

sage 300

2019.1 Release Overview

December 2018



Sage 300 - Pilot your business across functions, offices and geographies



Sage 300 is one of the most widely used business management solutions for small and medium companies, connecting the most critical parts of your business, including finance, operations, sales and service.

Current Version	2019.1 - 19 December, 2018
Next Version	2019.2 - April, 2019
Standard Integrated Functionality	Financials, Sales, Purchasing, Payroll, Inventory, Job Costing
# Customers	40,000+ globally



Winning in the Market



Fact #1

The preferred solution for tens of thousands of companies across the globe, Sage 300 connects the most important aspects of your growing business.

Fact #2

Sage 300 benefits from an extensive network of third-party solution providers whose add-on solutions extend Sage 300 ever further to meet the specialized needs of your business.

Fact #3

With Sage 300, you will have an accurate, real-time understanding of your financial position, whether it's cash flow, receivables, or payables across multiple locations, companies, currencies, and international borders.

Fact #4

Sage 300cloud brings you all the benefits of a trusted, proven, established on-premise solution with the added value of anytime, anywhere access and a range of complementary, cloud-based connected services.

Shifting market landscape

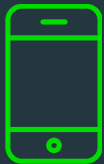


Forces of Change

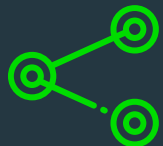
Product Strategy Pillars



Cloud



Mobile



Social

Customers for life

Put customers first in everything we do

Winning in the market

Create value for new and existing customers

Revolutionize business

Use smart technology to make customers' lives easier

One Sage

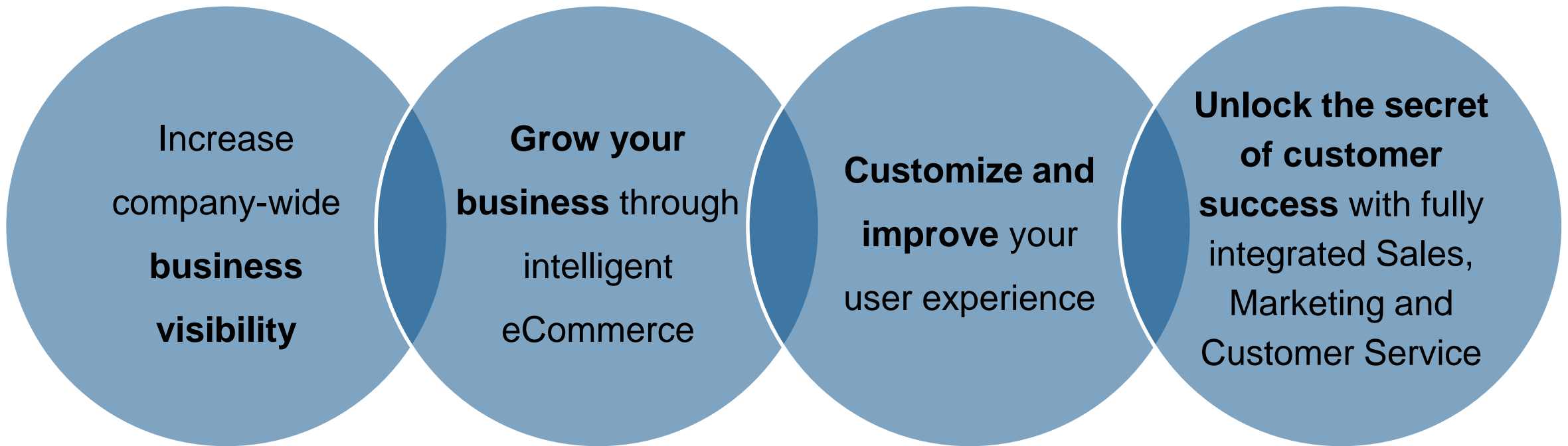
One inclusive team of smart experts

Product modernization

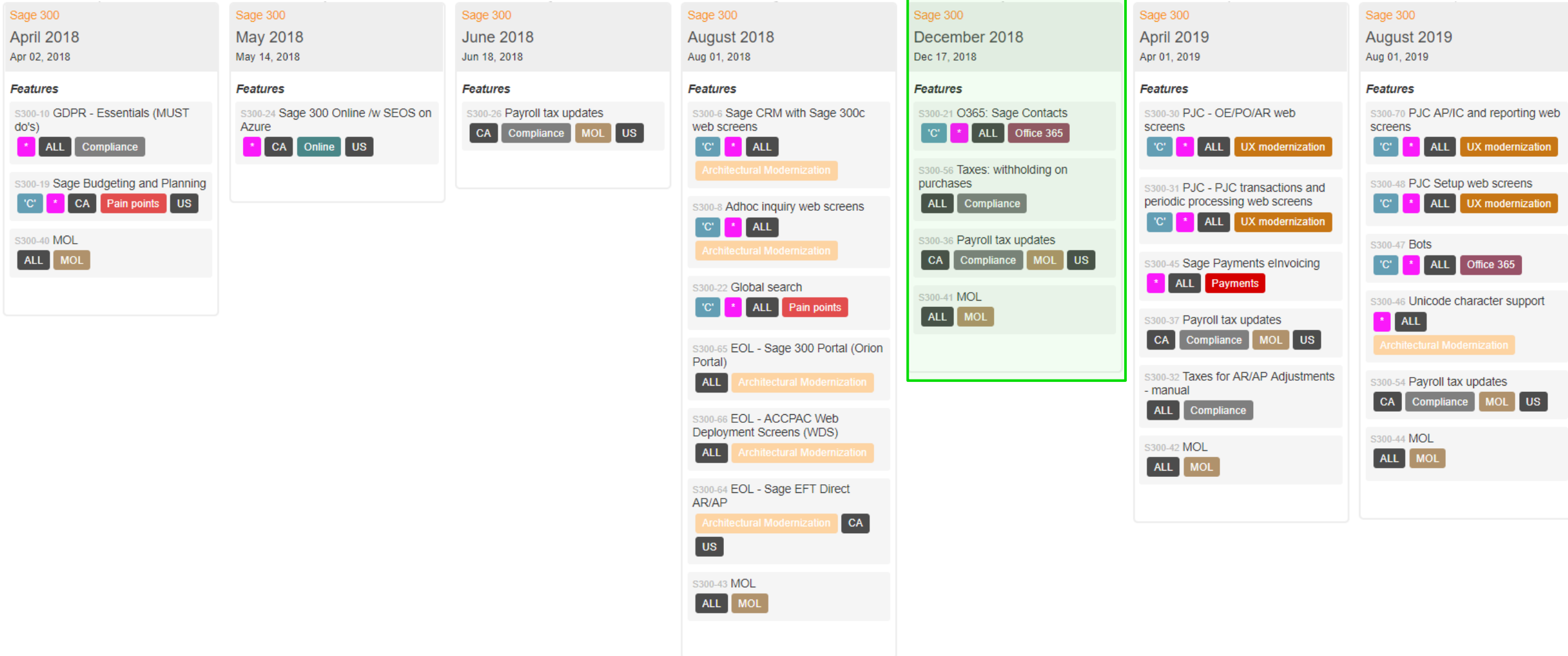
- User experience modernization and elimination of pain points such as installation, upgrades, and data security.
- Connected cloud apps (e.g. banks feeds, collaboration, invoicing) and self service (e.g. account management).
- Unparalleled integration of accounting, payments and payroll.
- Simple integration to a large ecosystem of 3rd party products through standard cloud APIs.
- Product migration is as easy as upgrading.



