

# What's New

*Sage 300 2020.1*

*December 17, 2019 Release*

# Contents



- **Multiple Contacts Module**
- **Web API Improvements for ISVs**
- **Privacy Measures**
- **UI Changes**
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# Multiple Contacts Module

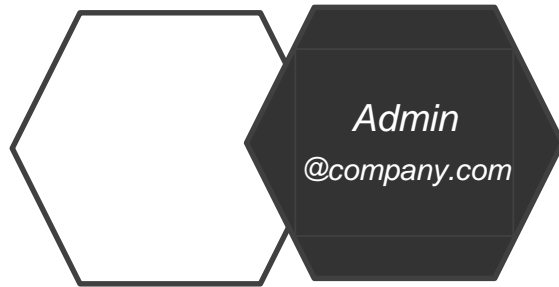
Available on Sage 300cloud and Sage 300 Online Only



# What is it?



Before



Now

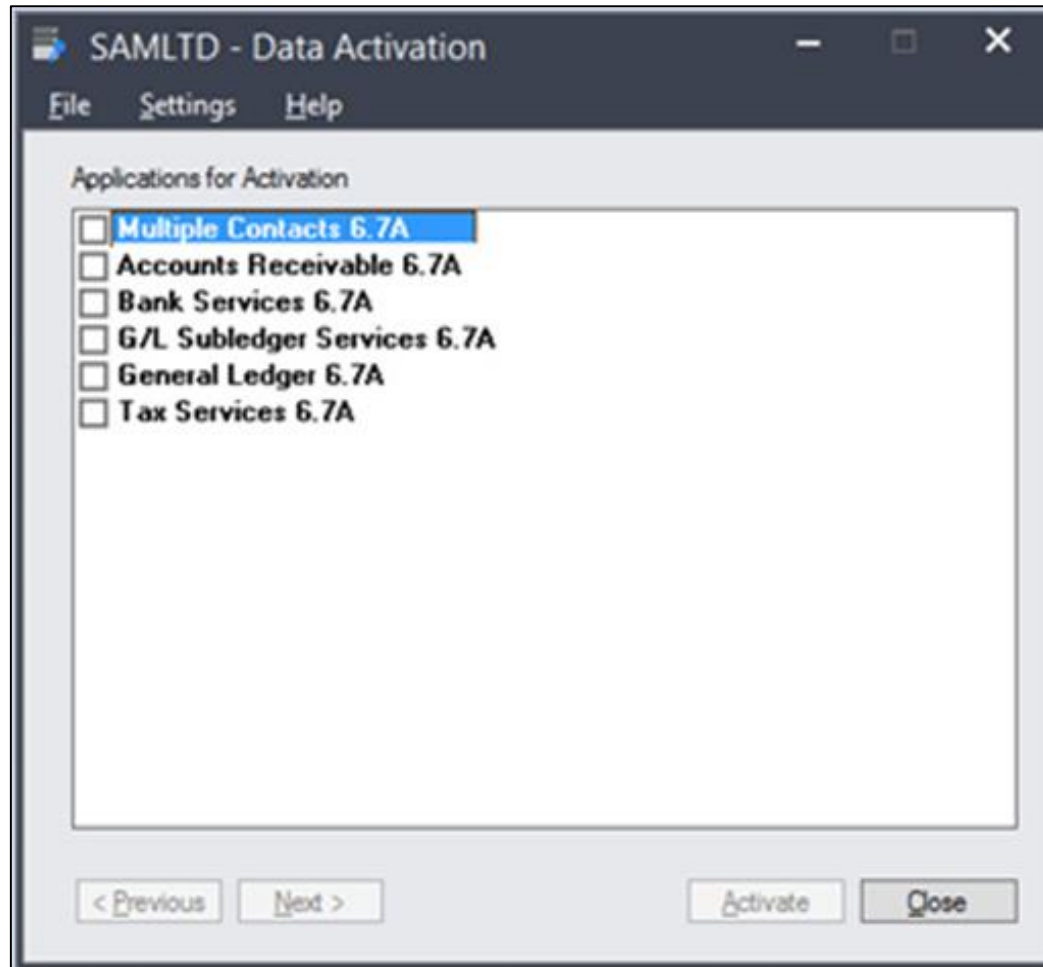


**Businesses using Sage 300cloud can now create contacts who can receive important forms, invoices, and emails within a vendor or customer account.**

**Previously, Sage 300 allowed only one contact per company.**

**Existing modules will be updated to allow for this functionality.**

# How to Enable



**Log into Sage 300 desktop application.**

**Go to Administrative Services. (Screen shown here)**

**Click on Data Activation**

**Check the Multiple Contacts box to activate.**



# Office 365 Integration



The screenshot shows the Microsoft Outlook interface with the Office 365 integration. The left sidebar displays folders like 'Inbox' and 'Sent Items', and a 'Groups' section with various organizational units. The main email view shows an 'Upcoming Meeting' from Paul Guy. The right sidebar features a 'Sage Contact' widget for 'BRO001 - Bronson Inc.' displaying account details and a credit limit of 4,000.00.

