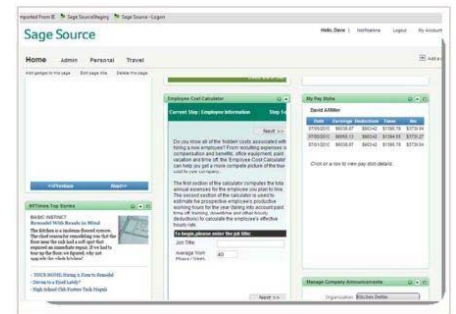# Sage 300 ERP Newsletter
From Equation Technologies

Sage
Authorized Partner

OVER 20 NEW PAYROLL FEATURES

Released earlier this year, **Product Update 1** (PU1) for Sage 300 ERP 2012 introduced new business intelligence reporting features, enhanced integration with Sage CRM, and usability improvements like color-coded company screens. PU1 also included a substantial update to the Payroll module and we'll explore some of the new features in this article.

Online Pay History Provided by Sage Source

Now you can provide employees with the ability to access, review, and print their payroll history using Sage Source. It's a cloud-based connected service for Sage 300 ERP that securely stores payroll information online so employees can login and access it anytime without tying up your internal payroll staff for routine record requests. Sage Source also provides other great features like an online bulletin board where you can post company announcements and news for your employees.

Workers' Compensation Tracking and Reporting

A collection of new features make it easier to track and report Workers' Compensation (WC), providing you with a more complete picture of your total payroll expense. Enhancements include the ability to assign employer expense and liability accounts in the GL to a specific WC Group, modification of the Payroll Workers' Compensation Codes window providing more GL posting options, simpler calculations and adjustments, and a handful of modified/new reports for improved tracking.
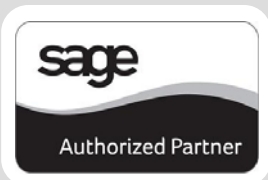
Federal & State e-Filing by Aatrix *(US Payroll Only)*

Another new connected service, **Sage Payroll Tax Forms and e-Filing by** Aatrix**,** provides over 250 **free, up-to-date, and automatically-populated** federal and state forms for Unemployment, Withholding, New Hires, W-2s, and more. Print out the reports you need at no cost, or electronically e-file any report for a small fee. This new connected service also allows you to set up reminders for the states in which you file to help avoid costly penalties.

New Name, Same Great Payroll

It's important to note that Sage 300 ERP Payroll is now called **Sage HRMS Payroll** (available in both U.S. and Canadian versions). This name change reflects Sage's decision to make it the common Payroll module used across their ERP portfolio. One benefit of this approach is to consolidate development resources which will accelerate product enhancements and improve support.

Bottom line: new name, same great payroll for Sage 300 ERP.

RELEASE NOTES: SAGE 300 ERP 2012 PRODUCT UPDATE 1
Download the Release Notes for Sage 300 ERP 2012 PU1 for more detail on the over 20 new payroll features as well as enhancements in other areas like business intelligence reporting and Sage CRM integration.

Speed Up Data Entry with Keyboard Shortcuts

Data entry is inevitable in accounting. But that tedious "heads down" work doesn't have to take up so much time. When entering a large volume of transactions, switching between your keyboard and mouse can be inefficient. It not only slows you down, but it can break your concentration and cause errors.

So here's a handy set of keyboard shortcuts in **Sage 300 ERP** (formerly Sage Accpac) that can really save time entering data, navigating screens, and processing transactions.