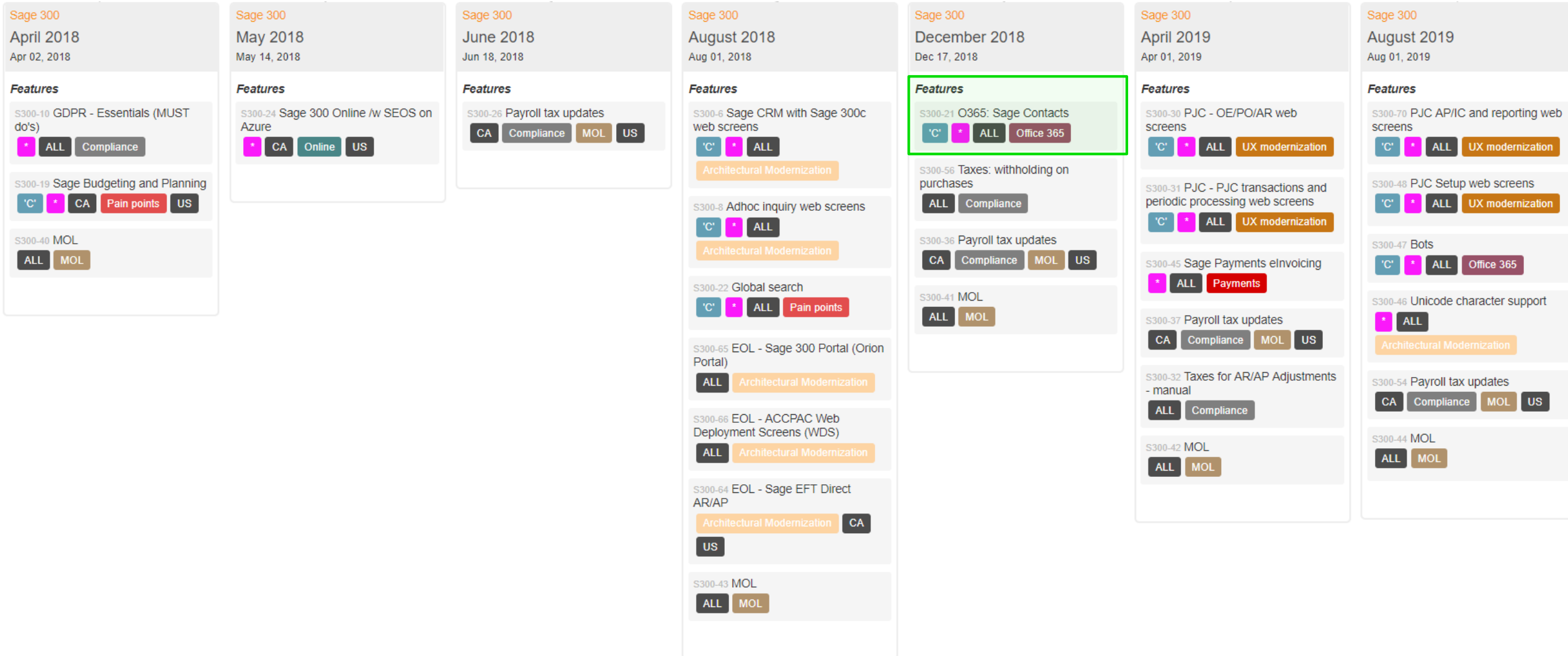
Key Messages



Product Roadmap



Product Roadmap



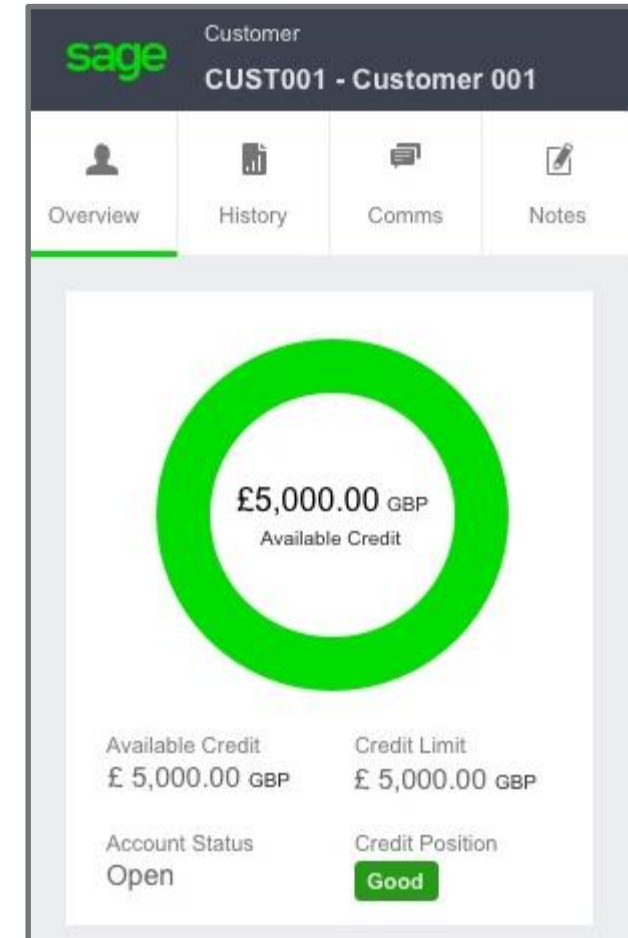
O365 integration with Sage 300cloud

- Introducing the integration of Sage 300cloud content into Office 365
- Integrating Sage Contact capabilities to enable new end users to access customer information from within their Office 365 environment
- Access key customer status and historical information

