Sage 300 Newsletter
Issue 2 - 2017

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In This Issue

WHAT'S NEW IN SAGE 300

Recent Product Update for Version 2017

The recently-released Product Update 2 (PU2) for Version 2017 included improvements for both the classic version of Sage 300 as well as new screens and functionality for Sage 300c.
Here's a look at some of the top new features in this newest version of the software.

General Enhancements in Both Products

Here are some new features or improvements to existing features for both Sage 300 and 300c.

More Flexibility in National Accounts – in AR, you can now change the national account for a customer even if there are outstanding transactions.

Improved Validation on P/O Receipt Entry Screen - in Purchase Orders, the Receipt Entry screen now prevents you from entering duplicate invoice numbers for the same vendor.

Improved Error Messages in Day-end Processing - if a problem occurs during day-end processing, improved error messages help you identify the cause of the problem more quickly and easily.

Improved Item Finder - now you find what you're looking for faster with the Item Finder which now includes information on quantities available, committed, on-hand, on purchase order, and on sales order as well as Preferred Vendor (name & number) and Preferred Vendor Item Number.

Sage 300c Web Screens

Sage 300c Version 2017.2 adds a collection of new web screens and enhancements to existing web screens that we'll take a look at here.

Order Entry Web Screen - new web screens for Sage 300c Order Entry include Invoice Entry, Shipment Entry, and Capture Payments with Invoices.

Accounts Receivable Documents - a new Inquiry feature makes it easy to look up A/R documents. It's available from the web toolbar, the A/R Customers screen, and some transaction entry screens in Accounts Receivable and Order Entry.

Simplified Emailing from Web Screens - a new Email tab on the Company Profile screen makes it easier to set up and manage print-to-email settings for web screens.

Check Customer Credit Status - a new Credit Status tab on the A/R Customers web screen displays credit status, outstanding balances, and other credit data for customers and national accounts (This info was previously available only from A/R Customer Inquiry in Sage 300 classic screens).

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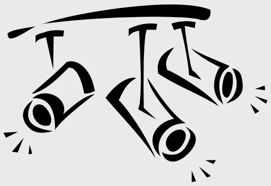


SAGE CRM

Why It's More Than Just a Sales Tool

It's easy to think of CRM software, as a tool that only the salespeople use. But great CUSTOMER RELATIONSHIPS (the "CR" in "CRM") are built on much more than sales. Let's take a look at some of the other components of Sage CRM that will help you deliver a consistent experience with every customer interaction including marketing and support.

Sage CRM for Marketing

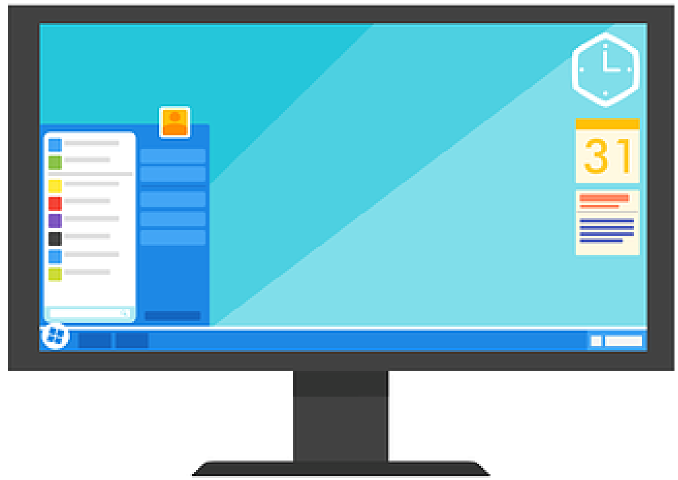
For many companies, customer relationships are more profitable ***after*** the initial sale. Marketing programs aimed at current customers not only have potential to build more profit into each relationship, but can also foster long term customer loyalty that's mutually beneficial.

Sage CRM includes a marketing component and features that allow you to build a detailed profile of your customers over the course of your relationship. This helps to ensure that ongoing communication is highly relevant based on previous purchases, product preferences, and other important customer-specific characteristics.

Sage CRM also integrates with MailChimp - powerful web-based email marketing software. When you combine customer and prospect data in Sage CRM with the email templates and tools in MailChimp, you have a powerful platform that makes your marketing effort fast, efficient, and far more effective.

Sage CRM for Customer Care/Support

Sales and marketing bring new customers to your business, but your customer service department keeps them with you for the long haul. That's why Sage CRM provides a customer service component so your customer support personnel have fast access to service requests, call and escalation history, recent customer communications, support cases, email communication, documents sent and received, and much more.

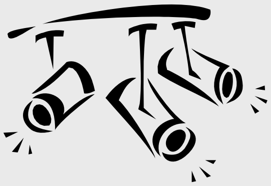


All service and support activities are captured in your CRM solution so that you start to build a knowledgebase of issues and resolutions. Your service reps can then use that knowledgebase to quickly resolve common challenges.

