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OLD FRIENDS RECONNECT

New Sage 300 and Sage CRM Integration

A totally brand new integration between Sage 300 and Sage CRM was announced with the release of Sage 300 Version 2019 earlier this year. While the two products were already connected in previous versions, this article looks at the features and functions that the new integration offers.

Changes to Sage CRM Screens

With the new integration, new screens, tabs and features have been added (or modified) throughout Sage CRM that allow you to see and access more information from Sage 300 than before. Here's a quick overview of the most prominent changes.

Promote to Sage 300 - use this screen to promote a Sage CRM company to a Sage 300 customer or vendor.

Customer & Vendor Inquiries - new A/R and A/P inquiry screens list posted or un-posted Sage 300 Accounts Receivable/Accounts Payable documents for a company right within Sage CRM. You can also edit existing or create new documents without leaving Sage CRM.

Orders and Purchasing Inquiries - new O/E and P/O inquiry screens provide a range of information that you can view or edit including all orders, shipments, invoices, sales history, purchase orders, requisitions, receipts, purchase history, vendor contracts, and so much more.

Quotes and Orders

New screens and changes to existing features related to the quote and order process in Sage CRM have been applied as well. You can create new quotes, edit existing quotes, and review key information at a glance (i.e. associated orders, expiration dates) without leaving Sage CRM. In addition to the ability to easily promote a quote to a Sage 300 order, the improved order screen in Sage CRM allows you to create or review information like order and shipping amounts, invoices, edit orders details, determine the status of an order (i.e. on hold), and much more.

A New Connection That's Better Than Ever

We've only scratched the surface by highlighting some of the most significant changes. But the new integration manifests itself throughout Sage CRM in the form of new tabs, buttons, and enhanced screens that allow you to view and edit more information on companies, customers, vendors, inventory, sales, orders, opportunities, and important transactions. In short, Sage 300 and Sage CRM are better together and work more closely than ever before.



[Contact Us](#) if you have questions about using Sage CRM or you'd like more information and we'll send you a copy of the detailed **Sage CRM Integration Guide**.

6 TIPS FOR A SUCCESSFUL YEAR END CLOSE

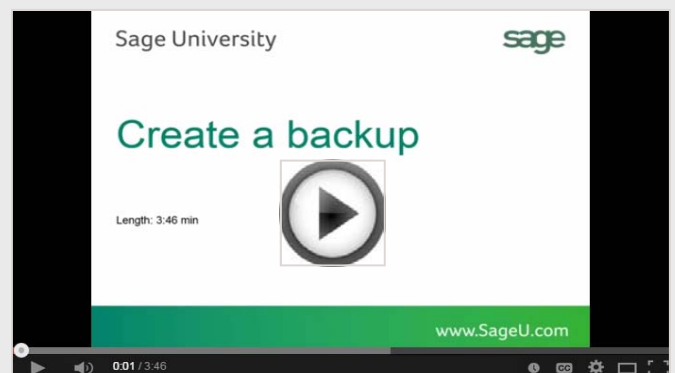
- 1. Back Up Your Data** - before you begin any year end process, be sure to execute a complete back up of your database. You should also **test the back up** to ensure it was successful and the data is readable. The only way to “reverse” year end processing is to restore your data from a backup. So do it now!
- 2. Check Your Version Number** - closing procedures can vary depending on the version of Sage 300 (or “Accpac”) you’re currently running. Check your version number and service pack before starting year end processing.
- 3. Create a New Fiscal Calendar** - Sage 300 allows you to begin entering transactions for the new year without closing out the current year. Simply create a new fiscal calendar in **Common Services > Fiscal Calendar** and then click the **New** icon. If the period date ranges are correct, then **Save** the year. Do this before entering transactions for 2019.
- 4. General Ledger Closing** - While it’s a good idea to close modules in a timely fashion, your General Ledger can remain open as long as you need while awaiting final processing (or audit adjustments) in other modules.
- 5. Check Data Retention Settings** - Sage 300 will retain historical data based on your software version and the settings you’ve configured in each module. So it’s a good idea to review all module and system settings to avoid the unintended loss/purge of important data during year end close. In particular, check GL Options to see how many years of history your system is set up to retain.
- 6. Remember, We’re Here to Help** - As you begin year end closing procedures and prepare to start fresh in 2019, be sure to contact us if you need assistance during this important time of year. As your software and technology partner, we’re here to help!

HOW TO CREATE A DATABASE BACKUP IN SAGE 300

One of the most important things you can do before starting the year end closing process is to backup your data. Here’s how to do it in Sage 300:

1. Click the **Start** button, highlight **Programs**, then **Sage 300, Tools**, and click **Database Dump**.
2. Type the password for the Admin user in Sage 300, then click the **OK** button.
3. Click to highlight the database that you want to Dump. Click the **Set Directory** button to enter the location where you want to save the files.
4. Click **OK**. You'll return to the Dump Sage 300 ERP Data screen.
5. Click the **Dump** button to proceed. A confirmation message will appear. Click **OK** to continue.
6. A Dataset Description screen will display in which an optional description of the database may be entered. Enter a description, then click **Done**.