Sage Contact



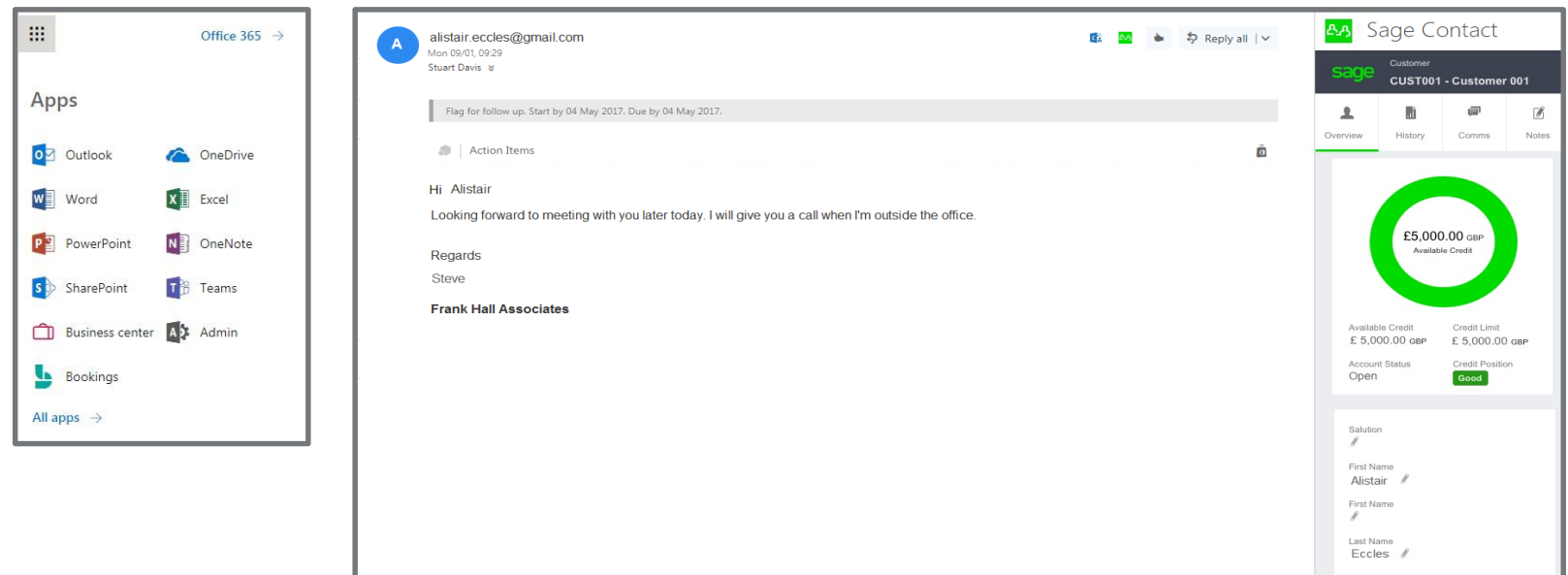
- Sage Contact is an **Outlook add-in** that provides key information about your **customers** and **suppliers** through Office 365.
- It's a really useful feature for Sales Reps who spend a lot of time on the road, like our persona Steve.
- With **Sage Contact**, Steve can access key information he needs to prepare for customer meetings anytime, from anywhere.
- **Sage Contact** is available through Outlook in Office 365 from from a laptop, a tablet or mobile device though the browser.
- It can also be accessed from Desktop Outlook.



