

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

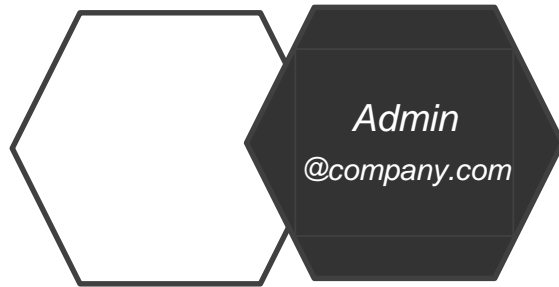
Available on Sage 300cloud and Sage 300 Online Only



What is it?



Before



Now

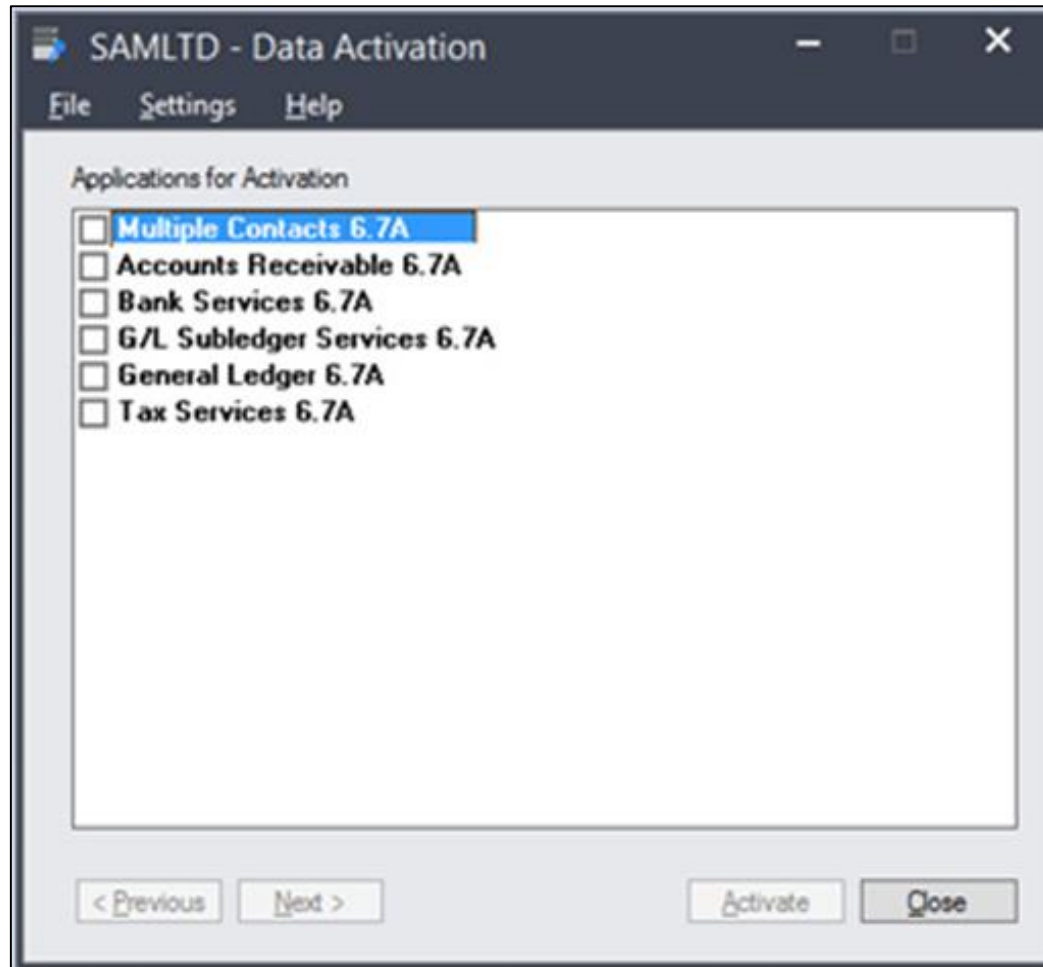


Businesses using Sage 300cloud can now create contacts who can receive important forms, invoices, and emails within a vendor or customer account.

