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Sage 300 News You Can Use



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## INTRODUCING SAGE 300 VERSION 2019

### A Look at the Best New Features

Sage 300 2019 is now available featuring continued modernization of the technical architecture, an entirely new integration with Sage CRM, and a new global search utility improving visibility across your entire system. Let's take a closer look at some of these and other great new features.

#### Global Enhancements

The following new features apply to both Sage 300c web screens and Sage 300 classic screens:

**Global Search** - Type a name, description, number, or code in Global Search to find transactions or records across your entire database. You can search for people, companies, transactions, accounts, and many other types of records.

**Export Declaration Number Field** - In A/R and Order Entry, you can now enter export declaration numbers for individual invoice details which is required for tax purposes in some jurisdictions.

**Modernized Technical Architecture** - Several older technologies within the Sage 300 architecture have been retired and replaced, improving performance, scalability and security.

#### Totally New Sage CRM Integration

The way that Sage CRM integrates with Sage 300 has been totally redesigned to make it easier to set up, and to improve usability and performance. Integration screens now have the same modern look and feel as web screens and perform faster too. The integration now uses the Sage 300c web screens instead of the old Sage 300 Portal which not only makes installation much simpler, but also enhances screen functionality and customization capabilities. Customers must be on Sage 300cloud in order to use integrated Sage CRM with Sage 300 2019.0 and later versions.

#### Retirement of Sage 300 Portal and Web Deployment

With the release of Sage 300 2019, Sage will be ending support for the old Sage 300 Portal and ACCPAC Web Deployment screens, both of which are based on outdated technology. With the release of Sage 300 2019, Sage CRM integration now uses the Sage 300cloud web screens instead of Sage 300 Web Deployment. These Sage 300cloud web screens also deliver the ad hoc inquiry functionality previously provided by the old Sage 300 Portal. However, Sage will continue to support both of these older technologies until August 2019.

#### Get Full Details

Refer to the [Sage 300 2019 Release Notes](#) for full details on all new features and program fixes included in the newest version. Don't hesitate to contact us if you need help with an upgrade.



# SAGE CRM

## How to Manage Marketing Consent

Depending on where you do business and the local privacy laws in your region, you may be required to have evidence of marketing consent from your contacts. In other words in order to send email, call or text, your contacts may need to have explicitly agreed to receive marketing communication from your company. In this article, we'll show you how to create and manage those consent records in Sage CRM.

### Consent Management Overview

Sage CRM 2018 Release 2 (R2) added consent tracking capability that enables you to store consent from customers against their contact record. Requests for consent can be issued directly from Sage CRM using preconfigured email templates that included an 'Accept' link. Once a contact clicks the link, the acceptance is recorded against their record in Sage CRM.

### Creating a Consent Record

1. Open the Person or Lead you'd like consent from.
2. Click the **Consent** tab, then click **New**
3. Configure the fields as appropriate then click **Save**

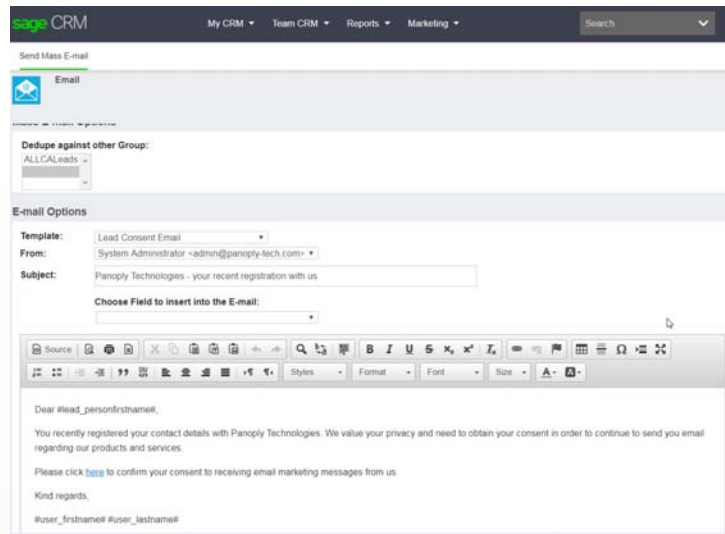
Now it's time to get in touch with the person or lead and ask them if they agree to receive marketing material.

### Sending a Consent Email

Using a template in Sage CRM, you can send a consent email with hyperlinks that allow recipients to accept or decline your marketing communication. To enable these consent emails, an administrator must do the following:

- Configure standard email in Sage CRM
- Ensure that Sage CRM is accessible from outside your corporate network

Now you're ready to send the consent email as follows:



1. Find and open a person or lead
2. Create or open an existing consent record, and then click **New Consent Email**
3. In the window that opens, from **Template** select **Person Consent Email** or **Lead Consent Email**
4. Edit the email body as necessary
5. Complete remaining email fields and click **Send Email**

**NOTE:** You can also send consent email to a group of multiple persons or leads using a similar process. When you send email to a group, Sage CRM automatically creates a consent record for each person or lead in that group. In addition, the system automatically records consent record status based on which link the recipient clicks (Accept/Decline). Refer to Sage CRM user documentation for full steps and details for sending consent email to a group.

### Have a Question or Need Help?



[Get in touch](#) if you have questions or need help using the new Marketing Consent capabilities in Sage CRM.



