

Optimizing Sage 100cloud

Exploring Tips, Tricks, and Best Practices

Blytheco
Transforming Companies

sage 100cloud

For the last 40 years, Sage 100 has been a trusted platform for thousands of businesses around the world. Over the years, Sage has made some major product revisions to evolve with changing technology, changing business landscapes, and the growing needs of their customer base.

Our team of Sage 100 experts focus on staying up-to-date on solution changes and advancements to identify new processes, add-ons, and automations that can help our clients optimize their software. In this guide, we share a few things we have learned and help you explore new modules, tips and tricks, and best practices.

Topics explored in this guide:

1 Power Modules for Sage 100cloud

2 Technology, Tools, and Approaches

3 New Features and Enhancements

4 Cloud Hosting

Power Modules for Sage 100cloud

Sage Intelligence

Power Module—Sage Intelligence

Sage Intelligence is included in your subscription and is one of the most powerful tools available to you in Sage 100cloud. With Sage Intelligence, you can easily harness the data in your system to gain visibility into your business and make informed decisions.

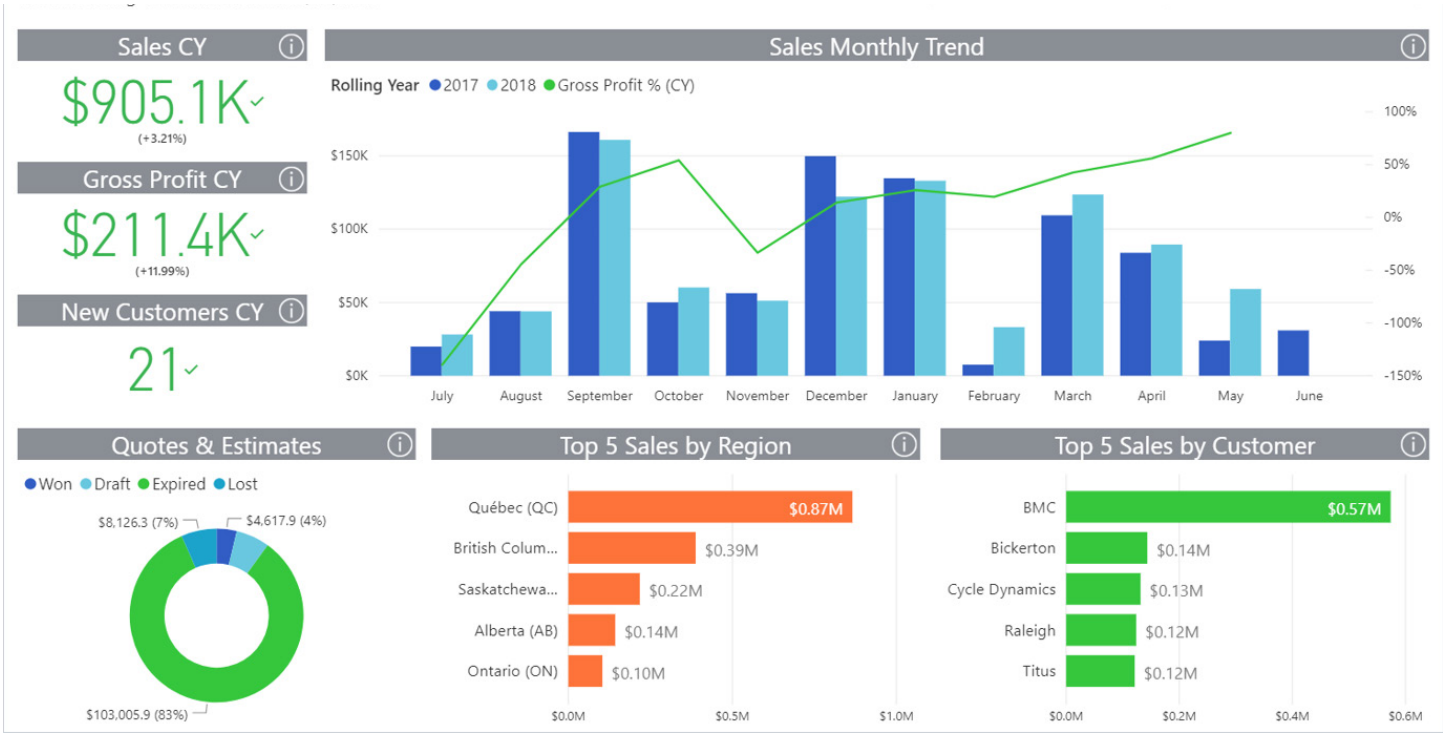


Key Benefits of Sage Intelligence

- Technology-driven business intelligence tool
- Dashboards to visualize your business
- Ability to monitor key metrics and KPIs
- Faster reporting, analysis, and planning
- Make better/faster business decisions
- Improve companywide efficiency
- Eliminate guesswork in your business

Enabling Graphical Dashboards

Sage Intelligence allows you to create, customize, and monitor key business indicators using graphical and interactive reporting dashboards.