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 web interface. The left sidebar displays the 'Folders' pane with 'Inbox' (16 items) and 'Groups' (Warehouse Cr, Store Front, Computer Acc, Cellphone Acc, Custom Desig, Annual Custor, Department Si, Finance 2, HR 1, Sales). The main email view shows an 'Upcoming Meeting' from Paul Guy <paulguy.bronsoninc@outlook.com> with a subject line 'Upcoming Meeting'. The right sidebar features a 'Sage Contact' widget for 'Customer BRO001 - Bronson Inc.' displaying account details: Account balance 133.48, Credit limit 4,000.00, Account status Live, Credit position Good, Payment terms 45 Days From Document Date. Below the widget is a 'Salutation' section with fields for First name (Paul), Middle name, Last name (Guy), Telephone (001 214 248 8924), Mobile, and Web site.

The 'Other Contacts' list displays several contacts with their initials and names: BC Bill Conner, MEJ Ms. Emma J. Botwell, MME Mr. Martin B. Lawrence, and 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, and 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 user feedback cards from Sage 300. Each card has a 'Planned' status, a vote count, a title, a description, and a 'Vote for' button.

- Card 1 (Top):**
 - Status: Planned
 - Votes: 190
 - Title: Multiple contact persons per vendor and per customer
 - Description: by: Stuart N. | over a year ago | Financial Management
- Card 2 (Middle):**
 - Status: Planned
 - Votes: 35
 - Title: Different email addresses for different document types
 - Description: by: Steve B. | over a year ago | Financial Management
- Card 3 (Bottom):**
 - Status: Planned
 - Votes: 92
 - Title: It would be good to be able to choose email addresses when emailing quotes, invoices, order confirmations from Order Entry.
 - Description: by: Judy K. | over a year ago | Operations Management
 - Text: 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.
 - 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.

