Convergence Technologies ltd

INTRODUCING SAGE 100 2020

Sage has announced the release of Sage 100 and Sage 100cloud 2020.0. Let's take a look at some of the top new features included in these latest versions.

Global Enhancements

Here are some of the top global enhancements that are carried throughout multiple modules:

Expanded Name Fields – several fields have been expanded from 30 to 50 characters including Customer Name, Customer Contact, Vendor Contact, Confirm To Name, and Requested by name.

International Address Support - to support international business, several fields have been modified to support international addresses for customers, vendors and contacts.

Multiple POs on a Single Receipt – similar to the existing multiple Sales Orders on One Invoice feature, you can now combine multiple POs into a single receipt (for Sage 100cloud only).

eInvoicing With Paya Connect

eInvoicing with Paya Connect combines click-to-pay functionality with a customer self-service payment portal, helping you save time through payment automation. Your customers can use the payment link to make online credit card and ACH payments. If you're using Paperless Office for invoicing, the invoice PDF is attached to the email. After customers make online payments, you can easily import them into Cash Receipts Entry. **Note:** this feature is only available for Sage 100cloud and requires a merchant account with Paya (formerly Sage Payment Solutions).

New Reverse Check Run Utility

If you've ever processed a check run with the wrong information, you already know how much time and manual effort can be required to walk it back. But now, the new Reverse Check Run Utility in Accounts Payable automates the reversal of checks or electronic payments created via the Check Printing and Electronic Payment Menu. This new feature, only available in Sage 100cloud, was a very popular request on the Sage 100 Ideas website.

Lot / Serial Expiration Dates

Expiration dates can now be added for items with lot or serial numbers when they are received into inventory or produced through Bill of Materials. An important feature for manufacturers and distributors who deal with food & beverage, chemicals, and medical equipment, this is the first phase of the Sage 100cloud lot/serial journey with lot/serial tracking features coming soon.

These are just a few highlights. Sage 100 and Sage 100cloud 2020 include much more than we can cover in just one article. For a complete list of new features and other important details, be sure to check out the 24-page What's New document (PDF).

Authorized Partner
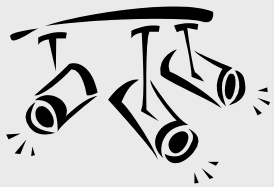
SAGE CRM
Introducing Sage CRM 2020 Release 1

Sage CRM 2020 Release 1 (R1) is now available. Let's take a look at some of the top new features in this latest version.

MailChimp Integration Enhancements

The **Sage CRM MailChimp integration** has been enhanced to automatically detect duplicate email addresses, making it easier to prevent and fix these occurrences.

To ensure that a Person, Company, or Lead record being added to the system has a unique email address, system administrators can now use a new **Detect duplicate emails** option. Then, if a group sent to MailChimp contains two or more records with the same email address, the group gets rejected.

This enhancement includes the following:

- Automatic detection of duplicate email addresses
- A new screen displaying records with the same email address
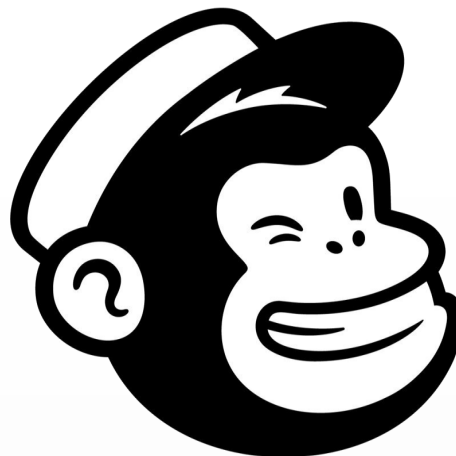- A new MailChimp notification

Managing Documents

The technology behind the Document Drop capability has been updated so the functionality is now **available in all browsers** that are supported by Sage CRM. Plus, you can drag-and-drop emails from Outlook in all web browsers.

In addition, you can now create document templates to perform a **nested mail merge**. This is where a parent entity record has the details of one or more child entity records embedded into it. For example, you can create a template that generates an Order document with embedded Order Item records.

Outlook Plugins

Just like Document Drop, the technology framework for installation of both Lite and Classic Outlook plugins has been updated which means they now work in any web browser supported by Sage CRM.

These Outlook plugins – or add-ons - for Sage CRM synchronize contacts, appointments, and tasks between the two applications. It also allows you to file single or multiple email messages in Outlook to one or more Sage CRM records so you have full documentation of all email communication between you and your customers. You can even attach Sage CRM shared documents to Outlook email.

Upgrading to Sage CRM 2020 R1

Contact us if you need help upgrading Sage CRM and be sure to click below to review the detailed release notes, system requirements, and other important details on Sage CRM 2020.

FULL RELEASE NOTES

SAGE HRMS
Automating HR Forms, Routing and Approval

In this article, we'll take a look at **Sage HRMS HR Actions** - a Sage Endorsed Add-on Solution that lets you easily create paperless forms using **any fields** from your Sage HRMS system. In short, you can process any employee action, from request to hire to termination and everything in between, using interactive, paperless web forms.

