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SAGE 100 PAPERLESS OFFICE

A Closer Look at New Features in 2021

Sage 100 Paperless Office is a very popular module and generates quite a bit of attention from customers submitting enhancement requests through the [Sage 100 Ideas website](#). In response, Sage 100 2021 released earlier this year introduced a nice range of new features that we'll take a closer look at in this article.

Default Delivery Options

A new **Default Delivery Options** task has been added to the Paperless Office Setup menu. An idea [submitted by customers](#), this task allows you to set up default form selections when creating a new customer or vendor record, so you don't have to set up each document individually.

More Detailed Delivery Logs

[Also requested by customers](#), a new **Electronic Delivery Log** button has been added to various tasks including Customer Viewer, Vendor Viewer, Employee Viewer, Journal and Register Viewer, and Period End Reports Viewer. This displays the most recent date and time the document was sent, the user who sent it, status of the submission, and the recipient's email or fax number.

You can also click the **Electronic Delivery Submissions List** button to view a list of all attempts to send a particular document. In addition, new inquiry tasks make it quick and easy to view a list of all documents sent to customers, with options to filter results and even re-send from there.

New Options for Associated Documents

With Sage 100 2021, you're no longer limited to PDF files when associating documents with journals and registers using Paperless Office. Any document type can be associated, including Word documents, Excel workbooks, images, and more.

Better Document Update Rules

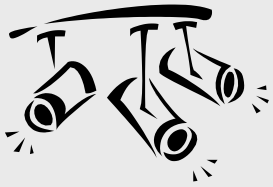
Forms are no longer flagged as updated when they are printed as PDFs, **but** not electronically delivered due to an interruption in the process. Previously when the printing and delivery process was interrupted, forms were sometimes flagged as updated when they were printed but not sent.

Email Additional Salespeople

When sending forms to customers, you can also send them to all salespeople who are receiving a commission on the sale. A new checkbox has been added to the Paperless Office Delivery Options window accessed through Salesperson Maintenance which enables this feature for statements, sales orders, and sales order invoices.



An already popular feature got even better with the release of Sage 100 2021. Be sure to [contact us](#) if you need help with Paperless Office or upgrading to the latest version.



SAGE CRM

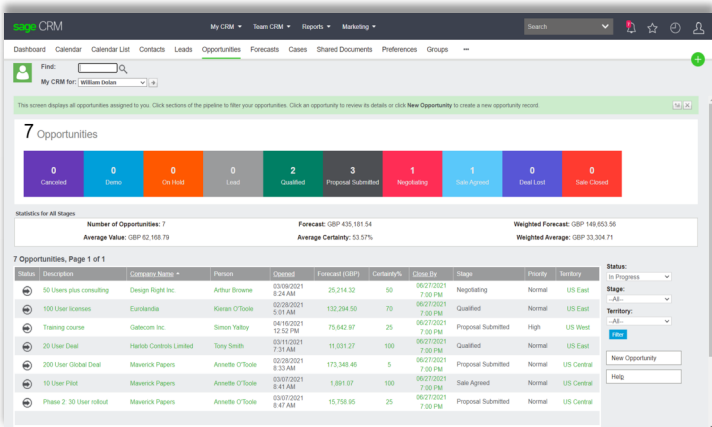
What's New in Sage CRM 2021 R2

Sage CRM 2021 R2 is now available. Let's take a look at some of the new features and enhanced capabilities added in this latest software release.

More Customizable Pipeline Reports

Reporting pipelines have been updated to a modern, fresh design with fully customizable colors & styles. The new rectangular style appears in pipelines that display on the Opportunity List and Case List screens, located within the 'My CRM', 'Company' and 'Person' contexts.

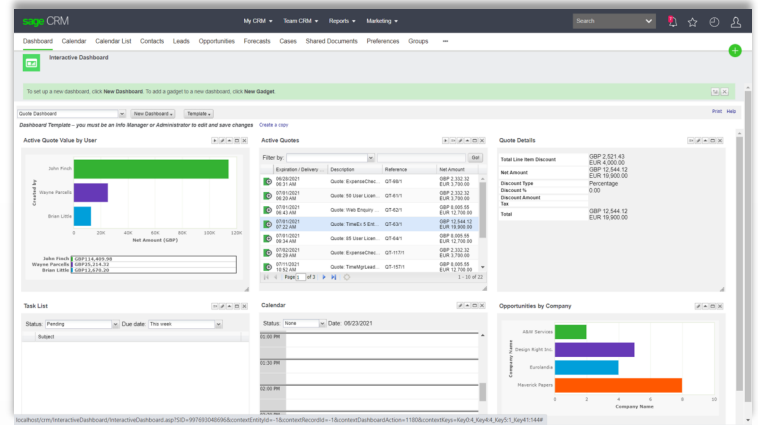
The segments of the pipeline show the count of records at each workflow stage and the colors used in the display are customizable.



New Quotes Dashboard Template

A new 'Quotes Dashboard' template has been added to Sage CRM 2021 R2. The new dashboard template displays a mix of gadget types, calling information from the Quotes table. Data is drawn from a new List report with quote details displayed in the Quotes Detail gadget.

The new Quotes dashboard template can be assigned by user profile. For guidance, refer to the instructions online for [Creating a Dashboard from a Template](#).



User Interface Improvements

For the release of Sage CRM 2021 R2, a detailed review of default screens and lists aimed to simplify and "de-clutter" the user interface. On some screens, certain fields have been removed from display while in other areas, additional columns have been included.

The goal is to make better use of screen space and display key information in a way that's more logical and organized. Over the next several releases, Sage plans to continue to enhance the user interface.

