



www.mbabsi.com

## In This Issue

### Page 1

Going Mobile in 2015

### Page 2

Introducing Sage CRM 7.3

### Page 3

How to Reverse an Accounts Payable Check in Sage 100 ERP

Contact Us



## Going Mobile in 2015

**Mobile Business** is expected to be the biggest technology development this year. With a mobile device in just about every pocket, it's no wonder companies are starting to leverage new technology to drive sales, manage operations, and keep customers happy. Last year we introduced you to [Sage Mobile Solutions](#) - now let's take a closer look at how Sage can help your business stay ahead of the competition by going mobile in 2015.

### Drive Sales - In the Office or Away

Add new customers and place orders anytime, anywhere with **Sage Mobile Sales**. This iPad app connects your sales team to an online catalog that tracks inventory in real-time, provides vivid product photos, suggests substitutions when you're out of stock, and populates related items to create cross-sell opportunities. With Sage Mobile Sales, your team has access to the ERP data they need to stay productive - in the office or away.

### Process Orders Onsite

While visiting a customer, you can use the Sage Mobile Sales app to pull up customer purchase history, generate quotes, and adjust for discounts **right on the spot**. You can then convert the quote into an order, record customer signoff/approval, and submit the order directly to Sage 100 ERP with the push of a button.

**What's more?** Your customers can immediately pay by credit card using a mobile swipe device. It doesn't get more convenient than that.

### Get Paid Faster

**Sage Billing and Payment** is a browser-based application that allows you to create new invoices, manage outstanding invoices, and receive payments electronically. Using customizable templates, you can easily personalize invoices to fit your company brand, include promotional messages to drive more sales, and send your electronic invoice in just seconds.

The new **Pay Now** feature gives your customers the option to pay their invoices instantly with just a click of the mouse - no more waiting for a check in the mail or running to the bank. Sage Billing and Payment provides your customers with the convenience of electronic payment, while at the same time getting you paid faster.

### Mobility for Sage 100 ERP

These new mobile apps are designed to work hand-in-hand with your Sage 100 ERP system. [Contact us](#) for more information on Sage Mobile Solutions if you're ready to take your business mobile this year and stay ahead of the competition.



Sage Mobile Sales puts your entire product line at your fingertips and in vivid color.



# Spotlight On: Sage CRM

## Introducing Sage CRM 7.3

The long awaited Sage CRM Version 7.3 features a host of exciting new features as well as a new contemporary look and completely redesigned user experience. This latest release provides you with easy access to the data, reports, and metrics you need to close sales faster and make every customer interaction count. Let's take a closer look.

### New Contemporary Design

Sage CRM 7.3 was redesigned with you in mind. The new look and feel of the **Contemporary Theme** provides an intuitive user experience that gives you quick access to all the information you need.

Use the new **Main Menu Dropdown Lists** to access all Main Menu options or the new **Find Field** to quickly locate what you're looking for. You'll also notice a new **Top Bar** of helpful icons that give you one-click access to your notifications, recently viewed records, and profile area.

**Note:** The new Contemporary Theme is optional for existing Sage CRM customers who are accustomed to the old layout - but it's the default theme for **new** Sage CRM customers.

### Business Accelerators for Sales

Sage CRM 7.3 also features new **Business Accelerators for Sales** - a suite of new functionality that provides your managers and sales team with the data and insight they need to close more sales and make better decisions.

Two new ready-to-use management dashboards - **Sales KPI for Managers** and **Sales Metrics for Managers** - use Sage CRM data from across your business to provide management with a range of reports and charts for better analysis.

There are also 9 new **Alerts and Escalation Rules** designed to notify your team of any critical triggers related to leads, quotas, or opportunities, and provide real time updates. New alerts include Daily/Quarterly Quota Remaining, Pipeline Update, Opportunity Close Date Approaching, Unassigned Lead/Opportunity, Lost Opportunities, and more.



New **Stacked, Gauge, and Combination Charts** help you identify and evaluate successful activities and trends for better sales analysis. These new charts provide a wider view of your data to gauge company performance.

### MailChimp Integration

Sage CRM 7.3 now integrates with [MailChimp](#) - a widely-used and popular email marketing platform. MailChimp allows you to easily create targeted marketing campaigns, send automated emails, and track results. Best of all? MailChimp is **FREE** for lists under 2,000 names.



You can launch MailChimp email campaigns right from Sage CRM. You can also share contacts or groups from Sage CRM and have MailChimp send back results of your campaigns - opens, clicks, etc. - so you can follow up as needed.