The 'Other Contacts' list displays several contacts with their initials and names:

- BC Bill Conner
- MEJ Ms. Emma J. Botwell
- MMB Mr. Martin B. Lawrence
- MTS Mr. Todd Simms

Below the list, contact details for Ms. Emma J. Botwell are shown:

- Title: Product Manager
- Telephone: (206) 905-8838
- Email: emmabotwell22@hello.com
- Address: 8843 North Sandusky Blvd, Seattle, Washington, USA, 98101

Office 365 tie in can bring customer information into Microsoft Outlook. Now multiple contacts will be shown.

# Why did we do this?



The image shows three overlapping screenshots of Sage user feedback cards. Each card has a circular icon with the word 'Planned' and a number, followed by the feedback text, the user's name, and the date. The top card has 190 votes, the middle card has 35 votes, and the bottom card has 92 votes. The bottom card also includes a 'Comments' section with a text input field.

**Planned 190**  
Vote for  
Multiple contact persons per vendor and per customer  
by: Stuart N. | over a year ago | Financial Management

**Planned 35**  
Vote for  
Different email addresses for different document types  
by: Steve B. | over a year ago | Financial Management

**Planned 92**  
Vote for  
It would be good to be able to choose email addresses when emailing quotes, invoices, order confirmations from Order Entry.  
by: Judy K. | over a year ago | Operations Management

Currently you have to change the delivery method in AR customer, and you can only choose either email, or contact email. Clients would like to be able to choose who receives the email without constantly having to change this setting in AR customers.

by: Judy K. | over a year ago | Operations Management

**Comments**

perhaps and email address per report type (O/E invoice, A/R invoice, statements...)

**This addition puts Sage 300 at parity with our competition and helps our customers alleviate a well documented pain point.**

# Privacy Measures

Sage makes it easy to comply with CCPA and GDPR requirements for anonymizing data





# Anonymizer



SAMLTD - Sage 300 Anonymizer

This tool anonymizes customers or vendors in Sage 300 by replacing their personal data with text that you specify. There is no record of the original data, or even of which customers or vendors you anonymize.

Anonymize ☒ Customers ☐ Vendors ☐ Contacts

Customer number

Replace personal data with

Anonymize Close

**Notice**

To anonymize contacts created in the Multiple Contacts (M/T) program, you must specifically anonymize them by selecting Contacts. Anonymizing customers or vendors does not anonymize such contacts, even if they are assigned to customers or vendors that you anonymize.

OK

**The Anonymizer is a separate app that can be added to Sage 300 or Sage 300cloud.**

**Once created, contacts can be deleted or anonymized based on the company's needs.**

**By Anonymizing a contact's personal information, a company can keep the financial transactions of the person's activities for marketing, financial, or other business reasons without keeping any personally identifiable information.**