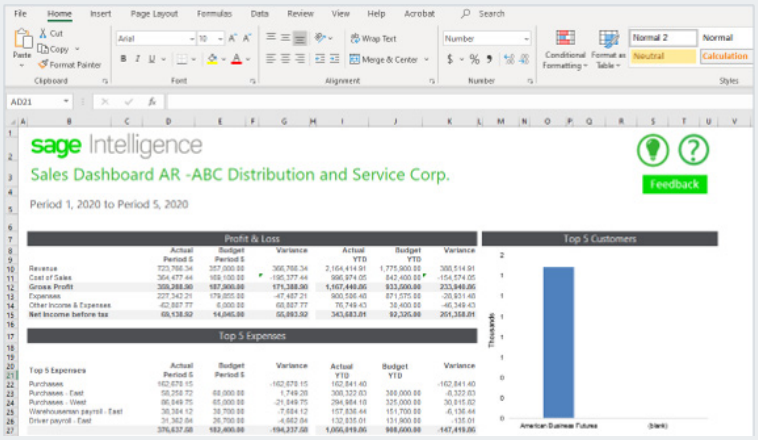


Power Modules for Sage 100cloud

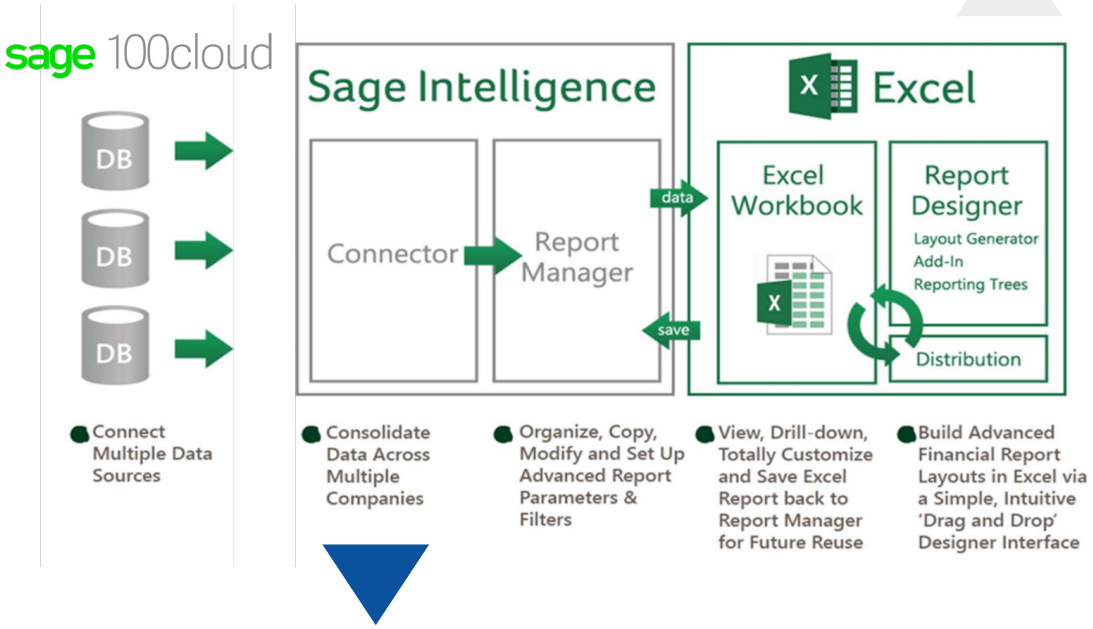
Sage Intelligence (cont.)

Sage Intelligence—Report Designer

- Easily generate custom GL-based reports
- Simple, flexible, and fast report writing
- Easily "slice and dice" your GL data
- Consolidate multicompany financials
- Report by department, location, or unit
- Unlimited number of reporting trees
- Eliminate guesswork in your business

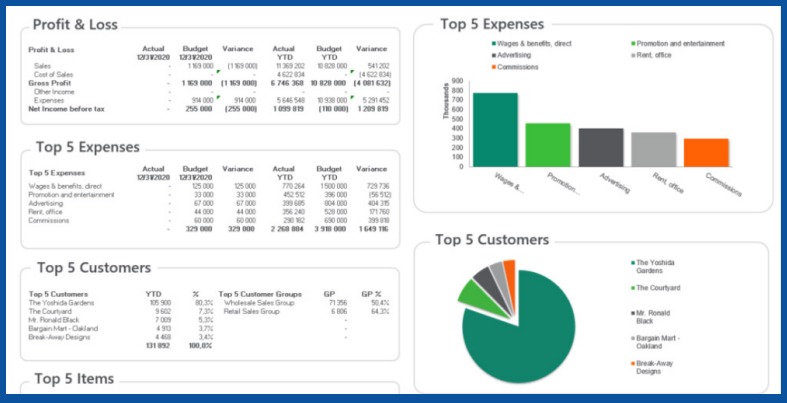


Sage Intelligence Components and Flow



Sage Intelligence—Connector Module

- Report sub-ledger data and external data
- Connects the report manager and Sage 100
- Easily connects to any ODBC source like:
  - Other ERPs
  - Microsoft SQL or Access
  - Excel
  - CRM software
- Create user defined fields, reusable containers, and SQL expressions even without SQL skills.



Power Modules for Sage 100cloud
Budgeting and Planning

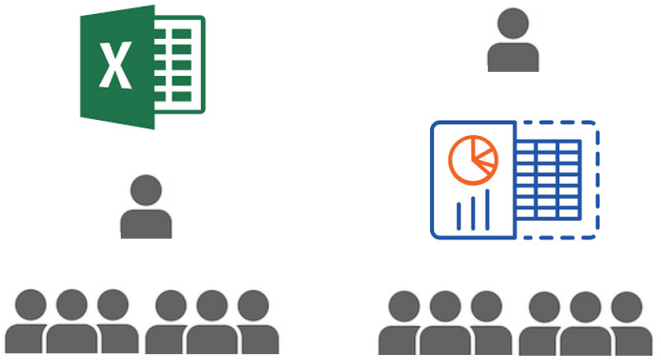
Power Module—Sage Budgeting and Planning

Sage Budgeting and Planning is a powerful tool that allows you to easily develop and maintain multiple budgets.

