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WHAT'S NEW IN SAGE 300
Version 2020.2 Now Available

The second product update (2020.2) for Sage 300 2020 was released in April. Here's a look at what's new including bank feeds that make it easier to reconcile your Sage 300 ledgers, simplified tax-related postings to the G/L, and improvements to several web screens in Sage 300cloud.

New Electronic Bank Feeds

With the new Bank Feeds functionality, you can easily connect Sage 300 electronically with your bank to download transactions. Not only will you save tons of time and reduce potential errors, Bank Feeds will also simplify your bank reconciliation process and ensure your accounts are up to date. Simply download transactions from your bank and match them up with your existing data in Sage 300. Sage 300 bank feeds include support for over 80 financial institutions in Canada, and more than 10,000 banks in the U.S.

Sage 300cloud Web Screen Improvements

Product Update 2 includes enhancements to the following web screens in Sage 300cloud:

Company Colors

If you use Sage 300 to manage multiple companies, you can assign a unique color to each company to make it easier to see which company's information you are viewing and avoid data entry errors. Previously, company colors appeared only in classic screens.

Long Comments for Order Details

For order details on the O/E Order Entry screen, you now enter information in the Comments/Instructions field in a box instead of a table. This allows you to enter long comments without splitting them into multiple rows in a table.

Specify BOM Numbers on Order Details

On the O/E Order Entry screen, when entering an order detail for a Bill of Material (BOM), you can now specify a BOM number in the Kit/BOM field.

Other Notable Enhancements

General Ledger in now integrated with Tax Services so you can enter tax amounts in G/L journal entries. The tax amounts are posted to Tax Services so they appear in the Tax Tracking report. In addition, you can now print Canadian T5018 (CPRS) forms on plain paper. Previously, you could only to official CPRS forms.

Check out the Sage 300 2020.2 Release Notes for more detail and be sure to contact us if you have questions or need help with an upgrade.

The first release (R1) of Sage CRM 2020 is now available. Let's take a look at some of the top new features in this latest version.

MailChimp Integration Enhancements

The **Sage CRM MailChimp integration** has been enhanced to automatically detect duplicate email addresses, making it easier to prevent and fix these occurrences.

To ensure that a Person, Company, or Lead record being added to the system has a unique email address, system administrators can now use a new **Detect duplicate emails** option. Then, if a group sent to MailChimp contains two or more records with the same email address, the group gets rejected.
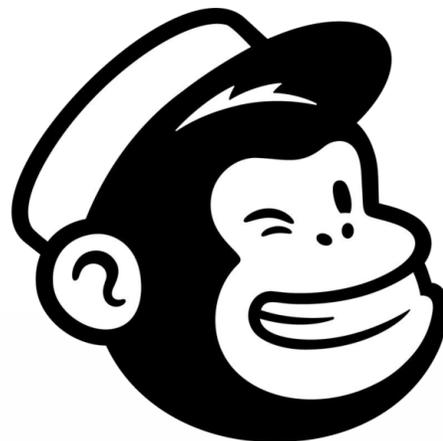
This enhancement includes the following:

- Automatic detection of duplicate email addresses
- A new screen displaying records with the same email address
- A new MailChimp notification

Managing Documents

The technology behind the Document Drop capability has been updated so the functionality is now **available in all browsers** that are supported by Sage CRM. Plus, you can drag-and-drop emails from Outlook in all web browsers.

In addition, you can now create document templates to perform a **nested mail merge**. This is where a parent entity record has the details of one or more child entity records embedded into it.

For example, you can create a template that generates an Order document with embedded Order Item records.

Outlook Plugins

Just like Document Drop, the technology framework for Lite and Classic Outlook plugins has been updated which means they now work in any web browser supported by Sage CRM.

These Outlook plugins – or add-ons - for Sage CRM synchronize contacts, appointments, and tasks between the two applications. It also allows you to file single or multiple email messages in Outlook to one or more Sage CRM records so you have full documentation of all email communication between you and your customers. You can even attach Sage CRM shared documents to Outlook email.

Upgrading to Sage CRM 2020 R1

Contact us if you need help upgrading or click below to review the detailed release notes, system requirements, and other important details on Sage CRM 2020.

FULL RELEASE NOTES

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One of the many benefits of using Sage HRMS is the ability to start small and streamline just your core HR processes at first. Then as your business grows, you can extend that same time-saving automation to other areas of the HR process and your complete employee lifecycle. Let's take a closer look at some of the most popular add-ons for Sage HRMS.

