



Convergence Technologies Ltd

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INTRODUCING SAGE 100 2019

What's New in the Latest Version

Sage 100 and Sage 100cloud Version 2019 is now available. With more than 30 new or enhanced features across key modules including Paperless Office and Inventory Management, some are saying it's the biggest release in years. Here's a look at what's new in Sage 100 2019.

Global Enhancements

Here are some of the new features focused on automation and time-saving efficiency:

Auto-Complete for G/L Account Numbers - This new feature for general ledger account numbers allows you to enter any portion of the account number, main account, account description, or account group as it auto-populates a list of matching options to choose from.

Copy Feature for Custom Lookup Views - A new copy button added to the User Lookup Wizard means that a custom lookup for one user or company can be easily applied to others without having to re-generate the query from scratch every time.

Message Enhancements - To ensure you have quick and easy access to the information you need, some message windows throughout the product now have a 'More Info' link with added details and related help topics.

Paperless Office Enhancements

In the Paperless Office module, a new **message editor** has been added to Electronic Delivery Message Maintenance allowing you to change text formatting (i.e. color, font, size, bold), create bulleted and numbered lists, and even insert links and images. The size of the message field has expanded from 4,096 characters before to 7,168 in Version 2019. In addition, three **new merge fields** have been added including CustomerPoNO, InvoiceDueDate, and ShipDate. Lastly, a wide variety of options have been added for emailing forms.

Inventory Management

An **Item Quantity Inquiry** button has been added to the Lines tab in Physical Count Entry that displays quantity information for the selected item. You can click the arrow next to this button and select 'Item Inquiry' to open the Item Inquiry window, or select 'Item Memo' to view, create, or maintain memos for the selected item. In addition, new options allow you to 'Include Inactive Items in Physical Count' which includes inactive items in the worksheet as well as an option to 'Print Variances Only' that omits items with **no** variance from printing on the register.

Upgrading to Sage 100 2019

In addition to the enhancements mentioned in this article, new features have also been added to General Ledger, Library Master, and Purchase Order. Contact us with questions about upgrading or refer to the [What's New Summary](#) and [Version 2019 Release Notes](#) for additional detail.



SAGE CRM

4 Ways to Find Information

What good is capturing and organizing all that data in Sage CRM if you can't find the right information when you need it? Let's take a look at 4 easy ways to find the right data, quickly and easily, in Sage CRM.

Using Quick Find

Using Quick Find, you can enter key terms in the **Search** field on the **top bar** (or press **Ctrl + s** to jump to search) to search all company, people, opportunity, case, lead, order, quote, solution, communication, and custom entity records at once. Quick find will return results containing your key terms in any text field, email field, or URL field. You can also search for records by entering a phone number (or part of it). This is the easiest way to find information quickly.

Using Find Screens

You can search a **specific entity** record by entering your search criteria in the Find Screen.

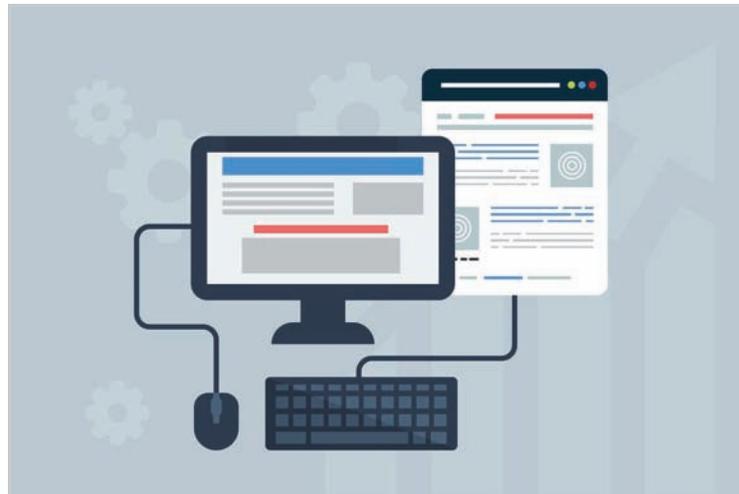
1. On the top bar, click the **search arrow** and click **<Entity>**
2. Click **Clear** to clear your last/previous search criteria
3. Enter your new search criteria

Using the Find Screen, you can combine any number of criteria, including wildcard characters, to narrow your search results. For example in the company find screen, you can search for all companies in Chicago, with more than 50 employees, that contain the word "software" in their name.

Using Advanced Find

Advanced Find performs complex database searches **across entities** including cases, communications, companies, leads, opportunities, orders, people, quotes, and solutions.

