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WHAT'S NEW IN SAGE 300 2019
A Look At Product Update 1

The newest update for Sage 300 2019, product update 1, is now available featuring a collection of global enhancements along with a new integration with Microsoft Office 365. Here's a look at what's new in Sage 300 2019.1.

Global Enhancements

New features and improvements in both **Sage 300** (Classic) and **Sage 300cloud** include:

Reverse Charges - in Tax Services, you can set up reverse charges for purchases. A reverse charge is a tax amount owed on goods or services you purchase, which you must remit directly to the relevant tax authority, instead of paying it to the vendor.

Withholding Taxes - in Tax Services, you can set up withholding taxes for purchases. A withholding tax is applied when purchasing goods or services from a vendor, and allows you to withhold some or all of either the selling price or the tax amount for a transaction.

Other Improvements - several core system improvements have been made, including the Item Finder, AR and PJC modules, and Ops Inquiry.

New Office 365 Integration

With Sage 300cloud, you can now access key customer information from any device that can access Microsoft Office 365 using **Sage Contact**. Sage Contact is an Outlook add-in that displays the following Sage 300 information through Office 365:

Overview - 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 300cloud.

History - 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.

Communications - quickly review and reply to recent emails to and from the customer as well as other communications entered directly from Sage 300cloud.

Notes & Memos - displays notes created in Sage Contact as well as memos from Sage 300cloud.

Sage Contact is a very useful feature for sales staff that may spend time on the road, yet need access to customer information in order to prepare for meetings.

Refer to the Sage 300 2019.1 Release Notes for full details on all new features and fixes. Be sure to contact us if you need help with an upgrade.

Did you know that Sage CRM can work hand-in-hand with your phone system? It's called Sage CRM CTI - short for Computer Telephony Integration - which extends core CRM functionality so that sales, customer service, and support reps are even more efficient and effective. Let's take a closer look at using Sage CRM with your phone system.

Sage CRM CTI Features

When you connect Sage CRM to your phone system using CTI, inbound calls are routed through your computer which allows you to leverage the following features:

- Automatic caller identification.
- Inbound calls provide clickable hyperlinks that instantly provide information from Sage CRM about that contact.
- You can click to go directly to the relevant Company or Person screen while the call is active.
- Quick and easy dial-out via hyperlinked phone numbers.

In short, everything your representatives need to know about a contact pops up onscreen without having to put them on hold and search for relevant records or history.

Taking Inbound Calls

When an inbound call is directed to your extension number, the CTI screen displays in a popup window in Sage CRM. If the number matches a company or person in Sage CRM, the contact is listed onscreen. If it matches more than one, all contacts are listed.

Once you click to answer or pickup the receiver, the call becomes active and additional screens and features are available. For instance if you are a sales person, you might see the New Opportunity screen popup which will gather context information so you can quickly log an interaction with the Sage CRM contact who just called.

Making Outbound Calls

Once CTI is enabled, all phone numbers in Sage CRM are displayed as hyperlinks. Even phone numbers in the context area of the screen are hyperlinks. To make a call, simply click on the linked phone number which then displays the Call screen as well as an Active call field. And of course, you can also make calls to numbers that are not stored in Sage CRM.

Sage CRM CTI Prerequisites

Naturally, you can't just connect Sage CRM with any old phone system. Here are just a few of the requirements that need to be met:

- A private PABX switch
- A telephony network and server
- A local area network (LAN) and LAN server
- Sage CRM CTI component installed on the server

Contact us for the full technical requirements documentation or if you'd like to learn more about connecting Sage CRM with your phone system.

SAGE HRMS
Saving Time with Online Benefits Enrollment

Providing a competitive benefits package is one way employers can recruit and keep talented employees. Unfortunately, benefits enrollment can be a rigorous, paper-intensive process for many HR departments. That's why we want to introduce you to an easier way with **Sage Benefits Enrollment**. Let's take a closer look.

What is Sage Benefits Enrollment?

A component of Sage HRMS, Sage Benefits Enrollment enables employees to make their own benefit elections online using the internet (or your intranet). Sage Benefits Enrollment even includes year-round life events management, so your employees can easily update information such as marital status and dependents.

Manual Versus Online

The manual approach to benefits enrollment can be full of frustration. There are stacks of paperwork to be completed, documents to be copied and distributed, and forms that are often lost or misplaced.

Sage Benefits Enrollment eliminates all that by moving the process online. Employees are guided step-by-step through selecting the benefits they wish to participate in and enter the necessary information into online enrollment forms. Once the employee enters data online, the information is *immediately available* to HR for review & approval and can automatically update your Sage HRMS system, thus eliminating duplicate data entry.

Simple For HR Administrators Too

Easy-to-use onscreen wizards guide HR administrators through the process of setting up benefit plans, including open enrollment start and end dates. Reminder emails can be sent to employees and errors are automatically flagged allowing HR to request appropriate changes.

The Benefits of Online Enrollment

Reduced HR Call Volume – because employees have direct online access to important details during the enrollment process, they are able to easily find answers to common questions on their own.

Shorter Cycle Times – Research suggests that a paper-based open enrollment process can take 6 to 8 weeks (from assembly & distribution of forms to manual completion and submission of those forms to HR). Online benefits enrollment can streamline that process down to 3 weeks or less.

Eliminate Duplicate Data Entry – eliminate duplicate data entry with an online benefits enrollment solution that shares data with your existing Sage HRMS software.

Reduce Material Costs – paper, printing, and postage are essentially eliminated by removing paper from the process and directing employees to electronic resources for forms and benefit details.

For many companies, the days of frustrating paper-based benefits enrollment are a thing of the past. Are you ready to do the same for your organization?

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What Do I Get with a Sage Business Care Plan?

Ever wonder why every year, you get a notice to renew your Sage Business Care plan as part of your Sage 300 software investment? Have you wondered what it includes exactly? In this article, we'll answer those questions and more.

What is "Business Care"?

Sage Business Care represents support and maintenance costs that every ERP software developer puts in place. This annual fee provides for ongoing research and development, product improvements, new version releases, and continued innovation so that Sage 300 keeps pace with broader changes in technology (in other words, helps to prevent Sage 300 from becoming obsolete).

Also depending on which Sage Business Care plan you choose (discussed later in this article), it also includes various levels of customer support.

Business Care Benefits

Here's a look at what's included in all Sage Business Care Plans:

Product Updates and Enhancements

Each year, Sage makes a significant investment in product development to incorporate new features, productivity enhancements, security updates, hardware compatibility, and product fixes & patches.

24 x 7 Knowledgebase Access

Each plan comes with unlimited access to the same problem-solving information used by Sage support centers which provides you with fast and searchable support knowledge.

Different Plans, Different Needs

Different Sage Business Care plan options allow you to choose the level of support you need based on your own in-house IT expertise.

Silver Plan - the base plan that includes the core benefits mentioned earlier, plus **5 Sage support cases** annually and 1 user for Sage Intelligence Reporting and Sage CRM.

Gold Plan - all the benefits of Silver, but with **unlimited** support cases **and** Anytime Learning courses through Sage University.

Platinum Plan - all the benefits of Gold, but with **2 users** for both Sage Intelligence and Sage CRM.

Note on Sage300cloud - with a Sage 300cloud subscription, Sage Business Care plans include additional features that are not available for Sage 300 Classic (perpetual license).

Contact us if you have questions about business care or need personalized support from our team of Sage 300 technical experts.

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