Sage Contact



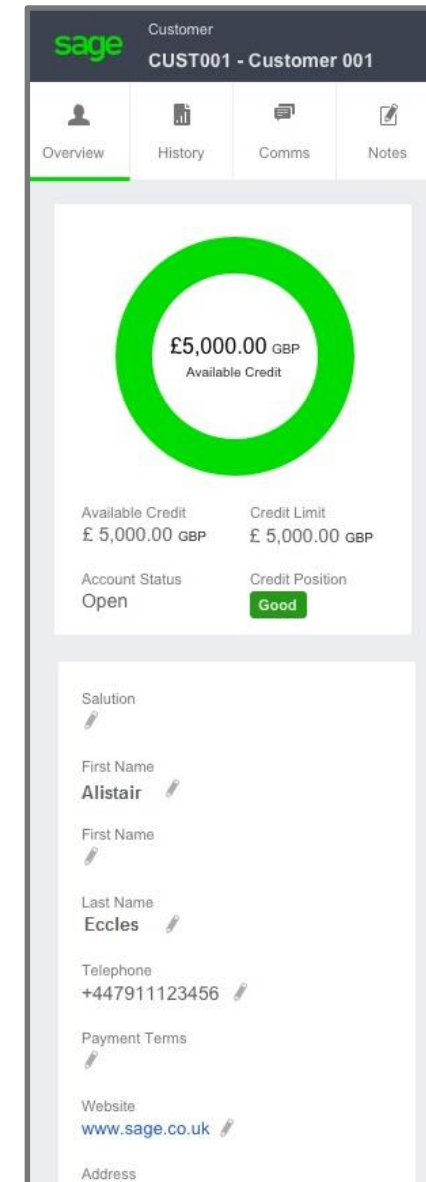
- Although Sage Contact is equally as useful when dealing with suppliers, lets' say Steve is out of the office today on his way to meet a customer.
- He wants to make sure he is fully aware of the **state of play with his customer** before the meeting.
- Previously he would have called the office to perform these checks.
- Now he simply needs to open a recent email *To* or *From* the customer and select the Sage Contact icon.



Sage Contact - Overview tab



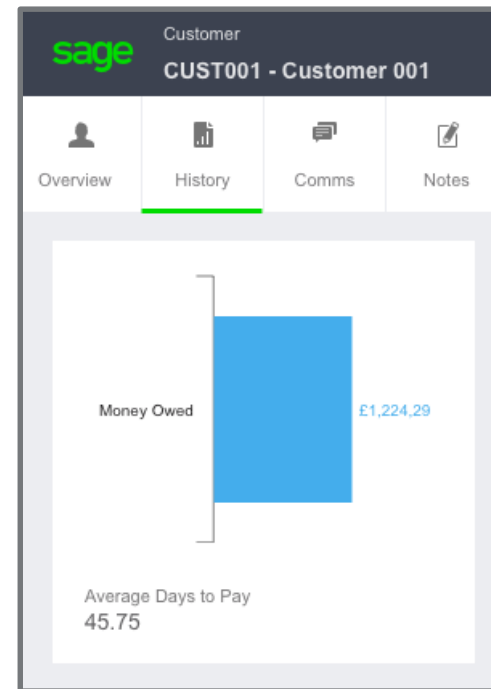
- The **Overview tab** is displayed by default on the side panel.
- From here **Steve** can view the customer's available credit, and he can see clearly whether the outstanding balance is ok or a cause for concern.
- Other contact details are displayed here too which may be useful, like the address and phone number.
- The contact details can be updated directly from the app and are reflected in Sage 300cloud straight away.
- This is useful for **Anne** back in the office too, as she doesn't need to switch between apps if she's working in Office and wants to make updates.



Sage Contact - History tab



- The **History tab** shows Steve how much money is owed by the customer at a glance.
- It tells him how many days on average it takes them to settle a bill.
- Steve can click through the last 20 customer **invoices** to review the details.
- And he can look at the last 20 **payments** received from them too.
- This is all useful information to have before the meeting starts.



Date	01/09/2016
Ref	INV5
Ref2	Invoice 005
Amount	£24.43 GBP
O/S	£0.00 GBP
Date	01/08/2016
Ref	INV4
Ref2	Invoice 004
Amount	£1,200.00 GBP
O/S	£1,150.00 GBP
Date	01/07/2016
Ref	INV3
Ref2	Invoice 003
Amount	£54.30 GBP
O/S	£54.30 GBP
Date	01/06/2016
Ref	INV2
Ref2	Invoice 002
Amount	£119.99 GBP
O/S	£119.99 GBP
Date	01/05/2016
Ref	INV1
Ref2	Invoice 001
Amount	£120.00 GBP
O/S	£0.00 GBP

1-5 of 20 1 2 3 4

Date	01/12/2016
Ref	
Details	Sales Receipt
Amount	£50.00
Date	13/08/2016
Ref	
Details	Sales Receipt
Amount	£4.00
Date	28/07/2016
Ref	
Details	Payment on Account
Amount	£100.00
Date	25/06/2016
Ref	
Details	Sales Receipt
Amount	£120.00
Date	25/06/2016
Ref	
Details	Sales Receipt
Amount	£100.00

