



## Convergence Technologies Ltd

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## WHAT'S NEW IN SAGE 100

### Version 2018.3 Now Available for Download

Sage 100 2018.3 is now available. Let's take a look at some of the most recent enhancements and product updates that are included in the newest release.

#### Custom Office Enhancements

Several changes and improvements were made to the Custom Office module including:

**Calculator Option for Numeric Fields** - A calculator check box has been added to the Multi-Line Definition window. Select this check box to include the calculator button next to the field.

**Buttons Appear in Screen Editor** - In the Customizer screen editor, Calendar, Calculator, and Lookup buttons now appear as they do when using the screen in Sage 100.

**Ability to Exclude UDFs from Selection Grids** - Use the new 'Exclude from Report Selection' check box when adding a user-defined field (UDF) to a table for a main entity, such as AR Customer, to exclude the UDF from selection grids for reports that use the table.

#### Sales and Purchasing

In the **Sales Order** module during invoice data entry, you can now **apply multiple sales orders to an invoice** if the invoice type is either Standard or Cash Sale. In addition, several reports, forms, registers, and on-screen inquiries have been updated to indicate that multiple sales orders have been applied.

In the **Purchase Order** module when creating POs using 'Auto Generate from Sales Orders', any drop-ship items that are used in multiple lines in a sales order can now remain on separate lines in the purchase order. Previously, duplicate lines were consolidated into one line in the PO.

#### Bill of Materials

A new field 'Sync Misc Charge Changes with Bill Tables' has been added to Bill of Materials Options. There are three options for updating bills with changes made for miscellaneous change items in Miscellaneous Item Maintenance:

- **Yes** - to update bills with the changes made in Miscellaneous Item Maintenance.
- **No** - if you do not want to update the bills
- **Prompt** - to receive a message when you update a field for a charge item in Miscellaneous Item Maintenance asking if you want to update the field in Bill of Materials.

#### Release Notes and Other Details

Download the [What's New Document](#) and [Release Notes](#) for full details of all enhancements and program fixes applied in Sage 100 Version 2018.3 and be sure to contact us if you need help updating your Sage 100/Sage 100cloud system to the current release.

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# SAGE CRM

## The Latest News & Product Updates

Here's a look at some of the most recent news and product updates for Sage CRM including an upcoming release, new option for support calls, and an in-depth test drive.

### Sage CRM 2018 Release 3 Coming Soon

Sage CRM 2018 Release 3 (R3) is scheduled for availability in August 2018. This latest version will include a number of improvements including these highlights:

**More Calendar Enhancements** - in addition to the ability to now create quick appointments for other users, you can also view all items in the calendar as a list to make better use of screen real estate.

**Quick Find** - Quick Find has been improved so you can search for Person and Company records by their postal address, email address, or phone number.

**Supported Character Sets** - improved support for Unicode characters, including special characters and emojis.

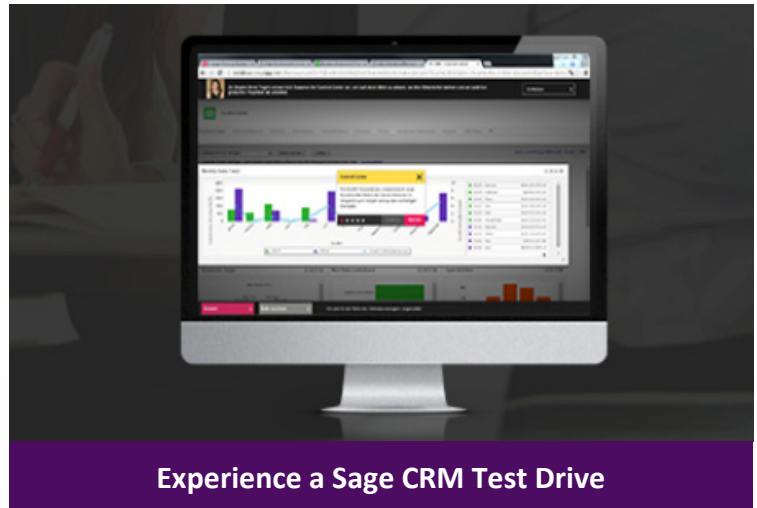
**Customer Cases** - more than 50 customer cases and product fixes have been addressed with this release.

### Take a Personal Sage CRM Test Drive

Are you looking to experience first-hand how Sage CRM can transform the sales, marketing, and service operations at your company? If so, then it's time to take Sage CRM for a personal test drive.

