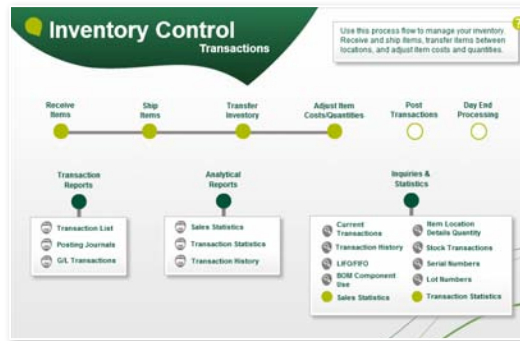# Sage 300 ERP 2012

What's New in Sage 300 ERP 2012?

Sage 300 ERP 2012 enhancements simplify and improve your experience with easier access to information, streamlined processes, and increased mobility. Additional new customer requested features will help you complete transactions more efficiently such as Entered By, On Hold Reason, and Requested By fields in Order Entry, copy order and create PO directly from Order Entry, and reverse GL batches. Enhanced Intelligence Reporting and Sage CRM functionality help you stay connected, collaborate successfully and reach your business goals by improving visibility into your business, simplifying forecasting, and mobilizing your workforce.

Sage Visual Process Flows Simplify Processes

New Sage Visual Process Flows reduce time navigating business processes by providing a graphical process-oriented interface that illustrates the steps and tools required to complete a task. Get started quickly using predefined process flows, or easily create your own custom flows to match your unique needs and specific roles. Particularly helpful for new employees learning Sage 300 ERP and your business processes, Visual Process Flows will guide you through standard tasks, as well as rarely performed tasks, such as year-end.

Sage Advisor Facilitates Product Updates

The new Sage Advisor Update functionality will enable you to keep your Sage 300 ERP 2012 system current with the latest product updates and enhancements. Automatically identifying your installed software, Sage Advisor conveniently allows you to set preferred notification options, review information, download and install available updates from the Sage Advisor Update Console - even monitor your Sage Business Care account status. Look for future Sage Advisor enhancements, such as "show me how" videos, on-screen help, and quick access to business advice.

### Accelerate Operations Inquiry with 2012 Enhancements

Sage 300 ERP 2012 introduces new inquiry functionality in the Inventory Control, Order Entry, and Purchase Orders operations modules. The Sage 300 ERP Inquiry tool enables you to easily create a customized ad-hoc query without the need to reference databases, programming, or web technologies. Save valuable time while getting greater visibility and insight into your business.

