Sage 300 Newsletter

Issue 2 - 2019

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INTRODUCING SAGE BUDGETING & PLANNING

Now Available for Sage 300cloud

A recent product update introduced the newest application now available for Sage 300cloud - **Sage Budgeting and Planning**. Let's take a look at this powerful tool that enables quicker, more informed business decisions by automating and shortening your budgeting and planning cycles.

The Budgeting and Planning Challenge

While most companies acknowledge the importance of budgeting and planning, many of them struggle with an inefficient and manual process that's time-consuming, sometimes inaccurate, and almost always frustrating for those involved. While simple spreadsheets may work for some smaller companies, that approach falls well short of what most mid-sized or larger organizations need in an environment that's more complex, often involving multiple people and departments. That's where Sage Budgeting and Planning comes in.

Key Features and Benefits

Whether you need to allocate a revenue target or cost projection from the top down, or consolidate several budget plans from the bottom up, Sage Budgeting and Planning accommodates your organizational structure with the following key features:

Plan Sheets - provides seamless integration of budget submissions from multiple departments using a familiar spreadsheet look and feel.

Plan Manager - the "command center" of the application, you can easily distribute, review status and revisions, lock down, and consolidate your Plan Sheets in a way that's seamless and efficient.

Calculation and Analysis - apply powerful calculations and global formulas for seasonal trends and other business drivers. Also perform "what-if analysis" to change plan assumptions and reorganize budget structures to see the potential impact of changes to your plan.

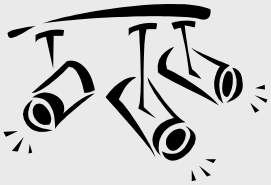
Security and Control - comprehensive security features provide full control over use of plan sheets and authorized users as well as who can view, edit, or modify information.

G/L Integration - integration with your Sage 300cloud General Ledger means you can transfer information back and forth without ever having to enter data more than once.

Now Available for Sage 300cloud

Sage Budgeting and Planning is now available to Sage 300cloud customers **free of charge** in a limited use capacity. Some features (including multiple users) may require an upgrade.

Contact us if you'd like more information or want to learn how to activate and start using your free version of Sage Budgeting and Planning.



SAGE CRM

Introducing Sage CRM 2019 (Release 1)

Sage CRM 2019.1 is now available. Following a 3-year road-map that sets the development path through 2021, this release focuses primarily on incremental improvements and enhancements of existing features. Here's a closer look.

Enhanced CRM Features

While Sage CRM 2019.1 doesn't appear to deliver any blockbuster NEW features, the latest release does deliver a nice range of enhancements to existing features in various areas of the product.

In the **Calendar** - which has significantly transformed and improved over the last several releases - you can now view a complete list of all your tasks and appointments in:
My CRM > Calendar List.

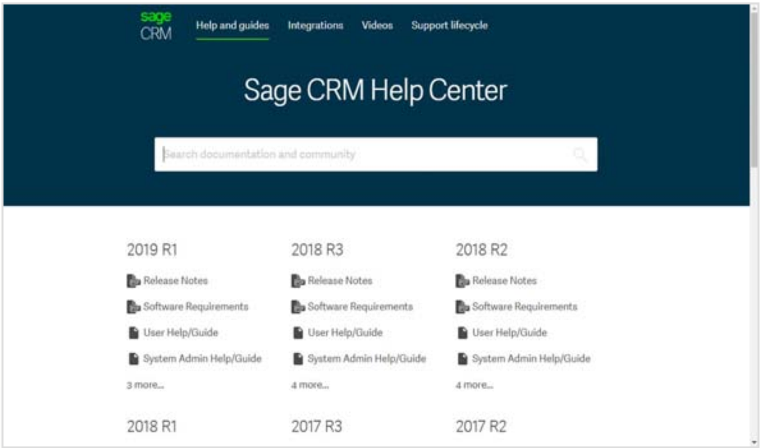
Now when you access Sage CRM using Microsoft Internet Explorer, you can use the ActiveX **Document Drop** to attach documents to custom entity records.

When it comes to **Email**, you can now use the Outlook Plugin to file emails where the To and/or From field is empty. Previously, an error would occur if either of those fields were empty.

Quick Find has been optimized for a scenario where a system administrator adds more entities to the Quick Find index and they are immediately available in search results. Previous versions may have shown incomplete search results in this scenario.

Based on feedback, improvements to Sage CRM Reports include **chart points** that have been made larger and are no longer connected by straight lines.

Lastly to enhance system **security**, new and amended user passwords will implement Bcrypt encryption technology which generates hashes and optimizes password strength.



Sage CRM Help Center

Getting you up and running quickly and answering product questions as they come up seem to be an intentional focus evidenced by the refreshed eLearning and updated User Assistance sections of Sage CRM. And as part of that goal, the Sage CRM Help Center at **Help.SageCRM.com** has been updated and provides easy access to:

Help and Guides - including release notes by version, user guides, administrator documents, helpful workbooks, and detailed software requirements specifications.

Integrations - documents and guidance for integrating Sage CRM with other applications.

Videos - deep-dive technical videos for things like Setting Up and Using Sage CRM Mobile, Installing the Classic Outlook Plugin, Setting Up New Users, and more.

Upgrading Sage CRM

Sage CRM 2019.1 (Release 1) is now available for download. Be sure to contact us if you've customized your system, are integrated with other applications, or just need a little help upgrading to the latest version.