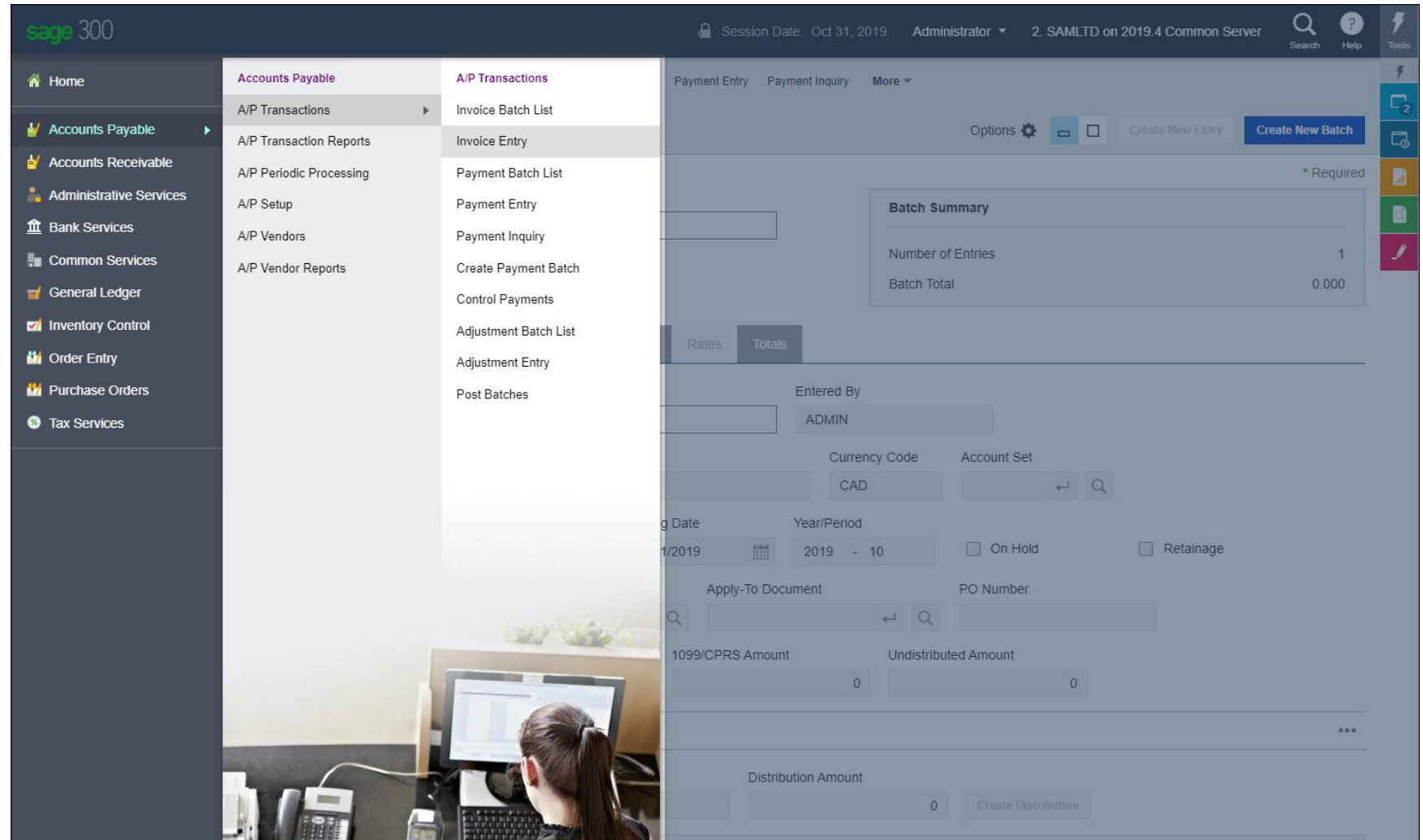


Web UI Updates

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

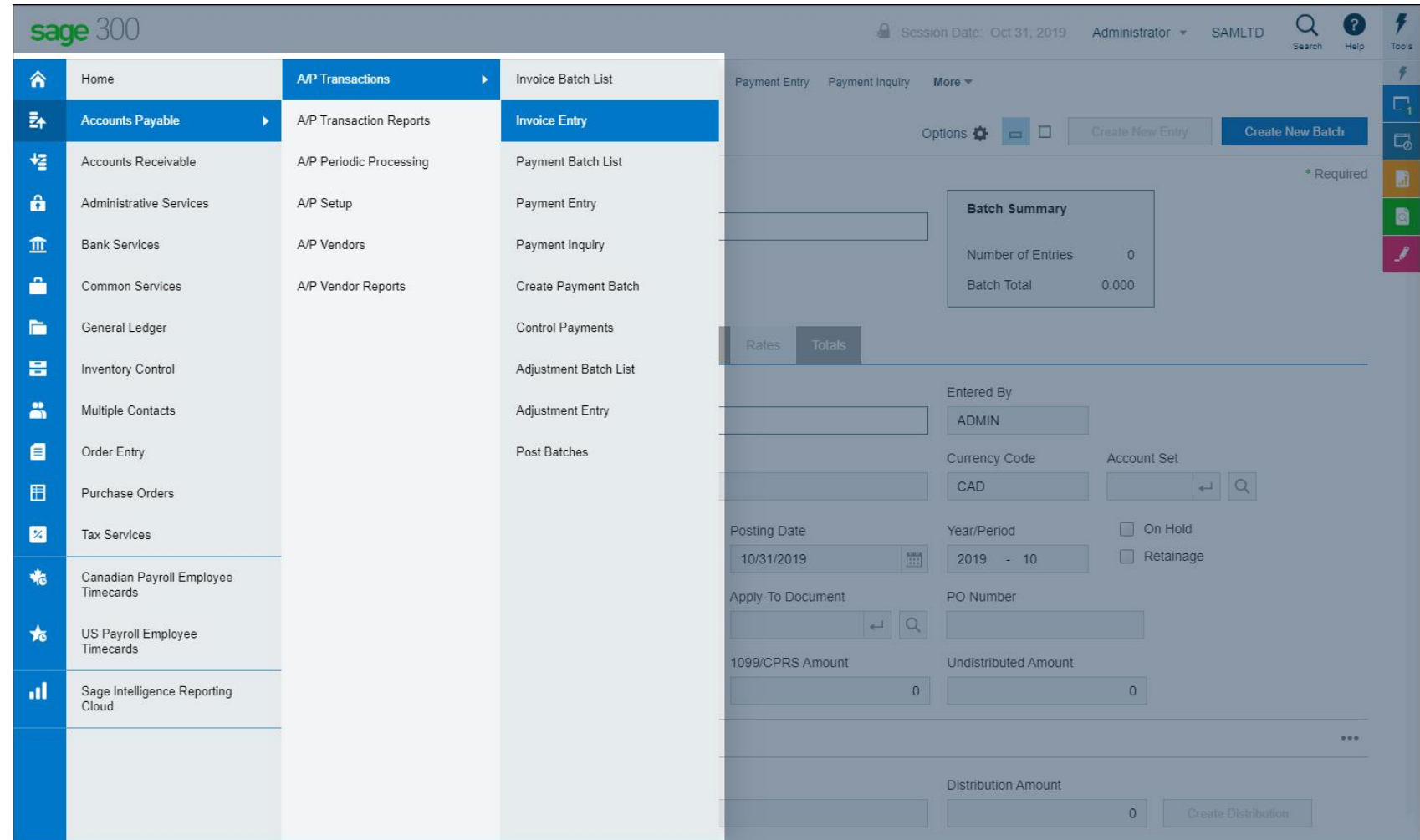
Before