BENEFITS

- Reduce time navigating business processes with Visual Process Flows
- Improve productivity with customer-requested enhancements throughout your system
- Get additional benefits delivered in value-packed enhancements throughout the year
- Simplify the process of applying Product Updates with your new Sage Advisor Update
- Access the information you need faster with easier to read tables, an improved finder, and Help
- Save time when processing credit card payments
- Make informed decisions using flexible, powerful, and comprehensive reporting
- Expand your customized reporting with enhanced capabilities
- Accelerate growth and stay connected with Sage CRM enhancements
- Ship cost-effectively and efficiently while improving delivery times
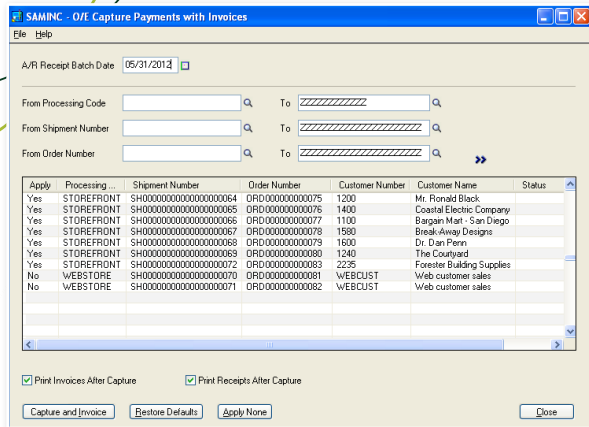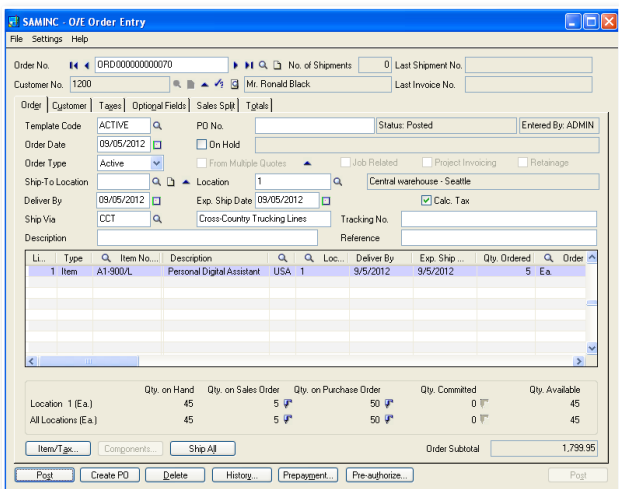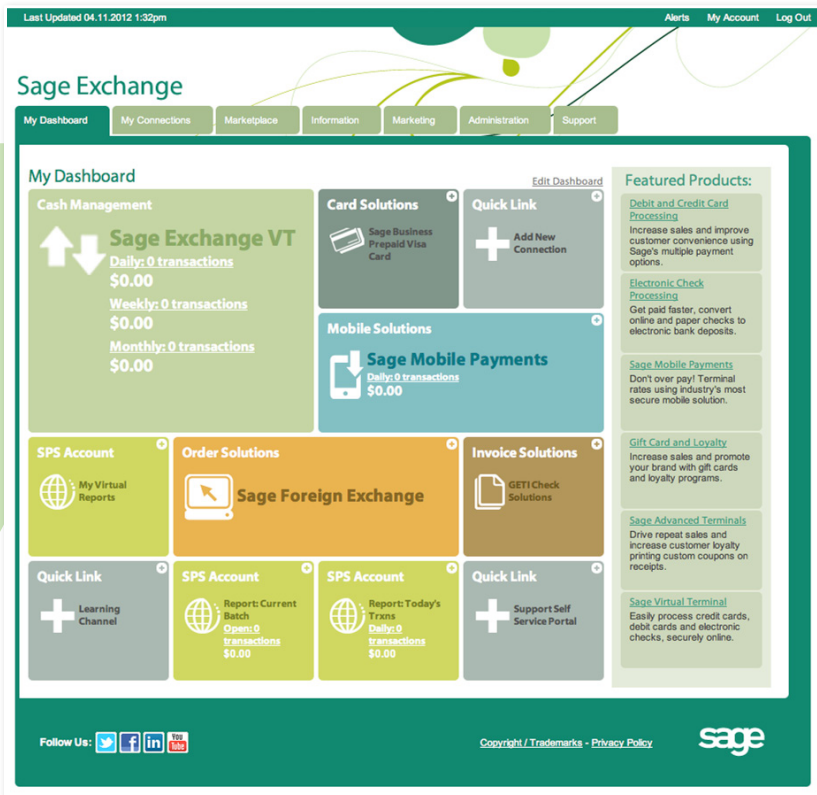
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Accelerate Credit Card Payment Processing

Enhancements in Sage 300 ERP 2012 allow payments to be processed faster and more efficiently. During Sales Order entry, Sage Exchange performs credit card pre-authorizations by verifying the customer has enough credit for the pending purchase, then reserves the amount of your transaction. Sage 300 ERP 2012 aligns with your business, providing the option for you to assign accounting personnel to oversee this process at the time of invoice, or opt for your warehouse personnel to capture pre-authorizations at the time of shipment. Accounting personnel can capture credit card payments, create invoices, and print receipts for a batch of shipped orders in a single step.

Real-time updates of payment activity are available 24/7 from the Sage Exchange Portal. Manage employee access and connect your Sage 300 ERP 2012 system to any payment device for automatic reconciliation conveniently and easily.

Streamline Order Entry

Sage 300 ERP 2012 enhancements allow you to right click to create a Purchase Order directly from within Order Entry, or create a copy of an existing order. Quickly identify who took an order, or why an order has been put on hold. Track and rate order deliveries using the new 'Deliver By' date, and conveniently access shipping information and the unique tracking number in Order Entry.

