vrakas/blum
computer consulting

sage | Authorized Partner

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.

i 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).

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
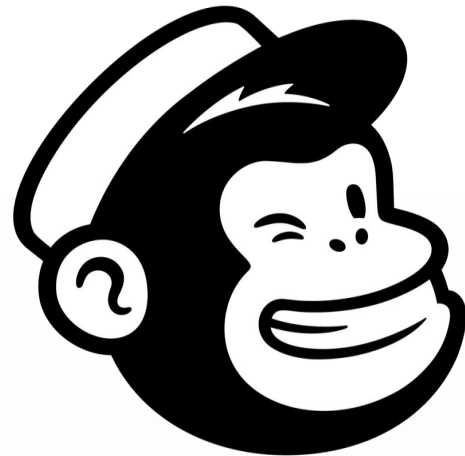- A new MailChimp notification

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

vrakas/blum
computer consulting

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.

vrakás/blum
computer consulting

Vrakas/Blum Computer Consulting
445 South Moorland Road, Suite 400
Brookfield, WI 53005
(262) 797-0400

www.v-bcc.com

WHAT'S NEW
At Vrakas/Blum Computer Consulting

Fully Staffed & Functioning During COVID-19 Pandemic

All of our employees are healthy and safe and are equipped to seamlessly connect with clients in a secure and productive environment from their at home work stations.

The only thing changing is our on-site support. For the time being we will be suspending on-site meetings and will be hosting remote meetings instead.

In addition, we have hired on a new experienced consultant who will be starting mid-April. Stay tuned for more details!

How Can VBCC Help?

Since activity for many has slowed down, it may be a good opportunity for the following items:

• Upgrade your current system

• Address projects that you haven't had time for

• Request a free system setup review

• We can also provide accounting assistance if you should have challenges with staffing

Questions?

Contact Us!

Helpful COVID-19 Blogs

Tech Tips for Working Remotely During the COVID-19 Pandemic

Finding the Silver Lining

Upcoming Webinars

All webinars begin at 12:00 p.m. CST, are free to attend and CPE is available!

How is COVID-19 Changing Tax Compliance
April 22, 2020 - Presented by Avalara

JobOps Basics
June 17, 2020 - Presented by VBCC

Sage Intelligence
July 22, 2020 - Presented by VBCC Consulting Manager, Dana Halpin

Visual Integrator
September 16, 2020 - Presented by VBCC Consultant, Jesse Braun

REFER A FRIEND - Be Rewarded

A referral is the highest compliment you can pay us. Please let us know if there is someone you believe that could benefit from our services.