More Freedom, Control, and Productivity: Sage 50c & Office 365

Presenter: Nakia Christian

#ThisIsMyOffice

Meet our presenter

Nakia Christian is a Senior Trainer for Sage 50 U.S. She has been a part of the Sage family for 12 years.

Nakia became a Sage 50 expert by troubleshooting technical issues and handling escalated calls as a Senior Support Analyst.

Today as a Senior Trainer, she is the lead curriculum developer for new Sage 50 releases. Nakia enjoys sharing her knowledge with new and existing colleagues.

Outside of the office, she is a chauffeur for her 11 year old son and a die-hard Atlanta Falcons fan.

Agenda

- What is Microsoft Office 365?
- Explain the Apps included with Microsoft Office 365 Business premium subscription
- Get started with Sage 50c and Office 365
- Connect Sage 50c to Office 365
- Use the Sage Contact app in Office 365
- Schedule a Sage Cloud backup in Sage 50c
- Locate a Sage Cloud backup in Office 365

The world works differently today.

50%

of business email users will primarily rely on a Surface, tablet or other mobile device by 2016.

3.5 million

SMBs will use instant collaboration apps by 2018, and

2.5 million

will use web conferencing

71%

of SMBs believe mobile apps will entirely replace some traditional solutions in the near future

Work isn't where you go, it's what you do.

New partnership

sage

sage

“Working together with Microsoft we are reinventing Sage 50, one of the world’s best-loved business applications.

We want to put the power of Sage and Microsoft behind more than 72 million Small & Medium Businesses around the world to liberate them from time-consuming tasks, and super-charge their productivity.”

Stephen Kelly – Sage Summit 2016

Microsoft

“Together, Sage and Microsoft are revolutionizing cloud accounting by creating seamless integration between two of the most popular and trusted business applications for the business builders of the world - Sage 50 and Microsoft Office 365.“

Satya Nadella – Sage Summit 2016

Say a big hello to…

New: Sage 50c

Powered by Office 365

Power, trust and familiarity of the desktop… with the flexibility and automation of the cloud/mobile

More Freedom

More Control

More Productivity

2017: Biggest year ever for Sage 50c

Jam-Packed Launches

Spring (March 28th)
Summer (July)
Fall (October)

Microsoft Partnership & Office 365

Publish Roadmap

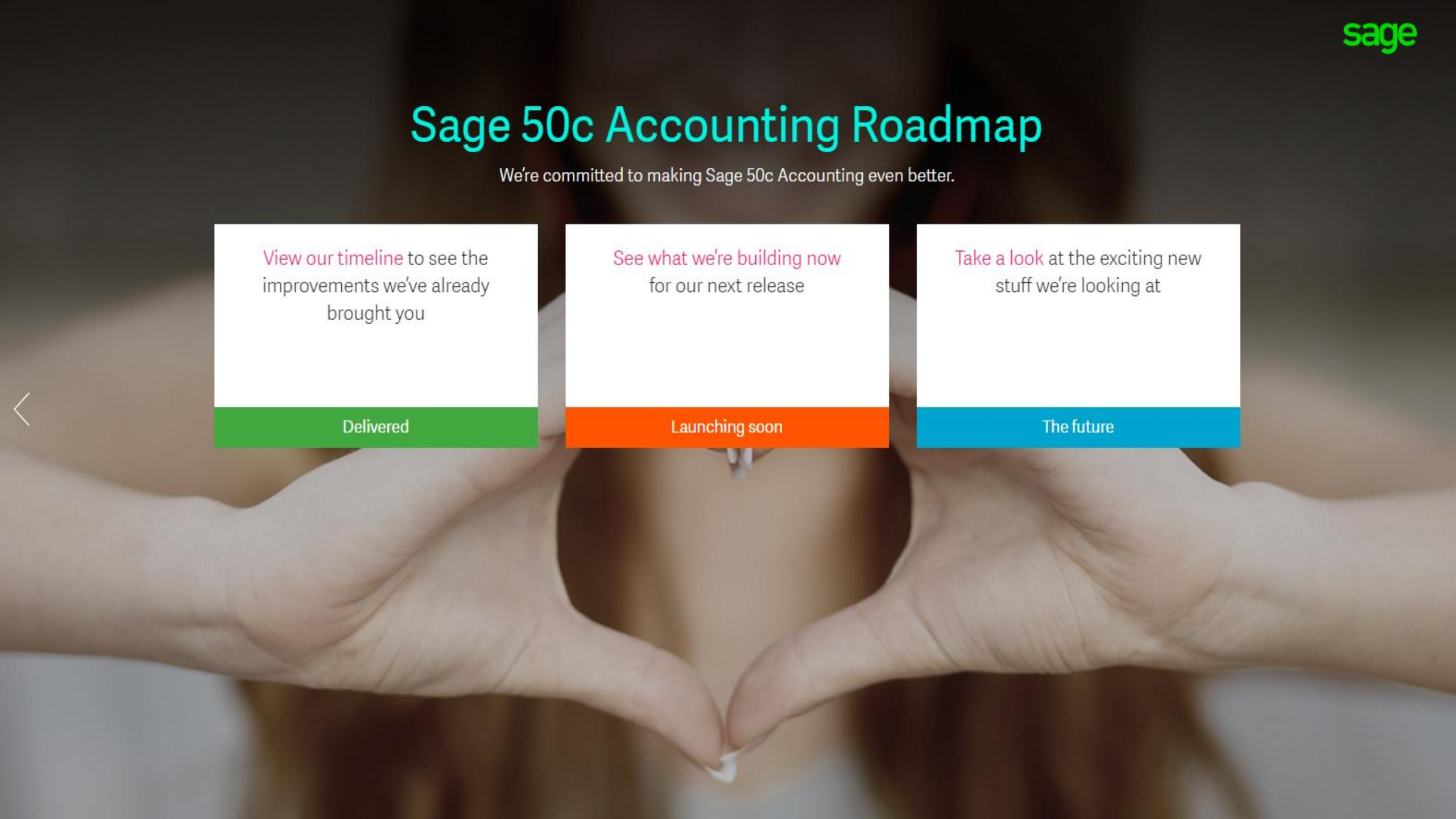
Sage 50c with Office 365 Integration Roadmap
www.sage.com/us/roadmap

Sage Roadmaps

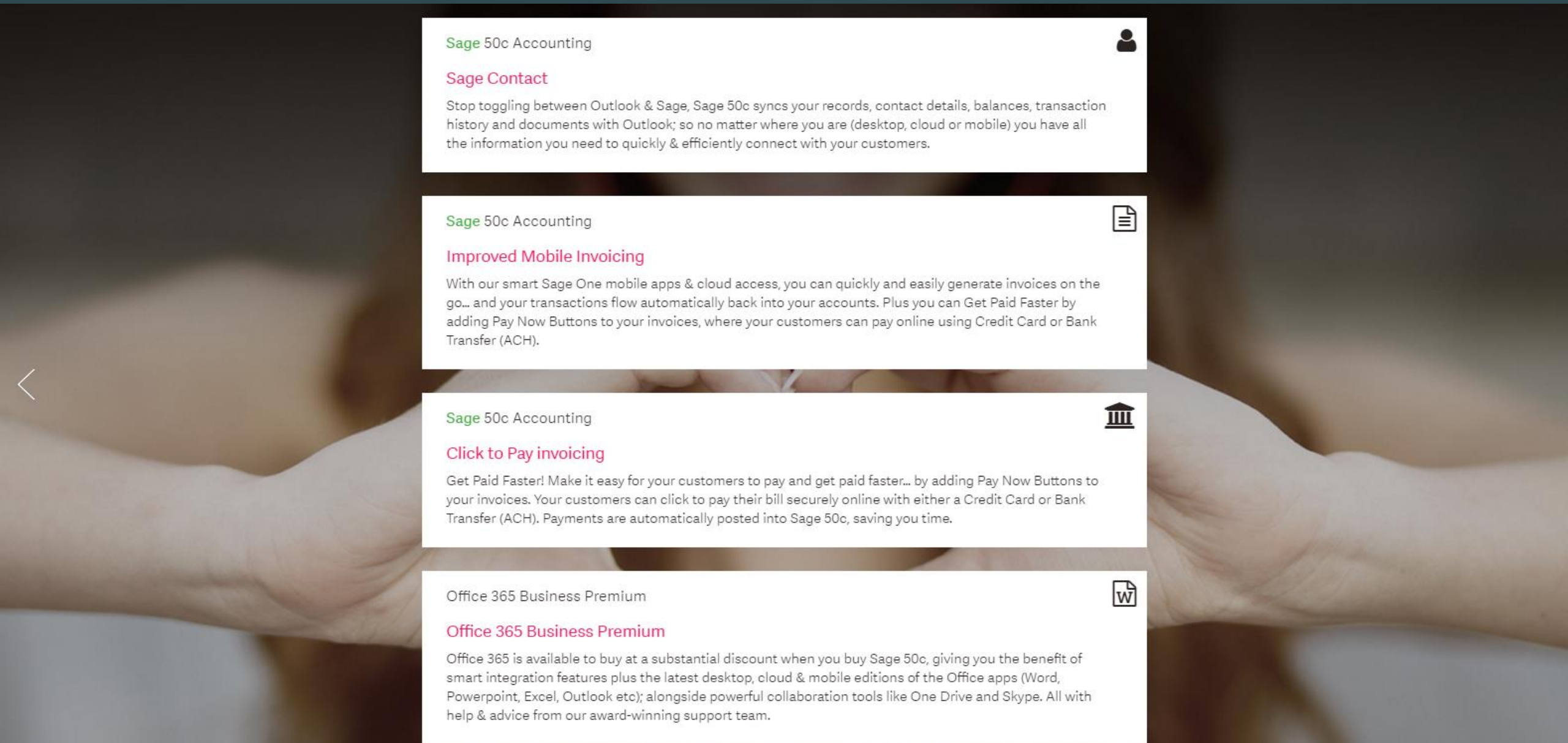
United States

Sage 50c Accounting

View the roadmap ›


sage
Sage 50c Accounting Roadmap
We're committed to making Sage 50c Accounting even better.
View our timeline to see the improvements we've already brought you
Delivered
See what we're building now for our next release
Launching soon
Take a look at the exciting new stuff we're looking at
The future

Sage 50c Accounting improvements delivered March 2017



Sage 50c Accounting

Sage Contact

Stop toggling between Outlook & Sage, Sage 50c syncs your records, contact details, balances, transaction history and documents with Outlook; so no matter where you are (desktop, cloud or mobile) you have all the information you need to quickly & efficiently connect with your customers.

Sage 50c Accounting

Improved Mobile Invoicing

With our smart Sage One mobile apps & cloud access, you can quickly and easily generate invoices on the go... and your transactions flow automatically back into your accounts. Plus you can Get Paid Faster by adding Pay Now Buttons to your invoices, where your customers can pay online using Credit Card or Bank Transfer (ACH).