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SAGE HRMS

Version 2019 Coming Soon!

It seems like it has been a while since Sage HRMS added major feature enhancements. That's why people are buzzing about the upcoming Sage HRMS 2019 release. Here's a preview of we expect to see when the new 2019 version becomes available.

Sage HRMS 2019 Overview

While product updates to Sage HRMS will always ensure compliance with current mandates in HR and payroll, the updates coming in 2019 are predominantly focused on enhancing the experience within **Employee Self Service**.

New Features Detail

Here's what to expect with Sage HRMS 2019.1:

Enhanced organization chart in ESS

Employees can view their managers and direct reports and drill down, which makes is easier for colleagues to find one another for various projects and search.

New Two Factor Authentication

Better security for employees accessing the system.

Employees can add their own profile picture in ESS

The picture can automatically transfer to HRMS, improving efficiency and making the system more personal.

Calendar attachment when receiving time off requests

Managers are now able to add the time-off request to their calendar (***big*** request from Sage City customers).

Add personal email and phone numbers

Employees can now add personal email and phone numbers on the company phone list page on their own (previously required admin/manager).

New check box for Mail Relay

Allows you to set up an anonymous email for replies.

Benefit Letters in ESS

Employees can now see their confirmation letters for Open Enrollment in ESS instead of HR having to print and send them.

Display Employee Attachments in ESS

Previously only available in HR, employees can now view their attachments page in ESS.

View My Menus from mobile page in ESS

Previously My Menus were only available on a computer in ESS, but are now available on mobile devices.

Updates to Life Events in ESS

Added ability to delete Open Enrollments that are in an Updated Status.

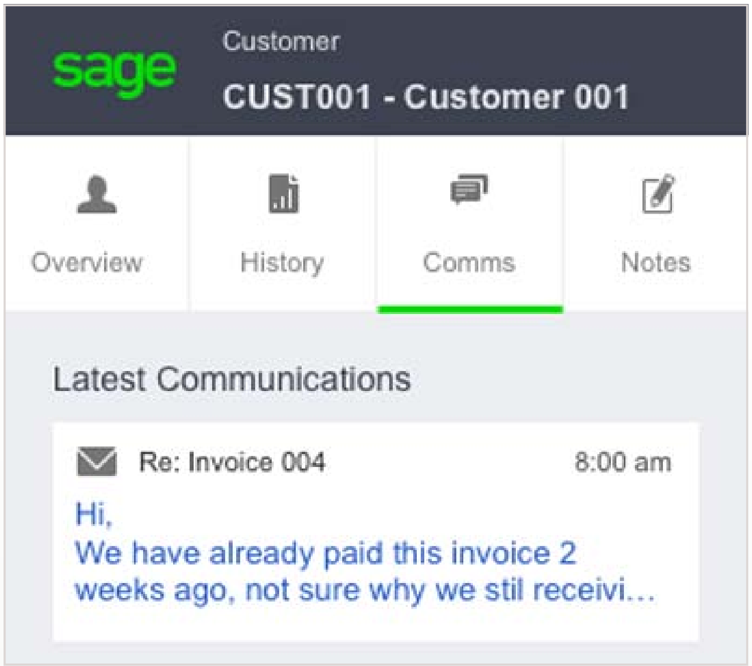
Stay Tuned!

Sage HRMS 2019 is not yet available. But stay tuned to our newsletter and we'll make sure to let you know when the new version is released and available for download.

In the meantime, feel free to contact us with any questions that come up.

SAGE CONTACT FOR OFFICE 365

With the release of Sage 300cloud 2019, Sage introduced **Sage Contact** - an Outlook add-in that allows you to view Sage 300 customer information in Office 365. In this article, we'll take a closer look at the app and integration.



Sage Contact for Office 365

When you integrate Office 365 with Sage 300cloud, you can use the Sage Contact app to view Sage 300 customer information in Outlook, including the following data:

- Recent invoices and payments
- Credit information
- Contact name, address, phone, and email
- Customer memos

What's more, you can also edit contact information and create new customer contact records in Outlook and have the changes update to Sage 300cloud.

Benefits of Sage Contact

Because it's available through Outlook in Office 365 via laptop, tablet, or mobile device, Sage Contact is a very useful feature for sales staff that may spend time on the road, yet need access to key customer information in order to prepare for meetings. Suppose you're heading out for a customer visit and want to make sure you're up to date on the status of their account. Rather than calling the office to have someone in accounting run a report and get back to you, you can simply use Sage Contact to open a recent email to or from the customer and select the Sage Contact icon to display the info on your device.

Sage Contact Components

Sage Contact consists of various tabs and sections that populate key customer information from Sage 300 into Office 365/Outlook. Here's a breakdown of what you'll see:

Overview Tab - provides the customer's available credit as well as address and phone number. Contact details can be updated in the app and sent directly to Sage 300cloud.

History Tab - displays how much money is owed by the customer as well as average number of days to pay invoices. You can also click through the latest invoices and payments to review details.

Comms Tab - quickly review and reply to recent emails to and from the customer as well as other communications entered directly from Sage 300cloud.

Notes Tab - displays notes created in Sage Contact as well as memos from Sage 300cloud. You can also update notes during or immediately after a meeting for better accuracy.

Refer to this online guide for more detail on using Sage Contact or get in touch if you'd like help getting it up and running.

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