

In This Issue

Page 1

New! Multiple
Contacts Module

Page 2

Sage CRM

Your Swiss Army
Knife in the Front
Office

Page 3

Sage HRMS

Automating HR
Forms, Routing
and Approval

Page 4

Introducing Sage
Business Cloud
Marketplace



Authorized
Partner

NEW! MULTIPLE CONTACTS MODULE For Customers and Vendors

With the release of Sage 300 2020 Product Update 1, you can now set up multiple contacts for customers (including national accounts) and vendors. Previously, Sage 300 allowed only one contact per company. Let's take a closer look at this new functionality.

A Highly-Requested Feature

In many cases, you probably have multiple contacts at a company. Whether it's a customer or vendor of yours, you probably have one contact for sales or purchasing, another for accounting, and so on. Especially it comes to emailing orders, quotes, and invoices, different documents often go to different people and departments.

That's why Sage added the new **Multiple Contacts Module** with the release of Sage 300 2020 PU1 - one of the most requested enhancements submitted to the [Sage 300 Ideas forum](#). Now you can set up Sage 300 to email A/P, A/R, O/E, and P/O documents to some or all of the contacts for any customer or vendor. And if you have Sage 300 integrated with Microsoft Office 365 or Sage CRM, the new contacts are supported in the Sage Contact app for Outlook 365 and Sage CRM.

Multiple Contacts Module Setup

To enable the new Multiple Contacts Module, perform the following steps:

1. Login to the **Sage 300 Desktop** application
2. Navigate to **Administrative Services**
3. Click **Data Activation**
4. Check the **Multiple Contacts** box to activate the module

NOTE: in order to send documents to your various contacts by email, you must have your system email settings configured properly. Click [Setting Up Email in Sage 300](#) for detailed instructions.

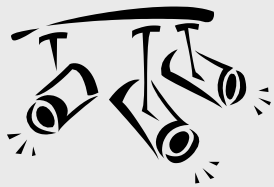
Other Enhancements in Sage 300 2020 Product Update 1

Other notable enhancements in Sage 300 2020 PU1 include:

- A new look for Sage 300 Web Screens with an updated visual appearance
- Admins can forcibly sign out users in Sage 300 Classic screens
- More fields on the Company Summary page in Sage CRM are now synchronized with Sage 300



Check out the [Sage 300 2020 Release Notes](#) for more detail and be sure to contact us if you have questions or need help with an upgrade.



SAGE CRM

Your Swiss Army Knife in the Front Office

Sage CRM is known for helping you organize and streamline sales activities like managing contacts and appointments or creating quotes and orders. But many don't realize that it's also highly adaptable - like a Swiss Army Knife - and can go beyond just sales functions to help you understand your customers better ... across your entire business.

Tools for Targeting the Right Customers

Sage CRM Marketing functions can help you generate more targeted campaigns and a better return on your marketing investment through features like:

- Integration with MailChimp to leverage the power of budget-friendly email marketing
- Automating communications to build relationships with prospects and keep leads warm
- Planning campaigns, tracking results, and collecting data so you can send your next campaign to the right people at the right time
- Send special offers and discounts to the right audience based on their purchase history stored in Sage CRM

Features to Improve Customer Service

You already know that customers are the lifeblood of your business. But do you have processes and technology in place to ensure that every interaction with your company is an efficient and pleasurable experience? Sage CRM for Service puts customers first with tools that help you:

- Leverage Sage CRM data to cross-sell and up-sell related products and generate repeat business
- Managed and automate customer service issues and resolve cases faster
- Monitor customer service metrics like call volume, case history, and resolution time to continually improve



Bridging the Front and Back Office

Because Sage CRM is designed to work hand-in-hand with your Sage 300 system, you get the added benefit of bridging the typical communications gaps between sales activity in the front office and accounting and operations activity in the back office. The result is greater reporting insight across your entire business, as well as improved communications and productivity, all of which creates new opportunities for business growth.

In practical terms, it means you can:

- Consolidate accounts into one reliable source for better data integrity
- Eliminate errors by entering data - like new quotes, orders and customers - only once
- See payment history, order status, customer cases, quotes, orders, shipments and more in one place

A lot has changed over the years - Sage CRM is no longer a narrowly-focused departmental tool used only by sales. It's time to start putting that Swiss Army Knife to work for your business!



SAGE HRMS

Automating HR Forms, Routing and Approval

In this article, we'll take a look at **Sage HRMS HR Actions** - a Sage Endorsed Add-on Solution that lets you easily create paperless forms using **any fields** from your Sage HRMS system. In short, you can process any employee action, from request to hire to termination and everything in between, using interactive, paperless web forms.

What Does HR Actions Do?

HR Actions eliminates the burden of paperwork by providing over 40+ online forms that cover the entire employment lifecycle. Here are just a few examples:

- New Hire, Requisition to Hire, and Transfer Requests
- W-4 and I-9
- FMLA/LOA Request
- Performance Appraisals
- Termination/COBRA
- Much, much more ...