**This helps a company comply with GDPR and CCPA requirements.**

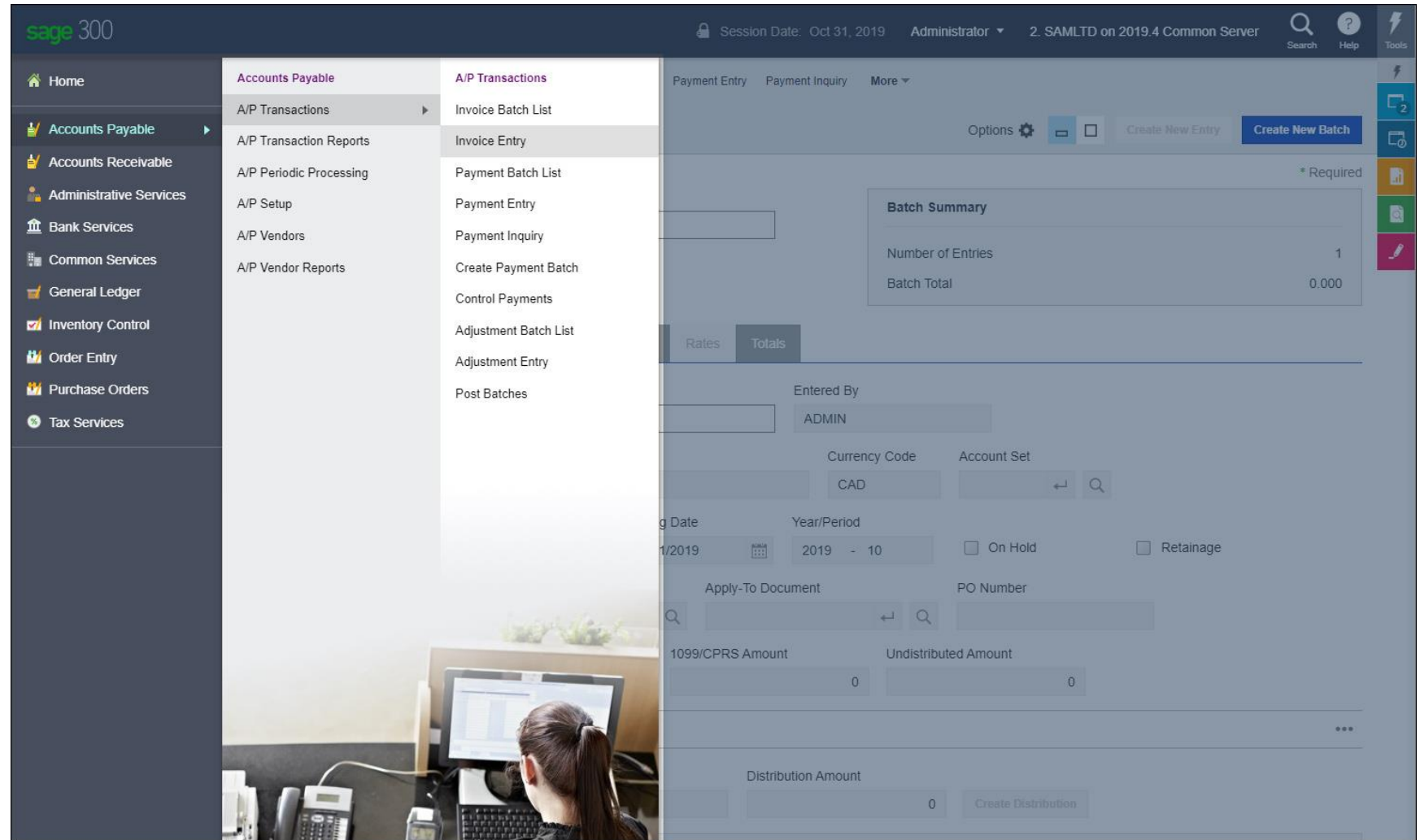


# Web UI Updates

**Sage continues to invest in our hybrid cloud strategy with cleaner, more intuitive web UI designs.**

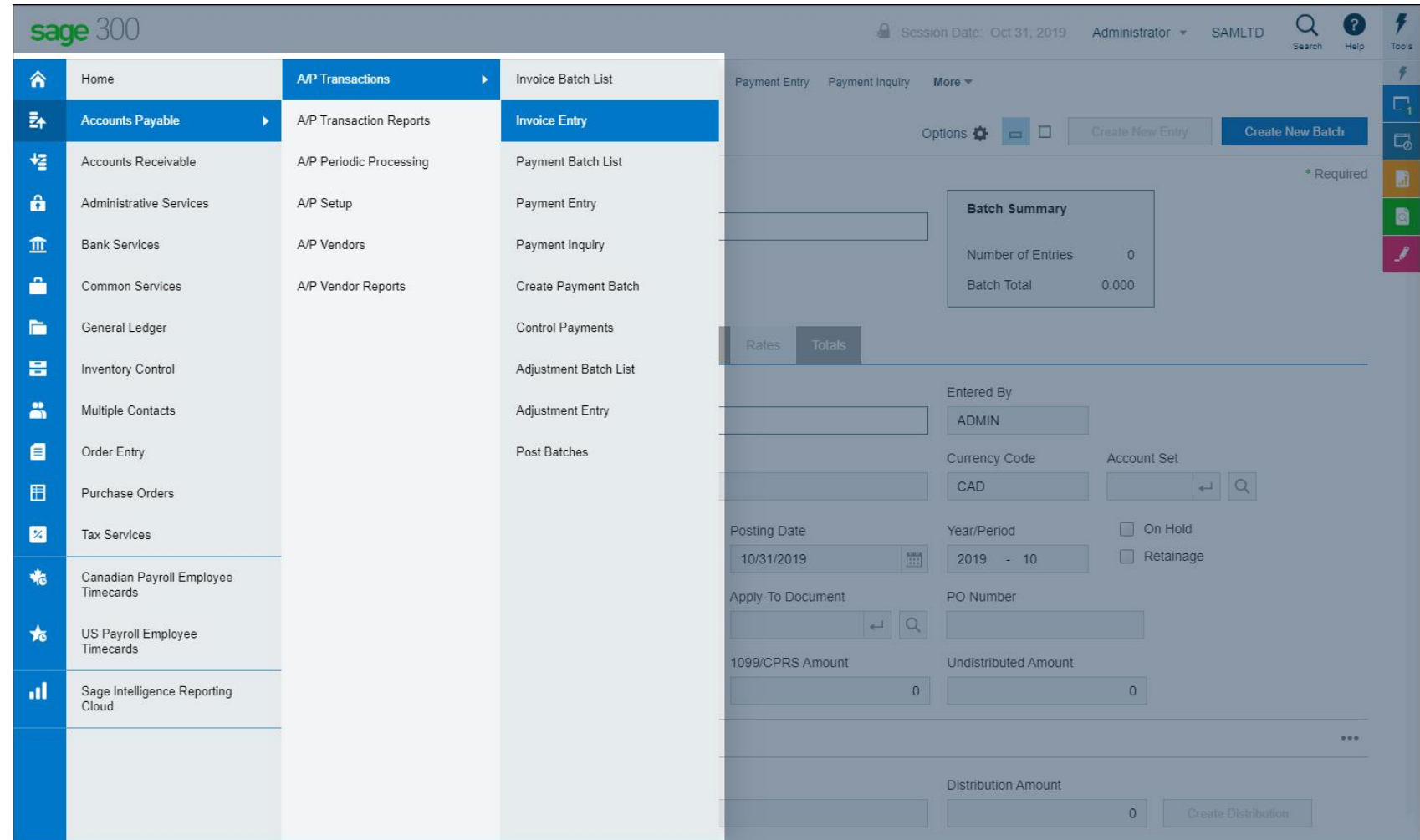
*Before*

## Browser icons, menus and submenus



After

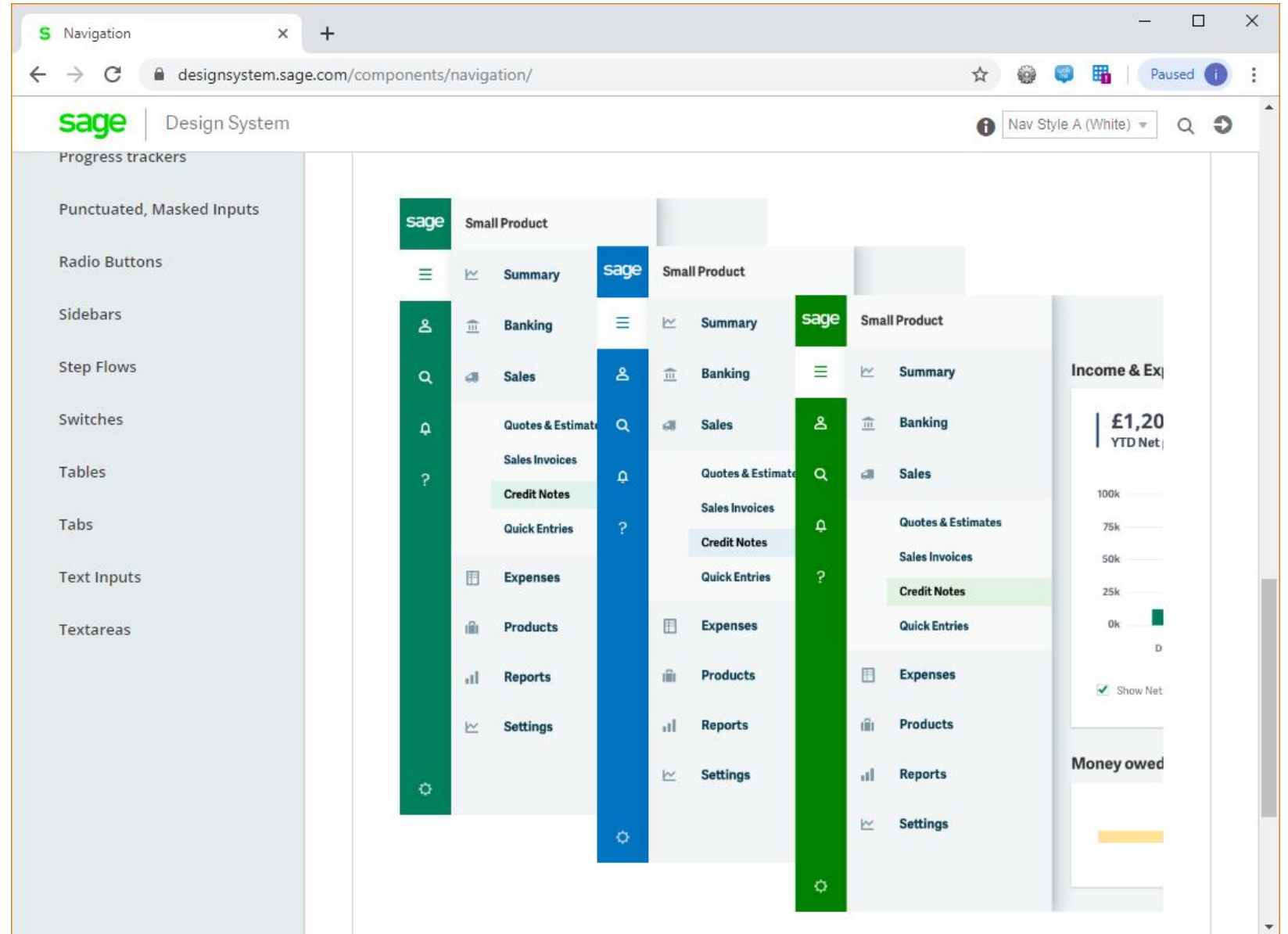
## Browser icons, menus and submenus





*Updated*

