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## INTRODUCING SAGE 100 2021

### What's New in the Latest Release

Sage 100 Version 2021 has introduced over 26 new features, many of which were suggested by the over 14,000 active customers using the product today. Here's a look at some of the newest features we think you'll like.

#### Even More Secure

Sage 100 2021 adds several pre-defined **role templates**, making it easier to create roles that are specific to your business. Role Maintenance has been enhanced to allow you to quickly assign or remove users to roles, apply changes to multiple roles, along with enhanced search and filtering capabilities to find tasks and security options more easily.

#### Better Record Keeping

Sage 100 customers who send orders, invoices, and other business documents through the system now have a **detailed log** to help you confirm that the emails were sent without any issues. Plus, Sage 100 2021 now supports PDFs, Word docs, JPEGs, and other file types to be associated to your journals and registers.

#### Expanded Email Options

Sage 100 now offers **OAuth** to authenticate SMTP email requests. Sage customers who use email providers like Gmail or Outlook which require 2-step authentication can now use those email providers directly in the system.

#### Other Notable Enhancements

There are also over 20 other notable enhancements in Sage 100 2021 including:

**Sales Order Recap** - Now you can run all sales recap reports with just a single click.

**Purchases Clearing** - a new history report allows you to reconcile purchases clearing at any time.

**NEC-1099** - the non-employee compensation form is now available in purchase order.

**Purchase Order** - PO module now displays line detail for receipt invoices in history.

Many of these new features were suggested by customers through the [Sage 100 Ideas Website](#). If you have an idea to submit (or vote on current ideas), be sure to check it out.

sage

Authorized  
Partner



Be sure to take a look at the [Sage 100 2021 Release Notes](#) for full details on all new features, product fixes, and other changes.

[Contact Us](#) if you have questions or need help upgrading to Sage 100 2021.



# SAGE CRM

## What's New in 2021

Earlier this year, Sage CRM 2021 (R1) was released with new features to make it even easier to manage your sales tasks, contacts, opportunities, and more. Here's a look at what's new in Sage CRM 2021.

### Telephone Numbers as Hyperlinks

Starting with Sage CRM Version 2021 R1, all telephone numbers in Sage CRM are formatted as telephone links.

With this now-familiar "tap to call" functionality that's prevalent in other apps you probably use, you can tap a telephone link in Sage CRM using a phone-capable device to call a phone number without having to dial it manually.

On a desktop computer, when you click a telephone link, you'll be prompted to select an application (for example, Skype) in which you want to open the link.

### Customizing Lists and Grids

Now, system administrators can use **inline customization** to change lists and grids which allows you to see how a list or grid looks like before and after your changes.

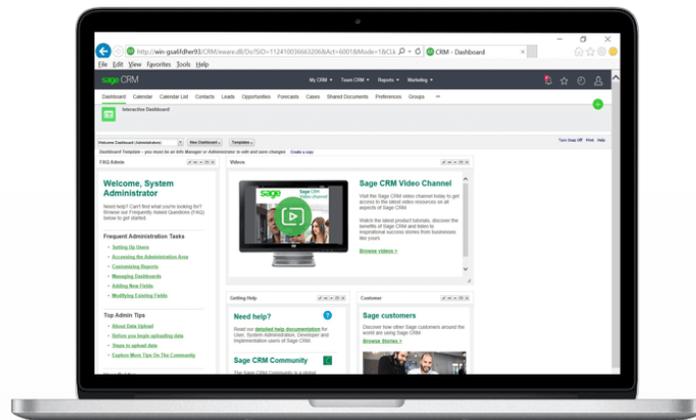
Lists are displayed when you select a tab within the context of company, case, lead, opportunity, solution, or person.

Grids are used to display the results of a search for a person, lead, case, opportunity, and so on. Grids are also displayed on the Company Quick Look tab.

In both cases, it's now even easier to make sure the data you need in Sage CRM is displayed in a way that fits the way your sales team likes to work.

### Self-Service Password Recovery

This handy new feature in Sage CRM 2021 R1 enables users to reset their Sage CRM password without contacting the system administrator.



When this feature is enabled in the system, a **Forgot My Password** link is added to the Sage CRM logon screen. To reset a forgotten password:

1. Launch the Sage CRM logon screen
2. Enter your user name in the User Name field
3. Click the Forgot My Password link

Sage CRM will send an automated email containing a password reset link to the email address associated with the user name. You can then reset your password by clicking the password reset link in the email.

### Technology Updates

A few technology platform updates in Sage CRM 2021:

- Support for Microsoft Azure Virtual Machines
- Support for OAuth 2.0
- Ability to accept web leads from multiple IP addresses



Contact us with your questions or to request help updating your system to Sage CRM 2021 R1



# SAGE HRMS

## Benefits of a Subscription License

If you're running Sage HRMS under a traditional perpetual license, there are some existing and planned new features exclusive to the subscription version that we think you should know about. Here's a look at the benefits of Sage HRMS under a subscription license.

### Subscription is the Future

Like all Sage software product lines - and indeed most modern business software on the market - the subscription model is now the norm. As such, each year Sage continues to add new features and value to Sage HRMS subscription that aren't available in the "traditional" perpetual license version.

In addition going forward, it's likely that nearly all future investment will be focused on Sage HRMS subscription. Rest assured that your Sage HRMS perpetual product will still be supported - but most software updates going forward will likely focus mainly on fixes and compliance.

