



## Convergence Technologies Ltd

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## SAGE 100 PAPERLESS OFFICE

### A Closer Look at Recent Enhancements

In a previous newsletter, we provided a high level overview of new features in Sage 100 2019. In this article, we'll take a closer look specifically at enhancements to **Paperless Office** since it's a popular feature of the software.

#### Formatting Options for Messages

A new message editor for Paperless Office (accessed via the Customer, Employee, and Vendor Viewer windows) features a tool bar with text formatting options, including the ability to Change the text color, font, and size, use bold or italic text, create bulleted and numbered lists, and insert links and images. In addition, the size of the message field has increased from 4,096 characters before to 7,168 in Sage 100 Version 2019.

#### New Options for Emailing

You can now specify whether the e-mail addresses used when e-mailing documents are added to the To, Cc, or Bcc field when messages are sent. Simply select To, Cc, or Bcc in the new 'Recipient' field which has been added to the following locations:

- Paperless Office Delivery Options (accessed from Customer or Vendor Maintenance)
- Electronic Delivery (accessed from the customer, employee, and vendor viewers)
- Paperless Office Selection (accessed from all reports supported by Paperless Office)

In the 'Electronic Delivery for Forms' window, you can now select **additional and/or multiple attachments** to include when emailing forms - and there is no restriction on the file type. Plus, a 'Paperless' button has been added in Salesperson Maintenance that provides a new option to **copy salespeople when e-mailing forms**. You can specify whether the salesperson will receive a copy of orders, invoices, and statements when they are e-mailed to customers from data entry, inquiry, and history tasks.

#### Merge Fields

Previously the merge fields were enclosed in angled brackets (< >). However, the new message editor is HTML-based and angled brackets serve a specific purpose in HTML so square brackets ( [ ] ) are now used to enclose the merge fields. Existing messages that contain merge fields in earlier versions of Sage 100 will be converted automatically. But it's a good idea to check and test any older messages anyway. In addition, three new merge fields have been added including CustomerPoNO, InvoiceDueDate, and ShipDate.

#### Upgrading to Sage 100 2019

Contact us with questions about upgrading to Sage 100 2019 or refer to the [What's New Summary](#) and/or [2019 Release Notes](#) for additional detail.

sage

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# SAGE CRM

## SageCRM.com Retirement in August

Last year, Sage announced the planned retirement of SageCRM.com - a hosted version of the Sage CRM product. With product retirement just around the corner, we'll take a look at what it might mean for SageCRM.com customers.

### Retirement Details

Product support and access to the SageCRM.com platform will end on **August 31, 2019**. Sage recommends that you backup and download a copy of your database and document library to a separate location. Instructions for downloading your database can be [found here](#).

These options are only available until August 31st 2019. No data or backups will be available after this date.

### Sage CRM On-Premises **NOT** Affected

The on-premises version of Sage CRM that integrates with your Sage 100 or Sage 100cloud software is **NOT** affected.

The only product that is being retired is SageCRM.com which Sage was hosting themselves on behalf of customers.

### Can I Switch to On-Premises?

Since the code base of hosted and on-premises Sage CRM are different, there isn't a direct or automated migration path to move from one product to the other. However as your Sage partner and support provider, we can provide guidance and options to facilitate a smooth transition.

### What is the Long Term Future of Sage CRM?

The on-premises version of Sage CRM continues to be developed, enhanced, and supported around the world with a product roadmap and release schedule covering the next several years. In a newsletter published earlier this year, we introduced some of the top new features of **Sage CRM 2019**



which included enhancements to the calendar, Outlook email integration, enhanced security and much more.

### Sage 100 is Better with Sage CRM

Because it integrates directly with Sage 100, Sage CRM on-premises delivers unique benefits and efficiency through added capabilities like:

- Sharing and synchronizing customer contacts
- Promoting a Sage CRM company to a new Sage 100 customer or vendor
- Sage CRM inquiry screens that allow sales reps to see orders, inventory and other data from Sage 100
- Converting Sage CRM quotes to Sage 100 orders

Not only do you eliminate duplicate data, you also have better reporting visibility across all aspects of your business from sales and marketing to accounting and operations.



Contact us with questions about SageCRM.com retirement or to discuss a transition to on-premises.



## Sage Summit 2020 Date and Location Announcement



Sage recently announced the date and location for Sage Summit 2020. This year, the conference will be hosted at the **Gaylord Palms Resort** in Florida **May 12-14, 2020**.

### Sage's Biggest Event

According to their website, Sage Summit is the company's largest event. The popular conference provides attendees with an opportunity to learn, connect, and grow with the Sage ecosystem.

Sage Summit US brings customers, partners, and accountants from around the country together for multiple days of deeper learning, product training, thought leadership, and networking to help your business thrive.

As in years past, you can expect inspiring speakers that lead impactful conversations, networking opportunities to share ideas, product education to enhance software knowledge, and a peek at future-thinking technology from Sage.

### Save The Date

Additional details including agenda, speakers, and more will be coming later this year.

[Click to Mark Your Calendar and Save the Date](#)

## Sage 100 Payroll Update and Enhancements

When Sage 100 Payroll 2.0 was released in 2018, it was totally re-imagined in order to align with the larger vision for Sage 100cloud. Building on the momentum of adding more than 100 enhancements since the original release of Sage 100 Payroll 2.0, here's a look at what's included in the newest Sage 100 Payroll 2.19.3.

### 'Other' Tax Deduction Tracking

Until now, 'Other' tax deductions have been bucketed under state tax and could only be recorded in a single GL account. This usually meant having to maintain separate spreadsheets to track state and other taxes. Sage 100 Payroll 2.19.3 now adds the ability to track these in separate GL accounts, so they appear in separate items.

### Employer Contribution Reporting

Recent tax law changes require employer contributions be considered part of an employee's total compensation. In response, Sage 100 Payroll now allows contribution expense account entry for employer contribution deductions and prints deductions on checks and direct deposit.

### Check Reversals

Sage 100 Payroll now allows the lookup and reversal of any checks outside the current quarter which creates better consistency in historical reporting.

### Pension Plan Reporting

The Pension Plan History report was replaced with a new Pension Profit Sharing report.

Contact us with questions about using Sage 100 Payroll 2.0.



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