Whether you sell products that require technical support or offer service agreements that continue beyond the initial sale, Sage CRM provides the tools you need to manage resources, resolve issues, and build long-lasting and loyal relationships. And with all of that information at their fingertips, your customer care reps will have a better opportunity to cross-sell complementary products and services.

Beyond the Sales Department

There's no doubt that CRM was originally created to improve efficiency and effectiveness of a company's sales processes. However since those early days, software like Sage CRM has transformed into something much more powerful than just a sales tool. Today's CRM truly helps you manage and improve customer relationships ***across your entire organization*** from sales and marketing to accounting, operations, and support.



SAGE PAYROLL LINK

Connecting Sage HRMS to Sage 300 Payroll

Whether you're already using Sage HRMS or considering installing it to reduce the paper shuffling and administrative burden of HR compliance, you'll want to make sure you don't create more problems than you solve by having to manage and enter data in two systems - once in payroll and another in HR.

That's where the **Sage Payroll Link** comes in, bridging the gap between employee files in Sage HRMS and payroll data in your Sage 300 accounting software.

What is Sage Payroll Link?

The Sage Payroll Link is an application that facilitates integration between Sage 300 Payroll and Sage HRMS. It's designed to easily transfer and synchronize your personnel, payroll, and company data between the programs.

Sage HRMS for Sage 300

Working together, Sage HRMS and Sage 300 can help you manage all aspects of HR compliance, benefits administration, training and certifications, attendance, and leave accruals with the following powerful components:

Sage HRMS - this is the powerful core HR solution for managing critical employee information. Ideal for just about any business, Sage HRMS helps you manage company benefits programs, track and prepare reports to ensure government compliance, and electronically store employee forms and certificates.

Sage HRMS Time Off - software used for tracking employee absences and leave accruals. Its flexibility allows you to define absence codes, handle the Family and Medical Leave Act (FMLA), and manage accruals and carry-overs. Designed to meet a wide range of attendance tracking needs, Sage HRMS Attendance offers unmatched flexibility in handling all types of attendance plans and employee time off.

Sage HRMS Train - this training management system allows you to define specific training needs, prepare compliance reports, and ensure certifications are completed on-time. In addition, it helps manage training requirements for new employees based on their current skill sets and automatically updates employee "Skills Profiles" upon completion of new courses.

Sage Employee Self Service - the web-based component of the core Sage HRMS solution includes Employee Self-Service functionality and Benefits Enrollment.

The Missing Link

With comprehensive HR management on one side and powerful payroll processing on the other, the Sage Payroll Link provides a bridge between Sage 300 and Sage HRMS so you never have to enter the same payroll or employee attendance and HR data twice.

Get In Touch if you'd like to learn more about connecting Sage 300 Payroll with Sage HRMS.

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Sage 300 Classic Screens

The good old Sage 300 Classic screens got a couple of enhancements too. Here's a look.

Easier Print-to-Email Options - a new Email tab on the Company Profile screen makes it easier to set up and manage print-to-email settings for Sage 300 classic screens. You can send email using Microsoft Outlook, or you can select the new 'Use SMTP' option to use an SMTP service to send documents via email.

Custom Price and Credit Limit Overrides - new customization options allow you to customize and specify how unit price limit overrides and credit limit overrides are approved in O/E transaction entry screens.

Notes Before Updating

As with any interim product update, PU2 for Version 2017 is not a full upgrade or product replacement. It is only valid until Sage releases the next product update for Version 2017 or the next full version release of Sage 300 (2018).

Sage 300 and Sage 300c 2017 require Microsoft .NET Framework 4.6.2. If you have not installed .NET Framework 4.6.2, you will be prompted to install it during installation of this product update.

Additional Resources:

Sage 300 2017 Product Update 2 Release Notes

Sage 300 2017 Compatibility and System Requirements

Need Help?

Be sure to Contact Us if you have questions or need help updating, upgrading, or anything in between.

SAGE 300: THE ROAD AHEAD

At various Sage Summit Tour stops worldwide, Sage has been delivering a "Road Ahead" presentation that gives us a glimpse of the product vision, development goals, and new features that are coming to Sage 300. Here's a look at the future of your ERP software in 2017 and beyond.

Product Vision and Strategy

The overall strategy for Sage 300 is continued modernization of the product to embrace "forces of change" in technology including cloud and mobile. Part of the aim is to bridge the gap between software and apps you run in the cloud and the software you manage on-premises. This "hybrid cloud" approach allows you to be selective about which technology - cloud or on-premises - is best for your business. Another clear goal is to create a Sage 300 system that provides unparalleled integration of accounting, payments, and payroll.

New or Improved Features to Come

Here are some things to expect later this year and next year:

- Modernized visual updates to the desktop interface
- Simplified bank reconciliation and direct transaction download through Sage Banking Cloud
- Connect Office 365 to store and link attachments to Sage 300 documents and transactions
- Perform ad hoc queries from the web screens

Get the Presentation Slides

Contact us to request a copy of the presentation slides where you'll get full details of the road ahead along with visuals and screenshots to see what's in store for Sage 300.

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Info@ADSSGlobal.net

www.ADSSGlobal.net

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