Sage 50c Accounting

Click to Pay invoicing

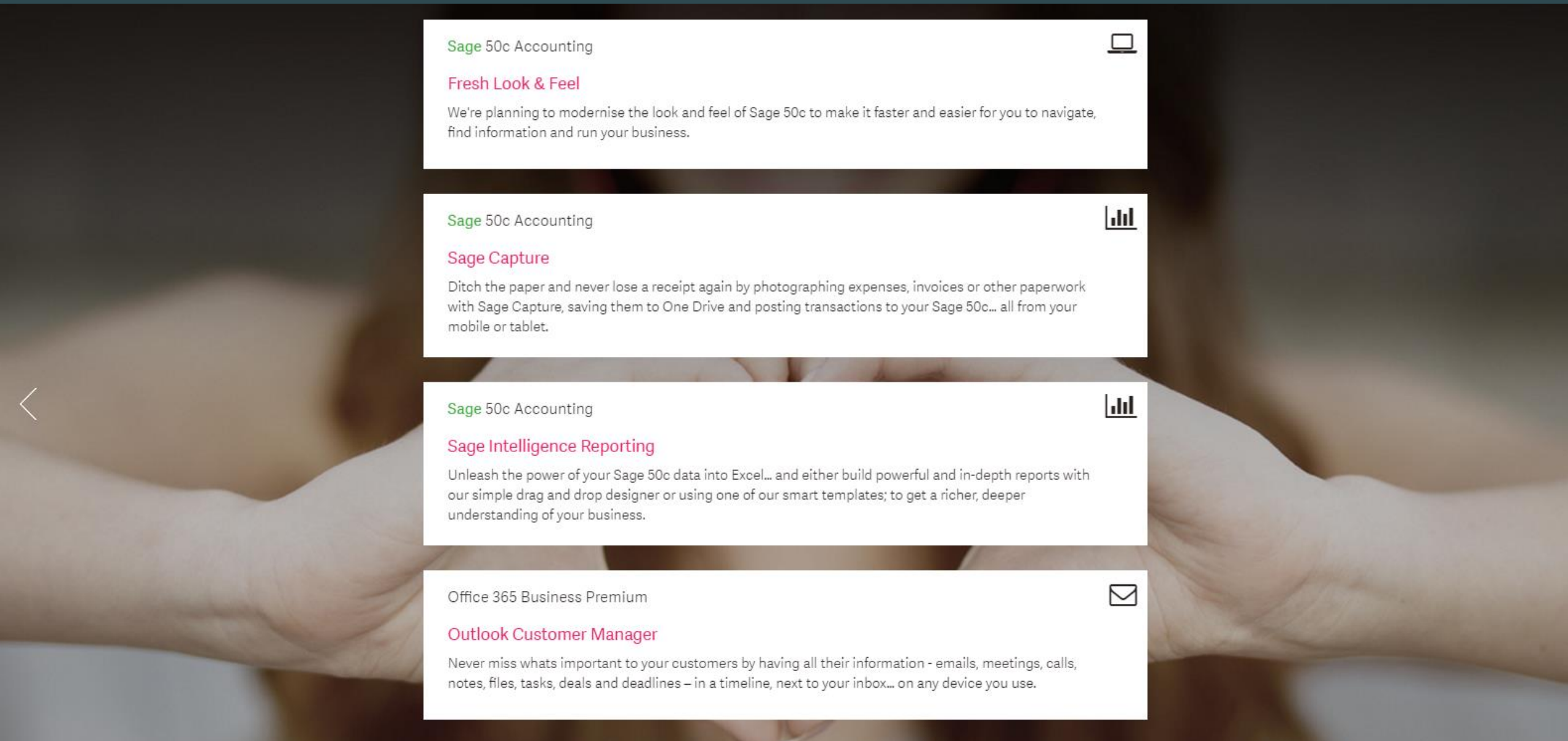
Get Paid Faster! Make it easy for your customers to pay and get paid faster... by adding Pay Now Buttons to your invoices. Your customers can click to pay their bill securely online with either a Credit Card or Bank Transfer (ACH). Payments are automatically posted into Sage 50c, saving you time.

Office 365 Business Premium

Office 365 Business Premium

Office 365 is available to buy at a substantial discount when you buy Sage 50c, giving you the benefit of smart integration features plus the latest desktop, cloud & mobile editions of the Office apps (Word, Powerpoint, Excel, Outlook etc); alongside powerful collaboration tools like One Drive and Skype. All with help & advice from our award-winning support team.

Sage 50c Accounting improvements launching soon Summer 2017



Sage 50c Accounting

Fresh Look & Feel

We're planning to modernise the look and feel of Sage 50c to make it faster and easier for you to navigate, find information and run your business.

Sage 50c Accounting

Sage Capture

Ditch the paper and never lose a receipt again by photographing expenses, invoices or other paperwork with Sage Capture, saving them to One Drive and posting transactions to your Sage 50c… all from your mobile or tablet.

Sage 50c Accounting

Sage Intelligence Reporting

Unleash the power of your Sage 50c data into Excel… and either build powerful and in-depth reports with our simple drag and drop designer or using one of our smart templates; to get a richer, deeper understanding of your business.

Office 365 Business Premium

Outlook Customer Manager

Never miss whats important to your customers by having all their information - emails, meetings, calls, notes, files, tasks, deals and deadlines – in a timeline, next to your inbox… on any device you use.

Polling question

Do you currently use Microsoft Office 365?

a) Yes

b) No

c) Not sure

Microsoft Office 365

What is Microsoft Office 365

Worry less

Work easier

Work together

What's is Office 365 Business Premium?

Easily create and edit professional documents real-time with colleagues

Word PowerPoint
Excel OneNote
Outlook Publisher

Desktop Mobile Online

Securely store, share and sync files across all your devices

OneDrive for Business

Work management, digital storytelling, search and discovery

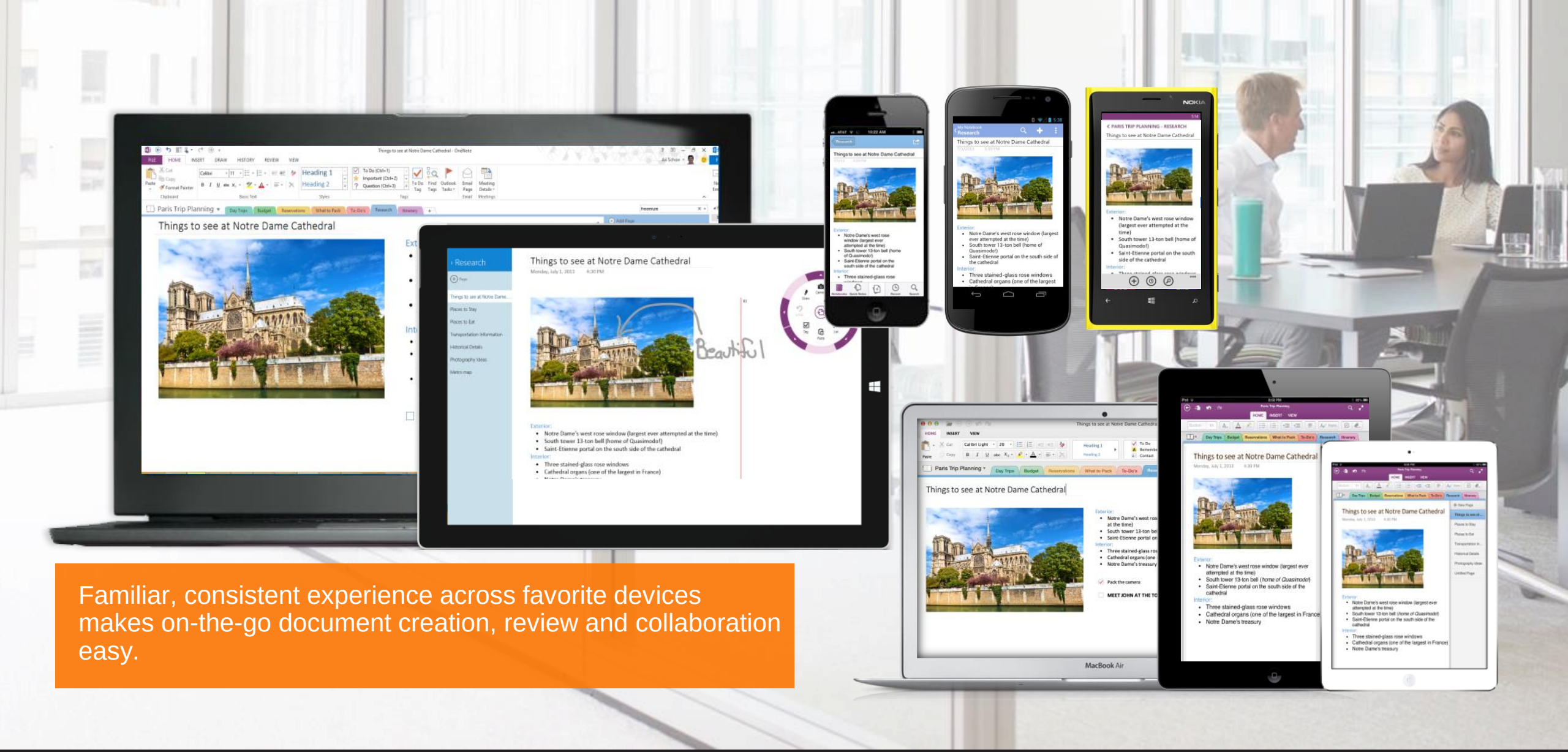
Office Delve Sway
Planner

Communicate and work together from anywhere. Securely share data and docs with colleagues, customers, suppliers.

Exchange Online OneDrive for Business
Skype for Business
SharePoint Online yammer

All you need for best-in-class productivity.

Office 365



Familiar, consistent experience across favorite devices makes on-the-go document creation, review and collaboration easy.

