



SOFTWARE • SOLUTIONS

2020 Q4 NEWSLETTER

Inside the Issue

Page 2

Acumatica 2020 R2 Virtual Launch Recap

Page 4

Going Virtual: How Businesses Are Adapating

Page 5

Sage 100 2020 Updates

Page 6

Third Party Add Ons

Page 8

ACC Updates



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Acumatica 2020 R2 Virtual Launch Recap

The Acumatica 2020 R2 Launch occurred on Wednesday, September 16 and had over 2000+ in attendance! This one hour-long premiere went in-depth with the new features of 2020 R2. Here is what happened during the virtual launch.

The virtual launch started with Jon Roskill, CEO of Acumatica, introducing the day's events from the Museum of Flight. When discussing remote work Roskill said, "Digital transformation has become a requirement... With so many businesses operating from remote locations and home offices now, it is more important than ever to have a single business truth.." He continued to say how Acumatica has allowed its customers to utilize their digital transformation features and stay connected at a time where connection can be difficult.

The agenda of the virtual launch was focused around the three main themes of Acumatica 2020 R2 and how these themes are meant to make business thrive, grow and take flight.

- **Work Smarter, Not Harder**
- **Power Growth with Best In-Class Functionality**
- **Technology Leadership on a Future-Proof Cloud Platform**

The demonstrations of new features were presented by Jessica Gadbois, Partner Enablement Manager/Solution Consultant, and Doug Johnson, VP of Product Management. Both of these talented professionals presented each functionality and example of tech leadership with superior knowledge.

Updated Features Include

- Improved Tax Management
- Changes to the Branches form
- Predefined user roles
- The State Diagram
- Changes to Fetch Data form
- Grouping of Continuation Sheet
- Changes in the Mobile App
- Filter records and add new ones
- Validating Bills Against Purchase Orders
- Selection of Owners



Usability Demo

In the new update, you can now enter a lead and instead of manually looking up the lead's address, you can populate it by using the "Address Lookup" tab in the lead details section. One of the most requested and a now favorite, according to Doug and Jessica, is the Recently Viewed Icon that allows you to go back to a project you were previously working on.

When performing Generic Inquiry, you are now able to add a related table. You can also preview other Generic Inquiries while working on a current inquiry.

It is no secret that Acumatica prides itself on the interactive dashboards the software displays. In this new update, you are now able to Auto Refresh Dashboards on the Dashboard toolbar.

Commerce Demo

One of the most exciting features in 2020 R2 is its ability to automatically create Accounts Payable documents from vendor bills, a new feature driven by Acumatica Artificial Intelligence and Machine Learning.

The most highlighted feature in this new update is Acumatica's new Point of Sale offering and true omni-channel capability. The Acumatica team was excited to announce this new feature as it is especially useful in today's new normal where digital relationships are becoming more common with customers.

Tech Leadership

In this last segment of demonstrations, Jessica and Doug focused on tech leadership. Configurable workflows were one of the highlighted features, where you can configure States – Transactions – Actions to fit your company needs. Within the configurable workflows, you can create fields at any of the points to be updated to your company specifics.

The last feature that was highlighted was the Acumatica Plugin within Outlook. The example presented was using bills sent via email to be submitted for recognition. One easy click and you easily have your information transcribed. If you have a paper bill instead of an electronic bill, you are able to scan it into the system and be able to submit it for recognition.

If you missed the live event, click [here](#) to watch the full presentation!





Going Remote: How Businesses Are Adapting

With COVID-19 changing normal business practices, the move from in-person to remote work was a learning curve for many companies. Organizations are adapting to this new reality while also transitioning to old practices by being back in the office.

Communication among employees, management, and customers is now more crucial than ever. Popular platforms like Google Hangouts, Zoom, and GoToWebinar have been paramount in keeping human connection feasible and efficient. Businesses are now conducting their in-person meetings and procedures through these common video software systems and are working to keep business practices relatively “normal.”

Another important component to business adaptation is secure, online technology. ERP systems have become more common and have allowed remote work to be possible. Data sharing and real-time updates are just a few of the benefits to ensure secure technology. With this system in place, data is proven to be safe because of the extra security within the software. In today's remote world, having a secure system is paramount for decision making and overall company trust.

The final way businesses are conforming to this new reality is a general sense of resilience and ability to adapt. Adapting to adjustments like working from home, organizational change, and shifts in normal business practices has shown that companies are resilient and will persevere during an unprecedented time. This establishes trust with their customer base and enforces the belief that they will quickly and easily bounce back when businesses are able to return to normal practices. Organizations who have suffered loss both financial- and personnel-wise are now recovering as they have adjusted to CDC guidelines and are able to bring people back. Furloughed employees are starting to be welcomed back proving that although tough decisions had to be made, companies are beginning to recuperate.

Sage 100 2020 Updates

The Sage team made updates to their software system in March 2020. Changes were made in 12 categories within the system, totaling over 50 updates within those features. Below are the most notable and prevalent enhancements made to the software.