You can also create enhanced searches based on a WHERE clause, and you can extend the selection criteria using AND and OR clauses.



1. On the top bar, click the **Search** arrow and **Advanced Find**
2. Click **Clear** to clear your last search from this page
3. Choose the entity on which you'll perform the search
4. Select the first field in your search criteria from Field Name and click Add. Repeat this step to add other fields to your search.

For Find and Advanced Find, you can save your criteria so you don't have to enter the data again to rerun the same search later. In addition, you can perform actions on the displayed search results like merge the data to Word, send an email, or create a new task.

Using Keyword Search

Keyword Search looks across all text fields on a specific entity and entities associated with it. For example, a Keyword Search on cases is also performed on associated companies, people, addresses, and progress notes.

You can enter all or part of the keywords you're looking for and even combine your keyword search with criteria from a standard Find screen.





SAGE HRMS

Version 2019 Coming Soon!

It seems like it has been a while since Sage HRMS added major feature enhancements. That's why people are buzzing about the upcoming Sage HRMS 2019 release. Here's a preview of what we expect to see when the new 2019 version becomes available.

Sage HRMS 2019 Overview

While product updates to Sage HRMS will always ensure compliance with current mandates in HR and payroll, the updates coming in 2019 are predominantly focused on enhancing the experience within **Employee Self Service**.

New Features Detail

Here's what to expect with Sage HRMS 2019.1:

Enhanced organization chart in ESS

Employees can view their managers and direct reports and drill down, which makes it easier for colleagues to find one another for various projects and search.

New Two Factor Authentication

Better security for employees accessing the system.

Employees can add their own profile picture in ESS

The picture can automatically transfer to HRMS, improving efficiency and making the system more personal.

Calendar attachment when receiving time off requests

Managers are now able to add the time-off request to their calendar (**big** request from [Sage City](#) customers).

Add personal email and phone numbers

Employees can now add personal email and phone numbers on the company phone list page on their own (previously required admin/manager).

New check box for Mail Relay

Allows you to set up an anonymous email for replies.



Benefit Letters in ESS

Employees can now see their confirmation letters for Open Enrollment in ESS instead of HR having to print and send them.

Display Employee Attachments in ESS

Previously only available in HR, employees can now view their attachments page in ESS.

View My Menus from mobile page in ESS

Previously My Menus were only available on a computer in ESS, but are now available on mobile devices.

Updates to Life Events in ESS

Added ability to delete Open Enrollments that are in an Updated Status.

Stay Tuned!

Sage HRMS 2019 is not yet available. But stay tuned to our newsletter and we'll make sure to let you know when the new version is released and available for download.

In the meantime, feel free to [contact us](#) with any questions that come up.



New Licensing for Sage Production Management

In a previous newsletter, we introduced you to the new Sage Production Management which replaces the legacy Sage 100 Work Order module. Let's take a look at the changes in your Sage 100 licensing that it will bring.

License Changes

Starting June 1, 2019, Work Order customers renewing their maintenance and support contract for Sage 100 **perpetual** will receive a \$0 license for Sage Production Management in place of Work Order. Maintenance and support (M&S) cost will vary depending on when your license is due for renewal.

If you're a Sage 100cloud **subscription** customer, your Work Order subscription will be replaced with a subscription for Sage Production Management. [Contact us](#) with questions about pricing which is slightly different than Work Order.

What It Means Going Forward

Sage will continue supporting legacy Work Order and Material Requirements Planning (MRP) until March 2022.

So while you may choose to continue using legacy Work Order for a while, Sage has created a migration tool that ensures a smooth upgrade process, making it easy to take advantage of the new and enhanced functionality.

In addition, a new MRP module that's compatible with Sage Production Management is scheduled for release at the end of June 2019 for both Sage 100 perpetual and subscription customers.



Contact us with any questions about the changes in product features or licensing.

Using Sage Support Courtesy Call Back Option



Sometimes when you contact Sage Support, call volume is higher and you may be asked if you'd like a courtesy call back. Let's take a look at how it works and what to expect.

When will you be called back?

Sage will call you back within the same period of time as if you chose to remain on hold (and always on the same day). For example if you are 10th in line when you choose a call back, Sage will call you after finishing with the 9th customer.

What number should you leave for a call back?

If you need to use your office/desk phone while you are waiting for the call back (be sure to include your extension), Sage recommends providing your cell phone number.

What if you miss the call back?

Unfortunately, Sage is not able to keep calling until they reach you. A support rep will leave a message, if possible, but you'll need to call back in again.



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