

# Understanding the Upgrade Process

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*Understanding the Upgrade Process*  
*Connections Webinar – August 14, 2014*

# Naming Conventions

Old Name	New Name
Mas90 (peer to peer)	Sage100 ERP Standard
Mas200 (client server)	Sage100 ERP Advanced
NA	Sage100 ERP Premium (SQL)

**ERP** – Enterprise Resource Planning – Back office (GL, AP, AR, SO, IM, etc.)

**CRM** – Customer Relationship Mgt – Front Office (Sales, Marketing, Customer Service)

Versions: 4.3, 4.4, 4.5, **v2013** (not 5.0)



# ERP Upgrade

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- What are my upgrade options?
- Why should I upgrade?
- When should I upgrade?
- How does the upgrade process work?



# What Are My Upgrade Options?

- Standard inter-version upgrade
- Standard Intra-version upgrade
- ABS upgrade (New Install Process)
- Version v2013 Providex or SQL backend



# Why Should I Upgrade?

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- How Important is Technology to Your Business?
  - Cost Savings** - Automation and Integration to Streamline. Improve speed and accuracy. Lower long term costs.
  - Growth** – Free up capacity, improve throughput, improve service to customers, improve employee satisfaction. Grow Gallons and Margin.
  - Decision Making** – More timely and accurate information facilitates better/quicker business decisions.
- Changing technologies
- Continued support
- New features



# When Should I Upgrade?

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- Individual Client decision

- Company Culture

**Early Adopters** - Technology is a source of competitive advantage. IT typically reports to CEO, and there is a continuous portfolio of IS projects in play. “IT is a strategic investment with long term positive ROI.”

**Mid Adopters** – Ad Hoc technology projects. IT typically reports to Accounting and there is more focus on cost controls. “IT is a cost center.”

**Late Adopters** – Technology is not viewed as a differential advantage (our system works fine as is, no new pressures from customers or competitors, or no tech savvy talent in house). IT is either outsourced, or is a second role played by someone in the company. “IT is a cost of business to be minimized.”

- Variables

- Version releases
- Technology changes/Support requirements
- Providex versus SQL/IT support
- End of Life announcements



# How Does the Upgrade Process Work?

- Phase 0 – Request for Upgrade
- Phase 1 – Upgrade Evaluation
- Phase 2 – Upgrade Authorization
- Phase 3 – Programming
- Phase 4 – DM2 Bench-testing
- Phase 5 – User Acceptance Testing
- Phase 6 – Pre Go Live Checklist
- Phase 7 – Go Live
- Phase 8 – Reinstatement of Support Services
- Phase 9 – Client Feedback



# Phase 0 – Request for Upgrade

- Sign and return the “Request for Upgrade” form. This authorizes DM2 to perform the “Upgrade Evaluation” which is the first step to providing you an estimate.
- DM2 will send you a confirmation of receipt for the Request for Upgrade.
- All upgrades require a current MAS90/200 maintenance plan with Sage Software and a current maintenance and support plan with DM2Software. DM2 will inform you if action is required to bring maintenance up to date.





# Phase 1 – Upgrade Evaluation

1. Send copy of your system to DM2
2. Programming code compare
3. Review options with Customer:
  - Custom Pgm (keep or remove)
  - 3<sup>rd</sup> party software
  - Forms, Reports, VI, C/O
  - Test plan; Test environment
  - Training needs



# Phase 2 – Upgrade Authorization

1. Upgrade Evaluation results in an Estimate to you (on an Upgrade Authorization).
2. Approval of the Upgrade Authorization places your project into the upgrade schedule and authorizes DM2 to move forward.
3. At this point you should hold off on making significant changes (setups/pgm) otherwise a revision may be necessary on your upgrade estimate.