# Navigation



*Updated*

# Date picker

sage | Design System

Buttons - Toggle

Cards, Tiles

Carousels

Checkboxes

Colour Picker

**Date Pickers, Time**

Date Ranges

Decimals, Currency

Dialogs

Dialogs - Full Screen

Dropdowns

Fieldsets, Addresses

Flashes

Global Search Bar

Header Bar

inputs for day, month, and year.

Today's date, the currently selected date, and a date under mouse hover are distinguished.

Standard Date Field

Due Date

01/10/2019

Info State

Error State

For Example: 27/01/1980

Day Month Year

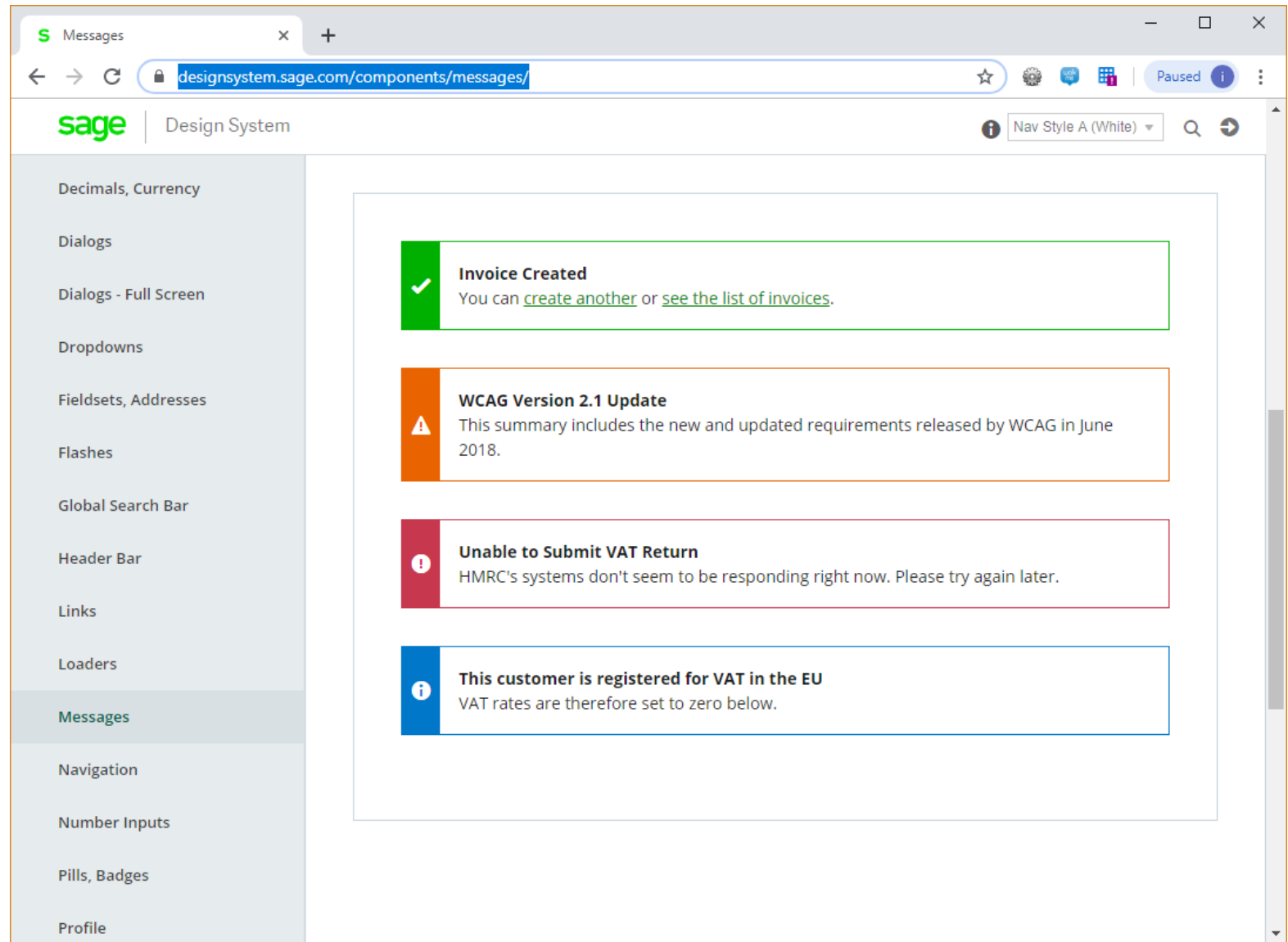
01 01 1981

October 2019

SUN	MON	TUE	WED	THU	FRI	SAT
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

*Updated*

# Messages



# Web API & SDK Improvements

Sage is improving our Web API and SDKs to simplify the integration of ISV partner products with our Web UIs.