Cross-platform experiences

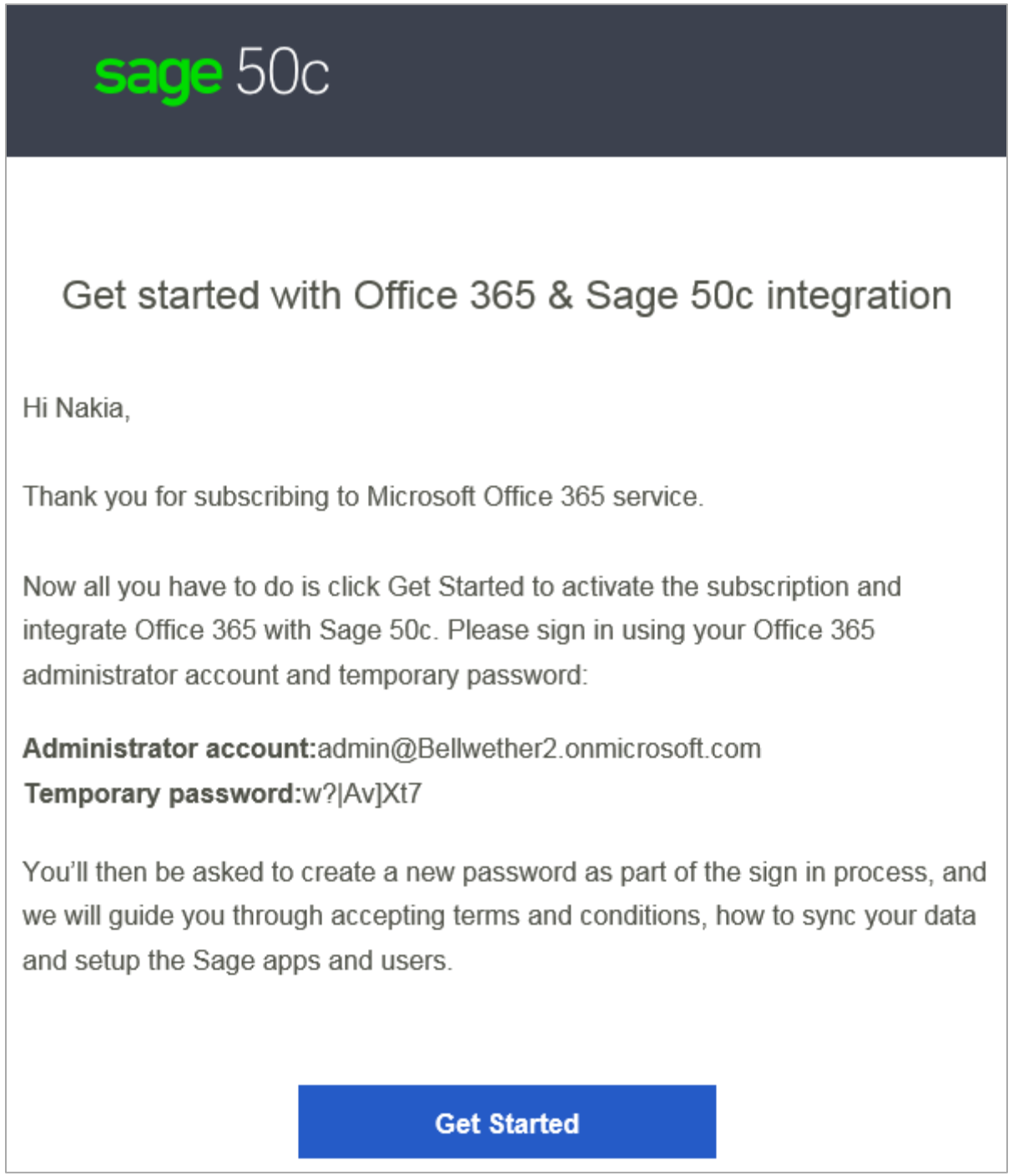
Office 365

Sage 50c and Office 365 Integration

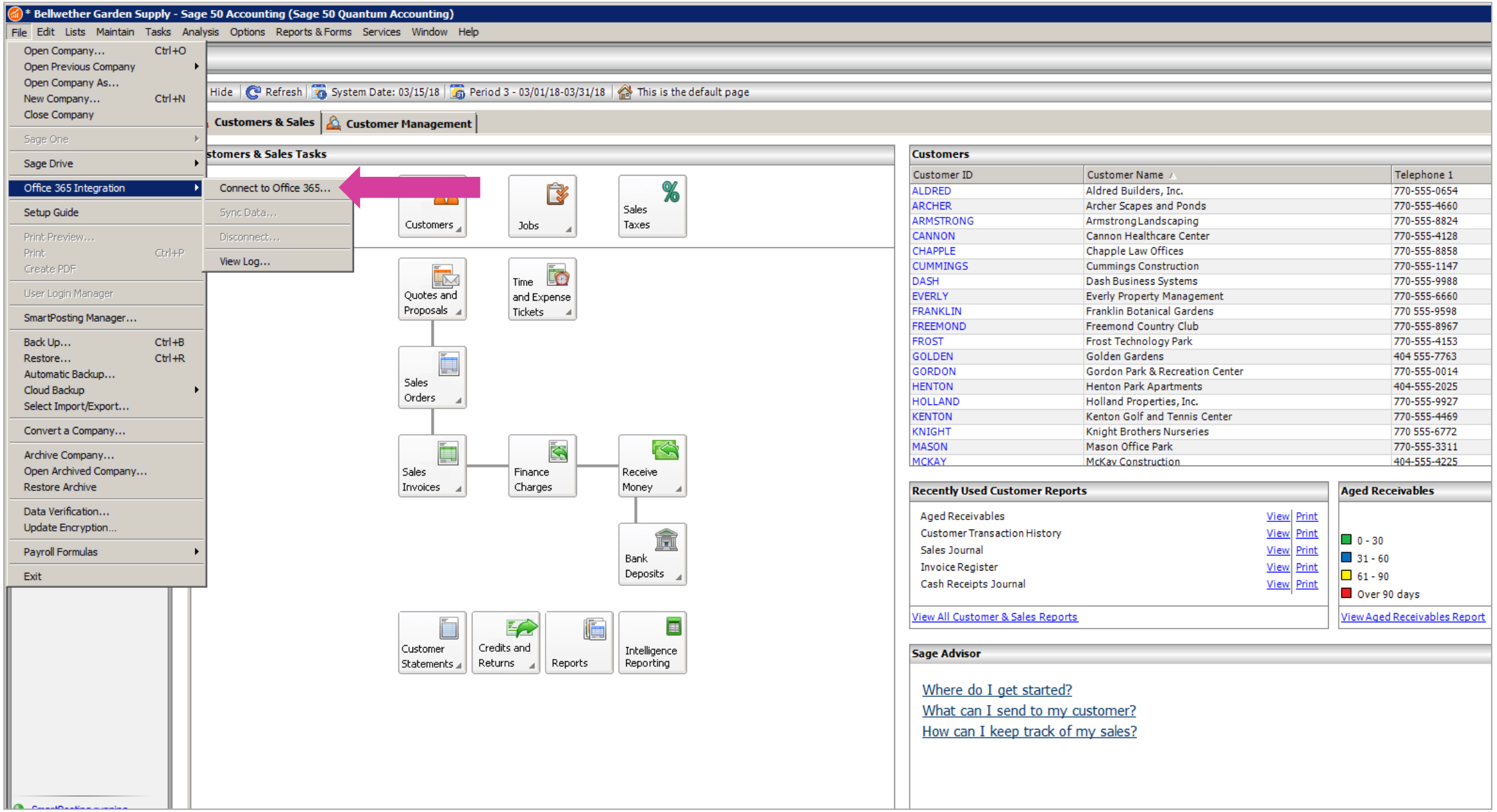
Integration approach

- Sage 50c integration with Microsoft Office 365 empowers you with a **fully integrated and collaborative solution** to streamline day to day business needs.
  - **Sage Contact** – sync your Sage 50 contacts (customers & vendors) with Outlook and view account balance, credit limit, contact details, invoices, and payments
  - **Sage Cloud Backup** – schedule and store backups offsite in the cloud
  - **Microsoft Office 365 Business Premium –** cloud access to all the core Microsoft solutions

Get started with Sage 50c and Office 365


sage 50c
Get started with Office 365 & Sage 50c integration
Hi Nakia,
Thank you for subscribing to Microsoft Office 365 service.
Now all you have to do is click Get Started to activate the subscription and integrate Office 365 with Sage 50c. Please sign in using your Office 365 administrator account and temporary password:
Administrator account:admin@Bellwether2.onmicrosoft.com
Temporary password:w?|Av]Xt7
You'll then be asked to create a new password as part of the sign in process, and we will guide you through accepting terms and conditions, how to sync your data and setup the Sage apps and users.
Get Started