# Phase 3 – Programming

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Only applicable to clients with custom programming

1. Timeline depends on scope of work and programming schedule; upgrade consultant will inform you of schedule updates.
2. This is the official point the project is “locked down” where no new programming changes or significant setup/process changes should be made until the upgrade is complete



# Phase 4 – DM2 Bench Testing

1. In-house testing based on agreed upon test plan and transaction samples provided by client
2. Bench Testing looks for “big rocks.” Your user testing will be more extensive
3. The timeline depends on complexity of the Test Plan



# Phase 5 – User Acceptance Testing

## 1. Remote walkthrough

Smaller, less complex projects

Low level training/user acceptance testing

## 2. Test server user acceptance testing

Best practice for mid/large, more complex projects

Separate test machine

In depth user training/documentation

Hands on transactional processing

Lowers risk factors



# Phase 6 – Pre Go Live Checklist

1. Verify/test connections
2. Confirm Go Live times
3. Verify user acceptance testing checklists
4. Backup confirmation document signed and returned
5. Confirm requirements related to system status i.e. no open batches



# Phase 7 – Go Live

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1. ERP is down while conversion/migration are running. Downtime depends on scope of your project and speed of your hardware – ask your consultant for an estimate
2. Upgrade consultant is your primary point of contact for Go Live and one week following
3. Users should take extra effort to ensure internal controls are being followed and verify system is operating as expected



# Phase 8 – Reinstatement of Support

1. Meeting to review the Reinstatement of Support Services document with any open items
2. Return to normal support services
3. Unlocks project and allows you to continue with new programming, consulting or add-on modules/features
4. Complete Project Survey together





# CRM Upgrade

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- What are my upgrade options?
- Why should I upgrade?
- When should I upgrade?



# What Are My Upgrade Options?

- Sage CRM versions:
  - 7.2 (latest version)
  - 7.1 SP2
  - 7.1 SP1
  - 7.0
  - 6.2
  - 6.1
  - 6.0



# What Are My Upgrade Options?

- Sage CRM/Sage 100 (DM2) **integration options:**
  - Sage Integration (EES)
  - Greytrix GUMU



# What Are My Upgrade Options?

- Sage CRM/Sage 100 (DM2) **integration options:**

- **Sage Integration (EES)**

- Best support for DM2 pricing in CRM Order Entry
- Limited CRM-MAS version compatibility

Sage 100/DM2 Version	Sage CRM Version EES	Sage CRM Version GUMU
2013	7.2	7.2
4.5	7.1 SP2	7.2
4.4	7.1 SP1	7.2
4.3	7.0	7.2



# What Are My Upgrade Options?

- Sage CRM/Sage 100 (DM2) **integration options:**
  - **Greytrix GUMU**
    - Latest Sage CRM version available with ALL Sage 100 versions
    - Supports multiple MAS company databases combined into a single Sage CRM database
    - DM2 pricing not fully available in CRM Order Entry
    - Additional software cost



# Why Should I Upgrade?

- Latest technology, compatibility with other systems
- Upgrading Sage 100, Windows Server, SQL Server
  - Sage CRM 7.2 requires Windows Server/SQL Server 2008 R2
- New features



# Why Should I Upgrade?

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- New Features by Sage CRM versions:

- 7.2

- Most advanced mobile options.
      - iPad runs full featured version of Sage CRM
        - » Full GUMU MAS-CRM integration
        - » Interactive Dashboard
        - » Full CRM workflows, screens, reports
    - Sage CRM Sales Lite for iPhone
    - Sage CRM Sales Tracker for Windows 8
    - Yammer, Facebook
    - Programmatic re-write, new interface



# Why Should I Upgrade?

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- New Features by Sage CRM versions:

- 7.1

- Web browsers now supported:
      - Google Chrome\*
      - Mozilla Firefox\*
      - Apple Safari
      - Microsoft Internet Explorer (always supported)
      - \*Enhanced document management
    - Improved Exchange/Outlook integration
    - Improved marketing campaigns, mail merge, Interactive Dashboard, Fusion charts, reporting





# When Should I Upgrade?

- Normally driven by the requirements of Sales, Marketing, Customer Service, IT
  - Mobile access required?
  - Upgrades to Sage 100, Windows Server environment?
  - Integration with DM2/Sage 100?
  - Trend to extend back office resources to front office CRM/customers?
  - To increase bottom line sales, customer satisfaction/retention



# New Features

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- All DM2 Modules in New Framework
- Multi CL networks in one company code
- CL Site Code expanded to 4
- Freight In Surcharge feature
- Valvoline Lubricants Interface
- Cap fuel tax charges if needed in your state
- Partial Tax Exemptions for excise taxes
- New budget calculations
- Sage Visual Process Flows
- Active/Inactive customer flag
- National Account customer type
- Sage Intelligence Features
- Sage CRM





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Follow-up questions?  
E-mail DM2 at: [sales@dm2.com](mailto:sales@dm2.com)



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