# Supporting our robust add-on ecosystem



**Techni**soft®

Peresoft 

 OrchidSystems

*norming*

**TaiR**  **x**™

It's now more straightforward to create web screens for our ISV community.

This helps bolster 300cloud adoption amongst ISVs.

A photograph of two women in an office setting. One woman is seated at a desk, smiling and looking at a computer monitor. The other woman is standing behind her, also smiling and looking at the same monitor. The background shows office windows and furniture. A dark blue semi-transparent rectangle is overlaid on the right side of the image, containing the text "Marketing Activities".

# Marketing Activities

# Product Specific Collateral



REFERENCE GUIDE

What's the Difference Between Sage 300 and Sage 300cloud?

### It's time to connect your existing systems to the cloud

Pay as you go with Sage 300cloud to get all the features of cloud connectivity without giving up the benefits of your on-prem or hosted solution. Whether your current Sage 300 solution is highly customized or not, you can take advantage of new cloud-connected capabilities.

- Subscription pricing means you can avoid upfront costs and pay in a way that makes sense for your business.
- Going cloud-connected means you'll always have access to the latest feature and compliance releases of the Sage 300 product.
- Make decisions with more confidence by providing key stakeholders with access to key business data and insights from nearly anywhere in the world.

Enhance Sage 300 to meet the needs of your growing business without disruption to processes that work, with Sage 300cloud.

