

Sage 100cloud

for Manufacturing



CHORTEK
CPAs | BUSINESS ADVISORS

sage Partner

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ASSURANCE | TAX | OUTSOURCED ACCOUNTING & ADVISORY | BUSINESS SOFTWARE CONSULTING | MANAGED IT



About Chortek

Chortek is a leading professional services firm with deep industry expertise delivering accounting, auditing, and tax compliance services, coupled with value-driven technology solutions and tailored M&A offerings.

Chortek advises business leaders and individuals on innovative ways to protect assets and enhance efficiencies through a consistent, client-centric experience.

Our goal:
Success for the life of your business.

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Introduction to Sage 100cloud for Manufacturing

Financials:

General Ledger
Accounts Payable
Accounts Receivable
Bank Reconciliation

Distribution:

Sales Order Processing
Purchase Order Processing
Inventory Management
Multi-Bin Basic
Return Merchandise Authorization (RMA)
Bill of Materials

Manufacturing – Make to Stock:

Manufacturing Mobility for Barcode
Sage Production Management (3 users)
Inventory Requirements Planning (IRP)
Shop Floor (3 users)

Also Includes:

Sage Intelligence (Report Manager and Viewer Report
Designer and Connector Modules)
Business Insights (Explorer, Reporter and Dashboard)
Crystal Reports
Custom Office
Paperless Office/Electronic Forms Delivery
Credit card processing
Sage CRM Server and One Named User
Visual Integrator

Additional Functionality Available:

Warehouse management
Shipping integration
Sage Alerts & Workflow (alerts, connections, reports
and workflow)
Payroll with direct deposit
Sales Tax by Avalara
Web Services (website integrations)
Fixed assets
Sage Data & Analytics

Make To Order

While Production Management is for Make to Stock, Sage 100cloud Operations Management adds functionality for Make to Stock-Complex, Make to Order/Custom and Complex assembly.

Sage 100cloud Operations Management features:

Standard Features:

- Estimating/quoting
- Sales Orders & Work Tickets
- Purchasing/Component Exception Manager
- Time Tracker – labor and material issues to job

Optional Features:

- Product Configurator – rules-based configurator
- Enhanced scheduling
- MFG 100 – mobile labor and parts entry
- WHSE 100 – mobile receiving, shipping, and physical count

Integrated Products

We work with the following third-party applications integrated with Sage 100cloud to provide additional manufacturing specific solutions for shipping, warehouse management, and EDI.

SPS Commerce | EDI Systems Integrations



TrueCommerce EDI



Avalara Sales Tax, Exemption Certificates, and Sales Filing



CIMcloud



Summit Hosting



Fraxion (formerly eRequester)



sage Inventory Advisor

sage Alerts & Workflow

Scanco Warehouse & Manufacturing Automation



Starship from V-Technologies for Shipping



ScanForce for warehouse automation and handheld bar code solutions



Payment solutions



Altec and DocLink



sage Intelligence

sage AP Automation

Powered By  Beanworks

Our Services

Editions: Standard, Advanced (remote users/sites) and Premium (SQL)

Pricing: Subscription - pay monthly or annually for the use of the software

On-premise or Hosted

Sage 100cloud is installed on your network server or can be installed on a hosted server (Summit Hosting or Sage Partner Cloud).

Implementation, Training, and Support

We will work with you regarding;

- Project and change management
- Installation
- Data conversion
- Configuration, setup, and change management
- Training, forms, and reports
- Go live and ongoing support (including product updates and upgrades)

Maintenance and Support

Sage 100cloud users subscribe annually to a Business Care plan that provides:

- Product updates and critical fixes
- New version releases (install, data migration, and training to be quoted separately)
- Access to Sage Support (five cases or unlimited options available)
- 24/7 access to the online support knowledgebase

Meet your Chortek Consulting Team



Steve Krueger
Principal



Debra Scheider
Team Administrator



Sue Wolf, CPA
Sr. Technology
Consultant



Debby Hanson
Sr. Technology
Consultant



Robert Allande
Sr. Technology
Consultant



Karl Metzger
Sr. Technology
Consultant



Andaleeb (AG) Ghazali, MCP, MCTS
Sr. Technology
Consultant

Your Chortek consulting team will provide:

Chortek Annual Sage 100 User Group

Annual Review of your Sage 100 System

Dedicated Help Desk phone number, email, and staff

Upgrade and product update consulting

Sage 100cloud Feature Highlights

Financial Modules

General Ledger:

- Multi-company
- Multi-department
- 32 character - 10 segment account number
- Sage Intelligence for Excel-based financial report

Accounts Payable:

- ACH capability
- Divisions
- Trial Balance and Aging Reports

Accounts Receivable:

- Email statements
- Posting by division
- Trial Balance and Aging Reports

Bank Reconciliation:

- Positive pay capability

Distribution Modules

Sales Order Processing/Credit Card Processing:

- Order entry, shipping data entry, and invoice data entry functionality
- Integrated credit card authorization and processing
- Electronic delivery of order acknowledgments and invoices
- Customer purchase history during order entry

Purchase Order Processing:

- Purchase orders generated from sales orders or reorder points
- Two-step receipt of goods and receipt of invoice capability
- Email vendor purchase orders
- Multiple vendors per item, vendor part numbers, vendor-specific pricing

Sage 100cloud Feature Highlights

Inventory Management:

- Serialized, lot, standard, average, LIFO, and FIFO valuation methods
- Price levels and customer-specific pricing
- Kits

RMA - Return Materials Authorization:

- Process the return, customer credit or cross ship and vendor credit or replacement
- Allows repair, return, or scrap options

Bill of Materials:

- Multi-level BOM

Production Management/IRP

Production Management - Make to Stock:

- Routings and travelers
- Work centers and operations

Inventory Requirements Planning (IRP):

- Integrated with Bill of Materials, Sales Orders and Purchase Orders

100cloud Operations Management - adds functionality for Build to Stock-Complex, Build to Order/Custom and Complex assembly (not a good fit for Process manufacturing, blending, perishables - use Sage X3)

100cloud Operations Management

Estimating and Quoting:

- Re-use past quotes to speed the creation of new ones
- Combining bills of material, routings, labor, and contracted services to create a detailed cost roll-up
- Automatic update of material costs to reflect recent purchases
- Product Configurator aids in selecting options and calculating pricing

Sage 100cloud Feature Highlights

Sales Orders and Work Tickets:

- Quickly convert from an approved detailed quote to a sales order
- Generate work ticket order automatically
- Check material availability before release
- Product Configurator can easily create Sales Order and Work Ticket
- Attach product documentation and procedures specific to the job

Purchasing (component exception management):

- Automated purchasing analyzes your supply and demand for jobs and helps you buy products and materials at the right time
- Consolidates requirements for purchasing power
- Automatically generates purchase orders
- Optimizes cash flow by ordering what is needed for jobs
- Creates dynamic to-do list for every job

Time Tracker

(Labor and material issues to job)

- Real-time management tools to manage your job costs effectively
- Integrated job cost accounting and job management
- Real-time job status and reports
- Real-time actual versus estimated costing
- Projected costing based on work completed
- Real-time alerts let you know of potential cost overruns while in production

Product Configurator

- Configuration Templates help save time and improve efficiency
- Rules-based configuration helps you determine which features and options are available
- Price calculation rules give you end-user pricing based on selected options
- Easy step-by-step configuration process saves time

Sage 100cloud Feature Highlights

Enhanced Scheduling

- Visual validation shows you a visual of options selected during the configuration process
- Smart part numbers identify a part's unique features
- Auto Build BOM and Auto Build Work Tickets

- Streamlined scheduling
- Material availability reporting aids in on-time deliveries
- Management by exception capabilities
- Drag and drop scheduling board and tools
- Work center calendars
- Finite and infinite scheduling
- Exception alerts
- Capable to promise helps you forecast realistic delivery dates

Field Service Dispatch

- Increase field service efficiency and revenue
- Real-time data and reporting
- Eliminate invoice errors and get paid faster
- Improve your overall customer experience
- Schedule and dispatch technicians for service calls
- Accurately schedule tasks and components needed for repair calls
- Capture real-time costs for profitability on a job-by-job basis
- Track costs against contracts
- Seamless Microsoft Outlook, Sage 100cloud and 100cloud Manufacturing integration

Sage 100cloud Feature Highlights

MFG 100 / WHSE 100

- MFG 100 - capture labor, materials and job status via bar code and mobile device to work tickets
- WHSE 100 - inventory receiving, picking, shipping and physical count via bar code and mobile devices

Sage CRM

(Customer Relationship Management)

- Sage CRM Server and one named user included in every purchase (requires SQL Server and separate installation)
- Integration with Sage 100cloud and Outlook/Office 365
- Automation for your sales and customer service teams:
 - Manage Prospects and Opportunities
 - Manage Campaigns and Email (via Mail Chimp)
 - Manage Customer Service calls

Other Functionality Included

Business Insights (Explorer, Reporter, Dashboard):

- Executive level dashboard with graphics of key metrics
- Wizard driven report writing tool
- Powerful Explorer module – visual verses reports

Crystal Reports:

- Used for customizing all forms and reports

Custom Office:

- Add user-defined fields for screens and reports
- Modify screens for users or groups of users
- Enhance security access/view of screen data

Paperless Office:

- Journals and registers are PDF'd with viewer
- Period end reports are PDF'd with viewer
- Electronic forms delivery for invoices, purchase orders, statements, etc.



Our Mission:

As a trusted advisor, Chortek LLP provides expert insight to enable leaders of organizations to succeed.

Our Vision:

To be recognized as the preferred choice for leaders of organizations seeking a trusted advisor with expertise in selected industries, niches and service lines.

To be an employer of choice acknowledged for investing in the growth and success of a dedicated, skilled and diverse team.

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