Other Notable Enhancements

Other notable new features include:

- New "spinner" indicates the system is working on a task
- New template selection options available when using 'Send Quote' and 'Send Order' quick mail merge
- Ability to configure multiple redirect URLs after a user submits a lead capture form
- Even more options when customizing the look and feel of screens down to individual fonts and screen elements

Get in touch if you have questions about Sage CRM 2021 R2



NEWS YOU CAN USE

Here's a collection of brief news and updates related to your Sage 100 software.

Sage 100 2021.2 Now Available

Sage 100 2021.2 was released September 15th. This second product update for version 2021 mainly provides product fixes and maintenance updates, along with a couple of minor feature enhancements as follows:

- DBA (doing business as) name and address fields were added to the Additional tab in Vendor Maintenance and the Vendor Maintenance On-the-Fly window. This was a feature request submitted by Sage 100 customers.
- Password fields are available when unified logon is enabled to support 3rd party applications access through ODBC.
- Previously-reported performance issues in certain screens and tasks have been addressed along with various product fixes. [Full details here.](#)

Does Sage 100 Work with Windows 11?

With the release of Microsoft Windows 11 expected in early October 2021, you might be wondering when you can start using Sage 100 with Microsoft's newest operating system. According to [this recent Sage Knowledgebase article](#), the Sage engineering team will begin compatibility testing for both **Sage 100 2020** and **Sage 100 2021** shortly after the Windows 11 release. If all goes well, Windows 11 should be supported with Sage 100 by the end of this year.

Sage 100 2022, targeted for release March/April 2022, is also expected to work with Windows 11.



Sage CRM 2021 R2 Now Available

Sage CRM 2021 Release 2 (R2), available as a stand-alone installation or integrated with Sage 100, is now available. Here's a brief overview of new features and enhanced capabilities added in this latest software release:

- New dashboard templates and reports for sales quotes
- Updated, modernized sales pipeline dashboard design with customizable colors and styles
- Enhanced mail merge flexibility
- User interface improvements that de-clutter many screens and lists
- New onscreen "spinner" that indicates the system is loading or performing a task
- Ability to redirect user to a custom URL after submitting a web lead
- Several fixes for reported performance issues



[Contact us](#) if you need help with your Sage system or need assistance upgrading to the latest version.

Vrakas/Blum Computer Consulting

445 South Moorland Road, Suite 400
Brookfield, WI 53005

(262) 797-0400



www.v-bcc.com

2021 Virtual User Conference



Designed with your continued education in mind, our annual User Conference is bigger & better than ever. Enhanced sessions presented by our team of experts and a day dedicated to our valued business partners ready to streamline your business.

[Join us for this 3-day event](#) | [CPE available upon request](#) | [All session times are CST](#)

Day 1 – Vrakas/Blum Learning Sessions (October 19, 2021)

8:00 a.m. to 4:30 p.m.

- [Back to Basics with Sage presented by Jesse Braun](#) (8 AM)
- [Warehouse & Multi-Bin presented by Kristen Baumgartner](#) (11 AM)
- [Manufacturing Scanning presented by Kristen Baumgartner](#) (12:15 PM)
- [Sage Intelligence/ Data Analytics by Dana Halpin](#) (3 PM)

Day 2 - Business Partner Learning Sessions (October 20, 2021)

[Track 1: 8:00 a.m. to 9:00 a.m.](#)

- CompuData: Cloud Hosting – Get Access To Your ERP Anywhere
- Credit Hound: Credit Control – Get Paid FASTER
- DSD Business Systems: InstaDocs Document Management
- Scanco: Work Order to Production Management
- V-Technologies: Starship – Shipping Made Easy
- Vrakas CPAs + Advisors: Form 1099-MISC and 1099-NEC Learning Session

[REGISTER FOR TRACK 1](#)

[Track 2: 11:00 a.m. to 12:00 p.m.](#)

- Altec DocLink: Document Management For Your Business
- CimCloud: Ecommerce & CRM with YOUR ERP
- ROI Consulting: IN-SYNCH – Real-Time Data Synchronizations with ANY 3rd Party System
- Tangerine Software: Sage Enterprise Intelligence – Improve Your Efficiencies
- TrueCommerce: Better Content for Better Online Sales
- VIP Integrated Payments: Credit Card Processing – Accept More Online Payments
- Vrakas CPAs + Advisors: Lease and Accounting Standards Update

[REGISTER FOR TRACK 2](#)

[Track 3: 1:00 p.m. to 2:00 p.m.](#)

- Beanworks: Accounts Payable Automation
- DataSelf: Advanced Analytics – 1 Million Plus Ways to Slice and Dice Your Data
- eci: Sage Alerts & Workflow – Keeping You Informed
- REPAY: Credit Card Processing – Empowering Your Business
- Vrakas CPAs + Advisors: How Can Small Business Accounting Services Provide Your Business with Support and Efficiencies
- Vrakas CPAs + Advisors: Tax Planning and Compliance Updates

[REGISTER FOR TRACK 3](#)

[Track 4: 3:00 p.m. to 4:00 p.m.](#)

- Avalara: Tax Compliance Experts
- CertiPro Solutions: eCommerce – Helping Your Website Make Money for You
- CompuData: Achieve CMMC Readiness & Meet DoD Requirements
- Sage Data and Analytics: Make Better Business Decisions with Sage Data & Analytics
- SPS Commerce: MAPADOC – EDI Software Scalable to Your Needs
- Summit Hosting: Cloud Hosting – Helping You Work from Wherever, Whenever
- Vrakas Business Valuations: The Value of Business Valuation

[REGISTER FOR TRACK 4](#)

Day 3 - Vrakas/Blum Learning Sessions (October 21, 2021)

8:00 a.m. to 12:30 p.m.

- [Sage Operations Management by Joe Jenders](#) (8 AM)
- [Sage Q & A by Lisa Dion & Justin Teague](#) (11 AM)