What Does HR Actions Do?

HR Actions eliminates the burden of paperwork by providing over 40+ online forms that cover the entire employment lifecycle. Here are just a few examples:

- New Hire, Requisition to Hire, and Transfer Requests
- W-4 and I-9
- FMLA/LOA Request
- Performance Appraisals
- Termination/COBRA
- Much, much more ...

And if the 40+ built-in forms aren't enough, you can easily build your own web-based forms without any technical skills or programming knowledge required.

HR Actions electronically routes forms for approval and saves the collected data directly into Sage HRMS without manual data entry and the form is saved in the personnel file. Plus, electronic routing slips for each form automatically notify approvers by email when there's a form to review.

Key Features and Benefits

A few key features and benefits of Sage HRMS HR Actions:

Robust Question Control - Questions can be fixed, generated by role, or open for editing by the employee, manager, or both. An additional option allows you to roll goals over into questions on a Performance Appraisal form.
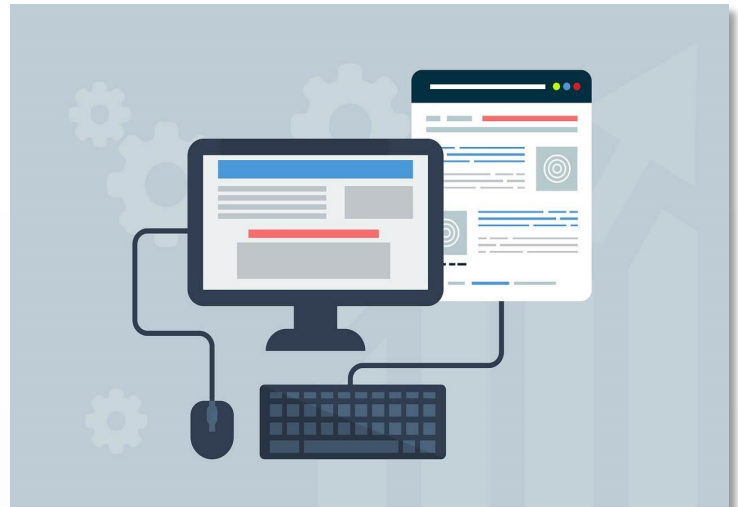
Control Routing of Forms in Workflow - Administrators can control the routing and flow of a form including stop it, skip an approver, or push it through the routing process.

Monitor Workflow - Monitor the status of forms being routed for approval with a dashboard. See where the form is on the electronic routing slip and who's left to approve the form.

Detailed Logs and Audit Trail - Approver comments and actions are logged with a date and time stamp. Changes to form field values include the date of a change, who made the change, and the type of change.

Form Control and Archive - Completed forms are available for viewing online and can have up to five file attachments (i.e., PDF, Word, Excel), which are also available for viewing.

Want to See More?

Contact Us to request more information, get a quote, or schedule a demo to see if **HR Actions** for Sage HRMS is right for your HR department.

Custom Office Improvements in Sage 100 2020

Custom Office is a popular module in Sage 100. So let's take a moment to review some of the enhancements applied to Custom Office with the release of Sage 100 2020.

Improved Grid Customization

This feature introduces a new user-interface in Custom Office similar to how grids appear in other Sage 100 tasks. Right-clicking within the grid now opens a Customize Grid Definition window that enables you to:

- Drag-and-drop columns to rearrange their order as well as move columns from one grid to another.
- Access Column Properties in order to modify column name, size, width, secondary grid description, and whether it's locked.
- Easily create additional columns.
- Access a Bulk Hide window to set the 'Hidden' option for multiple columns in a grid.

This feature is only available in Sage 100cloud and was a popular request on the [Sage 100 Ideas Website](#).

Save UDF Changes in Pending Status

You no longer have to choose between updating your user-defined field (UDF) changes right away or discarding them. UDF additions and modifications are now saved in a pending table. Now when you click Cancel in the User-Defined Fields window, a message will let you know that your changes have been saved. You can return to the User-Defined Fields window at a later time to continue working on your changes and update them when you're ready.

A new Pending Changes Summary task has been added to the Custom Office Main menu. You can also access this task by clicking the Summary of Pending Changes button in User-Defined Field and Table Maintenance. Use this task to view a list of pending changes as well as apply the updates. This new feature is available in Sage 100cloud.

Mask Information in Data Entry Fields

A 'Mask Display' check box has been added to the Options tab in the Multi-Line Definition window. You can select this check box to display filled-in circles in place of the actual characters when data is entered into this field.

Note that the data is **not** encrypted and it is masked only when displayed in task windows.

Ready to Upgrade?

Be sure to contact us if you need help upgrading to Sage 100 2020 or if you want to migrate from Sage 100 Classic to Sage 100cloud in order to take advantage of some of the new features exclusive to that updated platform.

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