Sage 300 Newsletter

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In This Issue

INTRODUCING SAGE 300 2017

Sage recently announced the release and availability of Sage 300 Version 2017. Let's take a look at some of the most important changes and new features.

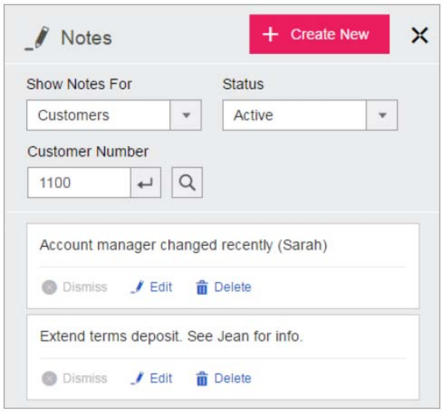
New, Redesigned, and Enhanced Web Screens

Sage 300 2017 introduces **redesigned web screens** that improve workflow and efficiency. Fields and controls on some of the most frequently-used transaction entry screens have been retooled so it's easier to hide fields and functions that you only use once in a while. A variety of similar productivity-enhancing updates were applied to web screens in Accounts Payable, Accounts Receivable, and Order Entry so you see more data and scroll less often.

In addition to the enhanced design of many of the existing web screens, several financial management web screens have been added for general ledger, A/R, and A/P, as well as completely new web screens for tax, bank, and administrative services (for user and security management).

New Notes Functionality Enhances Business Visibility

In both the web screens and the classic Windows screens, Sage 300 2017 introduces new Notes functionality for customers, vendors, and inventory items.



On the web screens, a new Notes panel allows you to easily create new notes as well as edit, dismiss, or delete existing notes. In the classic windows screens, a new Notes button on the desktop allows you to add and manage notes. While somewhat similar to existing Comments functionality, Notes will automatically appear when you select a record that has a note assigned which offers better visibility and allows you to be more proactive.

Faster Payment Processing

Sage 300 2017 features new screens and buttons that make **credit card processing** even faster and easier - including new **Quick Charge** functionality that will process payments with just one click. You can also select pending invoices for multiple customers where previously, it was only possible to process one customer at a time. In Order Entry, new buttons have been added that allow you to quickly pre-authorize or process payments with fewer tasks and keystrokes.

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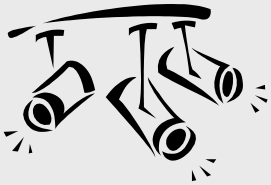
Sage 300 2017: What's New Guide

Contact us for a copy of the complete 12-page "What's New" guide that provides everything you need to know about Sage 300 Version 2017.



Sage CRM
Automating Sales & Service Workflows

When it comes to business, we all know that errors, manual processes, and redundancy waste valuable time and money. That's why it's important to implement pre-defined best-practices that everyone on your team adheres to.

And that's where the **automated workflow engine** in Sage CRM comes in, molding the software around your business so that every process is efficient, consistent, and repeatable.

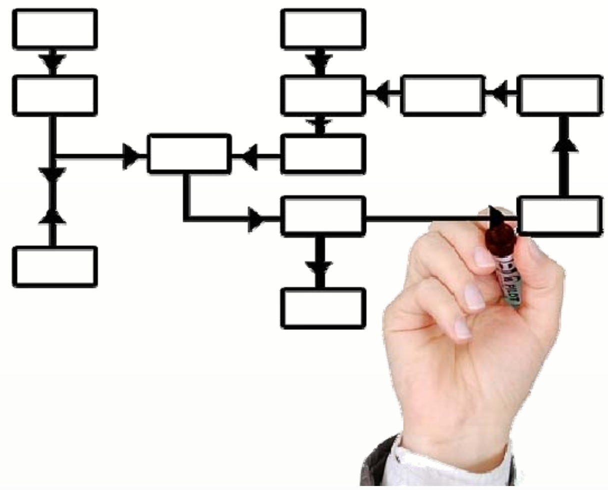
Sales Workflow Automation

One of the most obvious places to start when discussing workflow in Sage CRM is the sales process. At a high level, Sage CRM Workflows provide a tightly controlled system for how sales-related tasks are managed and flow through your business. A well-designed workflow can help you to identify bottlenecks or redundant tasks that require attention.

At the task level, Sage CRM Workflows can create triggers and alerts that ensure everyone is following the same best-practices and repeatable processes. A few examples of what you can do with Sage CRM Workflows include:

- Automatically create and add a follow up call reminder in your calendar after sending a proposal
- Automatically send a thank you email following a sale
- Require sales people to enter certain information at defined stages in the sales process to standardize lead qualification and opportunity management
- Require sales people to attach a certain document before advancing to the next stage in Sage CRM
- Issue alerts to a manager when a new opportunity is entered that exceeds a threshold

The options are endless but the objective is the same ... to be more thorough, efficient, and consistent when it comes to managing opportunities, following up on leads, and communicating with customers and prospects.



Customer Service Workflow

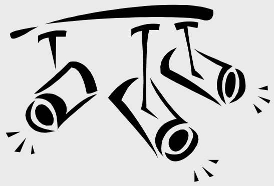
Sage CRM workflow isn't just for sales. It's equally useful in helping customer service representatives take a systematic approach to processing information, escalating cases, and getting support issues resolved quickly. For example if a customer support case or service request remains unresolved for longer than a predefined period of time, the Sage CRM workflow process can trigger an automatic escalation notification to the appropriate manager or supervisor.