1-5 of 20 1 2 3 4

[Back](#)

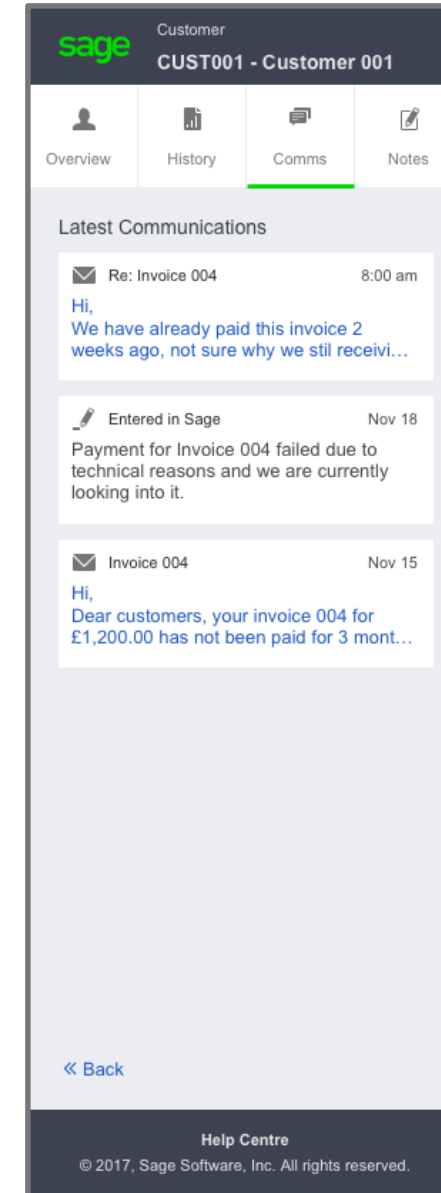
Help Centre

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Sage Contact - Comms tab

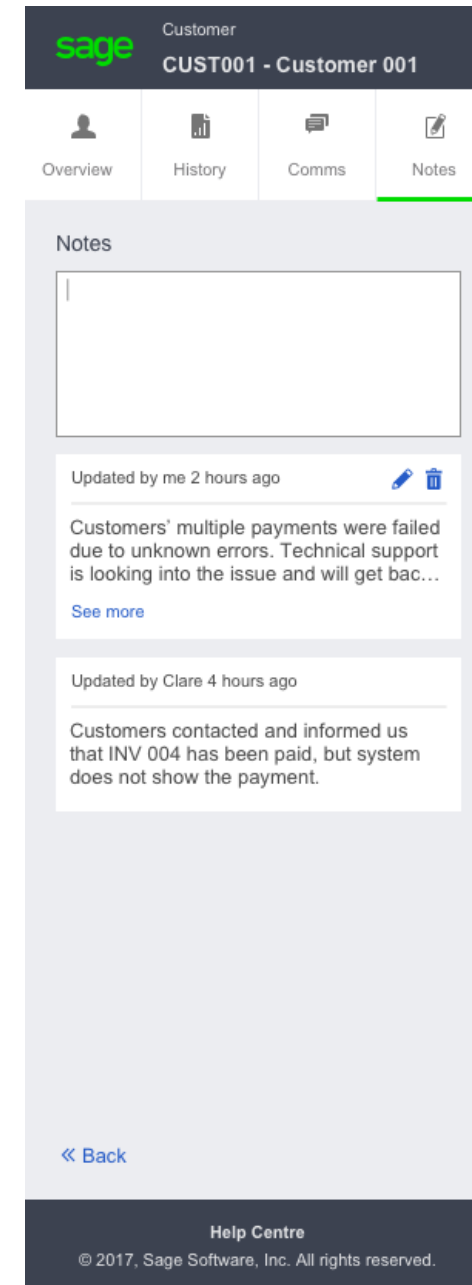


- Next Steve selects the **Comms tab**.
- From here he can review recent customer communications and emails quickly and easily.
- The tab displays emails *To* and *From* the customer as well as communications entered directly in Sage 300cloud.
- If he wants to reply to an email, Steve can simply select it to open it.
- Up to 10 items can be displayed on the Comms tab, sorted by the most recent, so Steve can get an up-to-date picture at all times.