#THRIVEON

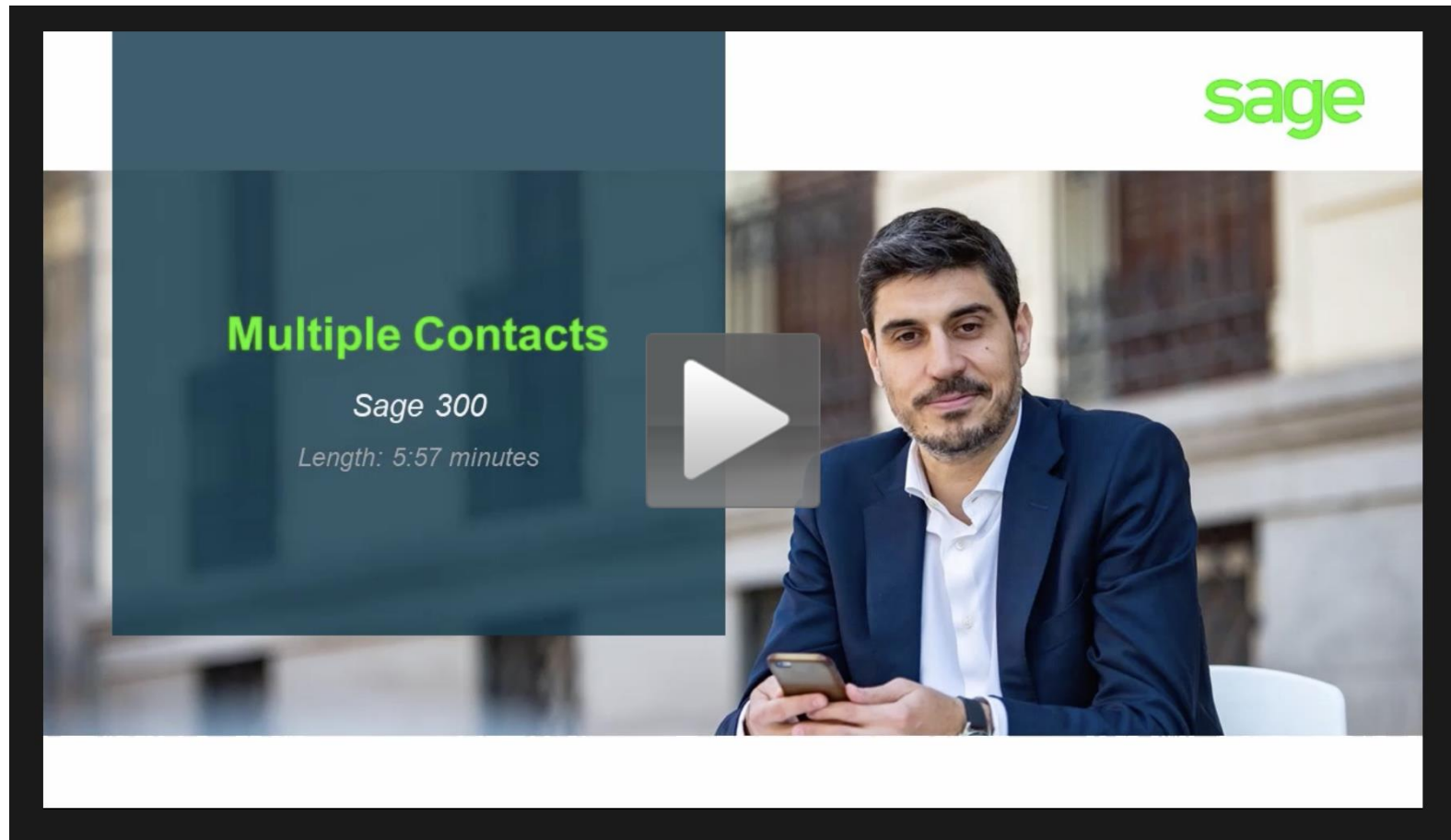
300 Product Suite  
Comparison Sheet

See your business in a new way with Sage 300cloud

Greater visibility for fast, effective decision making.