Key Benefits of Sage Budgeting and Planning

- Built-in work flows guide and revision control
- Easy to share and export reports
- Bottom-up or top-down budget processes
- Template-based and web-based
- Maintain multiple budges/scenarios
- “What-If” analysis to fine-tune budgets
- Simple upload to Sage 100 GL
- Easy drag and drop functionality

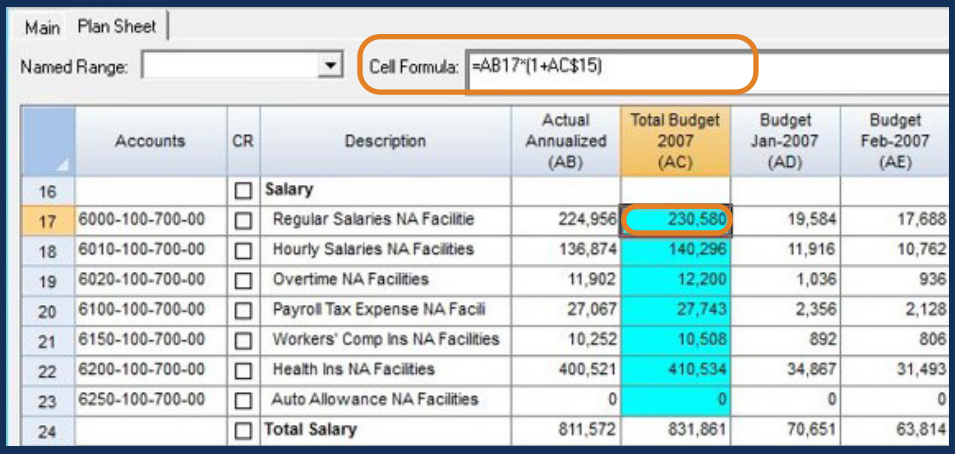
Two Common Budgeting Approaches



Leveraging Sage Budgeting and Planning

Budgeting and Planning Process:

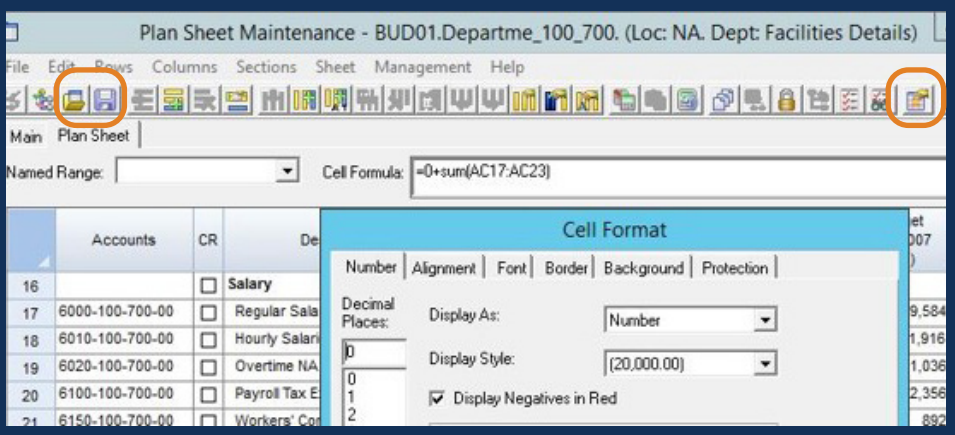
1. Start with templates to create plan sheets
2. Utilize work flows and user permissions to engage budget managers
3. Confirm data and finalize using review tools
4. Upload to Sage 100 (GL exchange or Visual Integrator)



	Accounts	CR	Description	Actual Annualized (AB)	Total Budget 2007 (AC)	Budget Jan-2007 (AD)	Budget Feb-2007 (AE)
16		☐	**Salary**				
17	6000-100-700-00	☐	Regular Salaries NA Facilitie	224,956	230,580	19,584	17,688
18	6010-100-700-00	☐	Hourly Salaries NA Facilities	136,874	140,296	11,916	10,762
19	6020-100-700-00	☐	Overtime NA Facilities	11,902	12,200	1,036	936
20	6100-100-700-00	☐	Payroll Tax Expense NA Facili	27,067	27,743	2,356	2,128
21	6150-100-700-00	☐	Workers' Comp Ins NA Facilities	10,252	10,508	892	806
22	6200-100-700-00	☐	Health Ins NA Facilities	400,521	410,534	34,867	31,493
23	6250-100-700-00	☐	Auto Allowance NA Facilities	0	0	0	0
24		☐	**Total Salary**	811,572	831,861	70,651	63,814

Budgeting and Planning functions similar to excel:

- Common functions: cell formatting, saving, and opening
- Common formulas: sum, divisions, subtotals, etc.
- Complex formulas: if/then, etc.

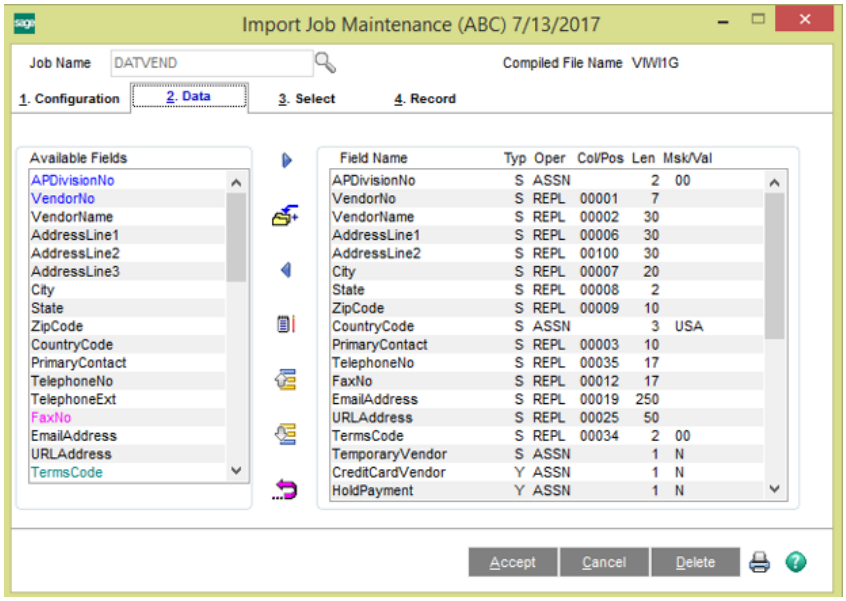


Technology, Tools, and Approaches

Visual Integrator and VI Utilities

What is Visual Integrator?

