Which Features Benefit Your Business?

Top Features (per Competitive Strategies, Inc.)
- Purchase Order History. Keep purchase orders in history just like how sales order history works. This will reduce the number of purchase orders kept in the open PO file. Multiple ways to copy a purchase order.
- Color Code Companies by the frame instead of the data entry screen. Keeps the screens readable but the surrounding frame color changes so that you can know you are in different company codes.
- Vendor field name length expanded to 50 characters.
- Multi-column sorting in grids. Works like Excel.
- Create PO from SO now copies lines in the same order as on the SO.
- New User Interface Scripting. Can hide columns in a grid for selected users. Can change color of a column or field. Can do trigger events for messages for a field.
- Role Maintenance additions. Limit a user's ability to export to Excel.
- Affordable Care Act
  - Required reporting forms added as the government makes the specifications available.
  - Adding a new report in Payroll to determine if a company must do this reporting.
  - Adding ACA Employer Maintenance into Sage 100.
  - Adding a 1095-c Report.
  - Adding ACA Employee Maintenance with Monthly Detail.
  - Created a website full of resources and information.
  - Added an ACA Survival Guide on the Sage City website.

Key Feature, Workflow, Usability and System Enhancements
- Select a different screen border and frame Color for each Company Code.
- Country Codes are pre-populated in the Country table.
- Ability to optionally install Canadian Zip Codes.
- Added a new User Preference to default to the current module when switching companies.
- Added a module option to control exporting to Excel from Lookups and right click within grids.
- Added a module option to control printing from Lookups.
- Sage Intelligence Viewer is now included in Role Maintenance for security.
- Journal/Registers will now default the Print Full Comments checkbox to the last value used.
- Customizer allows the user to create additional maintenance space on panels/forms for UDFs.
- All reports now allow direct access to the associated Paperless Office Viewer by using the Save drop down menu.
- Added printing tasks for approximately 17 reports not previously available in Paperless Office.

General Ledger and Bank Reconciliation
- Added a button in Account Maintenance to reverse a journal by creating the entries in General Journal Entry.
- Added ability to sort columns in Bank Rec entries using Excel as the model.
- When entering an unformatted GL Account Number in report selections, the value will automatically be formatted just like Account Maintenance.
- The GL Detail Report now prints Out of Balance when Total Debits are not equal to Total Credits.
- Update the remit to name to Bank Rec (when "Print Remit To Information" is selected in check printing) instead of the Vendor Name. This is required for positive pay export.

Accounts Payable, Accounts Receivable and Credit Card Processing
- Expanded the Vendor Name field in A/P to 50 characters.
- When creating a *PRNT* check, the print button will still be accessible even after the check is initially printed and the check number is written to the table, allowing the check to be reprinted.
- Added the ability to Keep Open Print Dialogs after printing Accounts Receivable Forms.
- Added Level III credit card processing for reduced fees.
- Manual Check and Payment Entry now allows access to the "Select Invoices" dialog for all purchase transfer vendors.
- Added Sort and Selection by Vendor to the AP Vendor Audit Report.
- In Credit Card Processing, added the ability to perform a second credit card pre-authorization after the first one has expired.
- Added Column Sorting to
    - Select Invoices for Payment dialog from Invoice Payment Selection.
    - Select Check and Electronic Payment Maintenance dialog in Check and Electronic Payment Maintenance.
    - Select Manual Check and Payment Invoices and Select Vendor Transfer Invoices dialogs in Manual Check and Payment Entry.
    - Select Vendor Transfer Invoices in A/P Invoice Data Entry.
    - Select Cash Receipts Invoices dialog in Cash Receipts Entry.
    - Select Customer Invoices dialog in AP from AR Clearing Entry (Period End Processing).
- Added Sort and Selection by Customer to the AR Customer Audit Report.

Sales Order, Purchase Order and RMA
- Added Purchase Order History (like what was previously done for Sales order/Quote History)
- Added the ability to do a õcopy fromö when creating a new purchase order
- Added the ability to redisplay the source document in entry after doing a Quick Print in Purchase Order.
- Added the ability to Keep Open Print Dialogs after printing Sales Order and Purchase Order Forms.
- Added new columns to grid for allocated freight or landed cost, and sales tax to PO Receipt History Inquiry.
- Added Warehouse Code, Sales Tax Schedule, Exemption Info, FOB and Ship Via on PO Ship-To Address dialog.
- Added an option for the Purchase Order forms to use the email address in data entry for Paperless Office.
- Added new printing options for "Keep Source Document Open" for PO forms.
- Added the Batch Number to õThis order is currently beingí ö dialogs in Purchase Order.
- Added a new PO Option on the Generate tab that allows the user to select to either sort by Item Code or Sales Order Line No. when creating a new PO through generation.
- Added a new option on the Sales Order Printing dialog to allow orders on hold to be printed.
- Added Vendor Memo button to main panel of Purchase Order Entry, Receipt of Goods Entry, Receipt of Invoice Entry and Return of Goods Entry.
- A warning will now display when leaving the Item Packaging Maintenance dialog in Shipping Data Entry and the quantity shipped does not match the quantity packed.
- Added the Batch Number to õThis order is currently beingí ö dialogs in Sales Order.
- Added Ship Via to Customer Ship-To Address.
- Added Customer Memo button to main panel of Sales Order Entry and Invoice Entry.
- Added a new option to the Sales Order Printing dialog to prevent orders on hold from being printed.

Inventory and Bill of Materials
- Copy Item in Item Maintenance now allows the user to exclude Item Vendors and Alias Items.
- In Item Maintenance, added the ability to launch Bill of Materials Maintenance.
- Added a new field in Item Maintenance Transactions tab to drill into the GL Source Journal.
- Added Copy From for Product Line.
- Added new Module Options to allow access to each Inventory Transaction Entry type.
- Added a new option in Bill of Materials Options to synchronize the first line of the item description when both the item description and bill descriptions are the same. This option does not apply if the item has an extended description.
- Added Sort and Selection by Item to the IM Item Audit Report.
- Added separate Role Maintenance security for Item Vendors Maintenance accessed through Item Maintenance.
- Last Physical Count Date will now update by Item and Warehouse. Both fields are now viewable in Item Maintenance/Inquiry.

To Do
- Circle the bullet point next to the features you would like to have us install, setup and provide training on.
- Return to Competitive Strategies via E-mail info@comstrategies.com
- We can also be reached at (920) 993-1077.

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