Sage 100 Newsletter

Issue 2 - 2018

Convergence Technologies ltd

In This Issue

THE ROAD AHEAD

For Sage 100 and Sage 100cloud

Sage recently provided us with a glimpse of the future for both Sage 100 and 100cloud including development goals, new features planned in upcoming releases, and continued expansion of the ecosystem of connected apps. Let's take a closer look at the road ahead for your ERP software.

Product Vision and Strategy

One word that describes all current and future product development goals is **modernization**. That applies to modernizing not only the underlying technology, but to the user experience when it comes to things like ease of use, screen navigation, and the installation process. It also means that if you need to migrate from Sage 100 or 100cloud to another Sage product, it will be as easy as updating. On the technology side, Sage aims to create unparalleled integration of accounting, payments, and payroll in addition to an expansive collection of 3rd party products and cloud-connected apps to extend the power and functionality of your core accounting system.

A Look at Future Releases

Here's what Sage has in store in terms of new features expected over the next several months:

March 2018 - new features expected with the release of Version 2018.2 include moving the Timecard component of desktop payroll to the business framework, enhanced budgeting and planning functionality, integration with Office 365 for Sage 100 customer contacts, and a handful of time-saving enhancements for ease of use.

June 2018 - the release of Sage 100 and 100cloud Version 2018.3 will bring modernized cloud-based mobile time entry, artificial intelligence BOTS that respond to KPI inquiries, consolidated sales order invoicing, and a dedicated marketplace for finding Sage-connected and 3rd party apps.

September 2018 - the release of Version 2019 later this year will bring real-time bank feeds and auto-clearing integrated with bank reconciliation, eCommerce integration for online business and customer self-service, a "Google-like" global search engine for Sage 100, mobile employee expense management, modernization of the Work Order module, and much more.

A Note About Sage 100cloud

It's worth pointing out that many of the planned enhancements and new features mentioned above will be exclusive to the Sage 100cloud product. While Sage is committed to supporting and allowing customers to continue using the traditional Sage 100 perpetual license product, most of the new development effort going forward will be focused on Sage 100cloud.

PDF

Contact us if you'd like a copy of the fully-detailed product roadmap presentation for Sage 100 and Sage 100cloud.

SAGE CRM

New Features Now Available

We saw the first release (R1) of Sage CRM 2018 back in December. Now just a few months later, the second release (R2) is available and brings some great new features that we'll take a closer look at in this article.

Sage CRM Calendar

Sage CRM 2018 R2 continues to build on what's probably the heart of the application - the calendar. This release further extends the great enhancements in Version 2018 R1 with new **filtering** options in all calendar views. **Action** and **Status** filters can be added to Day, Work Week, Week and Month views and are retained for the session duration. In addition, the calendar now displays dates according to your personal settings in the Preferences area.

MailChimp Campaign Results Visibility

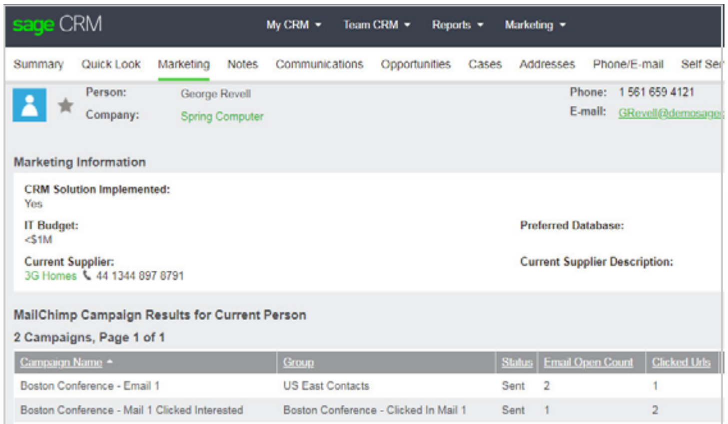
The results of your MailChimp marketing campaigns are now visible and available on the **Person Marketing Tab**. The details provided display marketing campaigns that this person has been included in, the number of email opens, and the number of clicks per campaign.

MailChimp campaign results are now also available on the **Company Marketing Tab** for any campaigns that used a company email address such as sales@company.com.

Together, these new campaign display options provide a quick and convenient way to see how engaged a given contact or company has been without having to run reports in MailChimp and use two different applications.

Tracking Marketing Consent

Depending on what country you do business in, legislation in your area may require additional steps in gathering consent before you're able to send marketing communication. With Sage CRM 2018 R2, you now have the tools to manage and track this process easily.



MailChimp campaign results now displayed right in Sage CRM on the Person and Company records.

With the new consent tracking capability, you can store the expressed agreement to receive marketing via email, text, or calls on the **Consent Tab** in contact records. Requests for consent can be sent directly from Sage CRM using preconfigured email templates.

Other Usability Enhancements

A collection of other enhancements help to make Sage CRM even easier to use. For example, the **Main Menu** has been optimized for a variety of screen sizes and long item names. No matter what size screen or device you're using, the main menu is always easily accessible and automatically adjusts as needed.

In addition, new **Mass Deletion** functionality has been added allowing administrators to bulk delete library items, documents and communications associated with a person in Sage CRM.