Endless Workflow Possibilities

The way you leverage Sage CRM Workflow is completely up to you. You can modify the standard workflows that come "out of the box" or create completely new and customized workflows. The possibilities for workflow automation are endless ... sales, marketing, customer service, contract management, service scheduling, time tracking and billing, and production are all areas of your operation that can benefit from consistent and repeatable workflow processes.

Need Help Getting Started?

Get in touch if you need help setting up or using Sage CRM workflow automation.



SAGE HRMS

Are You Listening to Your HR & Payroll Data?

Most HR departments rely on reports—reams of them. There is so much data and so many things you need to keep track of, it's really easy for important tasks to fall through the cracks or for deadlines to be missed.

But instead of flipping through stacks of paper or generating tons of onscreen reports searching for the information you need, why not have that data find YOU instead?

Your Data is Trying to Tell You Something

You'll probably agree that better decision-making hinges on the right people gaining access to the right information at the right time. From open enrollment and benefits changes to managing overtime and sticking to filing deadlines, timing is important. And that's where Sage Alerts & Workflow comes in.

Eliminate the Slack with Business Alerts

Sage Alerts & Workflow is an automated 'alert and response' system that ***actively monitors*** your Sage HRMS and Payroll database for important deadlines and events (that you pre-define) such as benefits expiration, hire date anniversaries, and performance reviews. Once an event is triggered, the system automatically fires off an alert and routes it to the person or people that need to know.

Imagine your Sage HRMS system proactively telling you when John Doe exceeds 20 hours of overtime this week, when Sam Smith is due for his performance review, or that the new benefit plan for Lori Jones is effective starting today.

Once these HR-related events are triggered, you'll receive an alert by email, mobile phone, on-screen pop, or one of several other alert delivery options. It's your choice to determine who receives the alert and how.

If there's an event, deadline, or any other HR-related activity you need to know about in a timely fashion, Sage Alerts & Workflow has you covered.

More Than Just Alerts

Typically, receiving an alert isn't enough - it's just the first step that initiates a process or requires a response. Most of the time, some sort of action or task follows the alert.

That's why Sage Alerts & Workflow is designed to make it faster and easier for you to take action on the alerts that it generates. Once an event or alert is triggered, the system can automatically run reports and send them to an HR manager, generate new hire or other HR forms and attach them to an email, update the status of an employee in Sage HRMS, or just about any other action you'd normally have to perform manually.

Keeping You Alert and Proactive

When it comes to HR and payroll, missed deadlines can be costly. That's why it's important to leverage technology that helps you keep tabs on what's happening, what didn't happen, and perhaps most importantly, what needs to happen soon.

Contact us if you'd like to learn more or see a demo of Sage Alerts & Workflow for Sage HRMS.

SAGE 300c ADDS INVENTORY FUNCTIONALITY

Now Includes Sage Inventory Advisor "Basics" at No Charge

It was recently announced that **Sage Inventory Advisor Basics** is now included with select **Sage 300c** bundles at no additional cost. Read on to learn about this enhancement to Sage 300c and what it means for inventory management.

What Is Sage Inventory Advisor Basics?

By now, you've probably heard about the Sage Inventory Advisor add-on – a cloud-based inventory optimization tool that works hand in hand with your Sage 300 software.

The newer "Basics" product is based on the "full" Sage Inventory Advisor suite, but without:

- Support for Bill of Materials
- Central Warehouse Consolidation
- Ability to Import Order Forecasts into Sage ERP

In short, it's a light version of the product that focuses on the most common inventory challenges while removing some of the complexity of more advanced functionality in Sage Inventory Advisor that not every company needs or uses. At the same time, it makes the product easier to implement, understand, and start benefiting from right away.

How is It Different Than the Core Inventory Module?

The core inventory functionality in Sage 300c is focused on processing and managing transactions. From there, Sage Inventory Advisor Basics then leverages that transactional data to help you make more informed decisions about how much inventory to stock, when to buy more, and many other strategic insights that the core inventory functionality isn't capable of. In short, they complement each other.

Here is a quick comparison of core Sage 300c inventory functionality versus Sage Inventory Advisor Basics:

Sage 300c Inventory	Sage Inventory Advisor
Creates and monitors inventory transactions	Analyzes inventory transactions and makes recommendations
Creates POs & purchase reports	Forecasts demand and purchase requirements using sales data
Tracks receiving stock	Identifies what to order and how much
Counts physical stock	Identifies when to expedite orders to prevent stock-outs
Tracks pick, pack, & ship	Recommends what inventory to reduce

Who Gets Sage Inventory Advisor Basics?

As mentioned earlier, Sage Inventory Advisor Basics will be included at no additional charge to customers running select Sage 300c bundles which include:

- Sage 300c **Advanced**
- Sage 300c **Complete**

The Sage 300c ***Essentials*** bundle – typically made up of "Financials Only" customers – is excluded.

In addition, customers running Sage 300c Advanced or Complete must be on a current **Gold** or **Platinum** level Business Care Plan. Customers on Silver level plans will not receive the free Sage Inventory Advisor Basics product.

Got Questions?

Contact us with your questions about Sage 300c or feel free to download the brochure and learn more about Sage Inventory Advisor.

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