Connect Sage 50c to Office 365


* Bellwether Garden Supply - Sage 50 Accounting (Sage 50 Quantum Accounting)
File Edit Lists Maintain Tasks Analysis Options Reports & Forms Services Window Help
Open Company... Ctrl+O
Open Previous Company
Open Company As...
New Company... Ctrl+N
Close Company
Sage One
Sage Drive
Office 365 Integration
Setup Guide
Print Preview...
Print Ctrl+P
Create PDF
User Login Manager
SmartPosting Manager...
Back Up... Ctrl+B
Restore... Ctrl+R
Automatic Backup...
Cloud Backup
Select Import/Export...
Convert a Company...
Archive Company...
Open Archived Company...
Restore Archive
Data Verification...
Update Encryption...
Payroll Formulas
Exit
Connect to Office 365...
Sync Data...
Disconnect...
View Log...
Hide Refresh System Date: 03/15/18 Period 3 - 03/01/18-03/31/18 This is the default page
Customers & Sales
Customer Management
stomers & Sales Tasks
Customers
Jobs
Sales Taxes
Quotes and Proposals
Time and Expense Tickets
Sales Orders
Sales Invoices
Finance Charges
Receive Money
Bank Deposits
Customer Statements
Credits and Returns
Reports
Intelligence Reporting
Customers
Customer ID
Customer Name
Telephone 1
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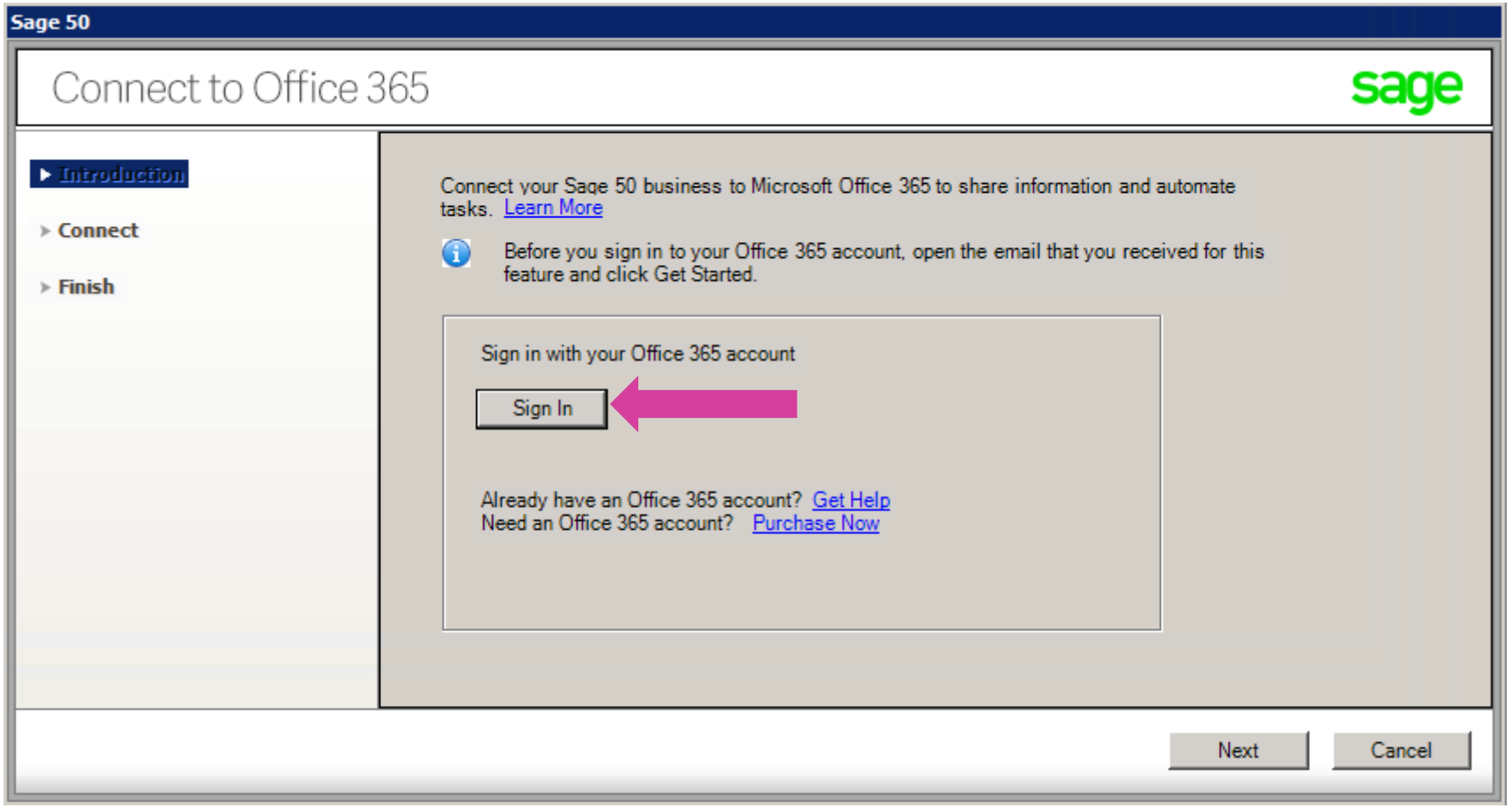
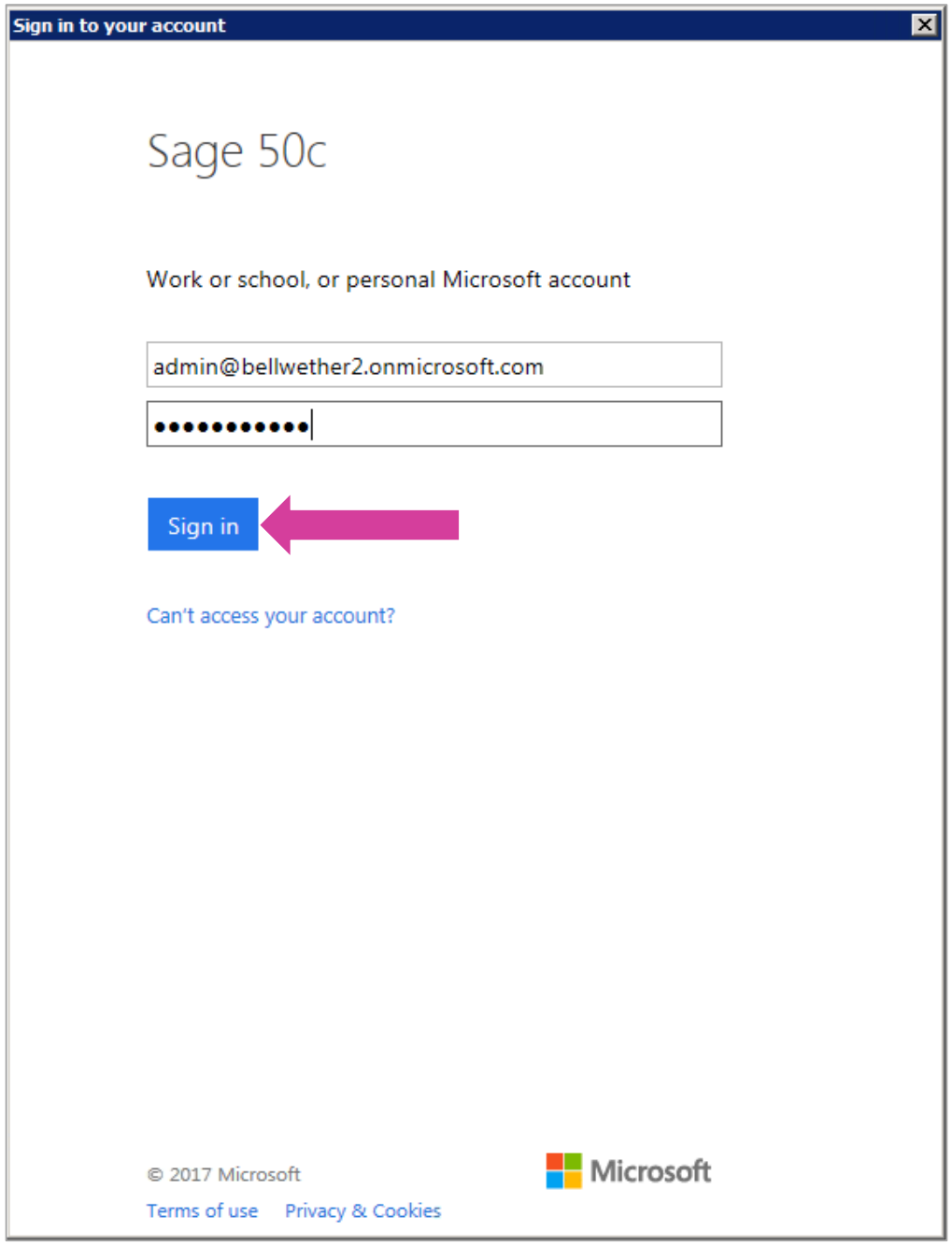
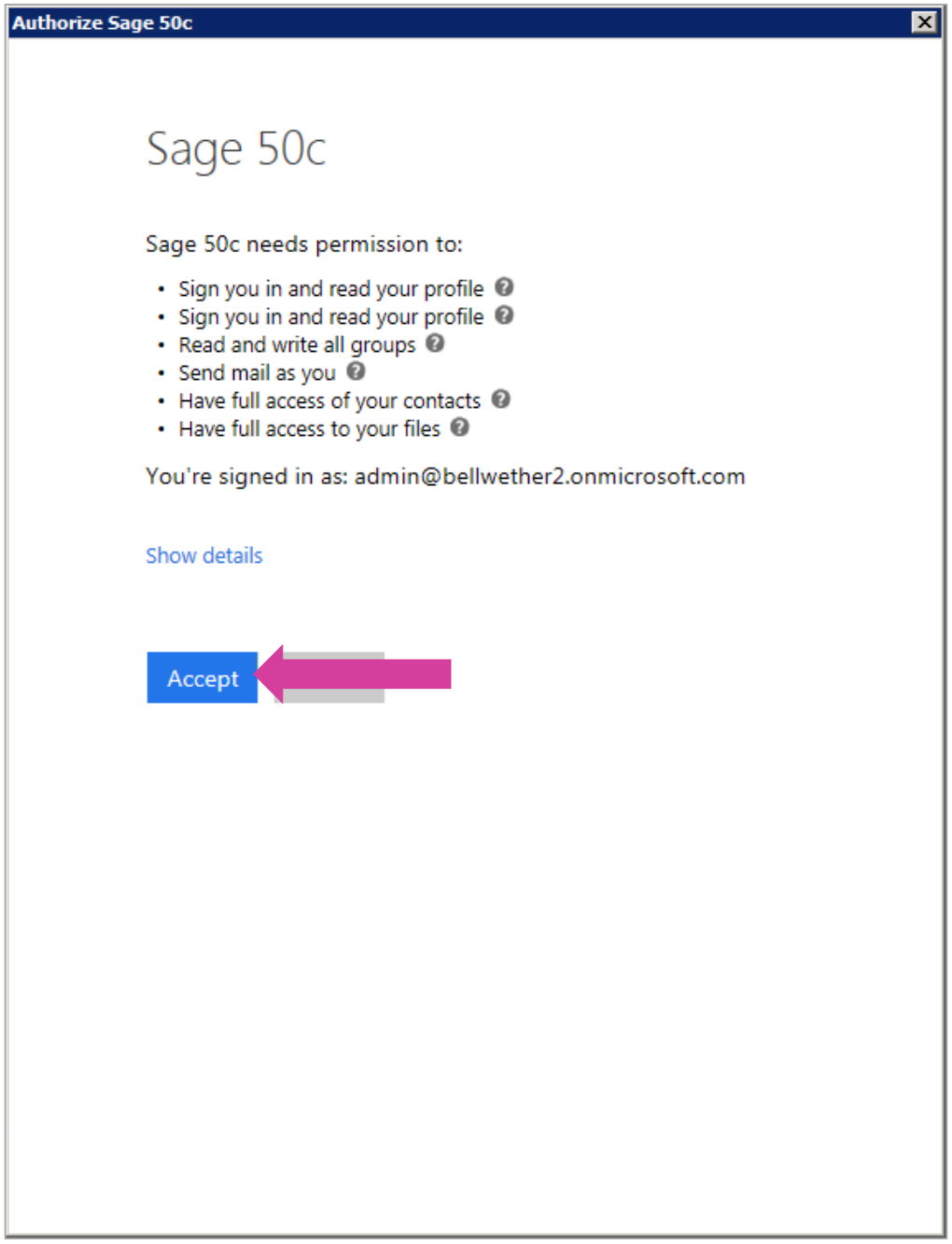
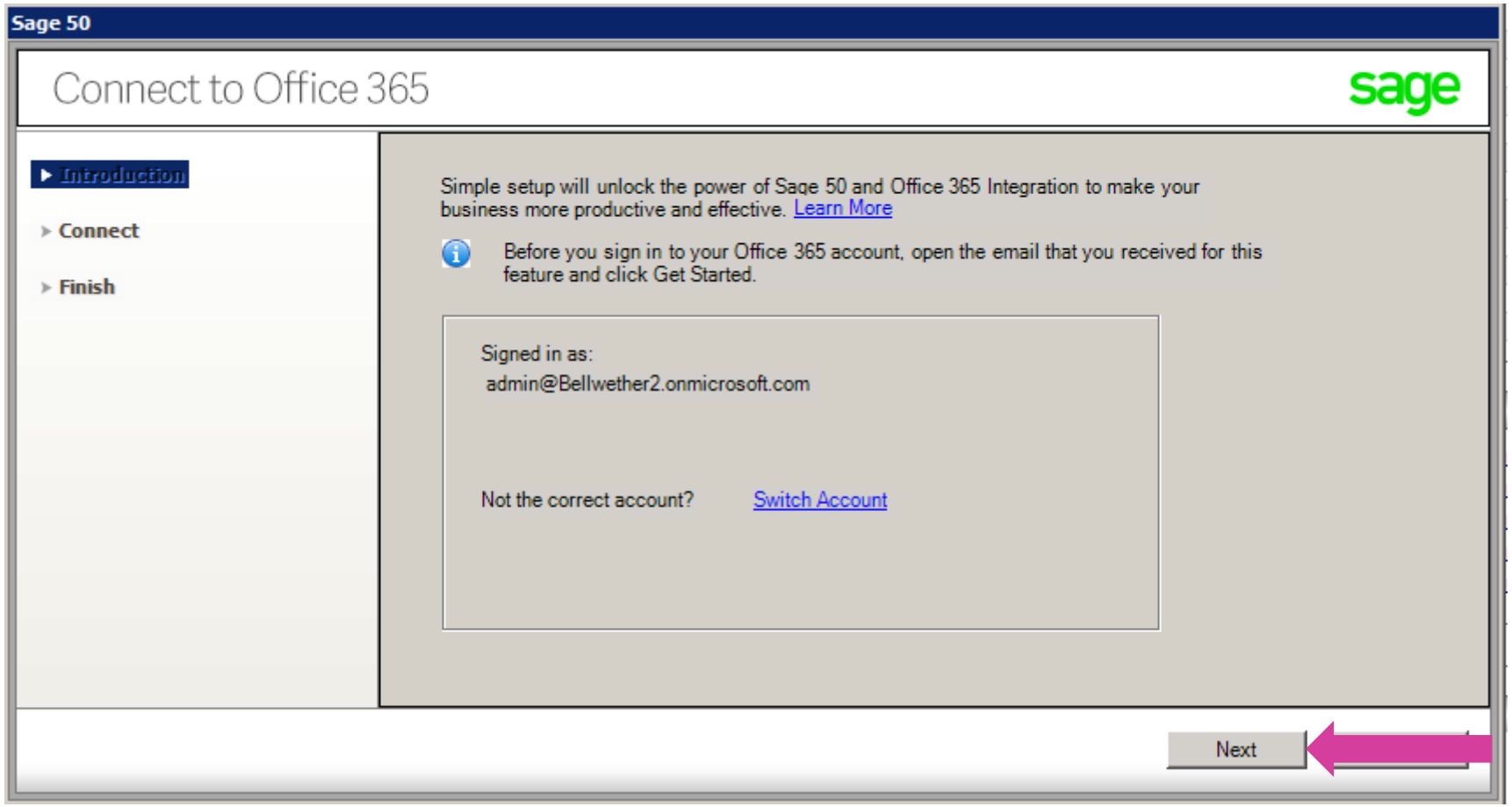
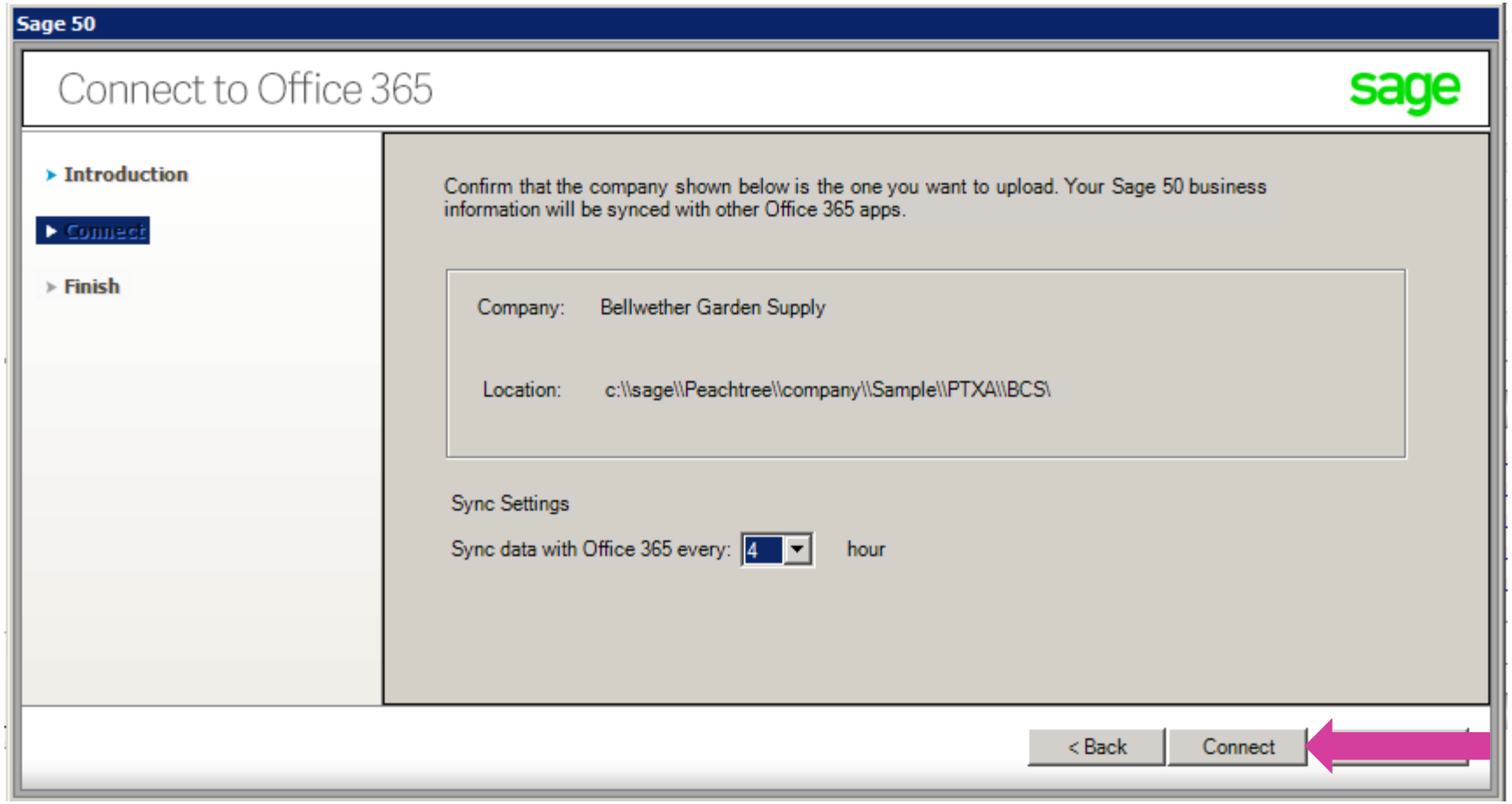
KNIGHT Knight Brothers Nurseries 770 555-6772
MASON Mason Office Park 770-555-3311
MCKAY McKay Construction 404-555-4225
Recently Used Customer Reports
Aged Receivables View Print
Customer Transaction History View Print
Sales Journal View Print
Invoice Register View Print
Cash Receipts Journal View Print
View All Customer & Sales Reports
Aged Receivables
0 - 30
31 - 60
61 - 90
Over 90 days
View Aged Receivables Report
Sage Advisor
Where do I get started?
What can I send to my customer?
How can I keep track of my sales?