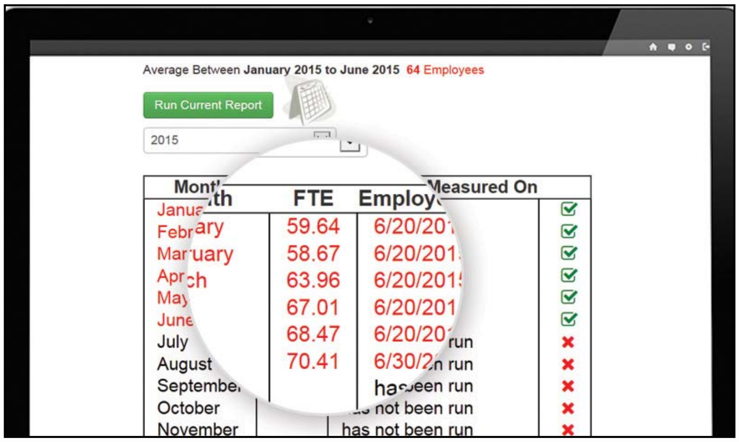
Have a Question or Need Help?

Be sure to get in touch if you have a question about Sage CRM 2018 or need help with an upgrade.

SAGE HRMS

Complying with ACA Using Sage HRMS

The Affordable Care Act (ACA) made life just a little more complicated for many of the HR and payroll departments we work with. Which of the new forms will you need to file? How many full-time employees do you really have? What are the fines for failing to provide affordable healthcare coverage? In this article, we'll show you how answering these (and other) questions and managing ACA reporting requirements is easier than you thought using Sage HRMS.



ACA Simplification Tools

As a Sage customer, you have 2 great options that simplify the complexity of ACA compliance including:

ACA Comply - a web-based application designed to work hand-in-hand with **Sage Payroll Services** (a hosted payroll solution).

My Workforce Analyzer – a dashboard and analysis tool designed to work with **Sage HRMS Payroll** (an on-premises payroll solution).

Flexible enough to meet the needs of a variety of employers, both ACA Comply and My Workforce Analyzer rely on integration with your existing Sage Payroll data (on-premises or hosted) to provide the tools, reports, and information you need to comply without entering data twice or managing two separate systems.

While both options may look slightly different from one another, they essentially offer the same set of features designed to minimize tax liability, avoid potential penalties, and simplify ACA compliance reporting.

Features Overview

Here's a look at the features and benefits included in ACA Comply and My Workforce Analyzer:

FTE Employee Calculator – Using your existing payroll data, automatically calculate the number of Full-Time Equivalent employees (FTEs) to determine your status as an Applicable Large Employer (ALE).

Employee Info at a Glance - see a summary of ongoing hourly, salaried, and variable hour employees with and without healthcare coverage, including the measurement periods, administrative periods, and stability periods.

Pay or Play Analysis – on-screen reports show comparisons and provide "what-if" modeling options to help determine what makes the most financial sense for your company (purchase insurance or pay the fine).

File with Ease - your forms will be filed for you electronically (ACA Comply only). You also get an option to have the Sage Payroll Services team print and distribute 1095-c copies on your behalf (additional fees apply).

ACA Compliance Made Easy

If ACA compliance requirements have made your life a little more challenging, it may be time to consider a new approach using ACA Comply or My Workforce Analyzer.

New Warehouse Status Settings in Version 2018

With the release of Sage 100 Version 2018, there are new warehouse status settings available that help you better manage your warehouses and inventory. In this article, we'll take a closer look.

Warehouse Maintenance

In Warehouse Code Maintenance, a new status field has been added that allows you to set a warehouse status to one of three options including Active, Inactive, or Restricted. Since the Active status is self-explanatory, we'll explore what it means to chose either Inactive or Restricted.

Inactive Warehouse Status

The **Inactive** status is intended for warehouses that are no longer in use. If a warehouse status is Inactive, you cannot select the warehouse in any data entry tasks.

A warehouse cannot be set to inactive if there is a record of inventory or if the warehouse is used in data entry or maintenance records (such as an open sales order or a ship-to address). If you try to change a warehouse to inactive while it's in use, a warning message displays preventing the status change and provides a 'Details' button that will reveal a list of records in which the warehouse is used.

Lookup Views Option - a new checkbox option, "Display Inactive Warehouses in ALE Lookups", has been added to the Preferences tab in Company Maintenance. While this checkbox is selected by default, you can choose to clear the checkbox if you no longer want inactive warehouses displayed in lookup views.

Restricted Warehouse Status

The **Restricted** status is intended for a warehouse that is still in use but activity needs to be temporarily suspended, for example, to take inventory. If a warehouse status is Restricted, it cannot be selected in data entry tasks unless an exception is created in the new 'Allow Entry of Restricted Warehouse' window.

To create exceptions, click the 'Allow Inactive Warehouse' button, which is next to the Warehouse Status field and available when Restricted is the selected status. You can then select data entry tasks using the restricted warehouse. You can enter dates in the Restricted Start Date and End Date fields to automatically start and end a period in which the warehouse is restricted.

These new warehouse options should make things easier for some customers who, in the past, have created "dummy warehouses" and other workarounds to address complex or unique warehousing and inventory requirements.

Please get in touch if you have questions or need help using any of the new features in Sage 100 2018.

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