Sales Brochure

# Customer Resources

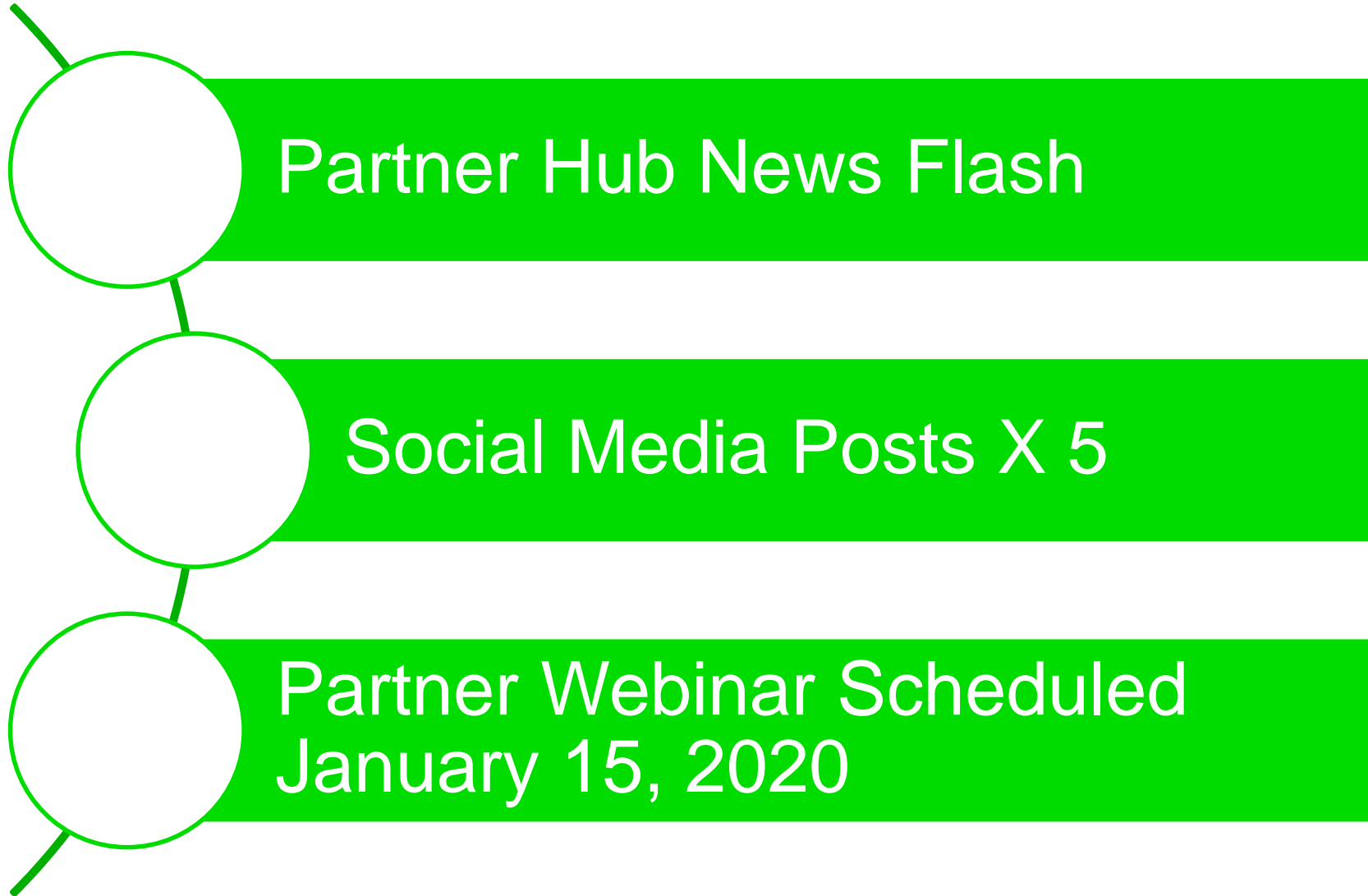


Learning Package

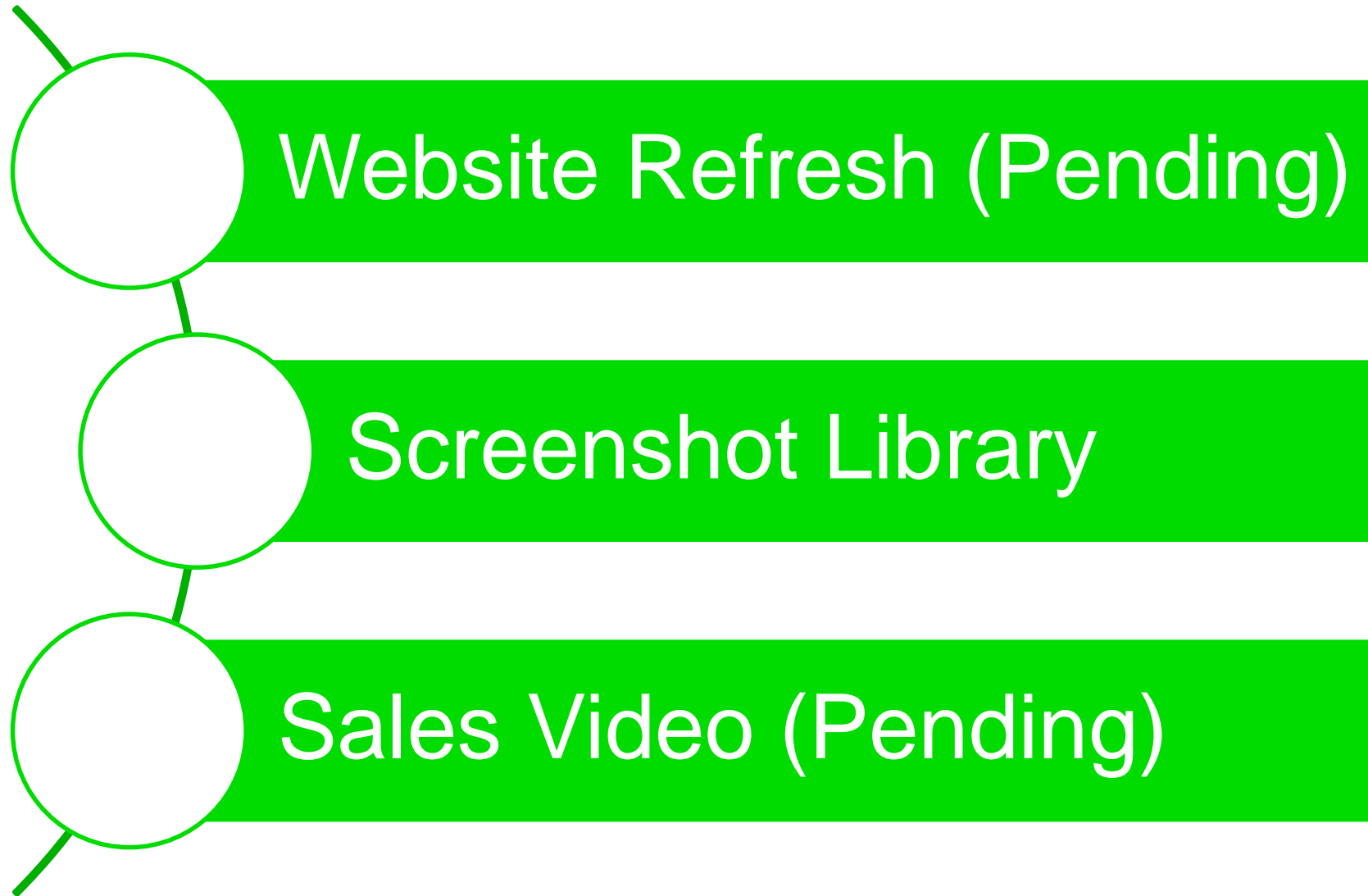
Release Notes



# Partner Enablement



# Internal Sales Enablement



# Customer Announcements

sage



# acutedata

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# Thank you

The Sage logo, featuring the word "sage" in a bold, lowercase, green sans-serif font.