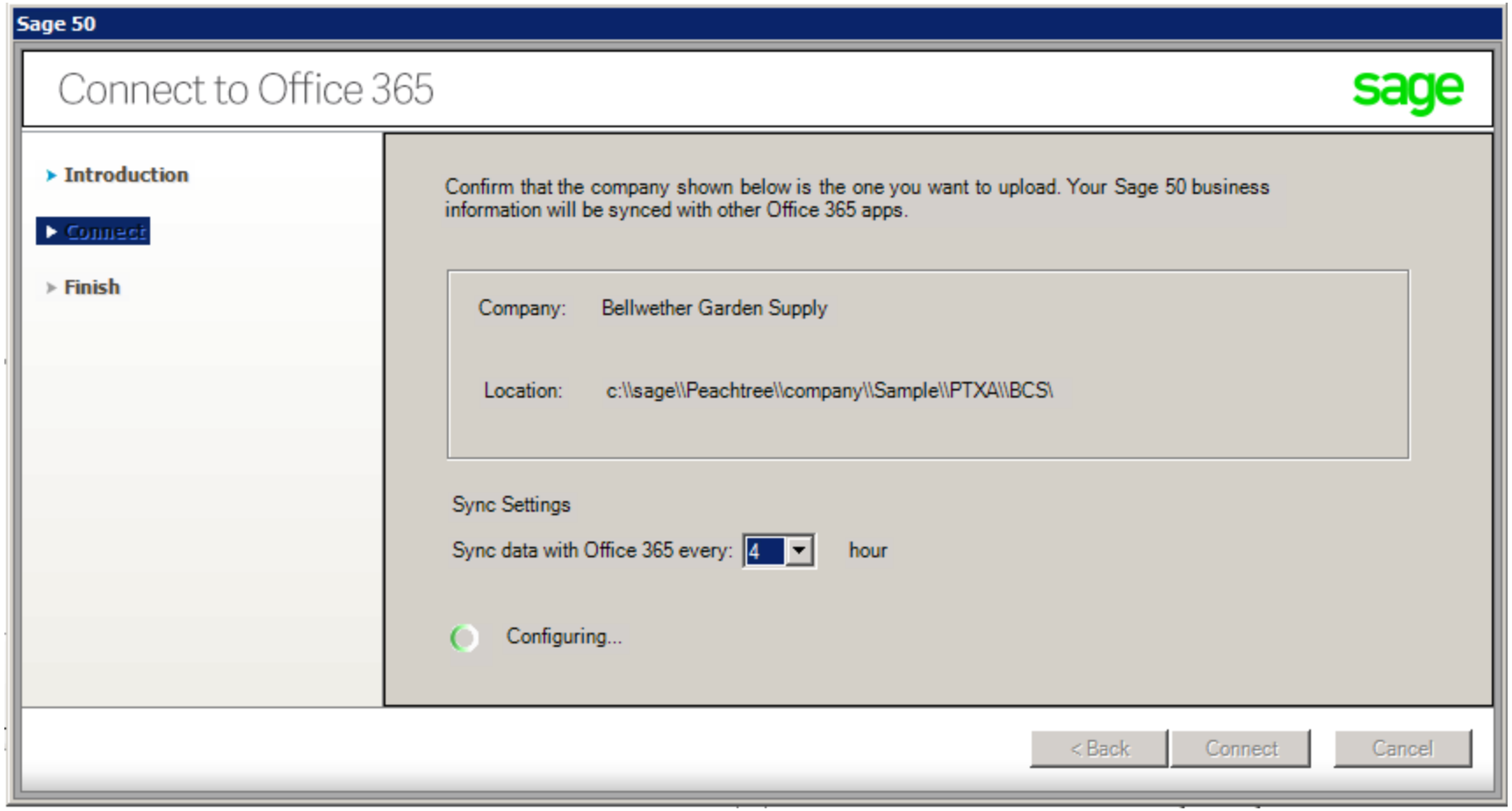

Sage 50
Connect to Office 365
sage
Introduction
Connect
Finish
Connect your Sage 50 business to Microsoft Office 365 to share information and automate tasks. Learn More
Before you sign in to your Office 365 account, open the email that you received for this feature and click Get Started.
Sign in with your Office 365 account
Sign In
Already have an Office 365 account? Get Help
Need an Office 365 account? Purchase Now
Next
Cancel


Sign in to your account
Sage 50c
Work or school, or personal Microsoft account
admin@bellwether2.onmicrosoft.com
Sign in
Can't access your account?
© 2017 Microsoft
Terms of use
Privacy & Cookies
Microsoft


Authorize Sage 50c
Sage 50c
Sage 50c needs permission to:
Sign you in and read your profile
Sign you in and read your profile
Read and write all groups
Send mail as you
Have full access of your contacts
Have full access to your files
You're signed in as: admin@bellwether2.onmicrosoft.com
Show details
Accept


Sage 50
Connect to Office 365
sage
Introduction
Connect
Finish
Simple setup will unlock the power of Sage 50 and Office 365 Integration to make your business more productive and effective. Learn More
Before you sign in to your Office 365 account, open the email that you received for this feature and click Get Started.
Signed in as:
admin@Bellwether2.onmicrosoft.com
Not the correct account?
Switch Account
Next