Browser icons, menus and submenus



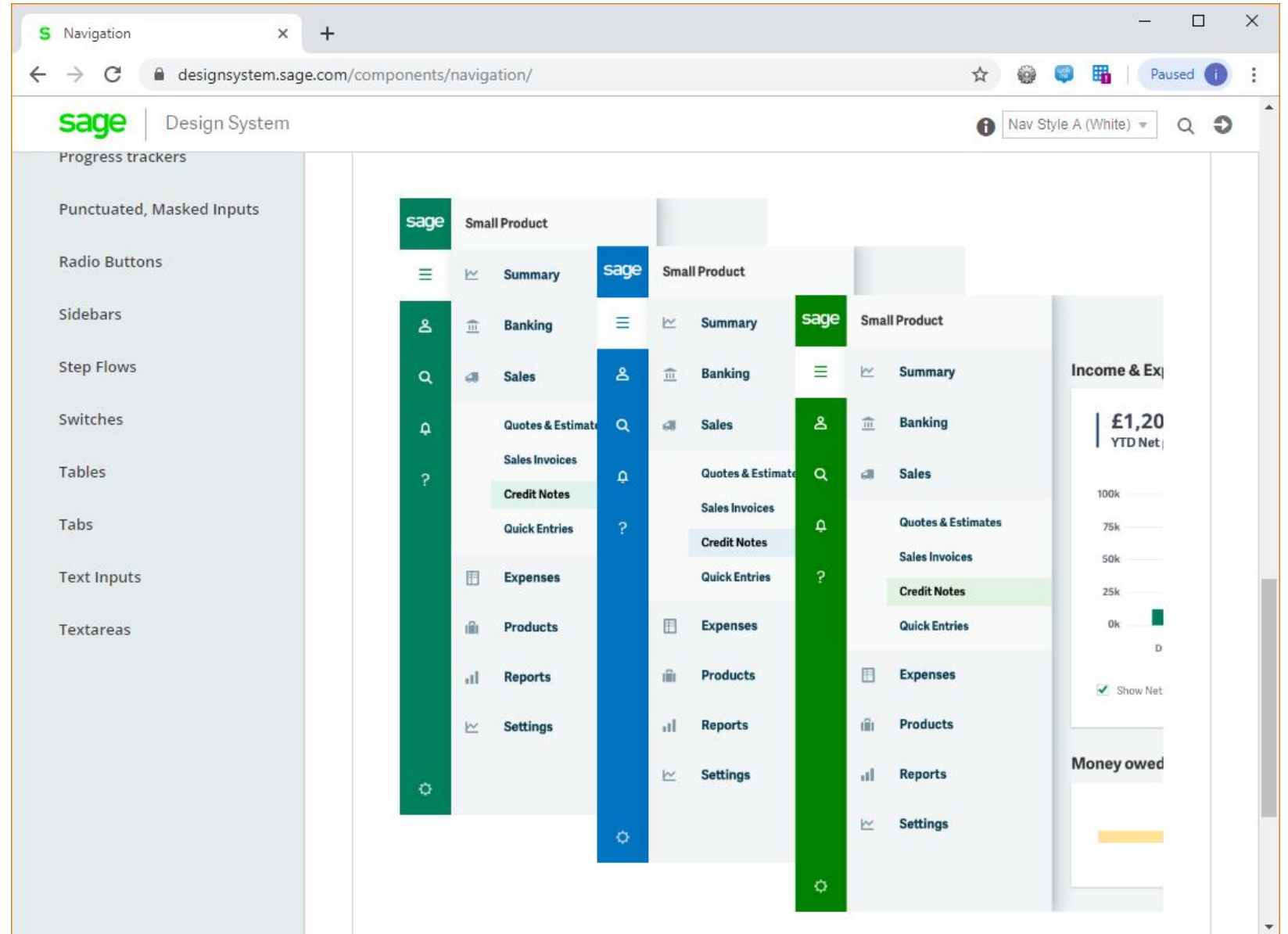
After

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

