

In This Issue

Page 1

Migrating from Sage 100 Classic to 100c

Page 2

Using the Classic Outlook Integration with Sage CRM

Page 3

News You Can Use

MIGRATING FROM SAGE 100 CLASSIC TO 100c

By now, you've certainly heard about **Sage 100c**. It's a modernized version of the classic Sage 100 software (formerly MAS 90 / MAS 200) that customers have been using for decades. With so many customers that have already migrated to Sage 100c and many more considering it, we wanted to take a moment to discuss the migration process which is actually quite simple.

Sage 100c Migration At a Glance

At a high level, here's what the migration process looks like from Sage 100 Classic to Sage 100c:

1. **Change Your License** - you'll need to change your current Sage 100 *perpetual* license (classic) to a Sage 100c *subscription* license.
2. **Check Your Version** - your current Sage 100 Classic installation needs to be version 2016 or higher. If you're running an older version, perform an upgrade before applying your new Sage 100c license keys.
3. **Apply Your New License Keys** - the new license keys provided by Sage (in Step 1) will unlock all the new features and modernized interface of Sage 100c.

Within hours of installing the new license keys, you'll be up and running. It's as simple as that.

What Do You Get?

Sage 100c delivers added functionality that you don't get with the classic version. Here are some of the most important features you'll unlock with your new Sage 100c license:

Modernization - modernized interface and desktop that's easier to use and highly customizable.

Advanced Inventory - more advanced features for inventory like Sage Inventory Advisor Basics and Multi-bin management.

Manufacturing - a full-featured advanced job management suite for manufacturers.

Process Automation - streamline core accounting functions with features for AP Automation and electronic invoice (eInvoicing).

Perhaps the most important thing to note is that going forward, Sage 100c will likely receive most of the attention and development effort from Sage in terms of adding new features, connecting with external applications, and continued modernization of the technology and interface.

Should You Migrate?

It's a question that has a different answer for each company and situation. In a nutshell if you're happy with your current Sage 100 Classic software, there's no need to change and you'll continue to receive product support for a long time. But if you want access to more advanced features for reporting, inventory management, manufacturing, process automation, and an overall modern interface, a migration to Sage 100c might be worth considering.



SAGE CRM

Using the Classic Outlook Integration

For many businesses, Microsoft Outlook is an indispensable tool for communication. In this article, we'll show you how to combine the power of Sage CRM with Outlook so you can take control of all tasks, contacts, and appointments no matter which application you use most often.

What Is Classic Outlook Integration?

Classic Outlook Integration is a plugin for Sage CRM that synchronizes contacts, appointments, and tasks between the two applications. It also allows you to file single or multiple email messages in Outlook to one or more Sage CRM records so you have full documentation of all email communication between you and your customers. You can even attach Sage CRM shared documents to Outlook email.

Installing the Plugin

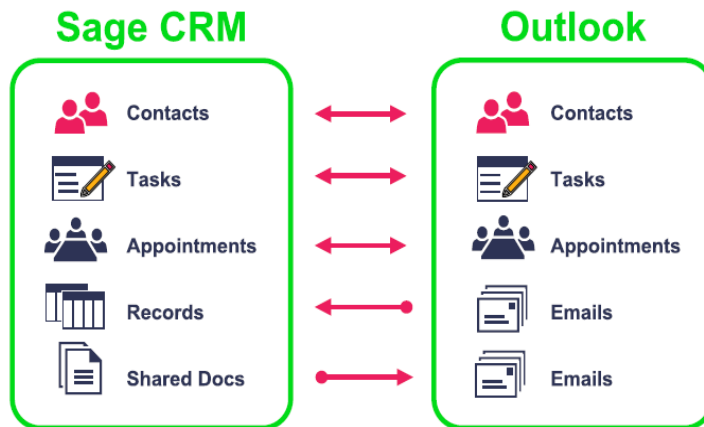
Before using the integration, you must first download and install the plugin for Sage CRM. For instructions and system requirements, [watch this installation video](#).

Once the plugin is successfully installed, a CRM ribbon will display in Outlook which provides access to the integration features. The ribbon allows you to file emails, add Outlook contacts to Sage CRM, initiate synchronization, and manage synchronization settings.

Depending on how you configure the integration, you can synchronize data from Sage CRM to Outlook only, from Outlook to Sage CRM only, or both ways. Watch the video on [configuring Classic Outlook integration](#) for guidance.