Sage 50
Connect to Office 365
sage
Introduction
Connect
Finish
Confirm that the company shown below is the one you want to upload. Your Sage 50 business information will be synced with other Office 365 apps.
Company: Bellwether Garden Supply
Location: c:\\sage\\Peachtree\\company\\Sample\\PTXA\\BCS\
Sync Settings
Sync data with Office 365 every: 4 hour
< Back
Connect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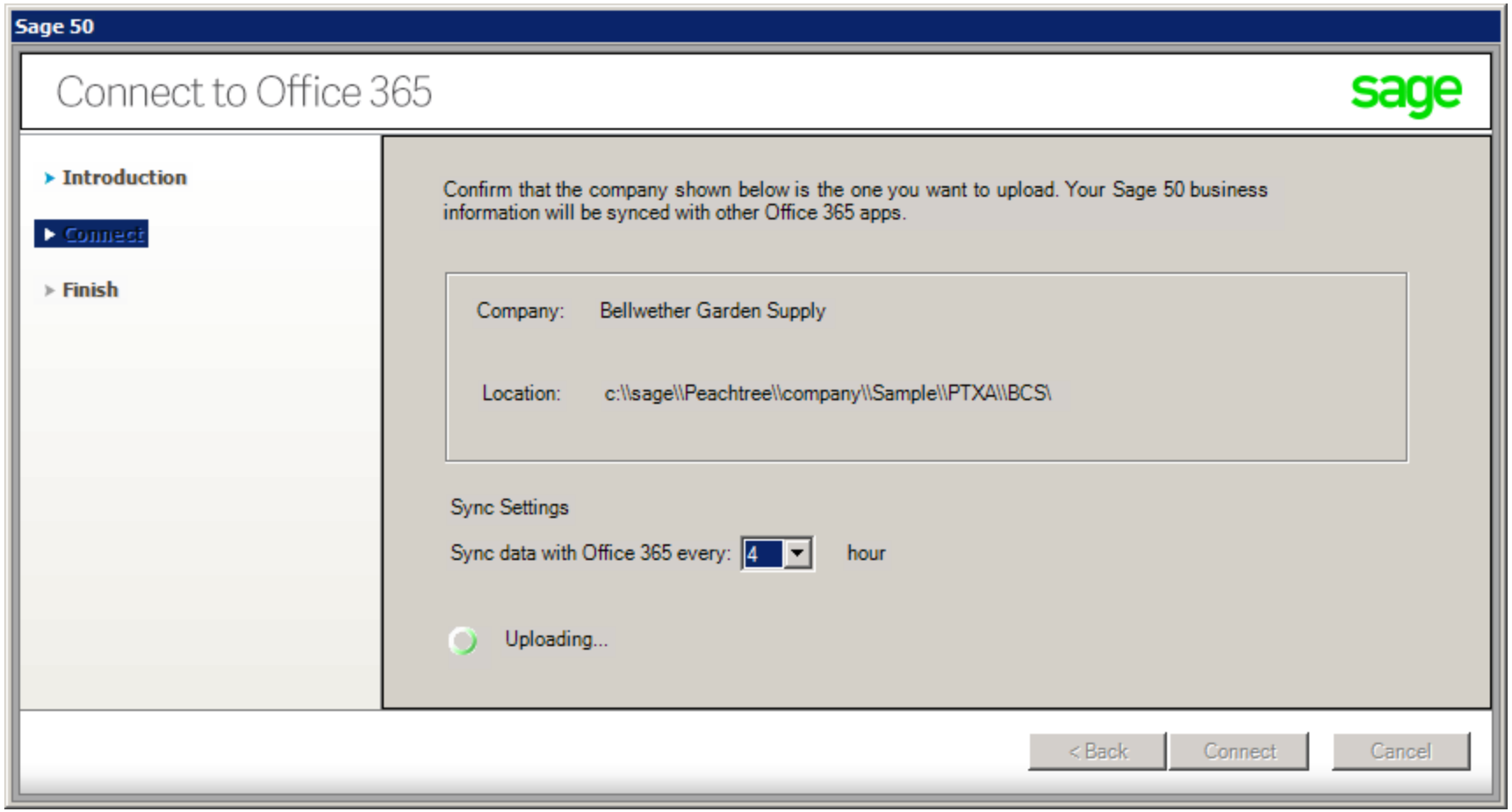
Configuring...
< Back
Connect
Cancel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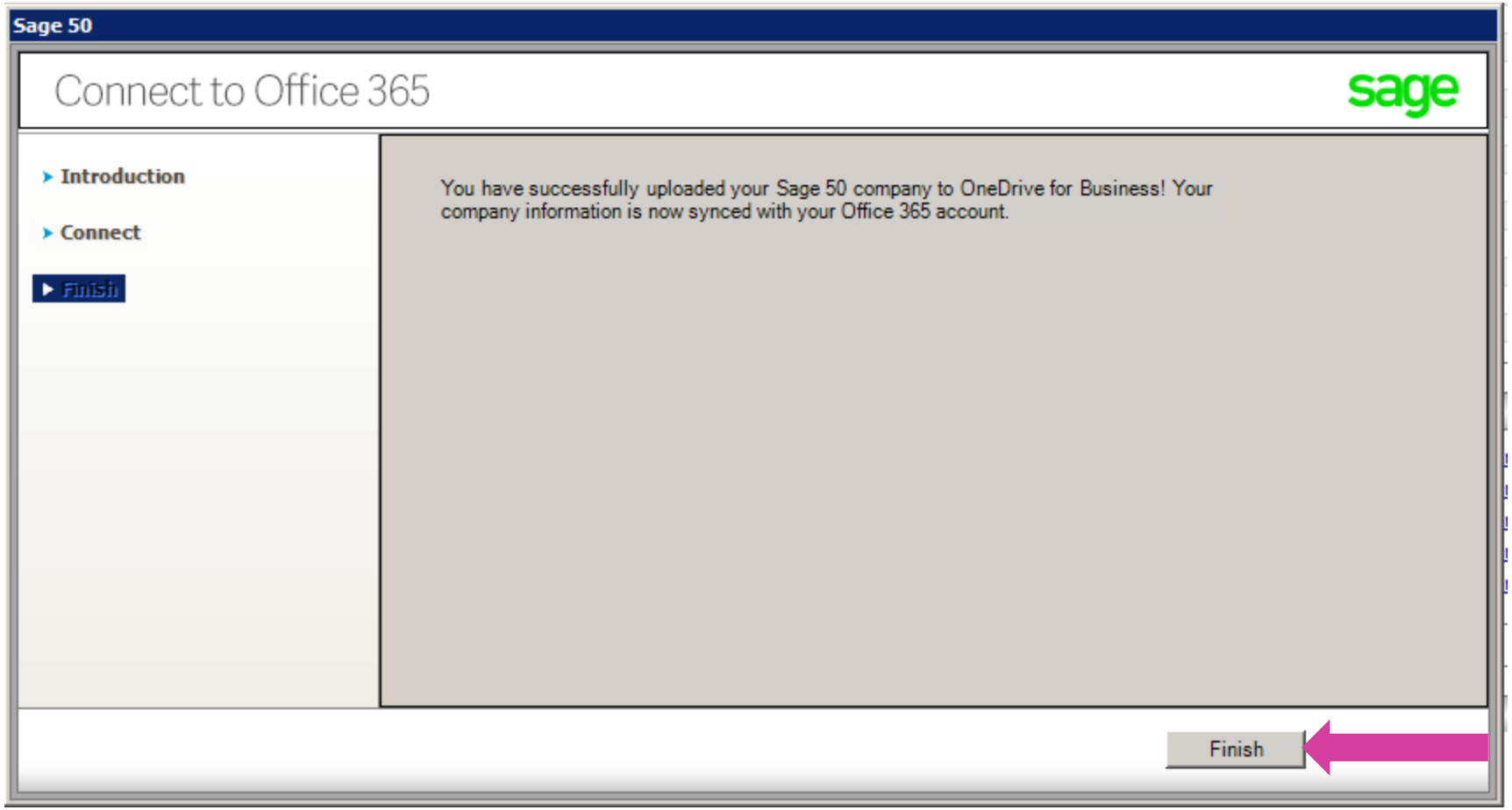
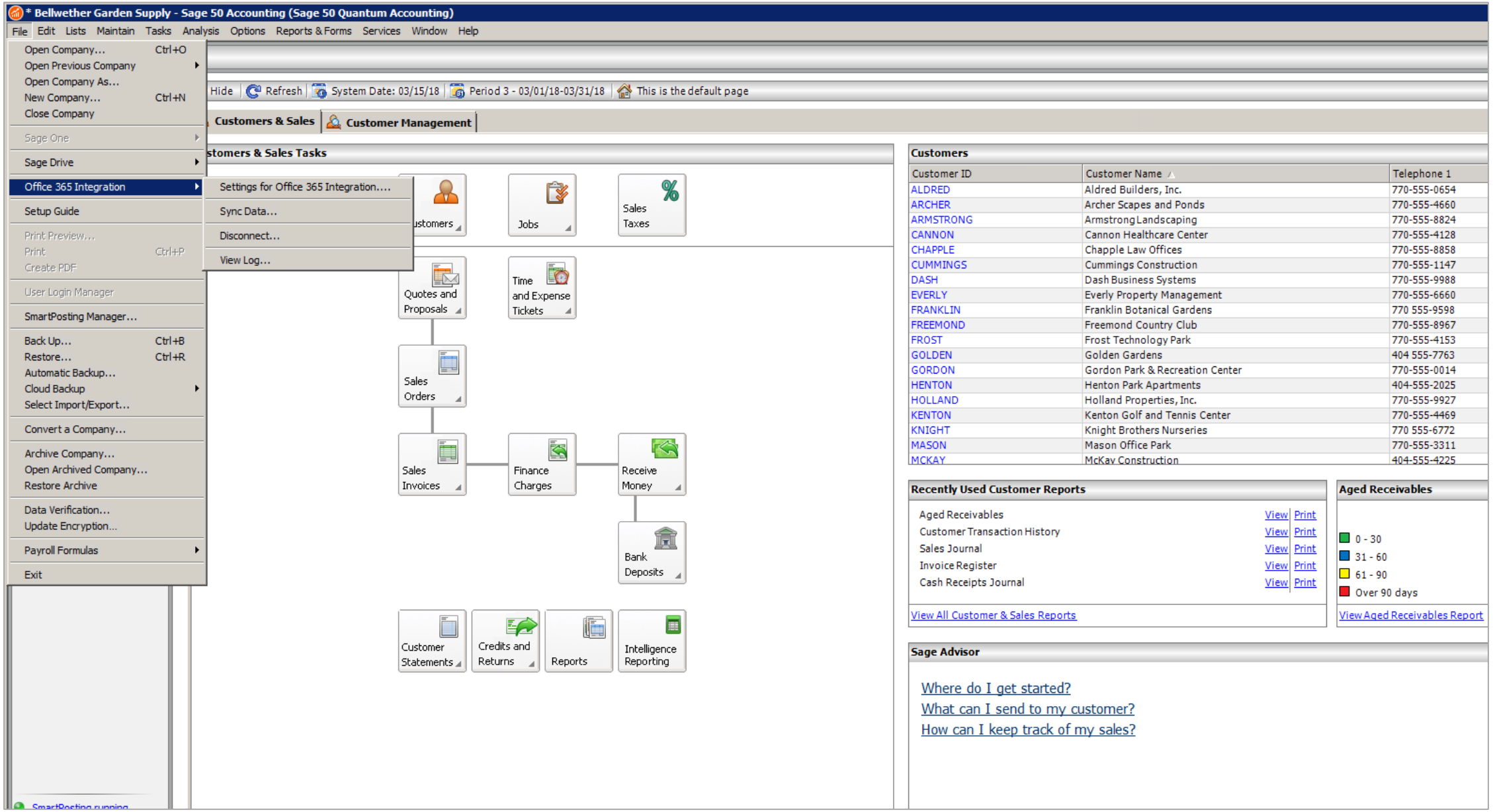
Company: Bellwether Garden Supply
Location: c:\\sage\\Peachtree\\company\\Sample\\PTXA\\BCS\
Sync Settings
Sync data with Office 365 every: 4 hour
Uploading...
< Back
Connect
Cancel


Sage 50
Connect to Office 365
sage
Introduction
Connect
Finish
You have successfully uploaded your Sage 50 company to OneDrive for Business! Your company information is now synced with your Office 365 account.
Finish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Print Ctrl+P
Create PDF
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SmartPosting Manager...
Back Up... Ctrl+B
Restore... Ctrl+R
Automatic Backup...
Cloud Backup
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Archive Company...
Open Archived Company...
Restore Archive
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Customers & Sales
Customer Management
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Jobs
Sales Taxes
Quotes and Proposals
Time and Expense Tickets
Sales Orders
Sales Invoices
Finance Charges
Receive Money
Bank Deposits
Customer Statements
Credits and Returns
Reports
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Invoice Register View Print
Cash Receipts Journal View Print
View All Customer & Sales Reports
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0 - 30
31 - 60
61 - 90
Over 90 days
View Aged Receivables Report
Sage Advisor
Where do I get started?
What can I send to my customer?
How can I keep track of my sales?
SmartPosting running

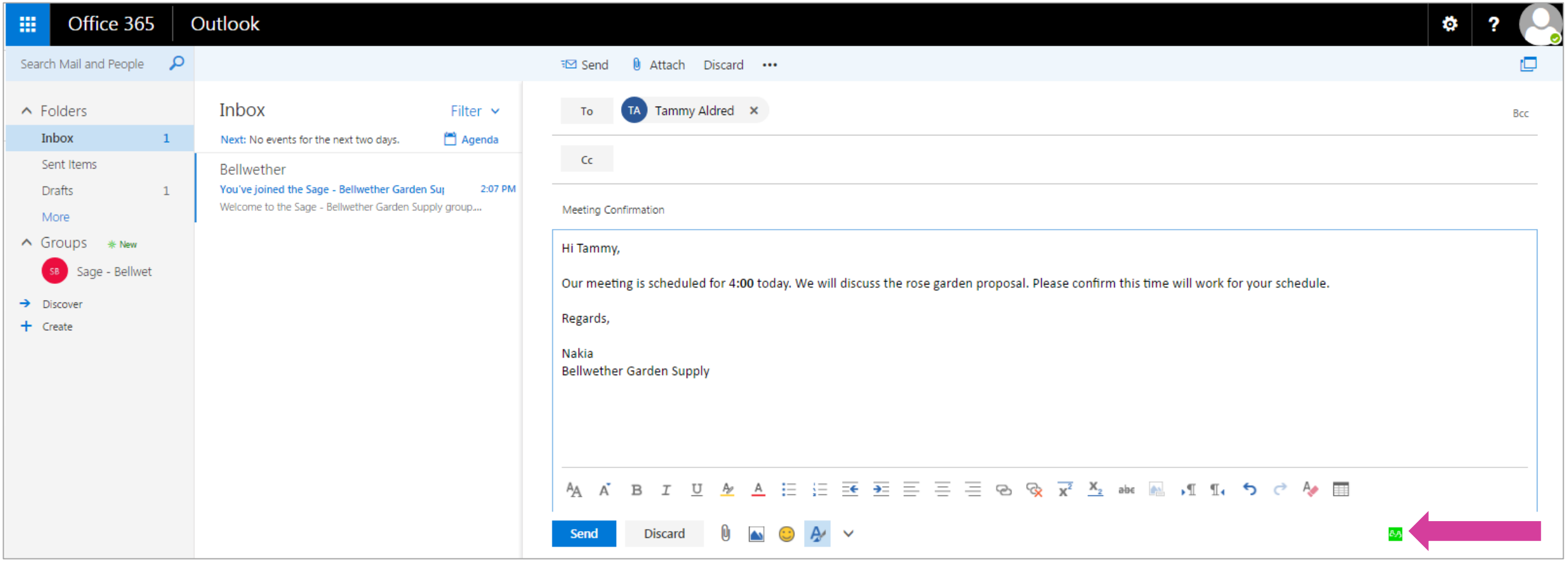
Polling question

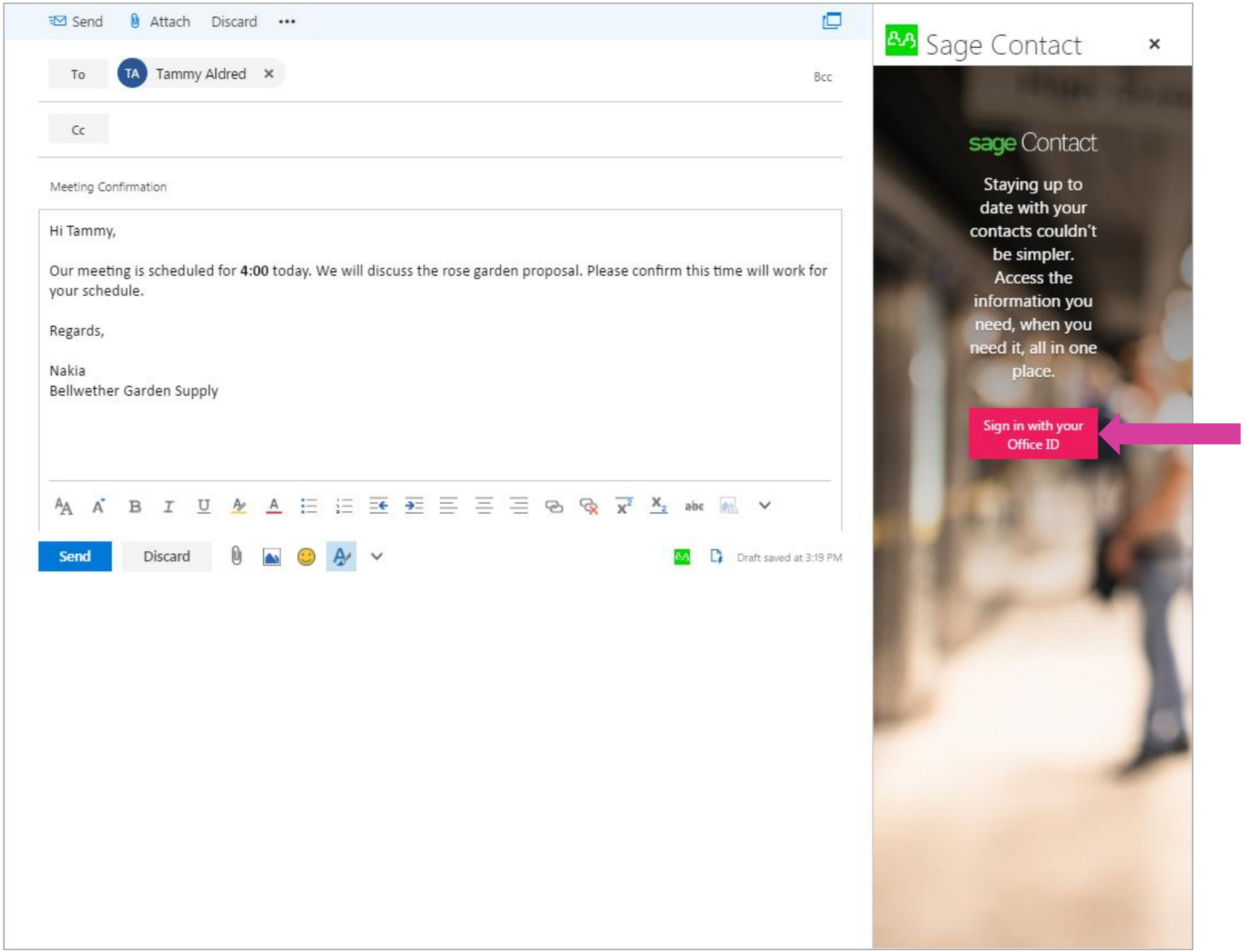
Do you spend time manually looking up contacts in your Outlook to use in Sage 50 or vice versa?