### Ready to Upgrade?

If you're running a stand-alone version of Sage CRM, you can upgrade at any time. If you're running Sage CRM **integrated with Sage 100 ERP**, you may need to wait until Sage CRM 7.3 is available to integrated customers in early Q2 2015. [Contact us](#) for details or if you need help upgrading.



### Sage CRM 7.3 Preview Guide

Contact us to get more info about the new features or how to get started with Sage CRM 7.3 with this helpful guide.

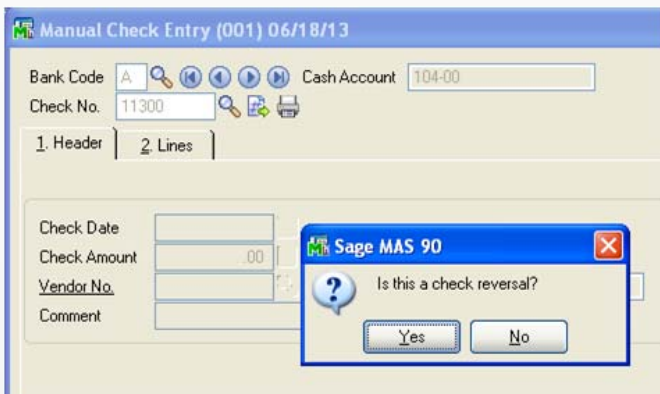
# How to Reverse AP Checks in Sage 100 ERP

Let's face it - mistakes happen all the time in business. Whether you sent a payment to the wrong vendor, issued a check in the wrong amount, or have to apply a stop payment - there are plenty of situations where you may need to **Reverse a Check in Sage 100 ERP**.

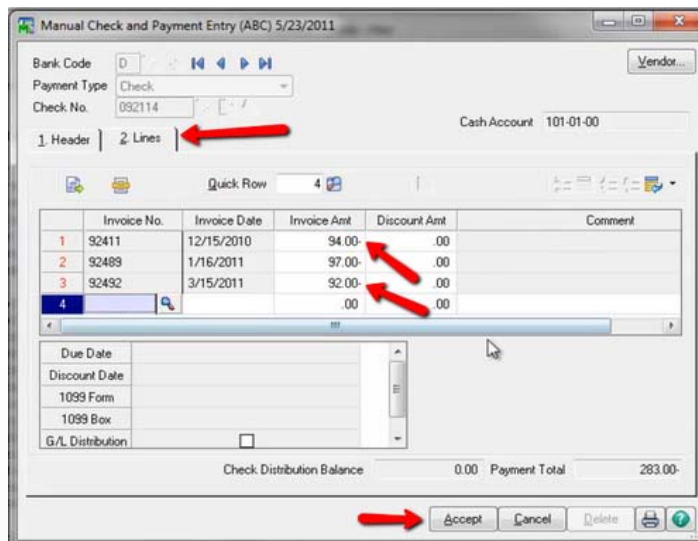
Here are the steps to reverse a check in Sage 100 (formerly "MAS 90") **Accounts Payable**.

If you have a check to reverse **without Job Cost distributions**, follow these steps:

1. Select **Modules, Accounts Payable, Main, Manual Check Entry**.
2. In the **Bank Code** field, enter the bank code associated with the check to reverse.
3. In the **Check No.** field, enter the check number of the check to reverse.
4. Click **Yes** in response to the question, "Is this a check reversal?"



5. Click **Yes** in response to the question, "Recall original invoices?" to reopen the original invoice.  
**Note:** If you click **No**, skip to **Option 2**.
6. Click **Accept** on the **Lines** tab where the invoice will be displayed with a negative amount. This will adjust the invoice balances back into Accounts Payable.



7. Print the **Manual Check Register** and then Click **Yes** to **Update Check Register**.

## OPTION 2

If at Step 5 you click **No** to "Recall Original Invoices" and leave the original invoice(s) closed, here are the remaining steps:

From the **Lines** tab, select the **GL Distribution Button/Icon**. Enter a GL Account and enter the original amount of the check as a negative value.

Click **Accept**, print the **Manual Check Register**, and **Update Check Register**.

**NOTE 1:** If the check was for G/L distribution only, an invoice will be created and posted to the vendor's Open Invoice file aka: **AP\_OpenInvoice.M4T**

**NOTE 2:** The process for reversing a check **With Job Cost Distributions** is slightly different. [Contact us for assistance](#).

**That's how you reverse an AP check in Sage 100 ERP!**

**MBA Business Software**

1117 Perimeter Center West, Suite E210

Atlanta, GA 30338

**(800) 274-8041**

**MBA**  
business software  
www.mbabsi.com

Info@mbabsi.com

| www.mbabsi.com