To see this full backup process in action, watch the [Sage 300 backup video demonstration](#) on YouTube.



HELPFUL YEAR END PROCESSING RESOURCES

Sage 300 Year End Center

Sage has created a [Year End Center](#) that provides valuable resources that can help guide you through a smooth year end closing process in Sage 300 including:

- Year End Tips, Articles, and Checklists
- Video Tutorials
- Online Q&A and Discussion Forum
- Live Chat With Tech Support
- Tax Forms, Payroll, and Reporting Guidance

Take advantage of this free and valuable resource!

[Visit Year End Center!](#)

Reviewing Year End Checklists

Checklists are great for helping you keep things on track and to ensure processes are executed in the right sequence. Here's how to access year end processing checklists that are built right into Sage 300:

Current Version of Sage 300:

1. Logon to your Sage 300 system
2. From the Task Ribbon, click **Help** then **Product Documents**
3. Browse the version of your product, then select **Checklists**
4. Click the link called **Year-End Procedures**

Older Versions of Sage 300:

1. Logon to your Sage 300 system
2. From the menu bar, click **Help** and then **Documentation**
3. Browse the **ENG** folder
4. Find the PDF called **Sage300ERP_Checklist_YearEnd.pdf**

Sage 300 Payroll FAQs and Tutorial Videos

For companies running the payroll module, here are answers to a few frequently-asked questions along with some helpful instructional videos to help prepare for year end.

When do I close the year?

You never close the year. Continue processing payrolls as you do all year long, entering period-end dates in the new year as you cross the calendar year boundary. After you have completed all of the previous year's year-end processing and made backup copies of the data, you can run **Delete Inactive Records** to remove terminated employees and other obsolete information from your data.

Can I produce W-2s (U.S.) or T4s (Canada) after processing payrolls for Jan 1?

Yes. The program allows you to start processing payrolls for Jan 1 and later produce W-2s/T4s for the previous year without any additional procedures. When you produce W-2s/T4s, select previous year as the Payment Year.

Is there a limit to the number of W-2s or T4s that can be printed?

No. You can print the W-2 forms or T-4 slips as many times as you need.

Helpful Videos:

[How to Download and Install Payroll Tax Updates](#)

[How to Print W-2 Forms](#) (U.S.)

[How to Print T4 Forms](#) (Canada)

How to Change GL Accounts That Were Set Up Incorrectly

During year end processing, some companies discover that certain GL accounts were incorrectly set up using the wrong **Account Type**.

For instance if Income Statement accounts were set up as Balance Sheet accounts, these accounts would not close to Retained Earnings after running Create New Year. In other words, the accounts would still have a beginning balance in the new year.

If you find yourself in that situation, here's how to resolve it.

1. Ensure the option **Allow Posting to Previous Years** is selected.
2. Create a new GL account with the correct Account Type (Income Statement).
3. Create a GL entry to transfer the balance from the old account (Balance Sheet) and into the new Income Statement account.
4. Select period 12 and the fiscal year in which the entry is intended to be posted.
5. Mark the old Balance Sheet account as **Inactive** so no additional entries can be posted to this incorrect account.
6. Repeat steps 2 through 5 for each account that was set up incorrectly as a Balance Sheet account.

NOTE: Do not run the Create New Year function again. The system will recognize the entry is posted to a prior year and will update the Retained Earnings account.



Be sure to [Contact Us](#) if you need help with this or any other issue with your Sage 300 software.

HOW TO EDIT 1099 VENDOR CODES OR AMOUNTS

At some point during year end processing, you may discover that the 1099 codes or amounts you've recorded for a vendor need to be edited or adjusted.

To Change a 1099 Code:

1. Go to **A/P Vendors** and select **Vendors**
2. Select the vendor with the issue
3. Click on the **Invoicing** tab
4. Choose the **correct** 1099 code
5. Click on **Save** and then **Close**

To Allow Editing of 1099 Amounts:

1. Go to **A/P Set Up** and select **Options**
2. Select **Transactions Tab**
3. Check of **Allow Edit of 1099/CPRS Amounts**
4. Click **Save** and then **Close**

To Update a Vendor's 1099 Amount:

1. Go to **A/P Vendors** and choose **A/P 1099/CPRS Inquiry**
2. Filter to **Vendor(s)**
3. Filter to the incorrect 1099 Code
4. Click on the double arrows (**Go option**)
5. Note the information for all entries listed
6. Filter to the correct **1099 Code**
7. Click on the double arrows (**Go option**)
8. Press the **Insert key** to add a new line
9. Enter the appropriate information for the detail line
10. Repeat the previous 2 steps for each detail line
11. Filter to the incorrect 1099 Code
12. Click on the double arrows (**Go option**)
13. Press the **Delete key** to remove the incorrect detail lines individually



SAGE HRMS

The Bottom Line on HRMS Technology

Companies today are tightening their belts, looking for ways to cut costs, and challenging their human resource (HR) departments to make more strategic contributions to the organization.