a) Yes

b) No

Sage Contact


Office 365
Outlook
Search Mail and People
Send
Attach
Discard
Folders
Inbox 1
Sent Items
Drafts 1
More
Groups New
Sage - Bellwet
Discover
Create
Inbox
Filter
Next: No events for the next two days.
Agenda
Bellwether
You've joined the Sage - Bellwether Garden Su
2:07 PM
Welcome to the Sage - Bellwether Garden Supply group....
To
TA
Tammy Aldred
Bcc
Cc
Meeting Confirmation
Hi Tammy,
Our meeting is scheduled for 4:00 today. We will discuss the rose garden proposal. Please confirm this time will work for your schedule.
Regards,
Nakia
Bellwether Garden Supply
Send
Discard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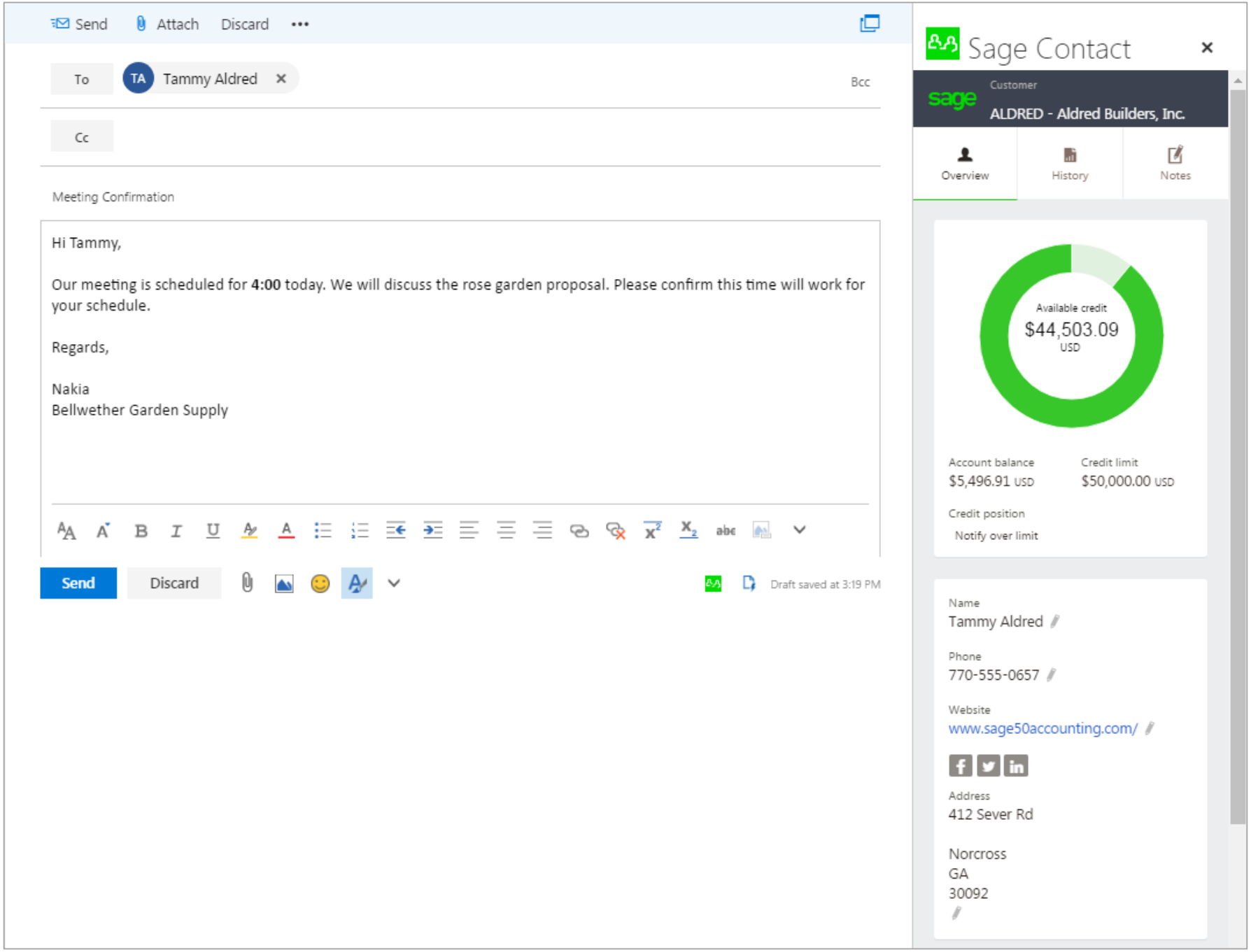
Send
Discard
Draft saved at 3:19 PM
Sage Contact
sage Contact
Staying up to date with your contacts couldn't be simpler. Access the information you need, when you need it, all in one place.
Sign in with your Office ID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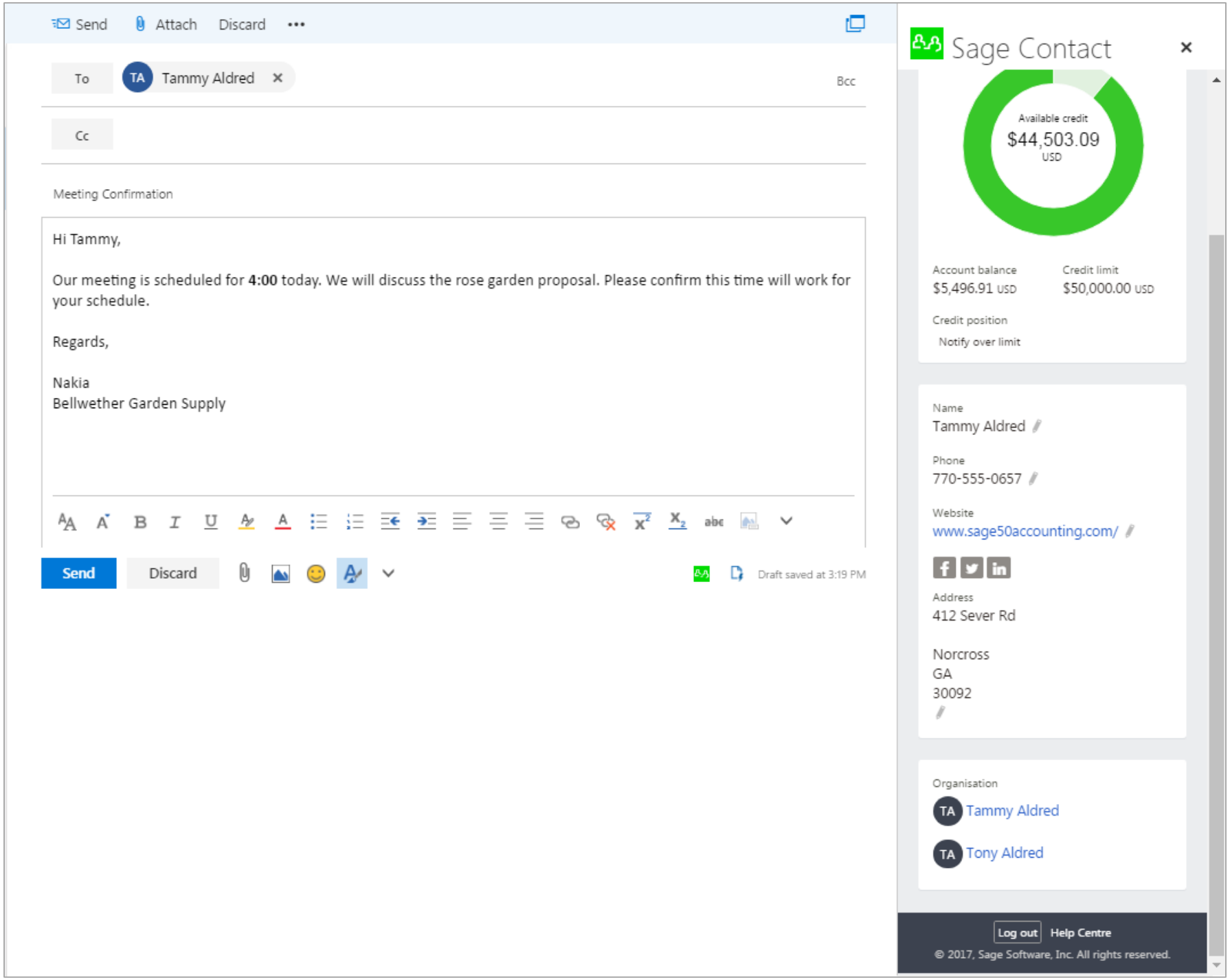
Regards,
Nakia
Bellwether Garden Supply
Send
Discard
Draft saved at 3:19 PM
Sage Contact
Customer
ALDRED - Aldred Builders, Inc.
Overview
History
Notes
Available credit
$44,503.09
USD
Account balance
$5,496.91 USD
Credit limit
$50,000.00 USD
Credit position
Notify over limit
Name
Tammy Aldred
Phone
770-555-0657
Website
www.sage50accounting.com/
Address
412 Sever Rd
Norcross
GA
30092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Bellwether Garden Supply
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Discard
Draft saved at 3:19 PM
Sage Contact
Available credit
$44,503.09
USD
Account balance
$5,496.91 USD
Credit limit
$50,000.00 USD
Credit position
Notify over limit
Name
Tammy Aldred
Phone
770-555-0657
Website
www.sage50accounting.com/
Address
412 Sever Rd
Norcross
GA
30092
Organisation
TA
Tammy Aldred
TA
Tony Aldred
Log out
Help Centre
© 2017, Sage Software, Inc. All rights reserved.

Send Attach Discard •••

To TA Tammy Aldred ×

Bcc

Cc

Meeting Confirmation

Hi Tammy,

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Regards,

Nakia
Bellwether Garden Supply

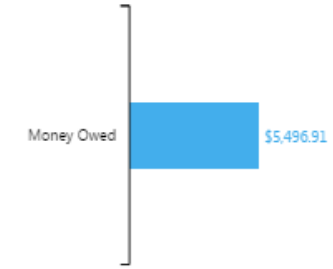
Send Discard

Draft saved at 3:19 PM

Sage Contact

Customer
ALDRED - Aldred Builders, Inc.