Visual Integrator (VI) is a free tool that allows you to import and export data from in and out of Sage 100cloud.



Key Benefits of Visual Integrator

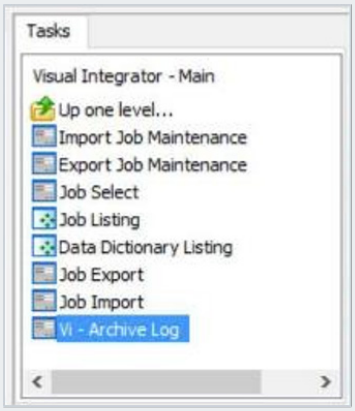
- Set-up simple integrations
- Upload payroll to your GL
- Perform sales order and invoice uploads
- Integrate your website to Sage 100
- Execute easy data cleanups
- Automate via task scheduler
- Integrate CRM and easily share data
- Upload Sage data to vendors and banks

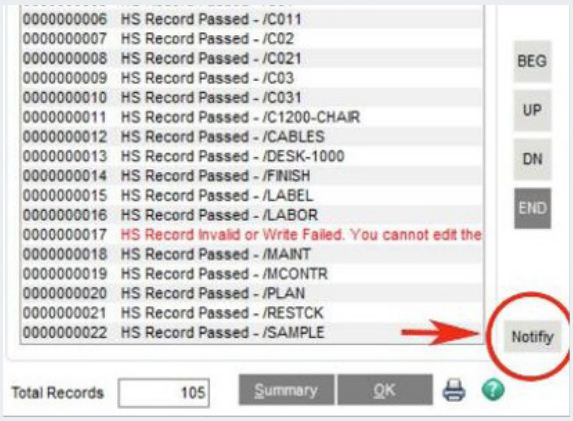
Blytheco Developed Enhancements - Visual Integrator (VI)

VI Archive Utility

Sage 100 only maintains a log for the last time a job is run. If a particular job fails, you may not know if it failed or why it failed. Our enhancement solves this through:

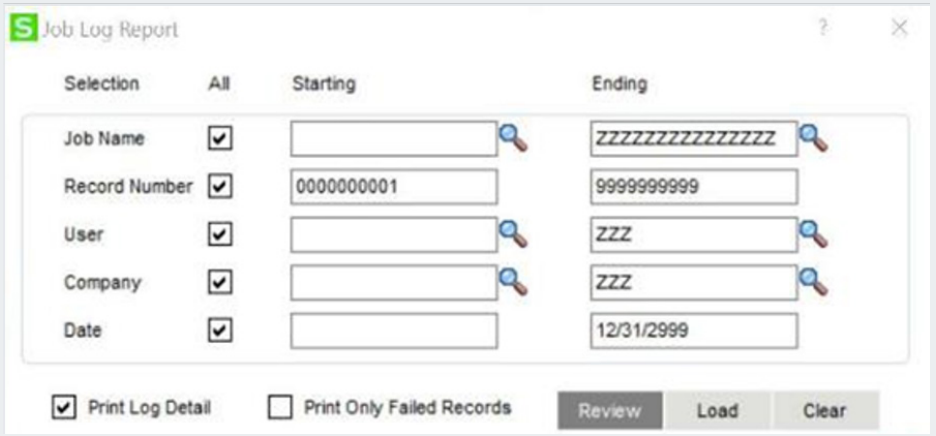
- Proper logging of all jobs
- Displays VI-job summary and identifies failed jobs
- Drill down on jobs by: job name, user, date, company
- Combine and sort by company or job status (pass or fail)





VI Email Notification Utility

This Blytheco enhancement provides an instant email notification of any issues encountered by the VI Archive Utility. This notification alerts you to critical failures and identifies which records failed and why.



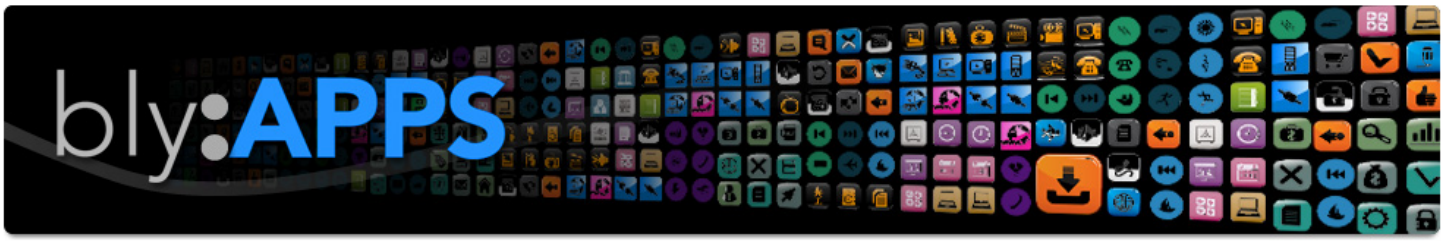
Technology, Tools, and Approaches
Blytheco Extended Solutions

Blytheco Developed Extended Solutions or "bly:APPS"

Over the years, our team has identified opportunities for improvement within Sage 100. We have perfected and packaged over one hundred enhancements engineered to solve everyday business issues and challenges across a variety of industries.

To explore all extended solutions, visit: **www.blytheco.com/blyapps**

For questions about a particular enhancement, pricing, compatibility concerns, or to request an enhancement, call: **949.583.9500**



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Accounts Receivable
Sales Order
Purchase Order
Inventory Management
Bill of Materials
Work Order
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Job Cost
Library Master
Custom Office
Payroll
Bank Reconciliation
Decimal Precision
Time Card
Custom/Other
»Ask any Question

Blytheco Home > Sage Software > Sage 100 > Customizations > bly:APPS Extended Solutions

bly:APPS - Sage 100 (MAS 90 & MAS 200) Extended Solutions

BlythecoDev offers an extensive catalog of robust vertical and productivity solutions to complement and extend Sage 100 (formerly MAS 90 and MAS 200). Sage ERP systems are the most flexible and powerful solutions available, and BlythecoDev's creative industry solutions ensure that you have the best of both worlds: top-of-the-line business management technology AND industry-specific processes. If you are interested in any of the solutions offered on these pages or have a general inquiry, please fill out our form Blytheco Solutions Questions or solutions@blytheco.com. , or call us directly at **949-583-9500 x2500**.