- **Reverse an entire Accounts Payable check run:** A reverse check run utility has been added to the Accounts Payable Utilities menu. You can use this utility to reverse an entire check run. Check runs are selected by entering either a register number or a bank code and check number. Checks with a type of Auto (a standard check) and Electronic that are posted to the cash disbursements journal can be reversed.
- **Expanded Name Fields:** Several fields have been expanded from 30 to 50 characters including: Customer name, Customer contact name, Vendor contact name, Confirm to name and Requested by name.
- **Add expiration dates for lot and serial numbers:** Expiration dates can be added for items with lot or serial numbers when items are received into inventory or produced through Bill of Materials. Expiration dates can be manually entered, or you can enter settings to automatically calculate them. You can also calculate sell-by, use-by, and return dates to determine how many days before or after an item's expiration date it can be distributed.
- **Convert SAP Crystal Reports:** In this update, the custom reports and forms for active modules are converted to the current level when you run conversion. Employees are still able to work within Sage 100 while reports and forms are being converted.
- **International Address Reporting:** You can now enter an international address for customers, vendors, and contacts. There has been multiple fields renamed and telephone and fax numbers now support international formats

**Don't miss our
upcoming Sage
Webinar:
Sage HRMS
Overview and
Product Tour.**

**When: October 13th
2pm
Register online at
4acc.com**

sage HRMS

Third Party Spotlights

Let ACC help you extend your system to meet your unique business needs

We have partnerships with a wide variety of third-party technology providers. These solutions can further help your organization streamline processes and boost efficiency. Here are a few we would like to highlight.



Any Document.
Any Process.
Anywhere.

Enterprise-Wide Document Management and Workflow Solution to help automate and streamline the document-intensive processes for any area in an organization - accounts payables, sales orders, expense reports, contract management, human resources, and beyond-and gain improved efficiency, visibility, and control. Go paperless at your company, and reap productivity and efficiency rewards with DocLink. Altec's partnerships with ERP software providers, like Sage and Acumatica, allow for tight integration and ease of use for your entire team.



Sales Tax is Hard.
Avalara makes it Easy.

Sales tax can be a necessary, complex nightmare for most businesses. Automating tax compliance saves time, money, and effort. Avalara is the fastest, easiest, most accurate and affordable way to calculate sales and use tax, manage exemption certificates, file returns, and remit payments. It is a can seamlessly integrate with your Acumatica or Sage 100 solutions.

AvaTax removes the guesswork by integrating seamlessly with existing business systems to eCommerce shopping carts and Point of Sale systems. Rates are calculated "behind the scenes" and automatically applied to transaction. As your business continues to grow, AvaTax is built to grow with you. This cloud-based Software-as-a-Service (SaaS) is tailored to meet each customer;s specific needs and eliminates additional hardware costs.



The payment solutions your business needs for the price you want

American Payment Solutions is an industry leader in ERP integrated payments. Reduce complexity, streamline processing and exceed customer expectations by seamlessly integrating American Payment Solutions credit card processing with your Sage 100 or Acumatica ERP solution. This simple and effective integration allows you to reduce risk, decrease fees and increase revenue. Consumers often prefer to pay with credit cards. With APS, your customers will enjoy the simplicity and speed of paying by credit card, and in turn, you will see profits soar.



Avoid saying, "If only we had known" with Automatic Alerts

You don't have sufficient time and sufficient staff to constantly monitor and analyze your ERP data, review everything that's going on, alert the appropriate people, and take appropriate actions in a timely manner.

With Sage Alerts & Workflow, you get a system that automatically and pro-actively monitors itself--triggering alerts and auto-responding to critical, time-sensitive business conditions so as to enable an organization to improve efficiency, maximize revenue, and ensure optimum customer satisfaction.



Contact us for an in-depth discussion about your evolving software needs.



Manage every step of your fixed assets lifecycle

With the ability to track and manage fixed assets through every step of the asset life cycle, customers enjoy simplified fixed-asset tracking with comprehensive depreciation calculations, including over 300,000 U.S. and Canadian regulations for businesses, governments and nonprofits. This software includes four modules: planning, tracking, depreciation and reporting. You no longer have to worry about the status of your fixed assets with this comprehensive and accurate software.



Built from the ground up for Acumatica, by Acumatica experts

Velixo Reports is the only reporting tool of its kind designed exclusively for Acumatica. This user-friendly Excel plugin allows you to connect using your Acumatica login credentials and start building Excel spreadsheets that instantly include Acumatica data. adds a ribbon to Excel and more than 50 functions that are specially designed to work with general ledger, project data and generic inquiries. Changes you make to formulas and cells are reflected immediately in your spreadsheet. You can easily update the cell to see the P&L of another branch, or run it for a different financial period.



ACC Updates

Company Highlights

In July 2020, ACC welcomed their new Marketing Communications Specialist!



If you have any questions, please email her at adonahue@4acc.com!

2020 Q4 Blog Highlights



Three Factors Affecting ERP Market Growth



The ERP Hero's Journey as told by Harry Potter



What are Dashboard Reporting Visualizations?



What is Sage Fixed Assets Software?



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