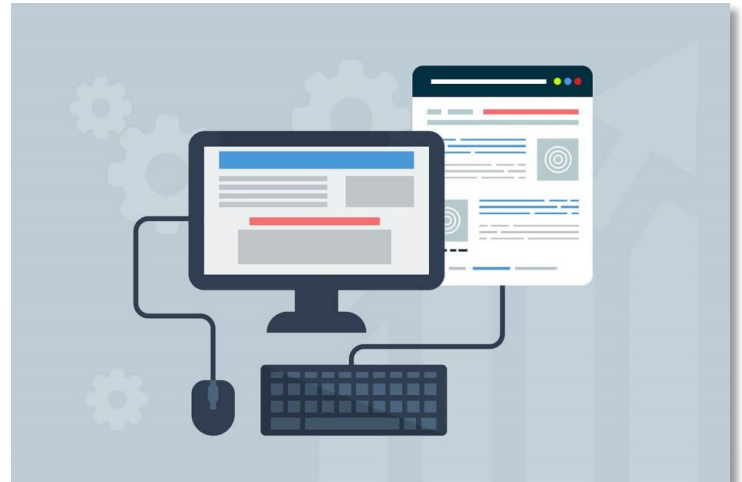
And if the 40+ built-in forms aren't enough, you can easily build your own web-based forms without any technical skills or programming knowledge required.

HR Actions electronically routes forms for approval and saves the collected data directly into Sage HRMS without manual data entry and the form is saved in the personnel file. Plus, electronic routing slips for each form automatically notify approvers by email when there's a form to review.

Key Features and Benefits

A few key features and benefits of Sage HRMS HR Actions:

Robust Question Control - Questions can be fixed, generated by role, or open for editing by the employee, manager, or both. An additional option allows you to roll goals over into questions on a Performance Appraisal form.



Control Routing of Forms in Workflow - Administrators can control the routing and flow of a form including stop it, skip an approver, or push it through the routing process.

Monitor Workflow - Monitor the status of forms being routed for approval with a dashboard. See where the form is on the electronic routing slip and who's left to approve the form.

Detailed Logs and Audit Trail - Approver comments and actions are logged with a date and time stamp. Changes to form field values include the date of a change, who made the change, and the type of change.

Form Control and Archive - Completed forms are available for viewing online and can have up to five file attachments (i.e., PDF, Word, Excel), which are also available for viewing.

Want to See More?



[Contact Us](#) to request more information, get a quote, or schedule a demo to see if **HR Actions** for Sage HRMS is right for your HR department.

Introducing the Sage Business Cloud Marketplace

Sage recently introduced the **Business Cloud Marketplace** - a new 'one-stop shop' where customers can go online to browse and find add-on tools and apps to manage and grow your business. Here's a closer look at this new platform.

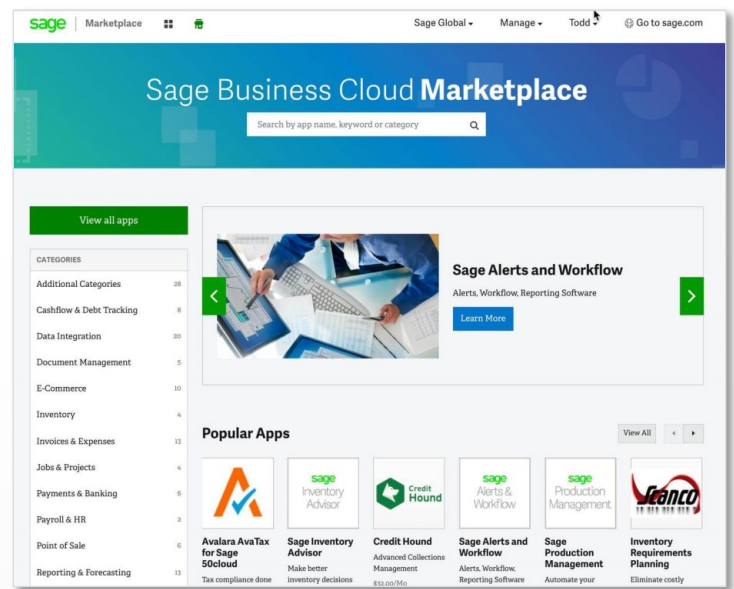
What is Sage Marketplace?

[Sage Business Cloud Marketplace](#) (Sage Marketplace) is a website and platform where Independent Software Vendors (ISV's) can showcase their integrated solutions designed to work hand-in-hand with Sage 300. These "add-ons" extend the core functionality in your ERP software to add even more automation and efficiency in areas such as:

- Document Automation
- AP Automation and Approvals
- EDI
- Electronic Payment Processing
- Shipping Management
- Field Sales
- And more ...

All of the solutions in the Sage Marketplace have been vetted by Sage so you have the confidence in knowing they've been tested to integrate and work with your Sage 300 system.

According to Sage, the new marketplace helps to accelerate their strategy of becoming a great Software as a Service (SaaS) company. What's more, Sage Marketplace supports their goal of offering customers extended benefits and choice that are available from a wide, growing, and vibrant Sage ecosystem.



Benefits to YOU

Just a few of the benefits to customers like you include:

- Access to hundreds of trusted and integrated apps that help automate tasks, simplify processes, and get even more value out of your relationship with Sage.
- Easily find sales information, brochures, customer reviews, see a demo, or take a product tour in one place, without having to visit multiple third-party vendor websites.
- For selected apps, you get the benefit of a single billing relationship with Sage rather than separately with another vendor or vendors for multiple apps.

[BROWSE APPS NOW](#)

***Note:** Sage Marketplace is launching initially in the U.S. followed by the UK and Canada later in 2020.*

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