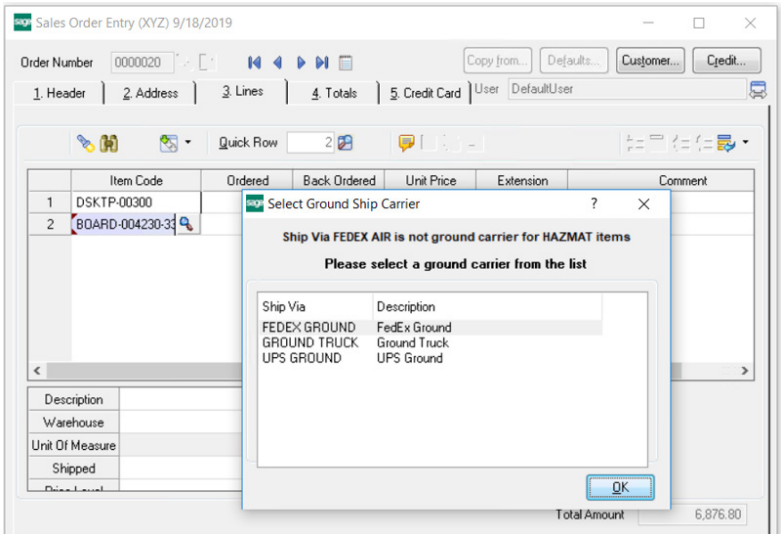
Page **1** of **23** 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 **Next**

Item Number	Description	Module
M9-AP-1006	**Cash Basis Accounting and History Posting** Provides the ability to operate a cash basis accounting system in the Accounts Payable module. Posting to the General Ledger occurs only when an Accounts Payable check...	Accounts Payable
M9-AP-1016	**Multiple Divisions/Companies on Checks** Allows a single Accounts Payable check to be generated to pay on-file invoices for the same Vendor number in multiple divisions and/or multiple companies. A single...	Accounts Payable
M9-AP-1024	**Foreign Currency Processing**	Accounts Payable

Technology, Tools, and Approaches
Blytheco Extended Solutions (cont.)

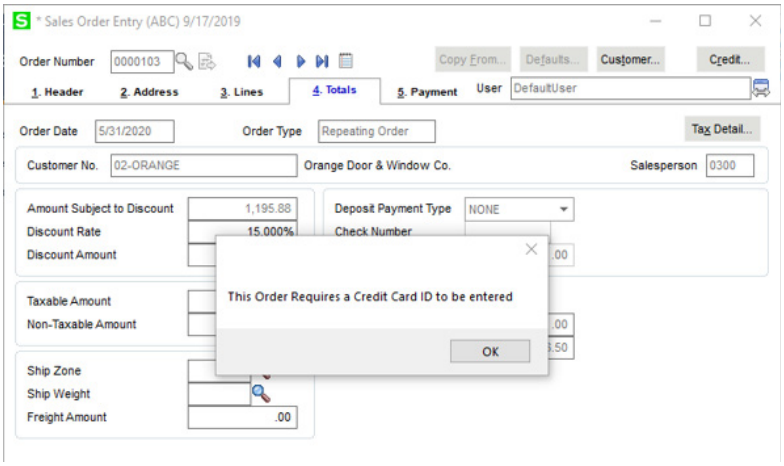
Custom Programming
HAZMAT Shipping Utility

Hazardous materials (HAZMAT) cannot be shipped via air travel without IATA documents (ground shipping is preferred). To help our clients tag items as HAZMAT, we developed this extended solution. With this solution, you can limit shipping items based on the items in the order and prevent an order from being saved if HAZMAT items and an "air-based" ship-to are used.



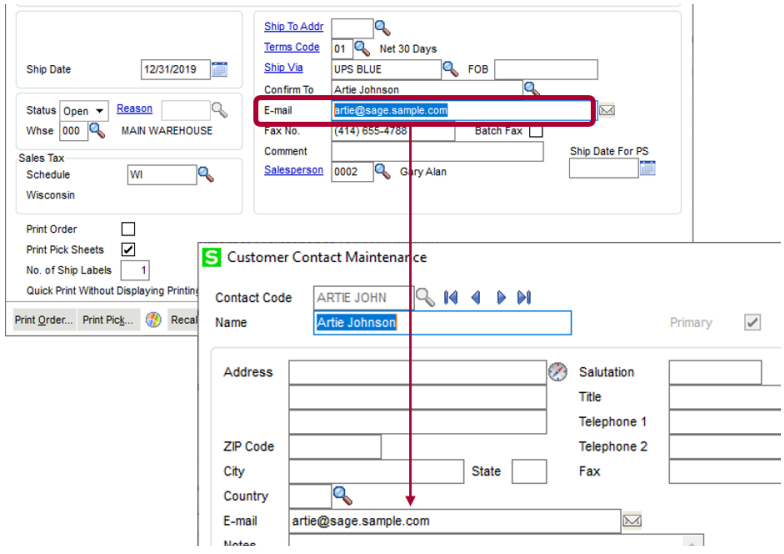
Custom Office Script
Credit Card Alert

Many Sage 100 users forget to enter a credit card ID when required. To expedite order entry and processing we developed this extended solution to require a credit card ID and display a scripted warning when required data is missing.



Custom Office Script
Email Contact Display

Oftentimes in the sales order entry and invoice data entry screens, missing or incorrect emails display in the "confirm to email". We developed a custom script to read your contact maintenance fields for the selected customer and display the correct/matching email address.



