Sage 100 in the cloud with Microsoft Azure, AWS, or Sage-accredited cloud platforms including ADSS Global, Cloud at Work, CompuData, RKL Solutions, and SWK Technologies.

Still not certain if a move to the cloud is right for you, consider a few benefits:

- Data migration in a single day<sup>1</sup> with no retraining necessary.
- Multi-layered security.
- On-demand scalability.
- Improved operational efficiency.
- Overall reduction of IT costs.
- Flexibility of remote access.
- Sustainability of a carbon-neutral cloud platform.<sup>2</sup>

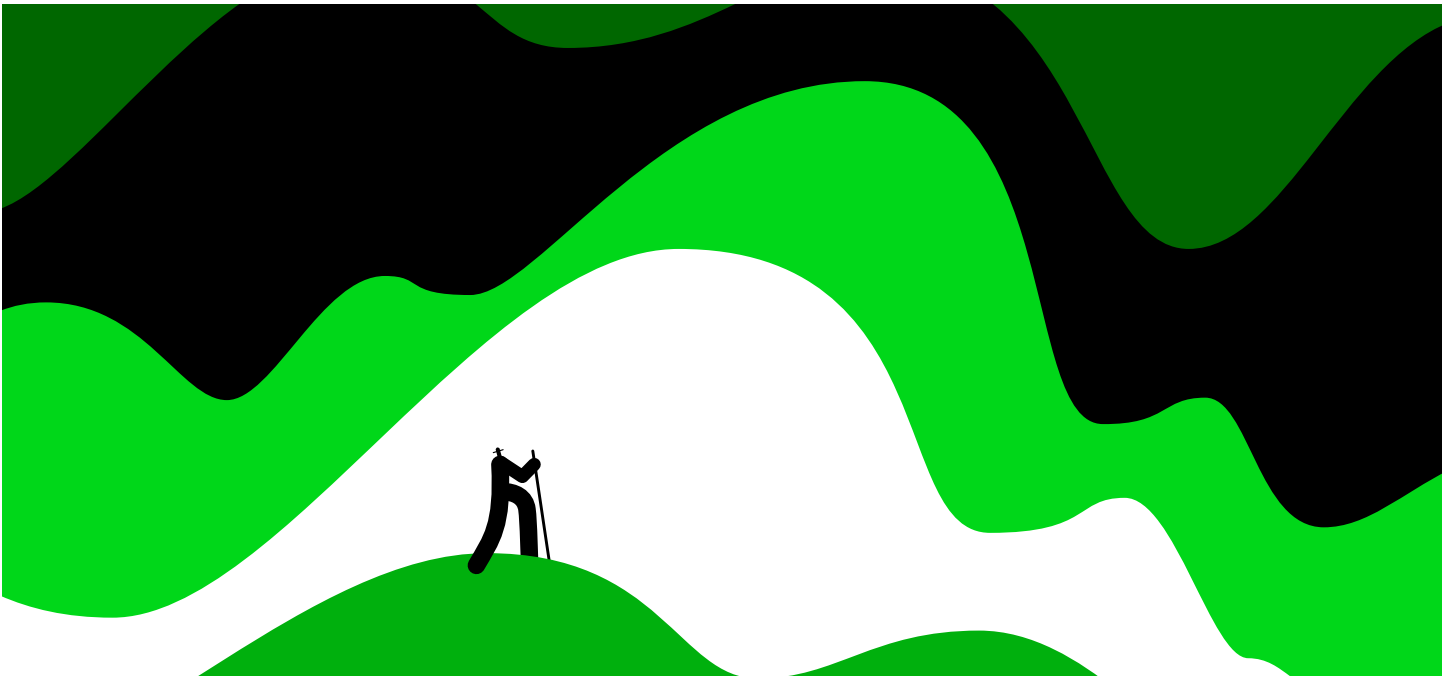
1. Estimate is provided by our Sage Partner Cloud Beta Program Partners. In some more complicated cases, data migration may take more than one day.
2. Learn more about Microsoft's sustainability practices [here](#).