A new series of role-driven test drives show how Sage CRM makes people's jobs easier. There are a few roles to choose from including CEO, Marketing Manager, Sales Manager, and Customer Service Representative. The test drives highlight top features like company-wide dashboards, integrated marketing campaign features, sales pipeline management, and detailed customer-case tools.

[Take a Test Drive Now!](#)



Experience a Sage CRM Test Drive

### New Online Scheduling for Support Calls

Tired of waiting on hold to speak with a Sage CRM customer support representative?

Well now you don't have to with the new online appointment scheduling option that allows you to schedule your preferred time and date for a Sage support representative to call you back.

**To schedule an appointment for Sage CRM support:**

1. Visit the [Online Scheduler](#) website
2. Select **Register Now** and follow the steps to create an account using your Sage Customer ID (or login if you've previously registered).
3. Select an appointment date and fill out the form.

All set! Your appointment is reserved so you can get back to work and have a Sage support rep call you back at the time you selected.



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# SAGE CONTACT FOR OFFICE 365

In a release of Sage 100cloud 2018 earlier this year, Sage introduced **Sage Contact** - an Outlook add-in that allows you to view Sage 100 customer information in Office 365. In this article, we'll take a closer look at the app and integration.

## Sage Contact for Office 365

When you integrate Office 365 with Sage 100cloud, you can use the Sage Contact app to view Sage 100 customer information in Outlook, including the following data:

- Recent invoices and payments
- Credit information
- Contacts' name, address, phone, and email
- Customer memos

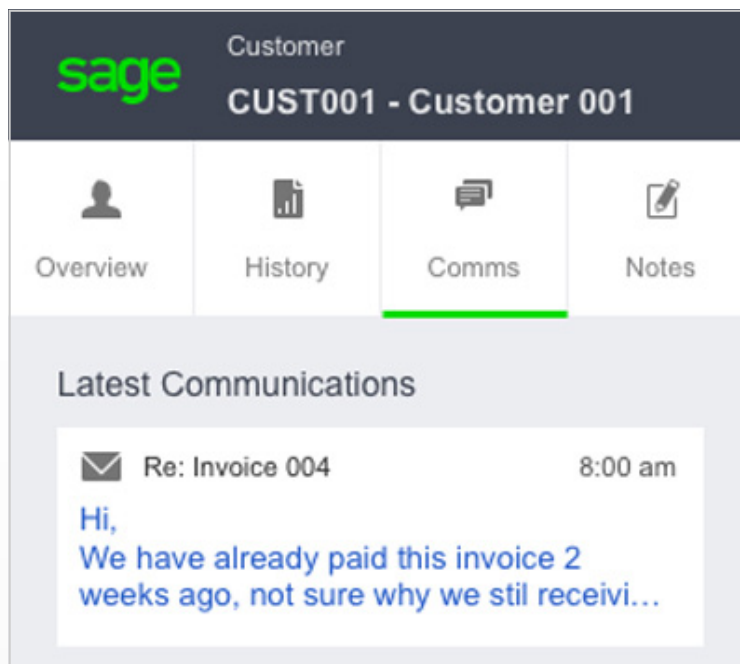
What's more, you can also edit contact information and create new customer contact records in Outlook and have the changes are update to Sage 100.

## Benefits of Sage Contact

Because it's available through Outlook in Office 365 via laptop, tablet, or mobile device, Sage Contact is a very useful feature for sales staff that may spend time on the road, yet need access to key customer information in order to prepare for meetings. For example, suppose you're heading out to a customer meeting and want to make sure you're up to date on the status of their account. Rather than calling in to the office and have someone in accounting run a report and get back to you, with Sage Contact you simply open a recent email to or from the customer and select the Sage Contact icon.

## Sage Contact Components

Sage Contact consists of various tabs and sections that populate the key customer information from Sage 100 into Office 365/Outlook. Here's a breakdown of what you'll see:



**Overview Tab** - provides the customer's available credit as well as address and phone number. Contact details can be updated in the app and sent directly to Sage 100cloud.

**History Tab** - displays how much money is owed by the customer as well as average number of days to pay invoices. You can also click through the last 20 invoices and payments to review details.

**Comms Tab** - quickly review and reply to recent emails to and from the customer as well as other communications entered directly from Sage 100cloud.

**Notes Tab** - displays notes created in Sage Contact as well as memos from Sage 100cloud. You can also update notes during or immediately after a meeting for better accuracy.



Contact us if you want more information about Sage Contact or need help getting it set up and running on your Sage 100cloud installation.

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