

# Sage 100cloud For Distribution





# **Sage 100 cloud 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



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.



# **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





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



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



# **The Chortek Advantage**

# Your Chortek consulting team:



Steve Krueger Principal



Sue Wolf, CPA Sr. Technology Consultant



Debby Hanson Sr. Technology Consultant



Scott Spencer 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



- Customer Portal
- Knowledgebase
- Sage City
- Sage Summit

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

## 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



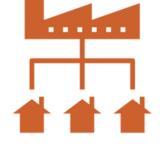
- Serialized, Lot, Standard, Average, LIFO and FIFO valuation methods
- Price levels and customer specific pricing
- Kits

## 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





# 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-defineded 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.



# **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