Sage Contact - Notes tab

- The **Notes tab** can display notes created in Sage Contact and memos from Sage 300cloud
- It's really useful when Steve wants to record important information “on the fly” during the meeting, or if he want to review existing notes and Sage 300cloud memos in advance
- And Anne can access the **notes and memos** back in the office from Sage 300cloud, or through Office 365
- The Notes are shared across other Sage Contact users, and Steve can see who has made the most recent update



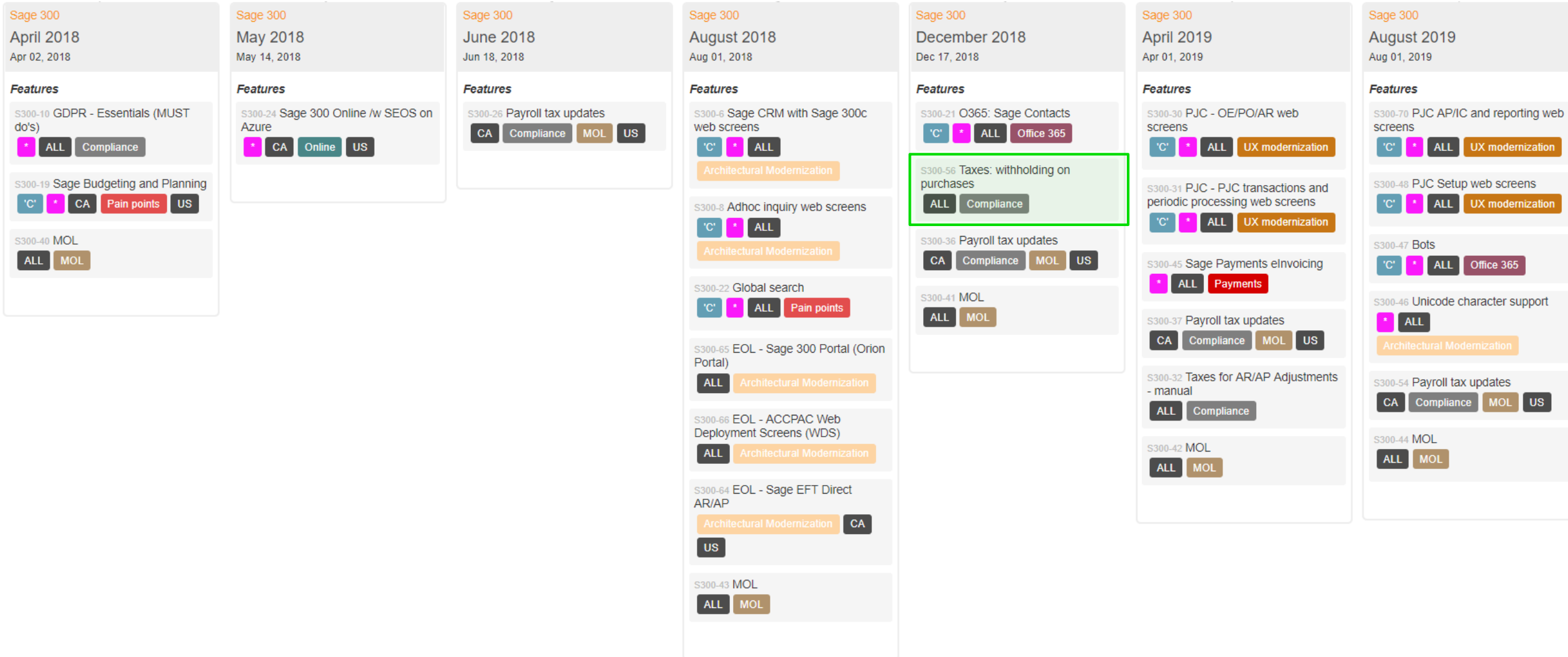
Sage Contact



- As you can see, Sage Contact is a really useful tool for Sage 300cloud customers who need access to key customer and supplier information when they are on the road.
- It enables them to prepare for customer and supplier meetings without having to call back to the office and pull information directly from Sage 300cloud.
- It empowers them to make decision on-the-fly because the information they need is available now, from their laptop, iPad or mobile device.
- Sage Contact targets the most valuable pieces of information that Sales Reps, Business Owners and other key employees need.
- This ensure that they can negotiate deals, build confidence, and do better business with their customers and suppliers anytime, anywhere.



