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LATEST UPDATE FOR SAGE 300 2018

Summary of New Features

The newest product update 1 (PU1) for Sage 300 2018 is now available. Here's a look at some of the top new features in this latest version of the software.

General Improvements

This product update includes new features and improvements in both **Sage 300 classic** and **Sage 300c**. Here are some of the highlights:

Customer and Vendor Email Copies - you can now receive copies of emails that you send to customers or vendors. In the **Send Copies To** field on the Email tab of the Company Profile screen, enter one or more email addresses where copies should be sent.

Tax History Clearing Options - on the **Tax Services Clear History** screen, you can now control which transactions are cleared by entering a range of tax authorities and either fiscal periods or document dates.

Tighter Security - now you can customize Sage 300 so users see only companies for which they have security rights. Refer to this [Sage Knowledgebase article](#) for configuration details.

Sage 300c Web Screen Updates

Here are some of the improvements to Sage 300c web screens in Version 2018.1:

More Breathing Room - to give you a little more room to work, the navigation menu was moved to the left side of the screen and it's now possible to hide the web toolbar.

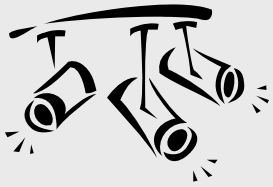
Improved Navigation - items on the menu are now listed in a more meaningful order to make them easier to find. In addition, Administrative Services, Common Services, Bank Services, and Tax Services are now at the top level of the menu along with other modules.

Data Export Filters - now you can apply filters to export only data that meets certain criteria.

Enhanced Language Settings - you can specify your preferred language on the screen and no longer have to set the language in your browser (applies to both Sage 300 classic and 300c). Also, user languages now include locales that identify the user's country or region and adjusts the presentation or formatting of some information (such as dates, for example).

Note Before Upgrading

A product update is not a full upgrade or a product replacement. If you are not yet running Sage 300 2018, please contact us for upgrade assistance.



SAGE CRM

Introducing Sage CRM 2018

Sage CRM 2018 is now available. Enhancements in this newest version focus on continued calendar improvements, ease of use, and simplified navigation across the product. Let's take a closer look.

Sage CRM 2018 Calendar

You may have noticed that enhancing Calendar functions has been a focus over the last couple of new releases and version 2018 continues that trend. Because the Calendar is at the heart of so many activities in Sage CRM, the following improvements are now available:

Task Quick Complete - Allows you to complete a task with a single click. Completed tasks are automatically removed from the screen when filtering by 'Pending'.

Drag and Drop Calendar Appointments - Appointments can be moved by dragging and dropping it to a new time in the Day, Week, Work Week and Month views.

Calendar Filter by Pending - User and Team Calendars now default to filter by pending in the Agenda and Task views area. Changes to filters persist for the duration of your Sage CRM session.

Quick Tasks Creation with Attached Documents - You can drag and drop files to the 'Drop files here' area in the Tasks view of the My CRM and Team CRM calendars to quickly create tasks with attachments.

Simplified and Easier to Use

A collection of smaller enhancements that, together, make a big impact on workflow efficiency and usability include:

Simplified Tabs - You can quickly move rarely-used tabs out of the way and into a new 'More' tab option, freeing up screen space and allowing faster access to the functions and areas you use most often for daily tasks.

Date	Time	Event	Person	Company	Action	Status	Complete
01 Friday December 2017	4:00 PM	✓ Check in with Susan - forecast			To Do	Pending	<input type="checkbox"/>
04 Monday December 2017	10:00 AM	✓ Set up lunch with Eurolanda	Kieran O'Toole	Eurolanda	To Do	Pending	<input type="checkbox"/>
08 Friday December 2017	11:00 AM	✓ Prepare presentation	Daniel Padden	American Gage	To Do	Pending	<input type="checkbox"/>
13 Wednesday December 2017	8:00 AM	✓ Submit Expenses			To Do	Pending	<input type="checkbox"/>

Quotes and Orders Screens - Various changes have been made to improve usability and make it even easier to create and manage quotes and orders.

MailChimp Integration Updates - Sage CRM now checks the format and validity of email addresses being sent to MailChimp, as well as detecting duplicate email addresses. Any issues found will appear as a Sage CRM notification.

Even More Integrated

With each new release, integration with your existing accounting software is a primary focus for the development team at Sage. The expressed intent is to make Sage CRM a no-brainer solution for anyone currently using a Sage ERP product. A seamless exchange of data and transactions between sales in the front office and accounting in the back office allow Sage CRM and Sage ERP to work together as one single system.

Upgrading to Sage CRM 2018

You can upgrade directly to Sage CRM 2018 R1 if you are currently running any of the Sage CRM v7.3 or Sage CRM 2017 versions. If you're running other versions, additional steps may be necessary. [Contact us](#) if you need help or have questions before upgrading.



SAGE HRMS

HR and Payroll Reporting Options

Did you know Sage HRMS delivers tons of standard and custom reports? Whether it's for government compliance, payroll analysis, or strategic evaluation of your workforce, here's a look at some of the reporting and analytics options in Sage HRMS that you should know about.

