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 sage

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Partner

INTRODUCING SAGE BUDGETING & PLANNING

Now Available for Sage 100cloud

A recent product update introduced the newest application now available for Sage 100cloud - **Sage Budgeting and Planning**. Let's take a look at this powerful tool that enables quicker, more informed business decisions by automating and shortening your budgeting and planning cycles.

The Budgeting and Planning Challenge

While most companies acknowledge the importance of budgeting and planning, many of them struggle with an inefficient and manual process that's time-consuming, sometimes inaccurate, and almost always frustrating for those involved. While simple spreadsheets may work for some smaller companies, that approach falls well short of what most mid-sized or larger organizations need in an environment that's more complex, often involving multiple people and departments. That's where Sage Budgeting and Planning comes in.

Key Features and Benefits

Whether you need to allocate a revenue target or cost projection from the top down, or consolidate several budget plans from the bottom up, Sage Budgeting and Planning accommodates your organizational structure with the following key features:

Plan Sheets - provides seamless integration of budget submissions from multiple departments using a familiar spreadsheet look and feel.

Plan Manager - the "command center" of the application, you can easily distribute, review status and revisions, lock down, and consolidate your Plan Sheets in a way that's seamless and efficient.

Calculation and Analysis - apply powerful calculations and global formulas for seasonal trends and other business drivers. Also perform "what-if analysis" to change plan assumptions and reorganize budget structures to see the potential impact of changes to your plan.

Security and Control - comprehensive security features provide full control over use of plan sheets and authorized users as well as who can view, edit, or modify information.

G/L Integration - integration with your Sage General Ledger means you can transfer information back and forth without ever having to enter data more than once.

Now Available for Sage 100cloud

Sage Budgeting and Planning is now integrated with and available to Sage 100cloud customers **free of charge** (on a limited use basis). Multiple users and some features may require an upgrade.

[Contact us](#) if you'd like more information or want to learn how to activate and start using your free version of Sage Budgeting and Planning.



SAGE CRM

How to Manage Marketing Consent

Depending on where you do business and the local privacy laws in your region, you may be required to have evidence of marketing consent from your contacts. In other words in order to send email, call or text, your contacts may need to have explicitly agreed to receive marketing communication from your company. In this article, we'll show you how to create and manage those consent records in Sage CRM.

Consent Management Overview

Sage CRM 2018 Release 2 (R2) added consent tracking capability that enables you to store consent from customers against their contact record. Requests for consent can be issued directly from Sage CRM using preconfigured email templates that included an 'Accept' link. Once a contact clicks the link, the acceptance is recorded against their record in Sage CRM.

Creating a Consent Record

1. Open the Person or Lead you'd like consent from.
2. Click the **Consent** tab, then click **New**
3. Configure the fields as appropriate then click **Save**

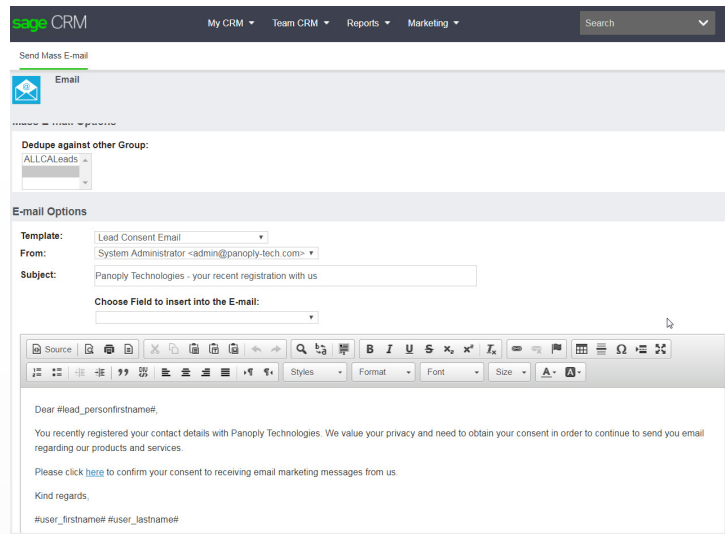
Now it's time to get in touch with the person or lead and ask them if they agree to receive marketing material.

Sending a Consent Email

Using a template in Sage CRM, you can send a consent email with hyperlinks that allow recipients to accept or decline your marketing communication. To enable these consent emails, an administrator must do the following:

- Configure standard email in Sage CRM
- Ensure that Sage CRM is accessible from outside your corporate network

Now you're ready to send the consent email as follows:



1. Find and open a person or lead
2. Create or open an existing consent record, and then click **New Consent Email**
3. In the window that opens, from **Template** select **Person Consent Email** or **Lead Consent Email**
4. Edit the email body as necessary
5. Complete remaining email fields and click **Send Email**

NOTE: You can also send consent email to a group of multiple persons or leads using a similar process. When you send email to a group, Sage CRM automatically creates a consent record for each person or lead in that group. In addition, the system automatically records consent record status based on which link the recipient clicks (Accept/Decline). Refer to Sage CRM user documentation for full steps and details for sending consent email to a group.

Have a Question or Need Help?



[Get in touch](#) if you have questions or need help using the new Marketing Consent capabilities in Sage CRM.

Sage 100/100cloud 2018.2 Now Available

Sage 100 and Sage 100cloud 2018.2 is now available. This latest product update features a central hub for time entry, anytime access to Sage contacts, new data analysis and planning features, and enhanced manufacturing features.

Key Enhancements

Here's a look at a few key enhancements that come with Version 2018.2:

Sage Contacts w/Office 365

You can now access customer contact data from any device that can access Office 365, anytime and anywhere.

Time Track Entry for TimeCard

This enhancement allows you to update all modules with time-related entries using a modern time entry portal.

Reprint SO from History

Now you can reprint a Sales Order from history in its original state for audit or conflict resolution. In addition, you can add notes and memos from history.

Sage Budgeting & Planning

Now included in Sage 100cloud, you'll immediately begin improving your budgeting and forecasting process using an easy to follow step-by-step implementation wizard (see our full Sage Budgeting and Planning article on page 1).

Release Notes and Upgrading

[Download the release notes](#) for full details of enhancements across the application as well as product fixes implemented in Version 2018.2. Be sure to contact us if you need help with an upgrade to this newest product update.

Sage 100cloud Migration Promo Ending Soon

The Parity pricing and \$0 Migrations offer introduced back in January 2018 (for renewal customers in the U.S.) will end on **September 28, 2018**. After that, migrations from Sage 100 "Classic" (perpetual license) to Sage 100cloud (subscription license) will revert to standard pricing.

Promo Details

With this promotional offer, you can migrate to Sage 100cloud, at the time of your renewal, for no more than the cost of your current Sage Business Care plan (or use \$0 migration transactions where applicable).

Added Benefits of Sage 100cloud versus "classic" Sage 100 may include:

- Modernized Web-based Interface
- Enhanced Notes Capabilities
- Sage Intelligence Report Manager and Designer
- Sage AP Automation
- Sage Inventory Advisor Basics
- Sage eCommerce (Coming Soon)
- Sage CRM
- Other Modules and Product Enhancements Available only for Sage 100cloud

Questions?



Contact us if you have questions about the promotion or want to discuss a migration to Sage 100cloud.

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