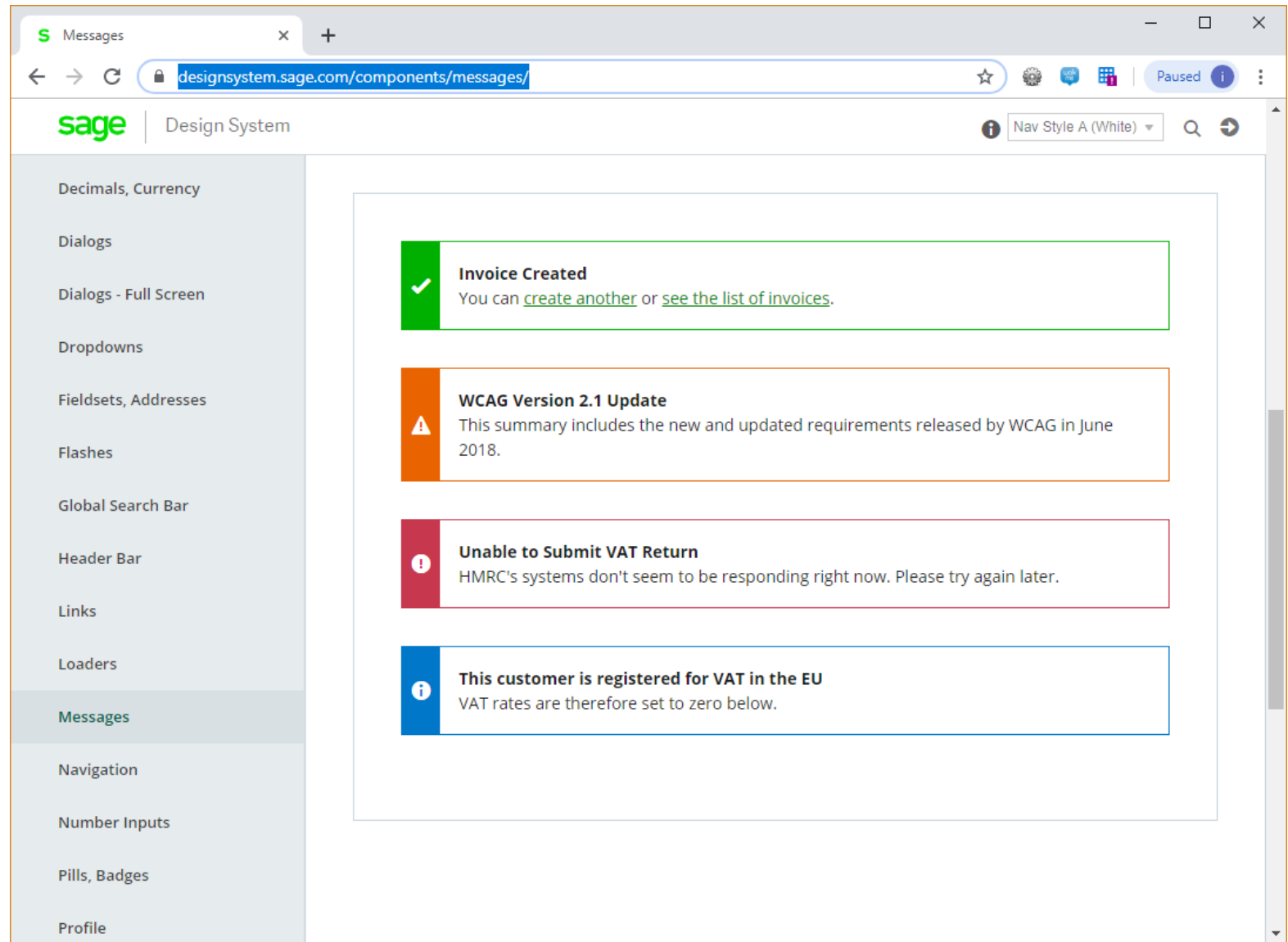
01 01 1981

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



Technisoft®

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.