While HR is traditionally viewed as a cost center saddled with time-consuming and paper-intensive administrative tasks, it's a necessary burden. The question is this ... how can you streamline your HR processes to minimize that burden while transforming HR into a model of efficiency with meaningful impact on the bottom line?

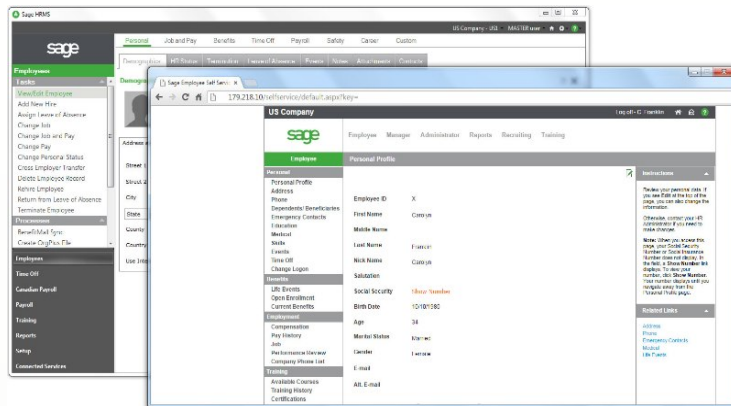
For some, the answer is automated HR software.

Maximizing Limited Resources

Most small and mid-sized businesses have limited staff to manage the many aspects of human resources. In fact, HR staff typically spends far more time performing routine administrative tasks than strategic objectives. But the simple fact is once those routine administrative tasks are automated, it has a profoundly positive impact on both the HR department and company overall. And that's where software like **Sage HRMS** can play an important role.

What is HRMS Anyway?

HRMS stands for Human Resource Management System. In the same way that ERP software automates your accounting and operations, Sage HRMS automates all aspects of managing your workforce including Employee Benefits, Time and Attendance, Recruitment, Compensation Management, Compliance, and more. You get hundreds of standard reports, customizable templates, automated workflow, and a full range of features that will reduce the cost of compliance, eliminate redundant data entry and paperwork, automate repetitive processes, and have your HR Department running like a well-oiled machine.



Digitizing All That Paper

By its very nature, the HR process is paper-intensive. Many companies rely on a combination of hard copy applications and forms, spreadsheets, and file cabinets to manage all that candidate and employee information. All that hiring data, payroll records, and benefit plan elections, and much more are probably stored in multiple places. To make matters worse, each change to those documents needs to be replicated across a variety of files and locations ... it's a record-keeping nightmare.

But with software like Sage HRMS, all of your employee data is digitized and consolidated into a single database. One single source of data and a lot less paper floating around results in fewer errors and potential fines, elimination of duplicate data entry, a streamlined efficient HR process, and more timely reports and analysis.

Want to Learn More?

Contact us with your questions about transforming your HR department from a burden to a benefit using Sage HRMS.

SageCRM.COM PRODUCT TO BE RETIRED

In a recent communication from Sage, the company stated that they reviewed their CRM portfolio and have decided to retire the SageCRM.com hosted/cloud product as of August 31, 2019.

While technical support will continue to be available through August 31st, after that date you will no longer be able to access SageCRM.com.

In a statement, Sage said the decision will enable the company to focus time and resources more efficiently.

Sage CRM On-Premises **NOT** Affected

The on-premises version of Sage CRM that integrates with your Sage 300 or Sage 300cloud software is **not** affected. The only product that is being retired is SageCRM.com which Sage hosted themselves on behalf of customers.

Planning for Retirement

If you're currently using SageCRM.com, it's recommended that you plan ahead and start your transition before August 31, 2019. Specifically, Sage recommends that you backup your database and download a copy to a separate location. Instructions for downloading your database can be [found here](#).

Contact us to plan ahead or discuss transition options which can include migrating your data from SageCRM.com to the Sage CRM On-Premises product.

SAGE SUMMIT RETURNS!



Next year will see the return of Sage Summit at two locations in San Diego, CA and Atlanta, GA. These will be the first Sage Summit conferences since 2017. During 2018, Sage replaced Sage Summit with a series of smaller, local events throughout the U.S. and Canada that was called Sage Sessions.

The return of Sage Summit in 2019 brings a multi-day conference that includes a keynote speech, welcome reception, breakout sessions, networking opportunities, and what Sage has described as a "scaled" tradeshow to showcase add-on solutions.

DATES, LOCATIONS, & REGISTRATION

San Diego, CA - February 13-15

Sheraton San Diego Hotel & Marina

[Registration Now Open ...](#)

Atlanta, GA - May 13-15

Hyatt Regency Atlanta

[Registration Opens February 2019](#)

Both locations will feature the same content, schedule, and speakers. Early bird pricing for San Diego is \$199 before January 13, 2019 and \$299 after that.

[Full details here.](#)

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