Sage 300 ERP Newsletter

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TECH TRENDS SHAPING THE FUTURE OF SAGE 300

The technology landscape is always changing. Every year we see new innovations promising to boost productivity, reduce costs, enable smarter decisions, and gain a competitive advantage. But with so many new trends, how is anyone expected to keep track of it all? In this article, we focus on just a handful of technologies that are shaping the future of Sage 300 ERP.

Mobile ERP - Business on the Go

Nowadays, employees are no longer tied to their desks. With the wide spread use of mobile phones and tablets, you can now take your ERP system with you anywhere. **Mobile Technology** gives your staff access to the information they need to drive sales, manage operations, keep customers happy, and stay productive in the office, on the road, or onsite with a customer.

As employees spend less time in the office, mobile technology like Sage Mobile Solutions becomes crucial for keeping you connected and productive. By updating Sage 300 ERP in real-time, mobile ERP guarantees that everyone is working with the most up-to-date information, improving collaboration across departments, and supporting better decision making.

New Technology makes it possible to access Sage 300 any where, anytime using the web or mobile device.

With mobile apps such as **Sage Mobile Sales** and **Sage Billing and Payment**, Sage 300 ERP is keeping you ahead of this trend by providing your team with new ways and more options to access inventory, process orders, and take payments.

Rise of the "Hybrid Cloud"

For some companies, choosing between the cloud and an on-premises installation is an either/or decision. But not everyone trusts **ALL** of their critical financial and operational data to a cloud vendor for safe keeping - **enter the "Hybrid Cloud."** By combining your on-premises ERP system with cloud-based applications, Hybrid Cloud technology gives you the best of both worlds. You get the flexibility and ease-of-access of the cloud while preserving your existing workflow, investment in training, and any customizations you've applied to your on-premises Sage 300 ERP installation.

In fact, Sage introduced us to this technology last year. Using the Sage Data Cloud, you can connect your Sage 300 ERP system to a whole new world of mobile applications, software, and services delivered from the cloud. This new technology enables data and transactions to flow freely, and synchronize, between the cloud and your on-premises Sage 300 accounting system.

Spotlight On: Sage CRM
Introducing Sage CRM 7.3

The long-awaited **Sage CRM Version 7.3** delivers a host of exciting new features as well as a new contemporary look and completely redesigned user experience. This latest release provides you with easy access to the data, reports, and metrics you need to close sales faster and make every customer interaction count. Let's take a closer look.

New Contemporary Design

Sage CRM 7.3 was redesigned with you in mind. The new look and feel of the **Contemporary Theme** provides an intuitive user experience that gives you quick access to all the information you need.

Use the new Main Menu Dropdown Lists to access all Main Menu options or the new Find Field to quickly locate what you're looking for. You'll also notice a new Top Bar of helpful icons that give you one-click access to your notifications, recently viewed records, and profile area.

Note: The new Contemporary Theme is optional for existing Sage CRM customers who are accustomed to the old layout - but is the default theme for *new* Sage CRM customers.

Business Accelerators for Sales

Sage CRM 7.3 also features new **Business Accelerators for Sales** - a suite of new functionality that provides your managers and sales team with the data and insight they need to close more sales and make better decisions.

Two new ready-to-use management dashboards - Sales KPI for Managers and Sales Metrics for Managers - use Sage CRM data from across your business to provide management with a range of reports and charts for better analysis.

There are also 9 new Alerts and Escalation Rules designed to notify your team of any critical triggers related to leads, quotas, or opportunities, and provide real time updates. New alerts include Daily/Quarterly Quota Remaining, Pipeline Update, Opportunity Close Date Approaching, Unassigned Lead/Opportunity, Lost Opportunities, and more.

New **Stacked**, **Gauge**, and **Combination Charts** help you identify and evaluate successful activities and trends for better sales analysis. These new charts provide a wider view of your data to gauge company performance.
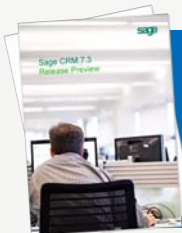
MailChimp Integration

Sage CRM 7.3 now integrates with MailChimp - a widely-used and popular email marketing platform. MailChimp allows you to easily create targeted marketing campaigns, send automated emails, and track results. Best of all? MailChimp is **FREE** for lists under 2,000 names.

You can launch MailChimp email campaigns right from Sage CRM. You can also share contacts or groups from Sage CRM and have MailChimp send back the results of your campaigns - opens, clicks, etc. - so you can follow up as needed.
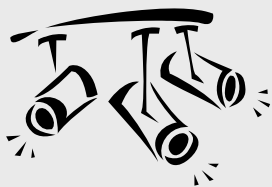
Ready to Upgrade?

If you're running a stand-alone version of Sage CRM, you can upgrade at any time. If you're running Sage CRM **integrated with Sage 300 ERP**, you may need to wait until Sage CRM 7.3 is available to integrated customers in early Q2 2015. Contact us for details or if you need help upgrading.

Sage CRM 7.3 Preview Guide

Contact us to get more info about the new features or how to get started with Sage CRM 7.3 with this helpful guide.

