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Sage Partner

HOW TO SETUP EMAIL DELIVERY IN SAGE 300

With the release of Sage 300 2022.2, you can now email documents using Microsoft 365. But in order to do so, you first need to setup email delivery in Sage 300 which we'll walk you through in this article.

Email Setup for Sage 300 Desktop Screens

1. In the Sage 300 classic desktop, open **Common Services** > **Company Profile**.

2. On the **Email tab**, specify how you will email documents

To email documents using Microsoft Outlook from your desktop, clear the 'Use Email Service' option. Otherwise, select this option and then specify one of the choices in the Email Service field).

3. If applicable, enter settings for your email service (i.e. server name, server port, password, etc.).

4. To receive copies of emails that you send to customers or vendors (via blind copy/Bcc), enter email addresses in the **Send Copies To** field (If entering multiple email addresses, separate each with a semicolon. For example: JoeBlow@company.com;JaneBlow@company.com).

5. Under **Send Test Email**, specify an email address and send a test to endure delivery (tip: if the test message does not arrive, check your spam folder and/or double check the settings entered).

6. Click **OK** to save your settings.

Email Setup for Sage 300 Web Screens

1. In Sage 300 web screens, open **Common Services** > **Company Setup** > **Company Profile**.

2. On the **Email tab**, specify an email service and then enter appropriate settings (refer to these additional technical instructions if using Microsoft Graph).

3. Enter other settings (from email address, send copies to, etc.).

4. Under **Send Test Email**, specify an email address and send a test to endure delivery.

5. Click **OK** to save your settings.

Email Setup Notes:
You can set up Sage 300 to email documents using one of the following methods:

- **SMTP** - you can use your own SMTP server, or SMTP service.
- **Microsoft Graph** - This service sends email via Microsoft 365.
- **Microsoft Outlook** - If Microsoft Outlook is installed on your local computer, you can use it to send email from desktop screens. You **cannot** send email in this way from web screens.

Sage 300 Technical Alert
Action May Be Required Soon

Sage has announced that there are two important technical updates approaching that may impact Sage 300 customers that are not on a recent product release.

Microsoft Will Disable Basic Authentication

Effective **October 1, 2022**, Microsoft will disable basic authentication and subsequently require the use of modern authentication (OAuth) for connection to servers, services, and API endpoints, such as Exchange online & Office 365 email tenants.

This means that in-product email services will stop working (i.e. sending email through Sage) for Sage 300 customers that are on versions **prior to 2020.8**. Sage recommends that all customers upgrade to the latest version of Sage 300 by October 1, 2022 (currently Sage 300 v2022.2).

Transport Layer Security 1.0 and 1.1 Deprecation

Transport Layer Security (TLS) is a third-party component that is widely adopted and designed to facilitate privacy and data security when communicating over the internet. TLS 1.0 and TLS 1.1 were formally deprecated in June 2018, making way for the recommended use of TLS 1.2.

As such, effective **September 2023**, Sage 300 will no longer support TLS 1.0 and 1.1. Customers will need to upgrade to Sage 300 versions 2019.6, 2020.3, or higher by that time.

New Requirement: Customer Support Contact Authentication

Beginning **October 2022**, Sage Customer Service will no longer assist an employee or customer contact (i.e. partner or accountant) if he/she is not listed in Sage's CRM system.
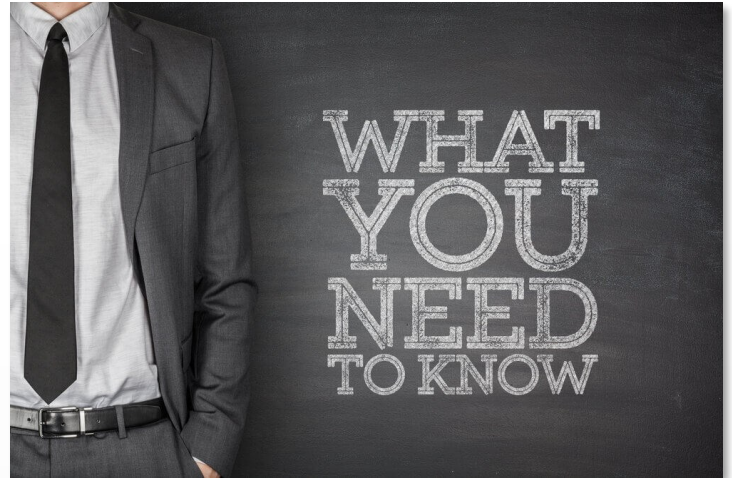
For example, if an employee reaches out to Sage by phone or chat and they are not already in the CRM system as a contact, Sage will not be able to assist until he/she is added by another existing authenticated contact.

In particular, Sage will request additional information before proceeding with changes to an account (i.e. add/remove contact or email addresses), subscription cancellation, or to request 2-factor authentication changes.

Sage Membership Masterclass Season 1 Now Available

In a previous newsletter, we talked about the launch of Sage's new "Member Masterclass" series featuring talks and articles from the world's leading experts on the challenges that are most important for businesses today.

An archive of Sage Membership Masterclass Season 1 is now available online, focusing how to find and keep great people as well as tips for building a happier, healthier, and more productive workplace.

Access Season 1 Here ...

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