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sage | Authorized Partner

MOVING SAGE 300 TO THE CLOUD
New Program Simplifies Migration

Sage has recently introduced a new program designed to facilitate and simplify the process of moving your Sage 300 data and system to the cloud. Let's take a closer look at the details and benefits of the new **Sage Partner Cloud** framework.

What is Sage Partner Cloud?

In a nutshell, Sage has created tools, forged strategic partnerships, and developed a framework for Sage Authorized partners to assist you in moving your Sage 300 software to the cloud. This new Sage Partner Cloud program includes 2 options for moving to the cloud, one of which leverages the power of Microsoft Azure, a widely-used and well-respected cloud hosting platform.

Top Benefits of Sage 300 in the Cloud

A few of the top benefits that customers experience when moving their ERP to the cloud include:

Security - top-tier cloud hosting providers invest *heavily* in data and systems security at a level that's cost-prohibitive for many small and mid-sized businesses. In short, your data is likely more secure (from things like cyberattacks) in a hosting environment than on your own servers.

Uptime - top cloud providers boast 99.99% uptime. You also benefit from redundancy measures, such as automatic backups, so in the rare event that a server does go down, you're up and running again faster than most companies can resolve a similar "server down" situation in-house.

Open and Flexible - Microsoft Azure is an open and flexible cloud-computing platform that allows you to easily dial up and adjust technology resources to scale with your business without having to buy, install and configure new equipment as you grow. What's more, the open architecture "plays well" with 3rd party applications which is important for Sage 300 customers using some of the most popular integrated add-ons for payroll, E-Invoicing, sales tax automation, and others.

Cost Savings - Investing in hardware, servers and IT staff can be very expensive and, in the long run, unpredictable. The upfront and ongoing costs to purchase, setup, and maintain your own data servers and hire the staff to support it (or pay outsourced IT) can add up quickly.

All the Benefit, None of the Hassle

Sage Partner Cloud was developed to deliver all the benefits of running your Sage 300 software in the cloud without any disruption to your business or having to implement and learn a new ERP system. In short, it's the same Sage 300 you know and love, but with the added benefit of security, reliability, flexibility and cost savings that comes with a cloud deployment.

Contact us to learn more about Sage 300 cloud migration options or with any questions about what the process entails.

Earlier this year, Sage CRM 2021 was released with new features to make it even easier to manage your sales tasks, contacts, opportunities, and more. Here's a look at what's new in Sage CRM 2021.

Telephone Numbers as Hyperlinks

Staring with Sage CRM Version 2021 R1, all telephone numbers in Sage CRM are formatted as telephone links.

With this now-familiar "tap to call" functionality that's prevalent in other apps you probably use, you can tap a telephone link in Sage CRM using a phone-capable device to call a phone number without having to dial it manually.

On a desktop computer, when you click a telephone link, you'll be prompted to select an application (for example, Skype) in which you want to open the link.

Customizing Lists and Grids

Now, system administrators can use **inline customization** to change lists and grids which allows you to see how a list or grid looks like before and after your changes.
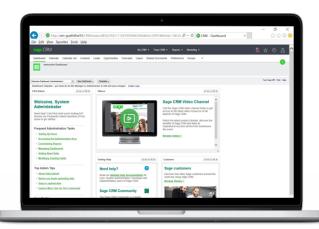
Lists are displayed when you select a tab within the context of company, case, lead, opportunity, solution, or person.

Grids are used to display the results of a search for a person, lead, case, opportunity, and so on. Grids are also displayed on the Company Quick Look tab.

In both cases, it's now even easier to make sure the data you need in Sage CRM is displayed in a way that fits the way your sales team likes to work.

Self-Service Password Recovery

This handy new feature in Sage CRM 2021 enables users to reset their Sage CRM password without contacting the system administrator.

When this feature is enabled in the system, a **Forgot My Password** link is added to the Sage CRM logon screen. To reset a forgotten password:

1. Launch the Sage CRM logon screen
2. Enter your user name in the User Name field
3. Click the Forgot My Password link

Sage CRM will send an automated email containing a password reset link to the email address associated with the user name. You can then reset your password by clicking the password reset link in the email.

Sage CRM 2021 R2 Releasing in August

The second release (R2) for Sage CRM 2021 is launching August 23rd featuring the following enhancements:

- Simplified screens and lists
- Improvements to quotes & order creation process
- Modernized reporting pipelines
- More control over webforms to capture leads
- Updated user interface (UI)

Contact us with your questions or to request help updating your system to Sage CRM 2021.

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CLOSEUP LOOK AT NEW SAGE 300 WEB SCREENS

You've probably noticed that each new release of Sage 300 features new Web Screens that have been developed. So we thought it would be a good idea to revisit what a web screen is, how they're used, and take a closer look at the newest web screens rolled out in Sage 300 2021 R2.

What is Web Screen?

The short answer is that web screens bring the functionality of "traditional" Sage 300 screens into a web browser. Therefore, whether you're using a desktop computer, a laptop, a tablet, or other mobile device, you can now enter transactions, generate reports, manage finances, and more - just about anywhere, and on a wider variety of devices.

Web screens run in parallel with the classic Sage 300 desktop screens, so there's no need to choose between the two. Each user can choose the interface that best suits their needs, while working in the same Sage 300 system.
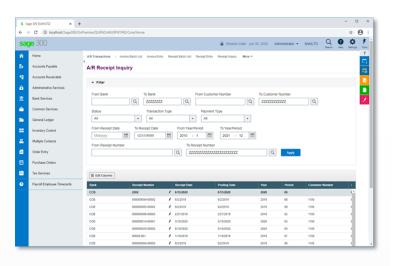
New Web Screens in 2021 R2

New web screens added in Sage 300 2021 R2 include:

General Ledger Web Screens

- **Account History Inquiry** - displays actual and quantity information for prior years, as well as total quantity and total net change information.
- **Budget Maintenance** - enter and display budget information for general ledger accounts.
- **Source Currency Inquiry** - displays source-currency and functional-currency account balances for multicurrency account.

Accounts Receivable Web Screens

- **Receipt Inquiry** - Use this screen to look up receipts.
- **Refund Inquiry** - Use this screen to look up refunds.

New Users Web Screens

Sage 300 2021 R2 includes a **New Users** web screen that you can use to add and manage user records. For instructions, refer to this help article.

Web Screen Functional Improvements

Improvements were also made to the utility of Sage 300 web screens including a redesign of the "**Finder**" (search) functionality that's available in several transaction screens, making it easier to navigate through large sets of results.

Plus, new **keyboard shortcuts** have been added including **Alt + Down Arrow** to open the Finder and **Esc Key** to close the Finder, as well as close popup screens and messages.

Lastly, a newly-improved process for printing reports from a web screen was rolled out in Sage 300 2021 R2.

Over the last couple of years, each new release has included a new set of web screens that can run parallel with their "classic" screen counterparts. Click to see the full list of web screens available in Sage 300 as of the latest version.

ADSS Global
(866) 408-0800
Info@ADSSGlobal.net

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