Sage 300 ERP Navigation Shortcuts
These shortcuts can help you move around a screen or form without leaving the comfort of your keyboard:

Page Up or Page Down	Go the first (top) or last (bottom) record visible in a list
Ctrl + Page Up or Ctrl + Page Down	Go to the first or last record in a Finder list
Ctrl + Tab	Move out of a grid or list to the button or field *following* the grid or list.
Ctrl + Shift + Tab	Move out of a grid or list to the button or field *directly above* the grid or list
Home / End	Go to the first/last entry in a list
Tab or Enter	Go to the next column
Shift + Tab or Enter	Go to the previous column
Alt + C (or Alt + F4)	Close a form or dialog box
Alt + E	Open the Set Criteria dialogue box to specify records that will be displayed in the Finder
Up / Down Arrow	Go up or down 1 line in the grid
Esc	Cancel/close a pop-up window

Sage 300 ERP Data Editing Shortcuts
These shortcuts provide a quick method of adding, deleting, or editing data in a record or form.

Insert	Insert a blank row in a grid to add a new record
Ctrl + Insert	Begin a new entry when you are pointing to a field that has a New button beside it
F2	Turn on edit mode in a list or grid (press again to turn off).
Delete or Alt + D	Delete the selected row or record
Alt + S	Save changes to the displayed work
Alt + A	Save a new record
F5	Launch the Finder to lookup data

SAGE SUMMIT 2013

Registration is Now Open!

The largest gathering of the year for Sage customers and business partners, the Sage Summit annual conference offers one-of-a-kind learning sessions, networking opportunities, expert guidance, and tips that will help you master your Sage 300 ERP software.

Sage Summit 2013 will be hosted in Washington, D.C. with customer events running from **Tuesday July 23rd to Friday July 26th**. Go online to learn more about the location, agenda, and some seriously fun activities planned this year!

 http://na.sage.com/sage-summit >>>

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In the Cloud or On-Premise:
You Have Options with Sage CRM

If you've been considering Sage CRM but still wondering which version is right for you - in the cloud or in your server room - this article can provide some helpful insight.

Sage CRM Cloud

Sage CRM Cloud is ideal for companies that want to get up and running quickly or have limited in-house IT expertise. Since it's in the cloud, you don't have to worry about managing servers and workstations and nightly database backups are performed automatically.

On the financial side, there is no hardware or software to purchase so the up-front costs are minimal. Essentially you're "renting" Sage CRM, paying monthly for the use of software-as-a-service (SaaS).

One aspect of Sage CRM Cloud to consider is that it **does not integrate** with your Sage 100 ERP system. Therefore, you wouldn't experience the workflow and data sharing benefits we've discussed in previous newsletters of connecting your sales and marketing activities with back-office accounting and operations in one single system and database.

Sage CRM On-Premise

Implementing Sage CRM On-Premise is all about control, ownership, and integration. Not only do you benefit from the built-in integration between Sage CRM and Sage 100 ERP, you also have the flexibility to integrate Sage CRM with other software applications you might be using to run your business like Microsoft Exchange Server, a computer telephony system for customer support, an e-commerce shopping cart, industry-specific or 3rd party applications, and more.

While Sage CRM Cloud has *some* customization capabilities, Sage CRM On-Premise provides **advanced customization** that allows you to modify the software to conform to your processes and work exactly the way you need it to.

Lastly since you purchase and own the software, you're up-front costs are higher while the total cost of ownership over time is lower. Plus, some companies prefer to maintain control of sales and customer data at their own location.

The Power of Choice

While Sage CRM offers two very different deployment options, both offer the full range of modules including sales, marketing, and customer service. In fact, the features and functions are nearly identical. And no matter which route you choose, rest assured that you won't be locked in because you can migrate between cloud-based Sage CRM and on-premise Sage CRM at any time!

Be sure to Contact Us with your questions or to discuss using Sage CRM at your company.

USING SAGE CRM & DROPBOX

Dropbox is a free online service that lets you save and share files and documents "in the cloud." Any file you save in your Dropbox is synchronized and available across your computer, tablet, and mobile device. It has become popular in the workplace, allowing you to easily share documents with your professional network without emailing huge files.

And now, you can **view Dropbox events** (uploads, downloads, changes) **within Sage CRM**, making it easier to track things like brochures and price sheets that you've shared with customers and prospects.

Click below to learn more about using this new feature:

Using Dropbox in Sage CRM >>>