Product Roadmap



Tax Services Improvements



✓ Reverse Charges

You can now set up reverse charges (also called customer accounting or self-assessed taxes) 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.

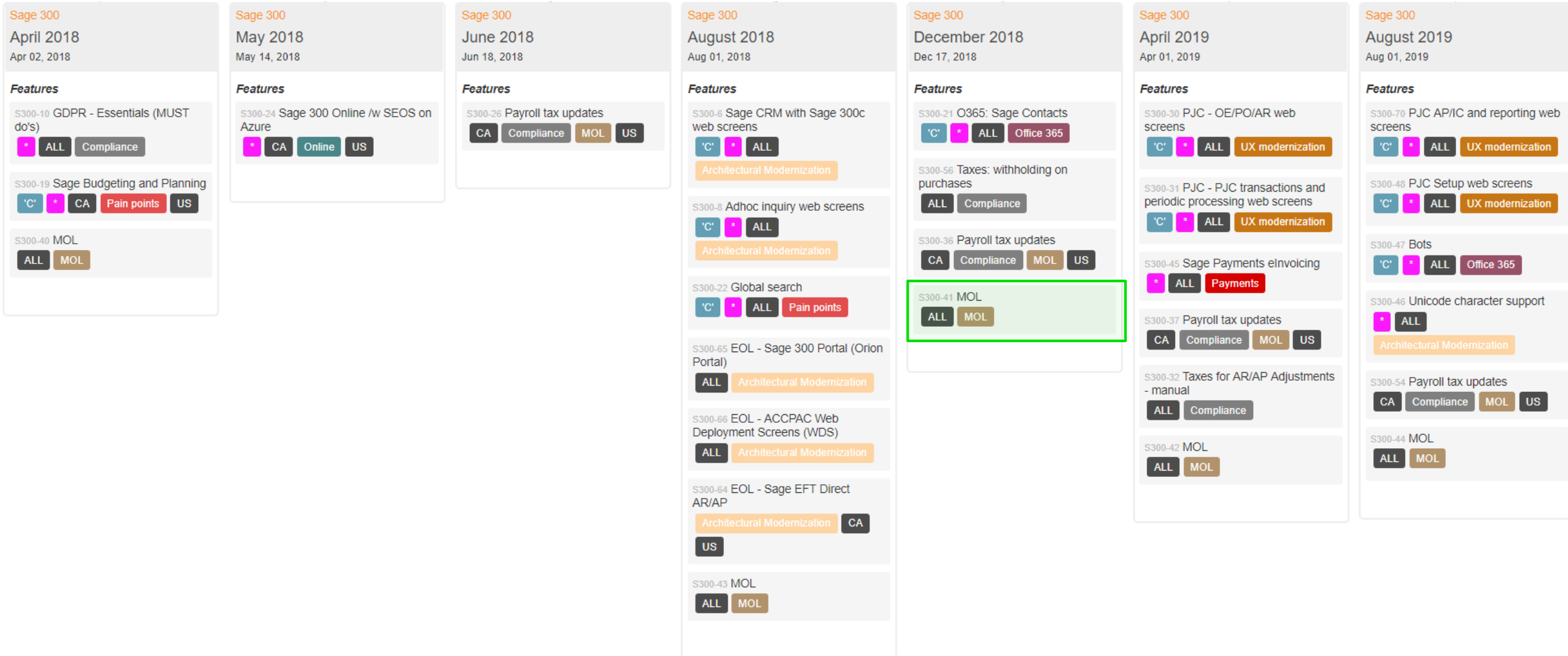
✓ Withholding Taxes

You can now 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. You then remit the withheld amount to a tax authority on behalf of the vendor.

✓ UK Taxes Program

For those customers reporting taxes in the United Kingdom, a new program is available to help you prepare digital records for your VAT, enabling you to provide updates to HMRC using the Making Tax Digital (MTD) service.

Product Roadmap



General Improvements / Fixes



✓ **Item Finder**

Incorrect values could be displayed in the Item finder.

✓ **Accounts Receivable**

Sage 300cloud web screens could prevent you from opening the Refund Entry screen.

✓ **Project and Job Costing**

Sage 300 desktop screens could cause the Contract Maintenance screen to stop responding.

✓ **Ops Inquiry**

In Sage 300 desktop screens, when you open the Item finder on the Ops Inquiry IC Item Inquiry screen, the finder displays the last criteria specified.

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Thank you