Technology, Tools, and Approaches

Sage 100cloud—Premium Edition

Why Move to Sage 100cloud Premium?

Sage 100cloud allows customers to move to premium SQL Server Reporting Services (SSRS) for no additional charge. A move to SQL is beneficial for companies exceeding 25 users, experiencing slow reporting, or requiring custom programming due to external integrations.

Key Benefits of Premium Edition

- Provides a robust infrastructure to support larger user counts
- Easily share reports via web browser, mobile device or email
- Take advantage of formatted data
- Data is more efficiently queried from SQL than ProvideX
- Leverage powerful dashboard tools and visualizations via the core BI report builder
- Use in conjunction with Sage Intelligence and Power BI to transform your data and user experience
- SQL server includes additional tools to support integrations

Edition Feature Comparison - Rating on a scale of 1-4 (with 4 being the strongest)

	Standard	Advanced	Premium
Database	ProvideX	ProvideX	SQL Server
Performance / Speed	●	● ● ●	● ● ● ●
Scalability / Capacity	●	● ●	● ● ● ●
BI Tools / Data Mining	● ●	● ●	● ● ● ●
Ease of Maintenance	●	●	● ● ● ●
Data Management	● ●	● ●	● ● ● ●

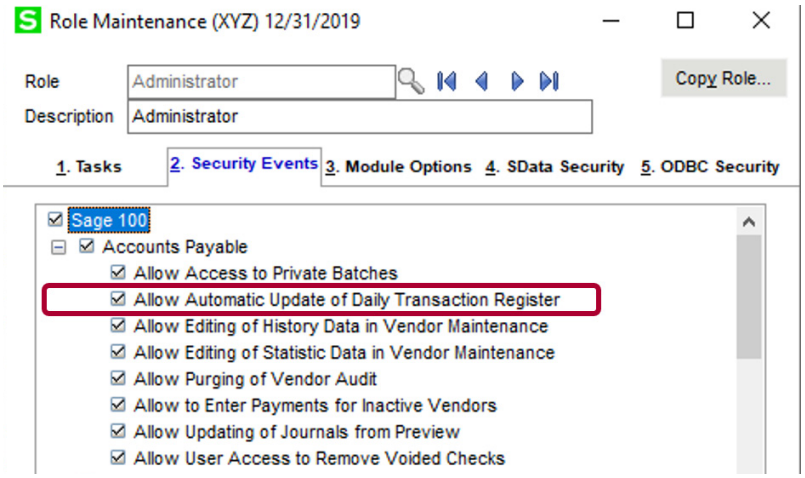


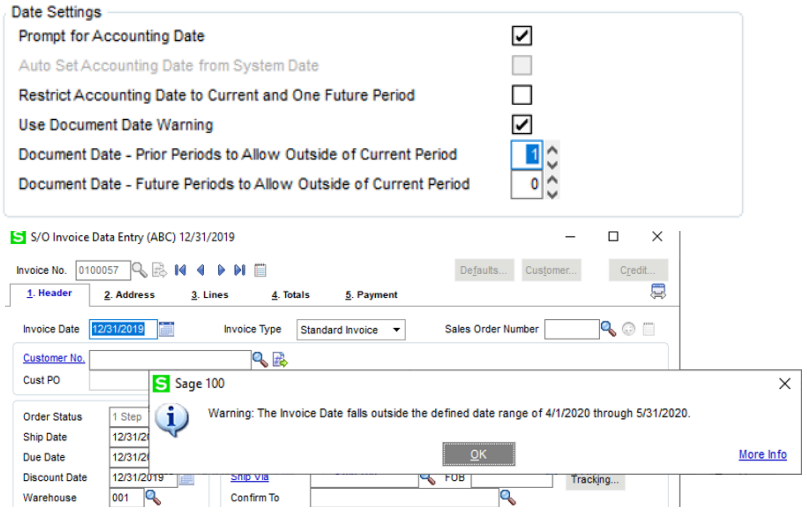
New Features and Enhancements

Sage 100cloud—Global Enhancements

Transaction Register Update

With Sage 100cloud version 2019, you can now update your transaction register automatically. A security event has been added to "Role Maintenance" that allows you to automatically update the daily transaction register on a user-by-user basis. These updates are automatically printed to Paperless Office and updated.



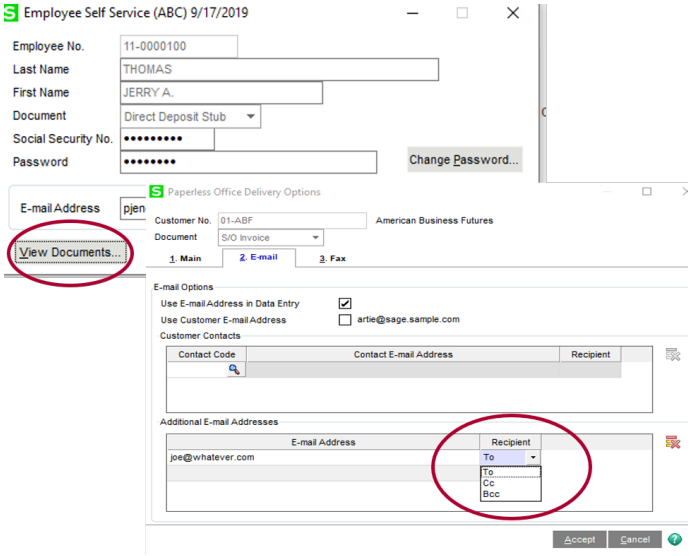


Document Date Warning

In Sage 100cloud, there are new "Document Date Warnings" that allow for control over document dates in prior and future periods. A pop-up warning displays in data entry when a document date falls outside of a specified range. A warning is then written to the Visual Integrator import log for tracking.