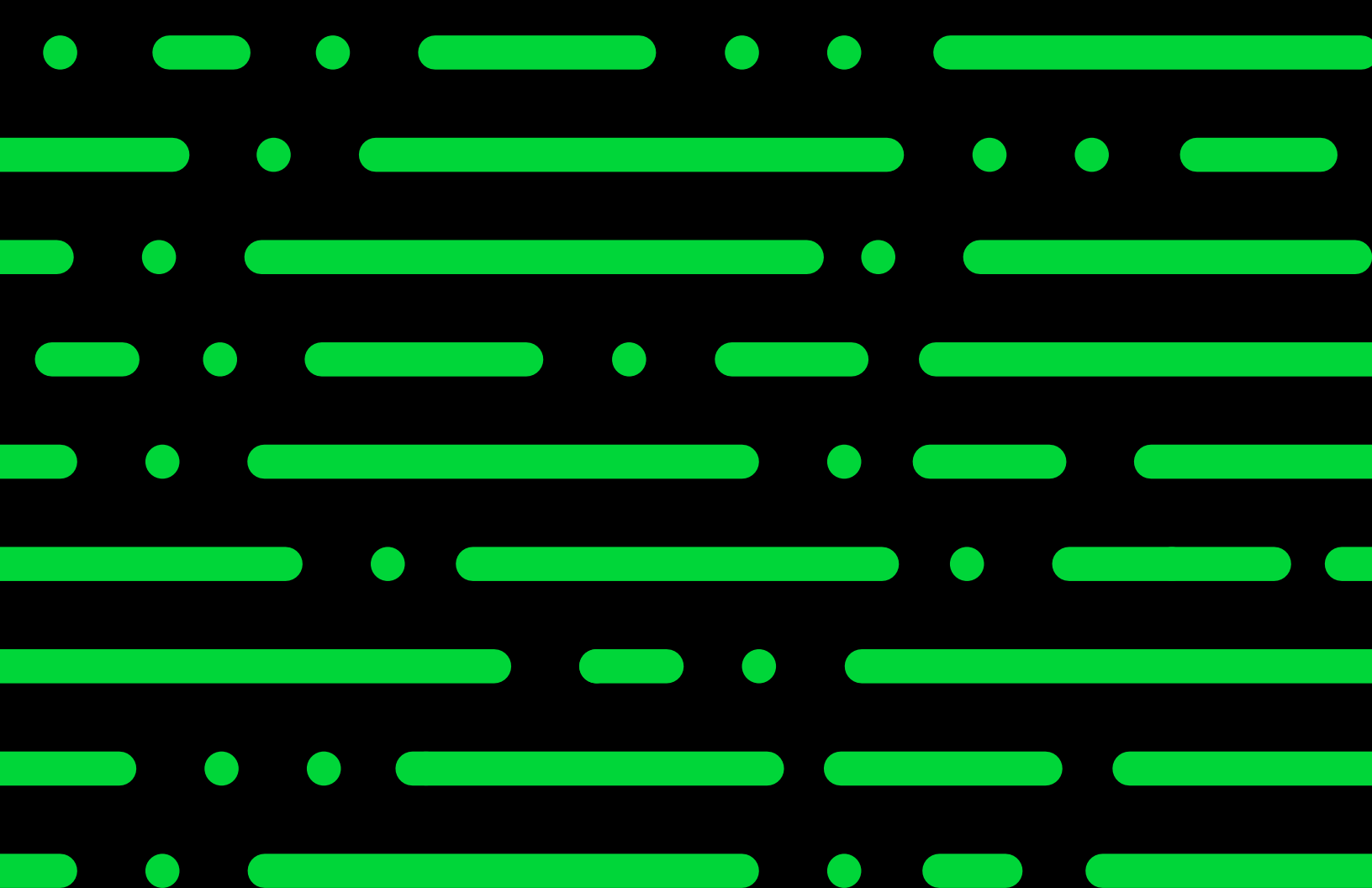
Learn how you can deploy Sage 100 in the cloud—  
**Sage Partner Cloud.**



**Discover the power of a trusted and reliable solution, designed to help you automate processes, decrease risk, and scale with ease.**

Schedule a **Sage 100** demo or contact us at 866.756.7243.





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