# SAGE HRMS

## The Benefits of Employee Self Service (ESS)

With open enrollment just around the corner, many HR departments are preparing themselves for the increased volume of questions and service calls from employees asking about benefit plans and choices. The whole process can be time-consuming and complex - a situation that we think sets the stage for an important technology for HR - Employee Self Service (ESS).

### What is ESS?

Employee Self Service for Sage HRMS provides a central location (typically a web portal or intranet) that enables authorized users to view and update personal data. As the name suggests, ESS allows your employees to “self serve” for routine tasks like time-off requests, updating dependents, or changing contact information.

They can also review current benefit elections, pay history, record of attendance, and more. It’s a great solution for HR departments that find themselves spending more and more time responding to repetitive, routine employee requests.

### Benefits of ESS

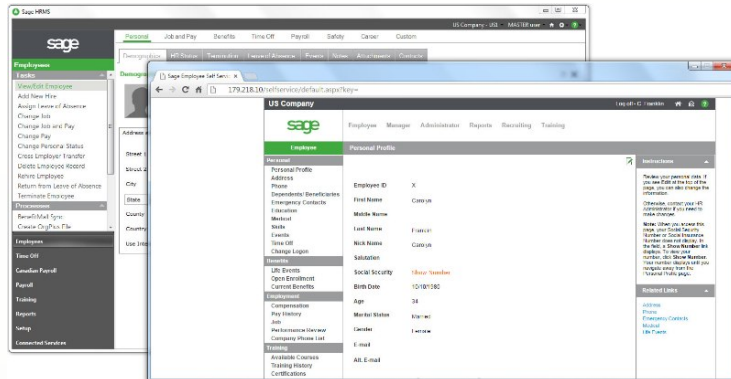
By automating some of the most common and routine employee activities, you can eliminate the considerable time and expense associated with paper-based forms and manual processes. Other benefits of ESS technology include:

#### Eliminate Duplicate Data Entry and Improve Accuracy

By allowing employees to enter their own record changes, you eliminate the need to have HR staff re-enter the same data already written on a paper form or manually transferred from another system. This also reduces errors.

#### Reduce Transaction Costs

Replacing paper-based processes reduces the time and costs associated with copying, routing, printing, mailing, filing, and storing paper.



### Improved Focus

ESS technology allows HR staff to focus on more strategic initiatives - like employee retention strategies or developing competitive benefits packages - rather than getting bogged down by repetitive administrative functions.

### Introducing Sage ESS

Sage ESS is an extension for your Sage HRMS system. In addition to many of the employee-related tasks mentioned above, Managers can view a direct reports’ personnel file, post employee notes, review attendance information, and approve time-off requests using Sage ESS.

Perhaps best of all, approved changes are automatically updated from Sage ESS to the Sage HRMS database which eliminates duplicate data entry. Perhaps most convenient of all, you and your employees can access Sage ESS using your laptop, tablet, or almost any mobile device.

### Want to Learn More?



Contact us with your questions about employee self service or to request more information, a demo, or pricing for Sage ESS for Sage HRMS.

# Sage 300cloud Migration Promo Ending Soon

The Parity pricing and \$0 Migrations offer introduced back in January 2018 (for renewal customers in the U.S.) will end on **September 28, 2018**. After that, migrations from Sage 300 “Classic” (perpetual license) to Sage 300cloud (subscription license) will revert to standard pricing.

## Promo Details

With this promotional offer, you can migrate to Sage 300cloud, at the time of your renewal, for no more than the cost of your current Sage Business Care plan (or use \$0 migration transactions where applicable).

**Added Benefits of Sage 300cloud versus “classic” Sage 300 may include:**

- Modernized Web-based Interface
- Enhanced Notes Capabilities
- Sage Intelligence Report Manager and Designer
- Sage AP Automation
- Sage Inventory Advisor Basics
- Sage eCommerce
- Sage CRM
- Other Modules and Product Enhancements Available only for Sage 300cloud

## Questions?



Contact us if you have questions about the promotion or want to discuss a migration to Sage 300cloud.

# Sage 300 Online (RDS) Retirement Announcement

Sage has announced that the old RDS version of Sage 300 Online is being retired on **December 31, 2018**. The primary reason for the retirement is that the current version of Sage 300 Online is based on older technology with limited functionality. As such, customers using the old Sage 300 Online platform will need to migrate to a different option before December 31.

## Introducing the **NEW** Sage 300 Online

In conjunction with the retirement announcement of the old version, a completely **new** and re-imagined Sage 300 Online (SEOS) product is under development and expected to be available sometime in Q4 2018.

## Better Technology, Better Experience

The new version of Sage 300 Online is hosted on Microsoft Azure and utilizes an HTML5 tool that renders a brand new user interface for any browser. It will also feature new modules that support multi-company and GL consolidations. In addition, Sage is planning to provide access to two main third party products, **Orchid EFT** and **Wellspring PrintBoss**, following completion of a security review. It all adds up to a brand new Sage 300 Online that delivers a much-improved customer experience through better security, functionality, and performance.

## What's Next?

Stay tuned for the official launch of the new online product which will deliver a simple migration process and offer a free trial period to get familiar with the new interface. In the meantime, contact us with any questions that come up.

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