User Interface Enhancements

Access multiple companies in Sage 300 ERP 2012 on the same computer using one user license. For improved readability, your grids will display alternate line shading, dynamically persisting even if you insert or delete rows.
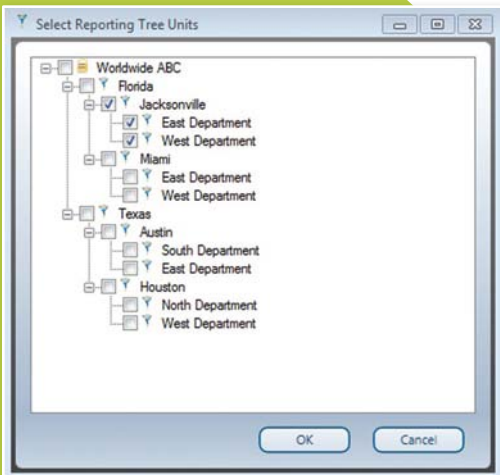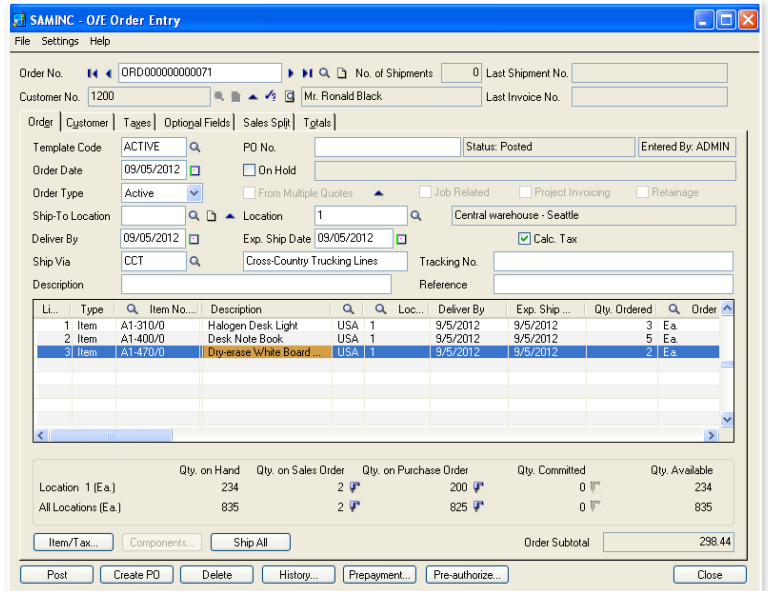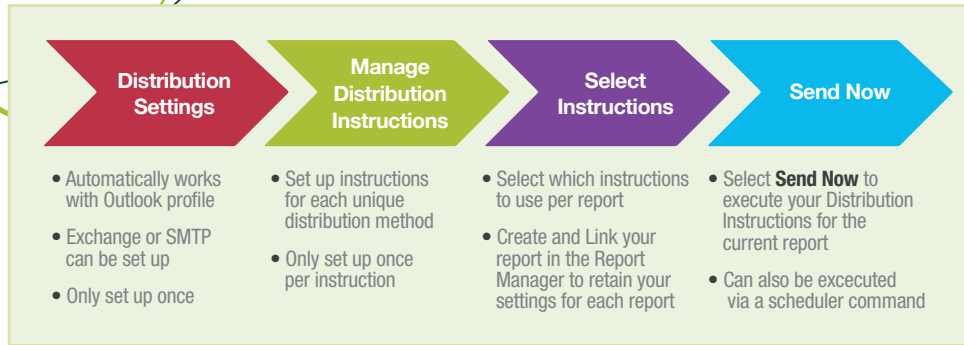

Improve Visibility with Intelligence Reporting

New Reporting Trees, Report Designer, and enhanced report distribution capabilities empower your informed business decisions with powerful financial reporting and analytics. Create and attach Reporting Trees to Report Designer layouts, and distribute meaningful information in Microsoft® Excel. Intelligence automatically consolidates data from multiple companies, divisions, and data sources for in-depth analysis. With the click of a button the new Reporting Trees allow you to model a reporting structure and view your organization in many different ways. Easily add or change reporting units without changing your financial data—accommodating reporting structures from simple to very sophisticated.

