Newsletter for Sage 100

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NEWS U CAN USE

Sage 100 Version 2016 is here!

Sage 100c has an impressive new look and allows users to scale their screen to suit their vision requirements.

Please check what version you are using and let's get you updated today. As a reminder, Sage Software discontinued support for MAS 90 v4.5 as of 9/30/15.

Save the Date - Summit 2016

The annual Sage Summit conference move to Chicago this year, and will take place July 25-28, 2016.

Registration for this popular event opens soon. Visit SageSummit.com to get details of speakers, courses, and information about special deals.

## Sage ERP Document Management Make Paperless A Reality In 2016

Few of us could argue that less paper in our business processes is a bad thing. When we eliminate paper, the savings and efficiencies multiply—less paper means less need for filing cabinets and the space they take up, fewer printers and less toner are needed, postage savings is realized, time savings add up, and the list goes on.

Sage ERP Document Management is a complete document management solution for Sage 100 that can help reduce the amount of paper your organization shuffles. It is a Sage Endorsed Solution, meaning it has been handpicked and tested by Sage and is marketed alongside the company's core solutions. In this article, we'll remind you of the benefits of going paperless, provide an overview of the product's functionality and offer some suggestions of ways you can put Sage ERP Document Management to work at your organization.

What is Sage ERP Document Management?

Going paperless with Sage ERP Document Management involves much more than simply digitizing your existing files. This integrated solution works within and beside your Sage 100 application to deliver enormous efficiencies.

Sage ERP Document Management can be used anywhere you have documents that need to be stored, including your accounting, legal, human resources, sales and marketing departments. As we mention above, this solution is more than a simple digital filing cabinet. It electronically
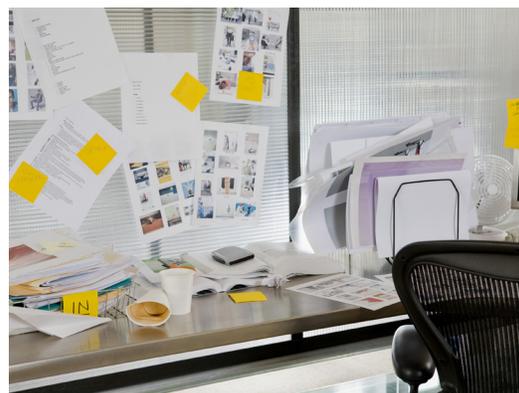
captures documents, streamlines business processes using workflow, automates the routing and distribution of all printed documents, reports and forms, and provides instant retrieval from the desktop or web. Let's look closer into each of these aspects and uncover the business benefits of this solution.

Capture

Sage ERP Document Management helps you capture, store, and retrieve documents that would otherwise be kept on paper. And there are multiple ways to capture those documents, including:

- ERM (Electronic Report Management) to capture and automatically index documents and reports from Sage 100
- Capture scanned and faxed documents.
- Saved documents from Microsoft® Office
- Using OCR, Barcode and XML Import

Workflow

In its role as a workflow engine, Sage ERP Document Management can help ensure your documents are easily located and have been handled according to your company's policies.

Sage ERP Document Management

- User configurable to move documents through business processes
- Automate business rules to streamline processing
- Configurable approval stamps and annotations
- Export capability to eliminate data entry
- Smart forms for custom data capture and entry

Output

Sage ERP Document Management can be used to schedule and distribute documents automatically based on receiver preferences.

- Automatically distribute documents to recipients based on their preferences — e-mail, fax, FTP or print
- Templates can be created to isolate and communicate data to the exact needs of the recipient
- Supporting documents can be collated behind primary document for automated distribution

Access and Share

Sage ERP Document Management enables your staff to retrieve, view, annotate and route documents instantly and securely.

- Document access is fully protected with role-based security

- Full audit tracking of all actions to a document

Key Business Benefits

We've touched on what Sage ERP Document Management can do, but what benefits do these features and functionality deliver? Below are just a few of those benefits.

- Enhance customer service with your ability to quickly locate and disseminate information
- Cut costs through paper and printer savings, less postage, and less need for filing cabinets and the space they consume
- Manage and protect sensitive data by eliminating the chance of paper reports being viewed by unauthorized users
- Disaster recovery and business continuity protection through electronic and off-site storage of vital business data
- Simplify and speed audits through quick access to needed documentation
- Save on courier service bills and transportation delays
- Speed the document approval process

Paperless Accounts Payable

As an example of the power of this solution, let's walk through how it can help you create a paperless accounts payable processing system.

1. The purchase order you enter in Sage 100 is captured electronically and a digital copy is emailed to your vendor.
2. The email acknowledgement you receive from the vendor is stored electronically along with the original purchase order.
3. The paper packing list you receive is scanned and stored.

4. The vendor invoice is routed electronically for approval. Customized workflows ensure it is routed to the appropriate reviewers.
5. The AP check is automatically captured from Sage 100 and the voucher is emailed directly to the vendor.

How Are You Managing Paper Now?

It's worth spending some time thinking about and then mapping out the flow of paper in your organization. The volume of paper and the number of times that paper is handled may surprise you. Be sure you take this mapping process through to the short and long term storage of the paper documents and their retrieval down the road.

By understanding how documents flow throughout your organization, you can better design a paperless system that meets your company's needs and delivers the efficiencies you expect.

Are you convinced that less paper is better? Contact us to learn more about Sage ERP Document Management. ⭐

Sure, You're Backing Up Your Server...
But Who's Protecting The Rest Of Your Data?

As a business owner or manager, you would never risk your business data by not backing up your servers on a regular basis. You likely even store a copy of those backups off site, either in a separate physical location or on a cloud-based storage platform.

But what about the vast array of business data that doesn't live on your servers? We're referring to customer correspondence, contracts, sales agreements, human resource documents, and countless other paper documents that you're storing in file cabinets. While not all of these documents are mission critical, many of them are, and all of them are at risk in the event of a fire, flood, or other natural disaster.

The obvious way to protect this paper-based data is to get rid of it! By converting your paper records to electronic documents, they can be backed up and stored securely just like your core business data is. An easy and effective way to begin collecting and storing data electronically is to use a tool like Sage ERP Document Management, covered in our main article.

Once you fully implement a document management solution, paper records become superfluous, as everything is collected and stored electronically. Next, you can make the decisions about what existing paper files ought to be scanned, and which are more practically left in their filing cabinets.

The fact is, in today's business environment, with the technology available to us, there is simply very

little need to generate and store paper documents.

As a Sage 100 user, you have access to the tools you need to protect every last page of your business data. Talk to us about how to implement a solution that fits your organization. ★

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