



accounting business solutions

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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.

## 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.

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