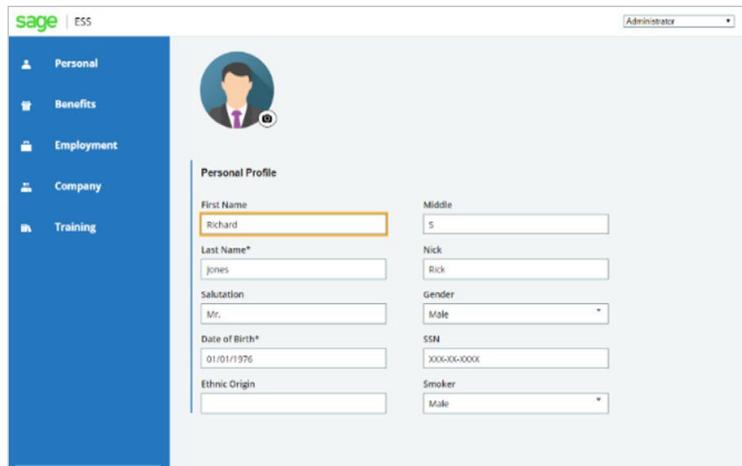
### Employee Self Service Enhancements

One particular area of focus, based on user feedback, will be to improve the user interface for employees. That's why Sage will roll out a new design interface in **Employee Self Service (ESS)** for the **subscription version**. The improved ESS experience will help employees more easily navigate the system using a modern, intuitive and attractive design.

Additional features planned include a new ESS experience for Open Enrollment. And for Time-Off management, the modernization of **ESS mobile access** along with additional mobile features provide a complete HRMS/ESS cloud-connected experience.

### Other Subscription Features

In addition to interface enhancements in ESS, other features available exclusively to subscription holders include:



- Ability to default employee contribution for all employees with automatic enrollment of HRMS Savings Plans
- Added capability to verify password with a view option on the HRMS and ESS logon page
- Export capabilities for the results of the HRMS "employee find" to Excel (XLS) format
- Expanded ESS capabilities for administrator to create and use customized security questions for logon
- New Secure Query report access from HRMS home page

### Added Support & Training Benefits

In addition to exclusive features, Sage HRMS Subscription also bundles added service and training benefits including:

- Access to [My Workforce Analyzer](#)
- Access to Anytime Learning online courses **and** 50% off all other HRMS training available at [Sage University](#)
- One-on-One annual system check to ensure you're getting the most out of your Sage HRMS investment



[Contact Us](#) if you have questions about how a Sage HRMS subscription license works.



## Enhanced User Roles & Security

One of the significant changes in Sage 100 2021 discussed briefly [on page 1](#) of this newsletter is the enhancement to security features and user roles. Here's a more in-depth look at these new capabilities.

### New Security Menu

A new Security Menu has been added to the Library Master module which includes several new tasks, as well as some that were relocated from other menus. These tasks include Administrator Tools, Export Roles (subscription only), Import Roles (subscription only), Role Maintenance, Role Report, Role/User Inquiry (subscription only), User Maintenance and User Report.

### Role Maintenance Enhancements

#### Role Types

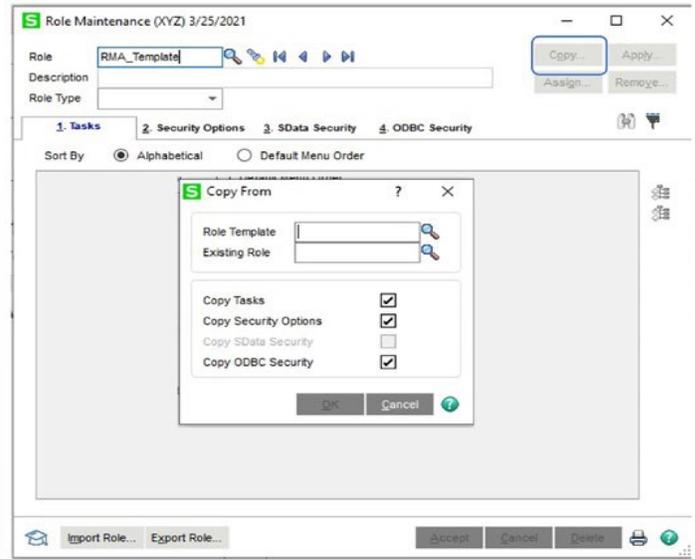
A Type field has been added including Admin, Auditor, Employee, and others. You'll be required to select a type when creating new roles. Existing roles created in earlier versions of Sage 100 will automatically convert over.

#### Importing and Exporting Roles

Click the Import and Export buttons to import and export roles. When you export roles, they are exported to the file and location that you specify. When you Import a role, you can select which of the roles included in the import file that you want to import.

#### Applying Role Changes to Other Roles

After making a change to a role, you can click the Apply button to open the Apply Role Changes window. In this window, you can select which changes to apply and to which roles they should be applied.



### Role Templates

When creating a role, you can Copy from one of several pre-defined role templates. Templates have been added for most modules and available based on modules installed.

### Role Report Enhancements

When printing the Role Report, you can select the Role Template Details option to view a list of all permissions available for one or more role templates. The Include Tasks and Events with No Access check box added in the 2020.1 update has been replaced with an Include Tasks and Options field. This field specifies whether to print tasks and security options for which the role has access, no access, or both.

### Simplicity and Security

These new features not only make it easier to manage security and user roles, but can also be helpful for companies that need to demonstrate regulatory compliance and show exactly who has access to which areas of Sage 100 software.



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