Marketing Activities

Product Specific Collateral

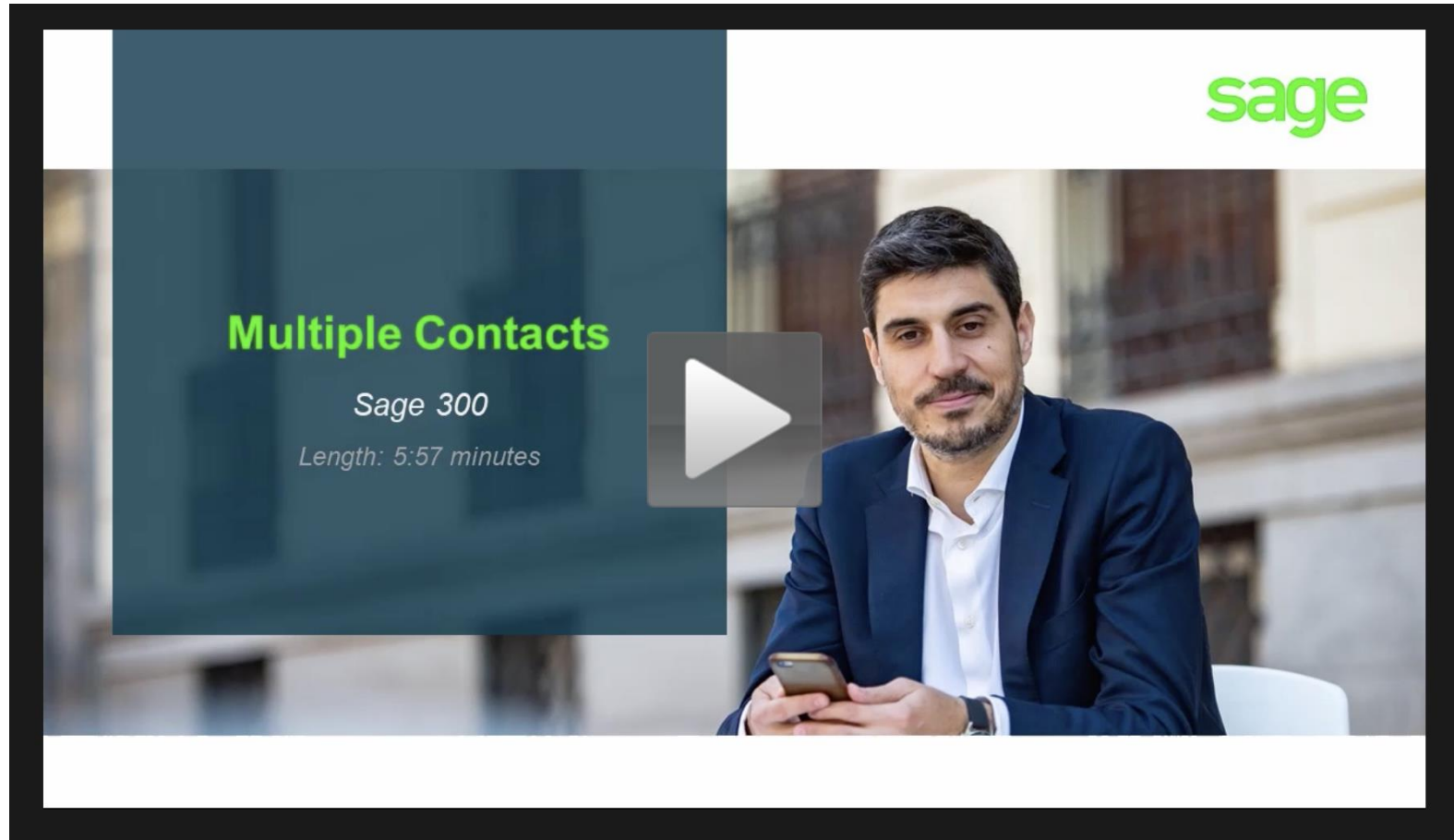


300 Product Suite
Comparison Sheet