Build customized financial reports using the Report Designer graphical interface to drag and drop, add pre-defined calculations, multi-level groupings, and create additional calculated fields. Conveniently use the "What If Analyzer" to dynamically change amounts on the report for forecasting and budgeting, or to create projections. Maximum flexibility allows you to group by page or columns, or by any field such as Segments, Companies, or Regions. The Consolidated Financial Report Designer supports multi-company consolidation.

Distribution Settings	Manage Distribution Instructions	Select Instructions	Send Now
• Automatically works with Outlook profile • Exchange or SMTP can be set up • Only set up once	• Set up instructions for each unique distribution method • Only set up once per instruction	• Select which instructions to use per report • Create and Link your report in the Report Manager to retain your settings for each report	• Select **Send Now** to execute your Distribution Instructions for the current report • Can also be executed via a scheduler command

Improve your workflow and increase business process efficiencies using Sage 300 ERP Intelligence Reporting to establish automated report distribution, send reports to a file, publish to an FTP site, and send via email. Choose the reports you want to distribute, who will receive them, and customize each email format using your existing Microsoft® Outlook profile and address book.

Mobilize Your Sales Force

Sage CRM dynamically links your mobile teams with your main offices, providing an end to end view of every opportunity on mobile and tablet devices. Sage CRM gives full visibility of what is happening with every prospect and customer, simplifies forecasting and strengthens pipeline management while dramatically reducing the time salespeople spend on administration - freeing them to spend more time selling.

Sage eMarketing for Sage CRM enables execution of high-quality, targeted email marketing campaigns, automatically delivering email communications to the right people at the right time for maximum impact. A simple three-step wizard helps you create effective e-marketing campaigns with ease using over 90 templates. Hot leads are efficiently delivered to your sales team members, making it easy to track results and calculate accurate ROI.

Several Mail Merge enhancements allow for easier implementation, development and execution of your campaigns. Use a custom template regardless of which web browser you're using - Internet Explorer (IE), Safari, Firefox, or Chrome. Pre-upload screening of file quantity, size, and type including the ability to exclude specific document extensions and to limit files by size (Firefox, Chrome and Safari).

In your Quote to Order workflow you can view, update, or change the salesperson of record, and commission splits.

Sales Split

	Salesperson Code		Salesperson Name	Percentage
Salesperson 1 (Primary)	BB	🔍	Bill Bhaisson	80.00000
Salesperson 2	DS	🔍	David Sanjos	20.00000
Salesperson 3		🔍		0.00000
Salesperson 4		🔍		0.00000
Salesperson 5		🔍		0.00000

New Specialized Features and Functionality for Sage 300 ERP 2012

Sage 300 ERP Sales Tax by Avalara is a web-based solution that automatically performs address validation, sales tax jurisdiction research, and rate calculation for you on the fly. An expertly maintained tax engine is accessed over a secure internet connection to apply address, jurisdiction, and rate information to your every transaction—within the same order-entry or customer set-up screen you typically use. The integration is seamless with Sage 300 ERP and all sales tax jurisdictions in the USA and Canada are covered.

Sage 300 ERP Shipping by SmartLinc helps you get your products in the hands of your customers quickly and efficiently. Streamline your shipping activities for all parcel carriers, Truck Load and Less Than Truckload (LTL) shipments, and Company Vehicles over the web. Shipping offers easy and secure methods to use the best rates to deploy quickly, either on-premise or in the cloud, and manage your shipping processes all the way to the printed labels, and originate shipments from the USA or Canada.

Sage 300 ERP Alerts and Workflow by Vineyardsoft is an invisible assistant that monitors your business for events and conditions that require awareness and immediate response. Identify elements that are crucial to the success of your business, and personalized alerts will be sent via email, fax, pager, cell phone and screen pop-up. Dynamically analyze data between multiple business functions (e.g., Accounting, Inventory, and CRM) and take the right action quickly.

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