Using Classic Outlook Integration

The first thing you'll do is to flag the Sage CRM contacts that you want to synchronize with Outlook. These contacts will then share data between the two applications and be included in all future synchronizations.




Now you're ready to get started with the following activities that will synchronize for you:

Scheduling Appointments - create a new appointment in either Sage CRM or Outlook and discover that it's in your calendar in both applications following the next synch.

Manage Tasks - creating a new task automatically adds a reminder in Outlook or onscreen notification in Sage CRM.

File Email - clicking "File Email" in Outlook will attach the message(s) to the "Communications" tab for the contact in Sage CRM.

Attach Shared Documents - attach documents from the "Shared Documents" tab in Sage CRM to emails sent from Outlook.

 Watch the [Working with Classic Outlook Integration](#) video to see it all in action.

Two powerful applications working together to make you more efficient and effective!

Sage 100 2017.2 Now Available

With this newest release, Sage 100 and 100c customers get improved payment options with Sage Exchange and a Sage 100 Direct Deposit service processing window. In addition, there's now a wizard that helps set up credit card, ACH payments, and direct deposit options. With these enhancements, Sage 100 continues to make payment processing fast and hassle-free.

For full details about all the changes and bug fixes, check out the [release notes](#). Sage 100 2017.2 is available for download on the [Sage Customer Portal](#).

New Service Status Website for Connected Services

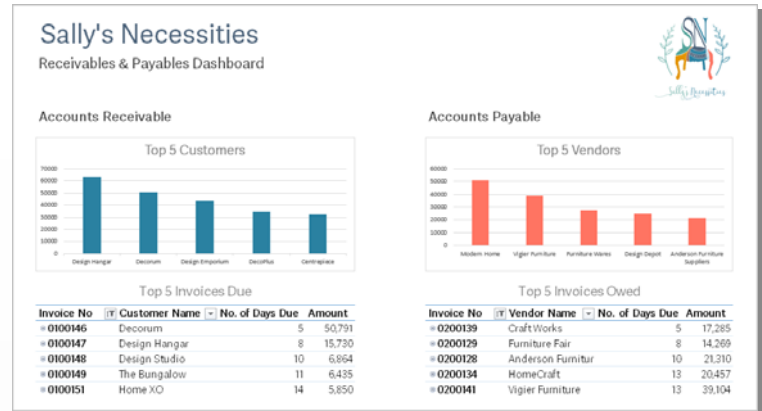
If you're using a Sage 100 online connected service like Direct Deposit, you'll want to bookmark the following new website: <https://trust.sage.com>

There you'll find the latest availability status so you can quickly determine whether a service is currently down. You'll also have visibility to scheduled maintenance so you can plan ahead to avoid potential processing delays or interruptions to your workflow.

Sage Intelligence Training: Getting Ahead with Sally

Sage has launched the third installment of the popular **Sage Intelligence Sally Series**. You've learned the basics and now it's time to get ahead of the competition.

It all began with part 1 of the series entitled **Starting Out with Sally**. Sally is a fictitious business owner that leads you through practical ways to make sense of the numbers and



improve your reporting skills with Sage Intelligence. Part 1 included 5 videos that have been [archived here on YouTube](#).

The second installment, entitled **Gearing Up with Sally**, kicks things up a notch as Sally guides you through the Financial Report Designer. The reporting techniques focus on Pivot Tables, Pivot Charts, and Dashboards. Part 2 includes 5 videos which have been [archived here on YouTube](#).

This third time around, entitled **Getting Ahead with Sally**, she focuses on designing reports from scratch using the Sage Intelligence **Connector module**. As she creates a dashboard combining Accounts Payable and Accounts Receivable in a single view, you'll discover how to define the specific data you want for your reports - making this series slightly more advanced than the previous two. In this series, the following topics are covered:

- Part 1: Connecting with the Connector
- Part 2: Get your game on with the Graphical Join Tool
- Part 3: Stepping it up with SQL
- Part 4: Expressing yourself through custom Expressions
- Part 5: Visualizing the result in Excel



Click to join the list and have the video series sent directly to you: [Join the Video Guest List](#)

Business Solution Providers, LLC.

21 Main Street, Suite 350
Hackensack, NJ 07601
(201) 993-1990

**BUSINESS
SOLUTION
PROVIDERS**

Info@BSP-LLC.com

www.BSP-LLC.com