Spotlight On: HRMS
A Closer Look at Sage HRMS 2015

Just released, Sage HRMS 2015 delivers new integrated payroll, benefits, recruiting, and employee self service features designed to maximize every dollar you invest in your employees. Let's take a closer look at some of the new capabilities in this latest version.

The Affordable Care Act & Sage HRMS

The Affordable Care Act (ACA) has brought significant changes to our healthcare system and has caused quite a few headaches along the way. With all the recent changes, you're bound to have questions regarding how the ACA affects you, your employees, and your business.

Luckily, you can use the new My Workforce Analyzer to help you track and analyze your HR data and make informed decisions regarding employee healthcare and ACA requirements. Available through Sage Source, this Sage HRMS add-on works by monitoring your employee hours to help determine if you qualify as a large employer and what your obligations are under the ACA.

Note: My Workforce Analyzer is available to Sage HRMS or Sage Abra Suite customers using both HR and Payroll products. Contact us for pricing or more details.

Human Resources Enhancements

The new **Employee Quick Find** feature allows you to easily search for employees by entering just the first few digits of an employee's ID, first name, or last name.

Sage HRMS also now automatically hides **HR/Employee Codes** once they have been marked inactive or reached expiration. The updated codes include: Benefit Insurance Plans, Benefit Savings Plans, Job Status Codes, Employee Note Author, Employee Note Type, Salary Grades, Employee Type, Events, Ratings, Shift Differential, and Skill.

With this new release, you are no longer required to delete a security user in order to remove the user's permissions.

Improved User Security Inactivation and Position Fields

Now, you can inactivate the user so it can be reactivated again at a later time. In addition to this new **User Security Inactivation** functionality, you can also identify the user's job title or **Position** with a new text field.

Other Notable Enhancements

- **Gross-up Calculator** - Calculate the gross amount of money that you need to pay in order for an employee to receive a predetermined net amount.

- **Improved Reporting Functionality** - Sage HRMS now includes SAP® Crystal Reports 2011 for designing and delivering powerful, flexible reports.

- **Microsoft Windows Internet Explorer 11** and the **Microsoft Windows 8.1 OS** are now supported by Sage HRMS and Sage Employee Self Service 2015.

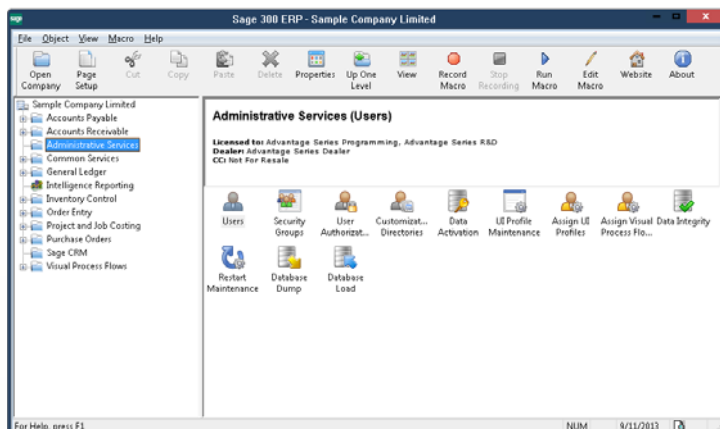### Sage HRMS 2015 Release Notes

Contact us for the Sage HRMS 2015 Release Notes or to discuss an upgrade.

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Sage 300 ERP 2014 features a simplified desktop design and more personalized workflow.

Simple Design and Personal Experience

Today's ERP systems are moving toward a simplified design that's less cluttered and navigation that mimics internet browsing. So whether you're using software on-premises or in the cloud, you get a user experience that's more intuitive and familiar across applications and devices. Technology is also becoming more personalized around each user's tasks, screens, and workflows.

Capitalizing on this trend, **Sage 300 ERP Version 2014** introduced a completely redesigned interface with a modernized desktop, ribbon style menu, updated icons, and clutter-free screens. New personalization options also allow you to customize shortcuts, modify screens, and rearrange menus so it's easier to find the tasks you use most often and personalize workflows around your specific role.

Want to Learn More?

Contact us to learn more about these trends or to see a demo of the newest technology in Sage 300 ERP.

END OF SUPPORT NOTICE

WINDOWS SERVER 2003/R2

As of **July 14, 2015**, Windows Server 2003/R2 will no longer be supported by Microsoft.

While this date may seem distant, now is the time to start planning an upgrade to a supported version of Microsoft Windows.

If you are still running Windows Server 2003, please contact us to discuss your migrations options.

Read the Full Announcement Here:
Windows Server 2003 Retirement >>>

SAVE THE DATE!

Sage Summit 2015 in New Orleans!

This year Sage Summit is headed to New Orleans for the annual gathering of Sage customers and partners.

Join the fun **July 27th - 30th 2015** in the "Big Easy" for this unique conference where you'll find inspiration from world-class business leaders, workshops, networking events, and tips and tricks to help make the most of your Sage product.

Registration for Sage Summit 2015 opens in March
In the meantime, head over to the Sage Summit website to sign up for updates. Or watch this video to see what attendees had to say about last year's event:

Sage Summit - Grow From Here >>>

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