Standard Reports

With loads of pre-configured reports on Employees, Time Off, Payroll, Compliance, Training, and system/audit trails, Sage HRMS probably has a pre-formatted report to meet the basic needs of most companies. Simply navigate to the reports section, select a report group (i.e. Employees, Time Off, etc.), highlight the specific report you want, define the report criteria (by date, employee, etc.), and then print, preview on-screen, or export the data.

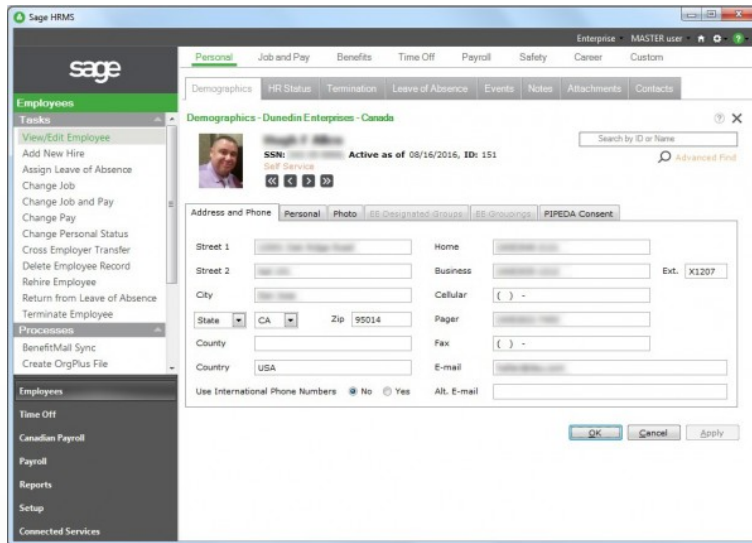
As mentioned, Sage HRMS comes packed with hundreds of reports across various modules that are sure to provide most of the information you're looking for right out of the box. But don't take our word for it - click below to download the **Report Catalog for Sage HRMS 2017**:

[Download Report Catalog](#)

Custom Reports

When you need a custom report that isn't available "out of the box" or pre-configured, then it's time to look to the Crystal Reports™ writer that's included with Sage HRMS. With the right skill set, your options are limitless using this powerful tool that allows you to create presentation-quality reports on just about anything in the Sage HRMS database - and in any format you want.

Be aware that some level of knowledge about Crystal Reports development as well as the Sage HRMS database and fields structure is required (database info available in the Data Dictionary).



Be sure to [contact us](#) if you need help customizing a report or want to learn about custom report training options.

Sage HRMS Secure Query

Another reporting option is Sage HRMS Secure Query. This powerful tool allows you to create custom database queries and generate ad-hoc reports. You can select which fields to output, sort records, build record filters, and group or summarize data. You can then output your query as a report, spreadsheet, or database table.

Before you begin working with queries, it's recommended that you refer to the **Set Up Sample Queries** section that helps guide you through the process of generating and using queries in a sample environment before running them on your live Sage HRMS database.

Getting Help

Whether you're running queries, customizing a report, or just need help finding a standard report, be sure to contact us if you have questions or need help.

Perpetual License Pricing Change Coming in March 2018

While many software providers have moved solely to subscription-based licensing, Sage continues to offer both **subscription** and **perpetual** license options to customers. To accommodate the added cost of maintaining both options, Sage announced that they'll be adjusting the price of Sage Business Care prices for **Sage 300 perpetual licenses**.

Beginning in March, Perpetual customers will see an annual **increase of 20%** on their renewal notification for any Sage Business Care plan renewing on or after **March 1, 2018**.

Sage states that pricing adjustments are determined based on an annual review across their entire solution portfolio which considers market conditions, the cost of doing business, added value delivered through major product releases, and various other factors. The price increase reflects the added personnel and resources required to support both subscription and perpetual license models.

Note: the increase does not affect Sage 300c subscription licenses which remain the same.

Sage 300c Name Change

Just when you thought you had the different product names figured out, we learned that Sage will be changing the name of Sage 300c. Effective in March 2018, Sage 300c will be renamed to **Sage 300cloud**.

It's primarily a marketing change designed to align Sage 300c with other cloud-focused products and services. However, there's no new licensing or features to become familiar with. Same product, different name.

Sage Sessions Live Events Coming to a City Near You

Earlier this year, Sage announced that in lieu of hosting a big annual Sage Summit event like we've seen in years past, the company has decided to take the show on the road and get closer to customers on their home turf.

The newly-formatted "**Sage Sessions**" tour is comprised of a series of live regional events throughout the U.S. and Canada. Similar to Sage Summit but more compact, Sage Sessions is a single-day event featuring a keynote, breakout sessions, product demos, and a lunch & mingle reception that provides networking opportunities. Each stop will also feature a scaled-down trade show and opportunities to speak with product experts from Sage and third parties.

There are currently 10 stops scheduled in the U.S. and Canada as follows:

Chicago, IL - April 24

Toronto, ON - May 8

Austin, TX - May

Atlanta, GA - June

Montreal, QC - June 26

Edmonton, AB - July

New York, NY - July

Seattle, WA - August 7

Vancouver, BC - September

Pricing is \$29 for early birds (up to 1 week prior to the event) and \$49 standard after that.

[Get Full Details and Agenda ...](#)

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