



# Sage 100cloud For Distribution

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**Sage** Partner

## Sage 100cloud for Distribution

### Financials:

General Ledger  
Accounts Payable  
Accounts Receivable  
Bank Reconciliation

### Distribution:

Sales Order Processing  
Purchase Order Processing  
Inventory Management  
DSD/ScanForce or Scanco Multi-Bin  
Return Merchandise Authorization (RMA)  
Bill of Materials  
Mobility for Barcode  
Inventory Requirements Planning (IRP)  
Sage Inventory Advisor  
Sage Intelligence  
    Report Manager and Viewer Users  
    Report Designer and Connector Module  
Sage Alerts & Workflow  
    Alerts, Connections, Reports, and Workflow Modules

### Also Includes:

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 Modules Available:

Payroll with Direct Deposit  
Production Management  
Sales Tax by *Avalara*  
Web Services – website integrations  
Fixed Assets

### For more information

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### Locations

- Waukesha, WI
- Appleton, WI

sage CRM  
sage 100cloud

Chortek LLP has been helping businesses manage their technology investments for over 25 years. Our suite of offerings includes Customer Relationship Management (CRM), Sage 50cloud, Sage 100cloud, Sage Business Works and Sage100cloud Manufacturing software solutions.

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## Integrated Products

Chortek works with these third party applications integrated with Sage 100cloud to provide additional Distribution Industry 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



### Scanco Warehouse & Manufacturing Automation



sage Inventory Advisor

sage Alerts & Workflow

### Starship from V-Technologies for Shipping



### ScanForce for Warehouse Automation and handheld bar code solutions



### Fraxion (formerly eRequester)



### Altec and DocLink



### Payment Solutions



sage Intelligence

sage AP Automation

Powered By Beanworks

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Editions: 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 recommended)

## **Implementation/Training/Support**

Chortek will work with you regarding:

- Installation
- Data conversion
- Configuration/Setup/Change Management
- Training/Forms and Reports
- Go live and on-going support (including product updates and upgrades)

## **Maintenance and Support**

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

- Support Plus (unlimited support) – included no charge first year
- Product Updates and Critical fixes
- New Version Releases– install, data migration and training quoted
- Access to Sage support (5 cases or unlimited options available)
- 24/7 access to the online support knowledgebase

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## The Chortek Advantage

Your Chortek consulting team:



Steve Krueger  
Principal



Sue Wolf, CPA  
Sr. Technology Consultant



Debby Hanson  
Sr. Technology Consultant



Robert Allande  
Sr. Technology Consultant



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



Karl Metzger  
Sr. Technology Consultant



Debra Scheider  
Team Administrator

### Your Chortek consulting team will provide:

- Client Update emails as needed
- Chortek Annual Sage 100 User Group
- Annual Reviews of your Sage 100 System
- Dedicated Help Desk phone number, email and staff Upgrade and product update consulting

**sage** provides:

- Customer Portal
- Knowledgebase
- Sage City
- Sage Summit

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## Key Sage 100cloud Feature Highlights

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### FINANCIAL MODULES



#### General Ledger

#### Multi-company

- Multi-department
- 32 character –10 segment account number
- Sage Intelligence for Excel Based Financial Report

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#### Accounts Payable

- ACH capability
- Divisions
- Trial Balance and Aging Reports

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#### Accounts Receivable

- Email Statements
- Posting by Division
- Trial Balance and Aging Reports

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#### Bank Reconciliation

- Positive pay capability

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### 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 acknowledgements and invoices
- Customer purchase history during order entry

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#### Purchase Order Processing

- Purchase order 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

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#### Inventory Management

- Serialized, Lot, Standard, Average, LIFO and FIFO valuation methods
- Price levels and customer specific pricing
- Kits

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#### RMA –Return Materials Authorization

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

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#### Bill of Materials

- Multi-level BOM

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## **Sage CRM – Customer Relationship Management**

Sage CRM Server and one named user included in every purchase\*

\*separate install with MS SQL Server required

Integration with Sage 100cloud and Outlook/Office 365

Automation for your sales, marketing, and customer service teams:

- Manage Prospects and Opportunities
- Manage Campaigns and Email (via Mailchimp)
- 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
- Sage Intelligence (Report ManageExcel-based
- Excel based reporting from various modules
- Designer included in Gold Business Care plan

Custom Office

- Aduser-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.

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## Integrations

Avalara for sales tax calculations, exemption certificate management, sales tax report filing

AP Automation

CIMCloud – Ecommerce website integration

Credit Card Processing – REPAY, Paya, or Century Business Solutions

DocLink by Altec

EDI – Direct Integrations with Sage 100 with your trading partner(s)

- TrueCommerce EDI Solutions
- SPS Commerce EDI System Integrations - MAPADOC

Fraxion - eRequester

Sage Fixed Assets

Scanco or ScanForce for Warehouse Automation and hand held bar code solutions

- Automate receiving, picking and physical count with bar codes and handheld units

StarShip from V-Technologies for Shipping

- Integrations with UPS, FedEx, USPS and many common carriers
- Direct link from Sage 100 Shipping Data Entry – no duplicate entry
- Shipping labels and Bill of Lading

Summit Hosting – Hosted Sage 100 for remote access and data backup

Sage Inventory Advisor

Sage Data & Analytics

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