Employee Benefits Management

Employee benefits management can be extremely tedious and paper-intensive. But **Sage HRMS Benefits Manager** can save time and cut those costs with key features including:

Benefits Carrier Connectivity - Cut the cost of benefits administration and eliminate paper enrollment forms with secure and automated communication of employee benefits enrollment data directly to health insurance carriers.
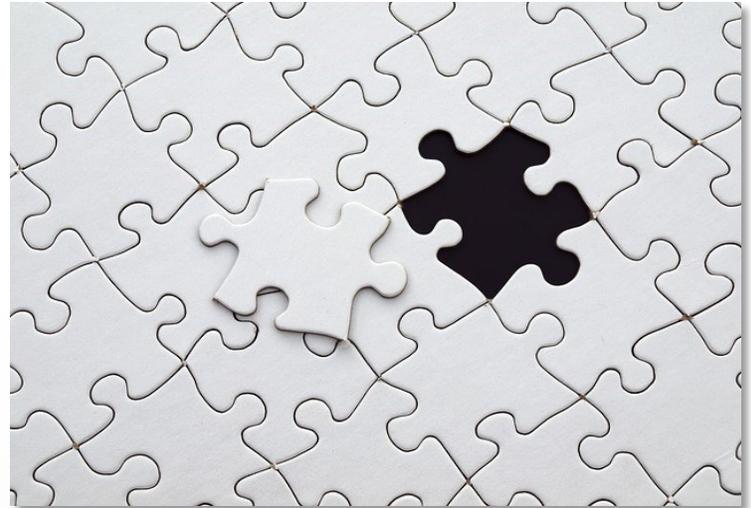
Open Enrollment and Life Events - Move open enrollment online and empower your employees to make their benefits elections and update life events with easy step-by-step wizards that walk them through the process.

Employee Self-Service (ESS)

Sage Employee Self Service (Sage ESS) empowers employees with ownership of their personal information so they can view and update certain HR fields without inundating HR staff with routine inquiries. Automated workflow and customizable features enable employees and supervisors to manage time-off requests, benefits changes, job details, training history, and more. Perhaps best of all, approved changes are automatically updated from Sage ESS to the Sage HRMS database which eliminates duplicate data entry.

Automate Time and Attendance

Time and attendance management solutions for Sage HRMS help you process payroll faster and more accurately. An automated time and attendance tracking system logs and analyzes employee work hours. Aside from assisting HR and

businesses to remain compliant with state and federal regulations, time and attendance tracking software captures the number of sick, vacation, and paid time off (PTO) days each employee takes per year and provides HR and payroll professionals with tools that monitor and facilitate payroll.

Recruitment and Onboarding

Recruitment and onboarding is arguably the most important role in the HR process. That's why Sage HRMS offers a variety of add-ons, most from third-party developers, that help you automate and streamline recruiting, hiring, and onboarding so you can:

- Hire the best talent and reduce employee turnover
- Collaborate with recruiters and hiring managers to ensure access to top applicants
- Paperless collection of employee and applicant data using the web

Contact Us to request more information or schedule a demo of any of the available Sage HRMS system add-ons.

SAGE SUMMIT DATE CHANGE

Due to current conditions and with a focus on the health and safety of Sage Summit 2020 attendees, Sage has rescheduled the event to take place **December 9-11, 2020**. The popular annual software conference was previously scheduled for May 2020.

Other Event Details

While the date has changed, the location remains the same which will be hosted at the Gaylord Palms Resort in Orlando, Florida. The event venue is a premier location just minutes from Walt Disney World® and Universal Orlando Resort™.

In addition, registration deadlines and pricing have been extended as follows:

- Early bird (through September 14, 2020) - **$499**
- Save (September 15 - November 29, 2020) - **$599**
- Standard (November 30 - December 10, 2020) - **$799**

Be sure to click below for additional details about the agenda, keynote, learning sessions, or to register.

[Sage Summit 2020](#)

COVID RESOURCES FOR SAGE CUSTOMERS

To help guide customers during these challenging times, Sage has gathered information and resources to help you navigate the current coronavirus pandemic including:

- Guidance for enabling remote working capabilities
- Assessing whether you're eligible for government-funded financial support
- COVID-related FAQs
- Business continuity guidance and advice

To access this dedicated resource online, go to:
https://www.sage.com/en-us/coronavirus/

Free Training Available

In addition, Sage is generously offering access to select eLearning packages and webinars **at no charge**. Sage has combed through their library of courses and highlighted content they feel will be most relevant and beneficial during this time including:

- Getting started with Sage 300 Financials (52 videos)
- Introduction to Sage 300cloud
- Introduction to Sage 300 Online
- Sage 300 Navigation Basics (13 videos)
- User Interfaces Explained

This free training available to customers **through May 31** includes Any Time Learning and live product training through [Sage University](#).

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