Updates to Paperless Office

- Expanded usability options
- New PDF option for payroll checks
- Improved message text formatting options (color, font, etc.)
- Additional merge fields; PO No., invoice date, and more
- Specify recipients as "TO, CC, or BCC"
- Include multiple static attachments
- Customize the columns and buttons on your viewers; journal, register, period-end, and report viewer



New Features and Enhancements
Payroll Enhancements

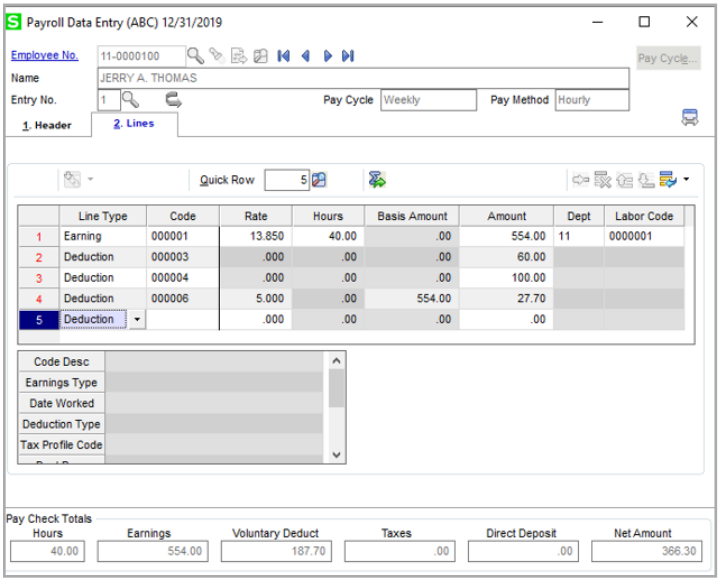
sage Payroll

Sage 100cloud 2019 has received a redesign/refresh of the payroll module. This refresh is the first substantial update to this module in over 20 years. On plan Sage 100cloud customers can take advantage of improved usability and enhanced features.

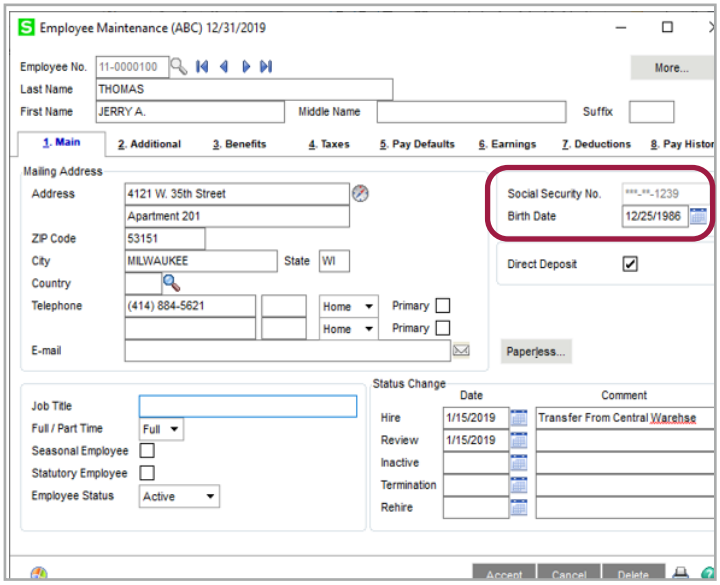
What's New in Sage 100cloud Payroll?

- Available for Sage 100cloud Premium edition
- Grid views in data entry and reporting
- Crystal-based reporting
- Batch entry for multiple batches with different dates, etc.
- New tax calculation engine eliminates manual tax table updates and allow W-2 printing after processing payroll
- Encrypted personally identifiable information
- New and improved reports for: certified payroll, pension plan audit, EEO-1, check history report, employer expense summary, and more
- New "reverse check" button to quickly key a check reversal
- Additional fields for employee maintenance such as: email, job title, status change dates/comments, ethnicity, race, Veteran status, and more

New Feature Highlights



Take advantage of new grid views, batch entry, and improved tax calculation.



Personally identifiable information like social security numbers are now encrypted.

New Features and Enhancements
Production Management

What is Sage 100cloud Production Management?

To keep up with advancements in manufacturing processes, Sage 100cloud now offers a more robust suite of manufacturing capabilities/tools built into the framework of the software. This all-in-one solution combines the functionality of multiple modules and creates tighter control on manufacturing/production processes to streamlines efficiency.



Feature Comparison - Work Order Module vs. Production Management

Functionality	Work Order	Sage Production Management (Sage 100)	Sage Production Management (Sage 100cloud)
Backflush/Automatic issue of labor in WO	✓	✓	✓
Batch Entry		✓	✓
Crystal-based Reports		✓	✓
General Alias Item Numbers on Materials Tab		✓	✓
Instant Recording of Labor Transactions to WO		✓	✓
Instant Recording of Material Issues to WO			✓
Original and Revised Budgets for Labor, etc.		✓	✓
Payroll and Accounts Payable Integration		✓	✓
PO Issuance for Outside Processing in WO		✓	✓
Primary and Secondary Data Entry Grids		✓	✓
Special and Miscellaneous Items as WO Materials			✓
Subassembly Explosion Into WO		✓	✓
Unique WO Ticket - Overhead and Direct Costs		✓	✓
User-Defined Fields, Tables, and Scripting		✓	✓
Variable and Fixed Overhead Calculations	✓	✓	✓