Sales Brochure

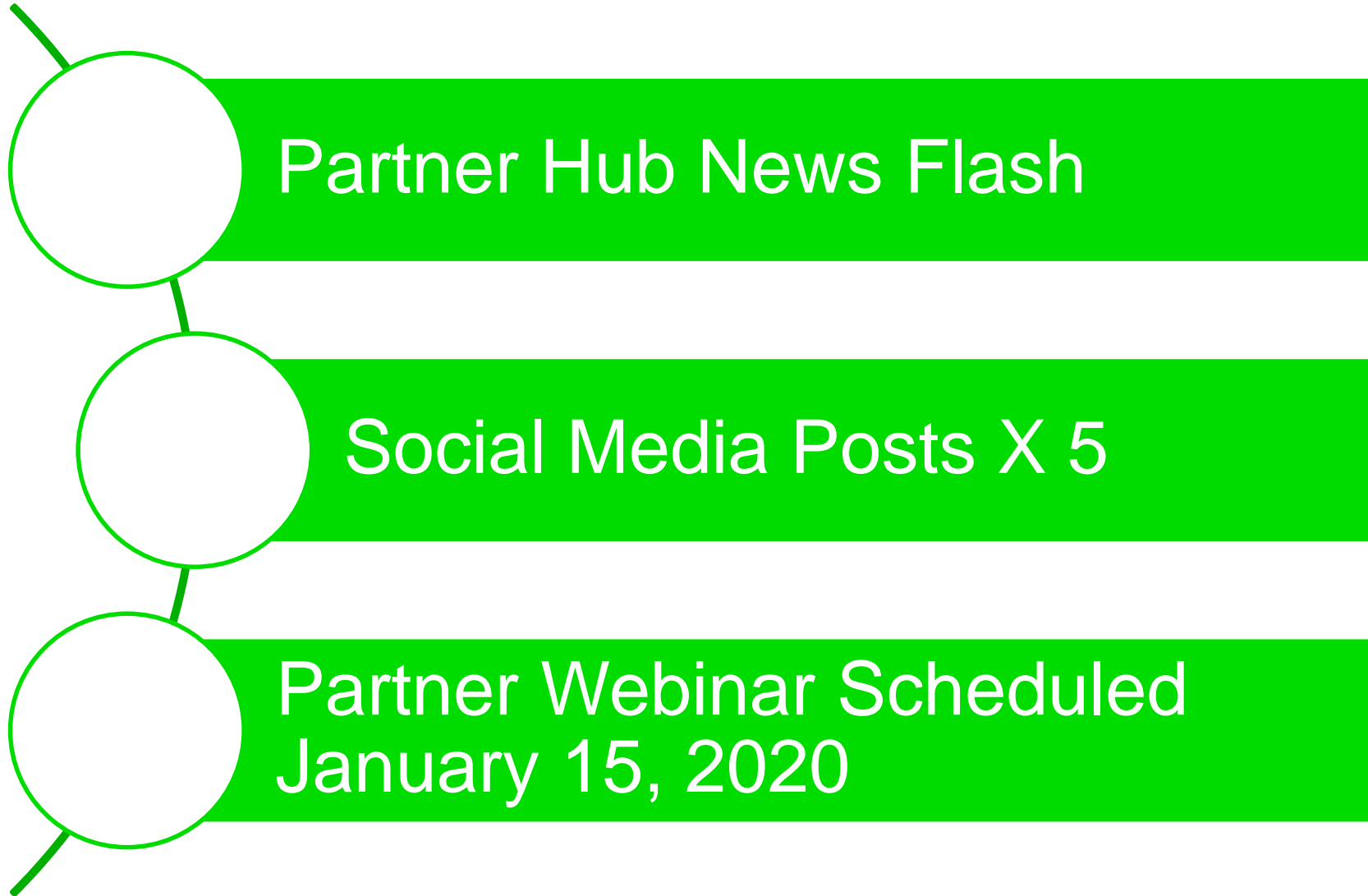
Customer Resources

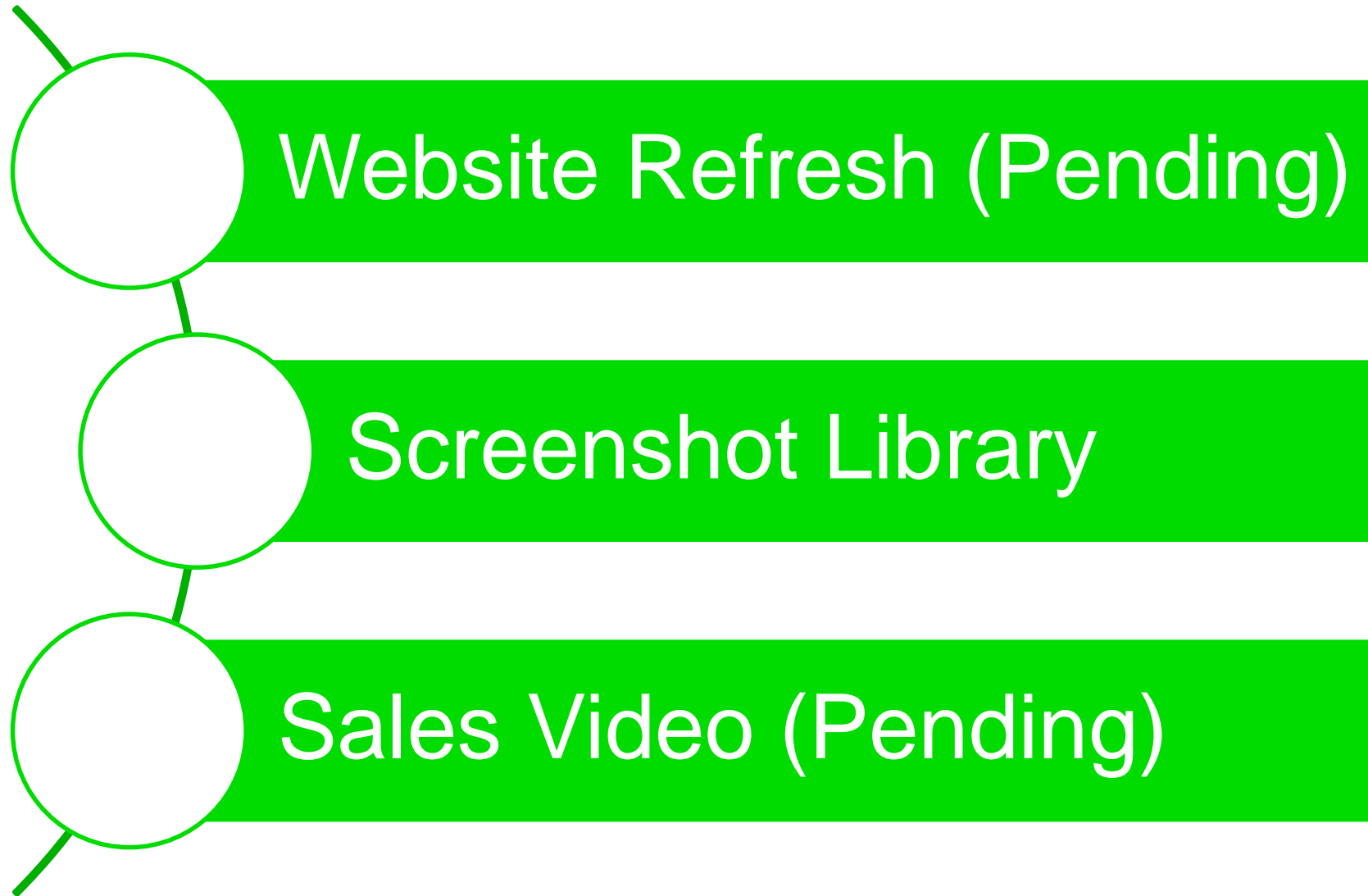


Learning Package

Release Notes

Partner Enablement





Customer Announcements

sage



Thank you



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