New Features and Enhancements

Sage Contact—Office 365

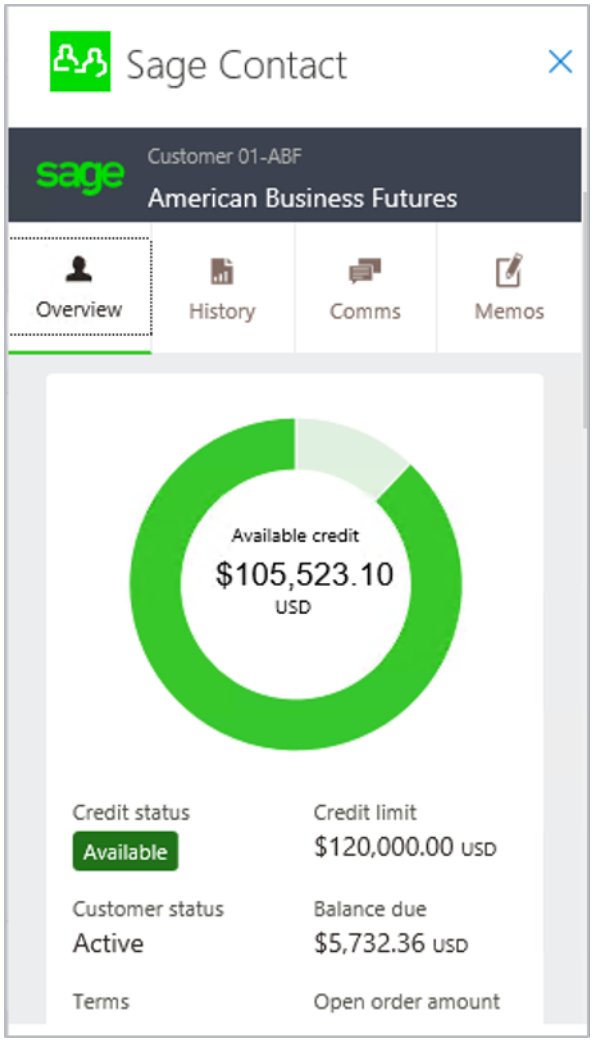
What is Sage Contact?

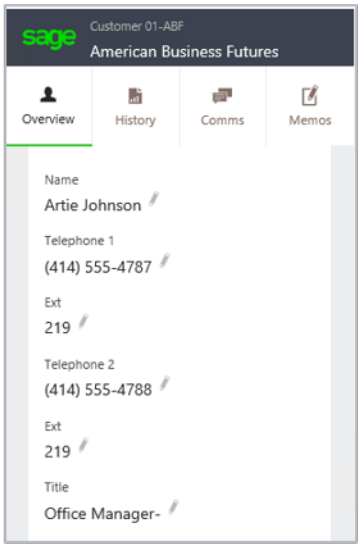
Sage Contact for Sage 100cloud is a Microsoft add-in application available for Office 365 customers. This app allows you to easily view Sage 100cloud customer information right within Microsoft Outlook.

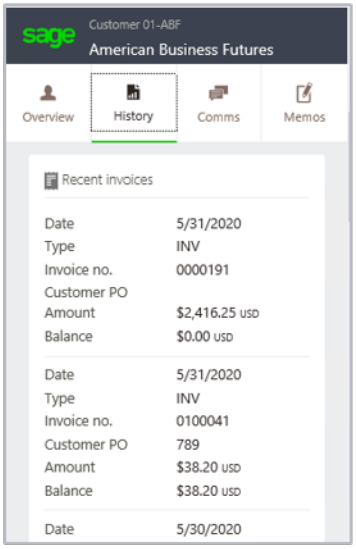
Benefits of Sage Contact for Sage 100cloud

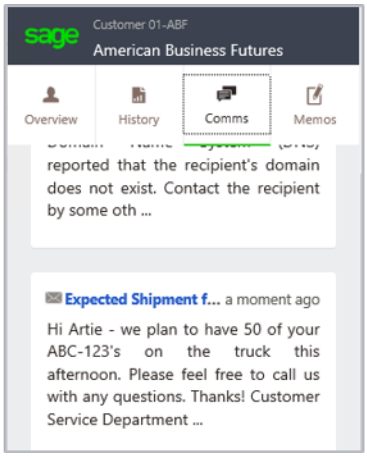
- Available for all Office 365 and on-plan Sage 100cloud users
- View account balances within Outlook
- Easily adjust credit limits and open customer orders
- Access contact information and make updates
- View recent invoices, payments, and account credits
- Open any/all recent email communications for a specific customer/contact
- Edit and view customer memos/notes created within Sage 100cloud as well as generate new memos from Sage Contact

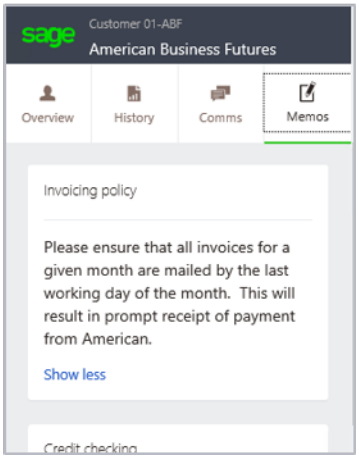
Sage Contact User Interface











Cloud Hosting
blyCloud Secure Cloud Hosting

Why **bly**Cloud?

Hosting with blyCloud offers your team a simple alternative to deploying your software on your in-house servers. blyCloud is specifically configured by Sage 100 experts to provide a complete turnkey solution with seamless access to all key features, functionality, and extended solutions for an optimal user experience. Free your team from the constant burden of maintaining hardware, updating servers, and scaling up infrastructure as you grow. Place your trust in a team of cloud security experts and secure enterprise level protection against cyber threats and ransomware.

Advantages of Hosting on blyCloud

- Secure hosting in world-class data centers to deploy your existing ERP in the cloud
- Access to Sage 100 via browsers and other modern devices
- Elimination of dedicated servers for your ERP, freeing up capital expenditures and hardware refreshes
- Access to scalable infrastructure that dynamically provisions as you grow
- Reduction of internal IT efforts on server maintenance and security, allowing IT to focus on strategic initiatives
- Increased system security, monitoring, and alerts with advanced protection against cyber threats, viruses, and ransomware
- Hourly data snapshots and full nightly backups for recovery
- 24/7 enterprise-level product support

100%
Reduction of in-house server maintenance, backups, and hosting for your existing ERP

99%
Guaranteed uptime using blyCloud's secure hosting services

24/7
State-of-the-art system monitoring, security, and support



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