Overview History Notes



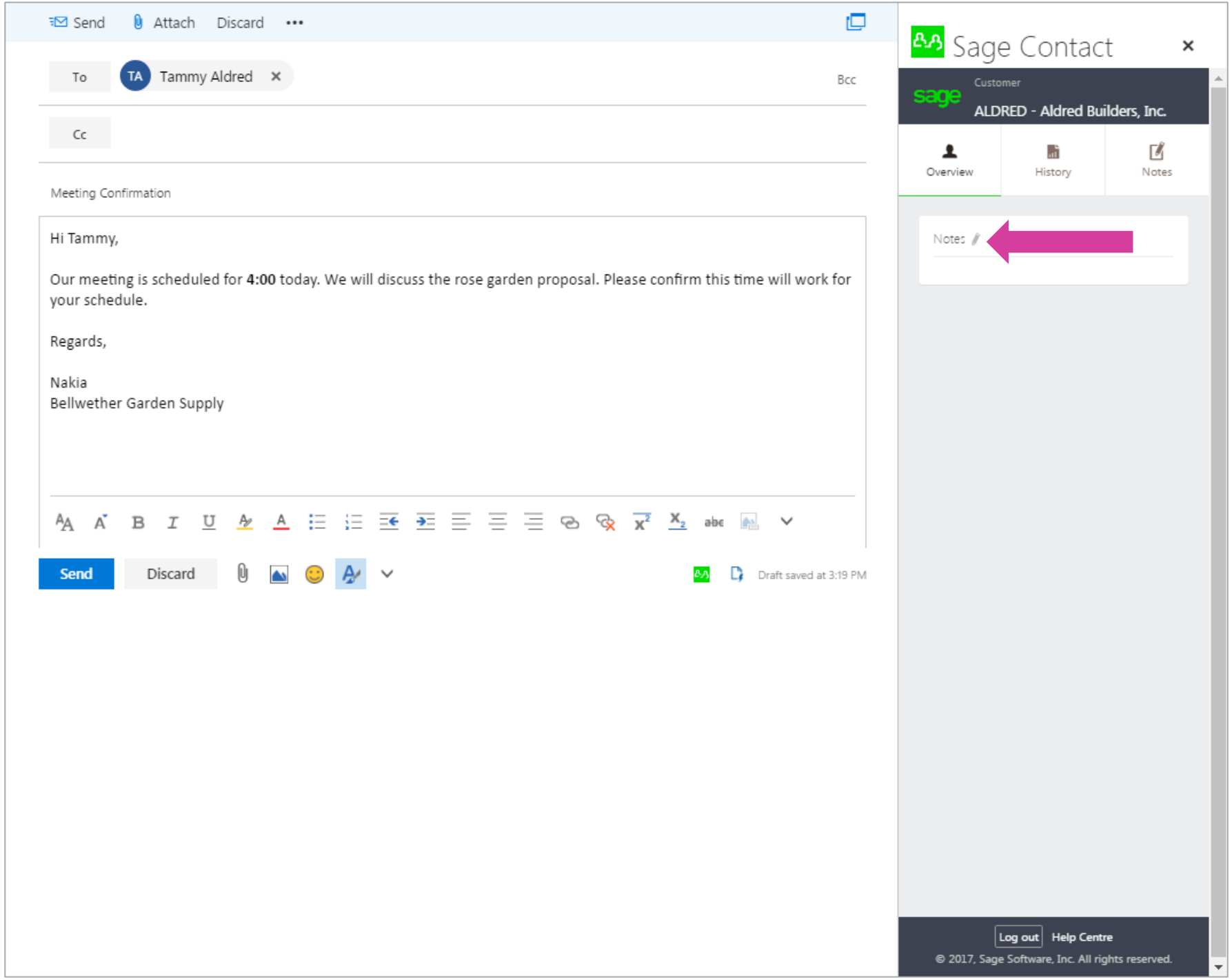
Average days to pay
0

Last 5 Invoices

Date	03/03/2018
Ref	10332
Details	Lawn and Turf Care Service
Amount	$129.97 USD
O/S	$69.97 USD
Date	02/14/2018
Ref	10129
Details	Topsoil 5lb. Bag
Amount	$5,426.94 USD
O/S	$5,426.94 USD

Last 5 Payments

Date	03/14/2018
Ref	12345
Details	
Amount	$60.00 USD


Send
Attach
Discard
To
TA
Tammy Aldred
Bcc
Cc
Meeting Confirmation
Hi Tammy,
Our meeting is scheduled for 4:00 today. We will discuss the rose garden proposal. Please confirm this time will work for your schedule.
Regards,
Nakia
Bellwether Garden Supply
Send
Discard
Draft saved at 3:19 PM
Sage Contact
Customer
ALDRED - Aldred Builders, Inc.
Overview
History
Notes
Notes
Log out
Help Centre
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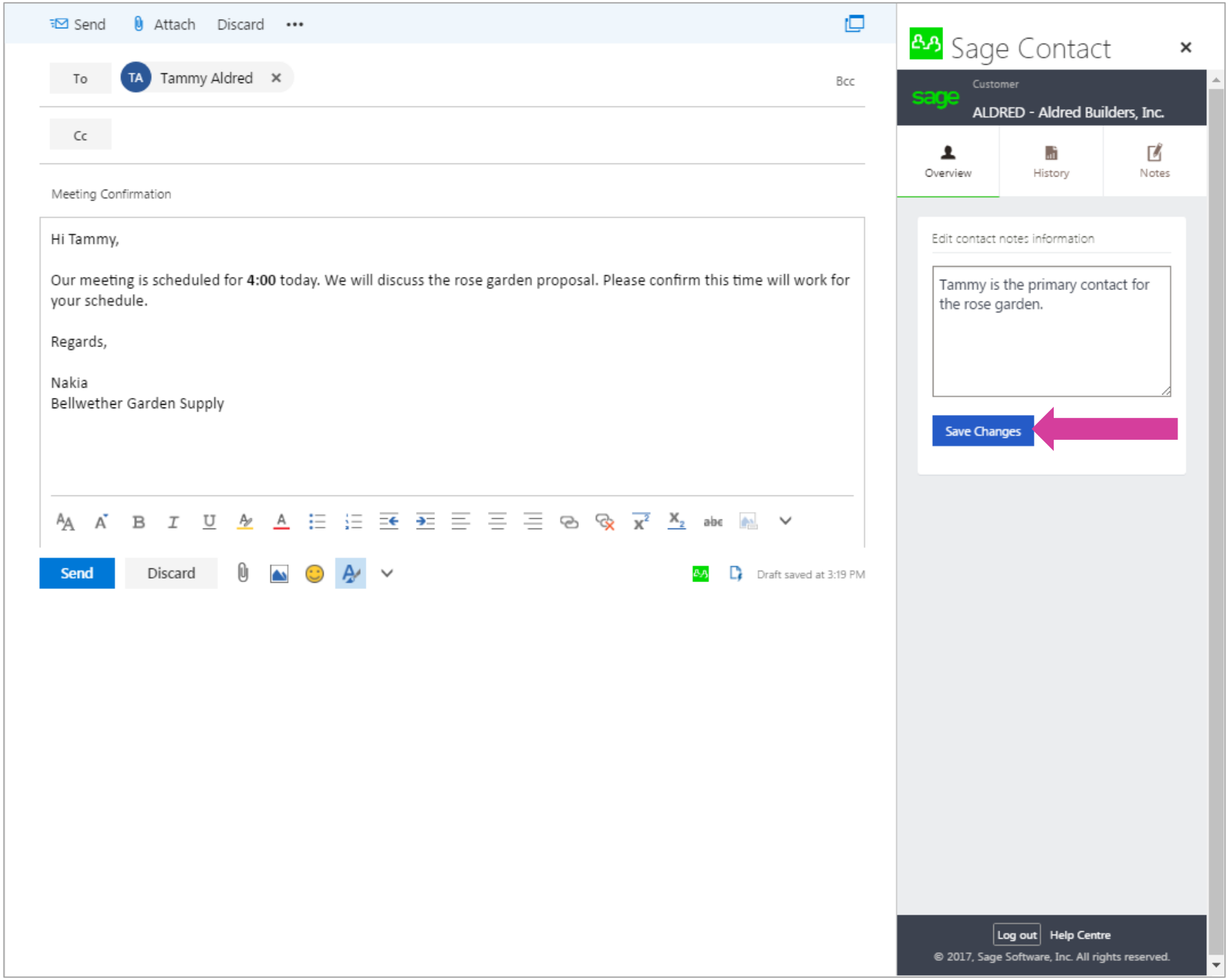
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Send
Discard
Draft saved at 3:19 PM
Sage Contact
Customer
ALDRED - Aldred Builders, Inc.
Overview
History
Notes
Edit contact notes information
Tammy is the primary contact for the rose garden.
Save Changes
Log out
Help Centre
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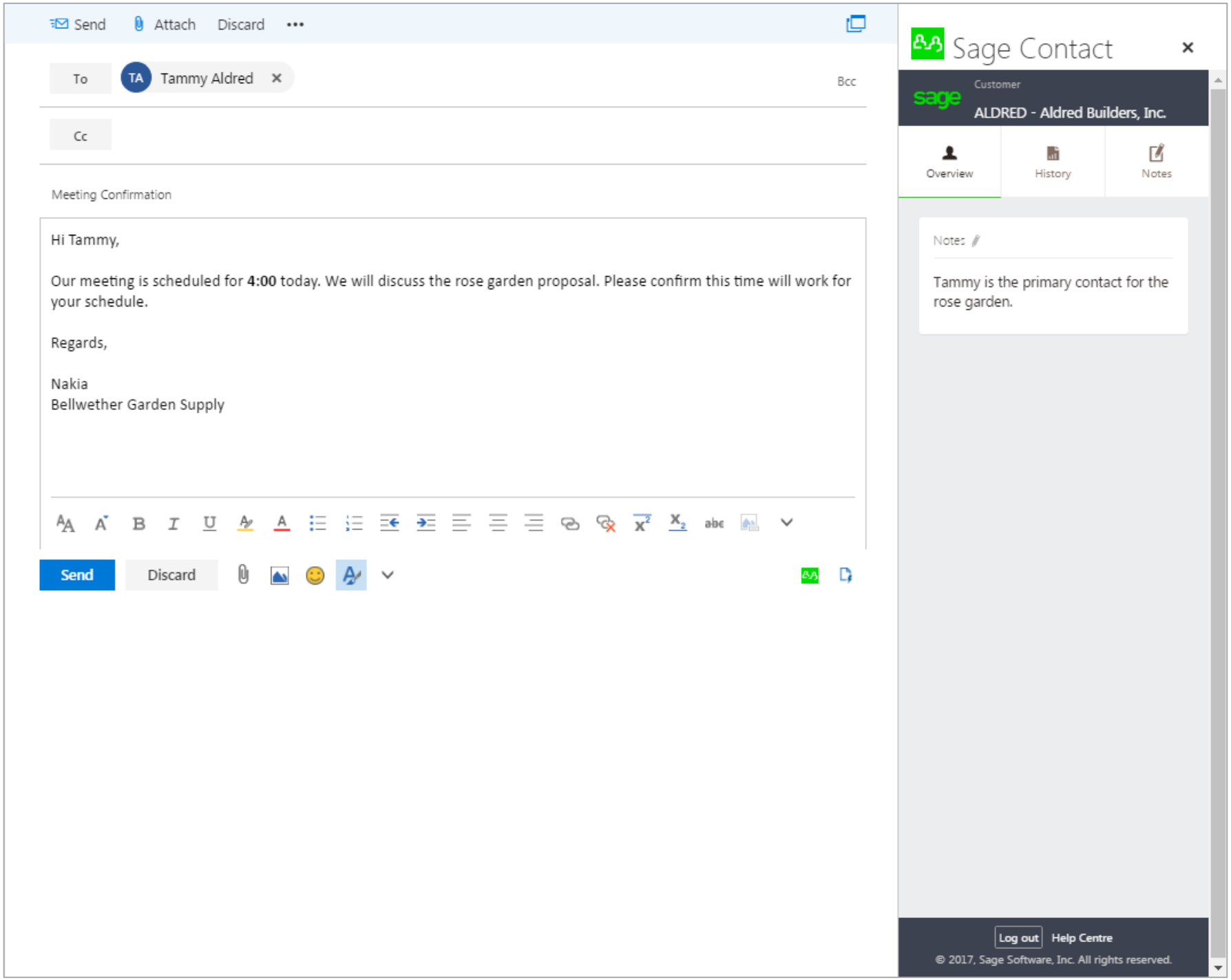
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Overview
History
Notes
Notes
Tammy is the primary contact for the rose garden.
Log out
Help Centre
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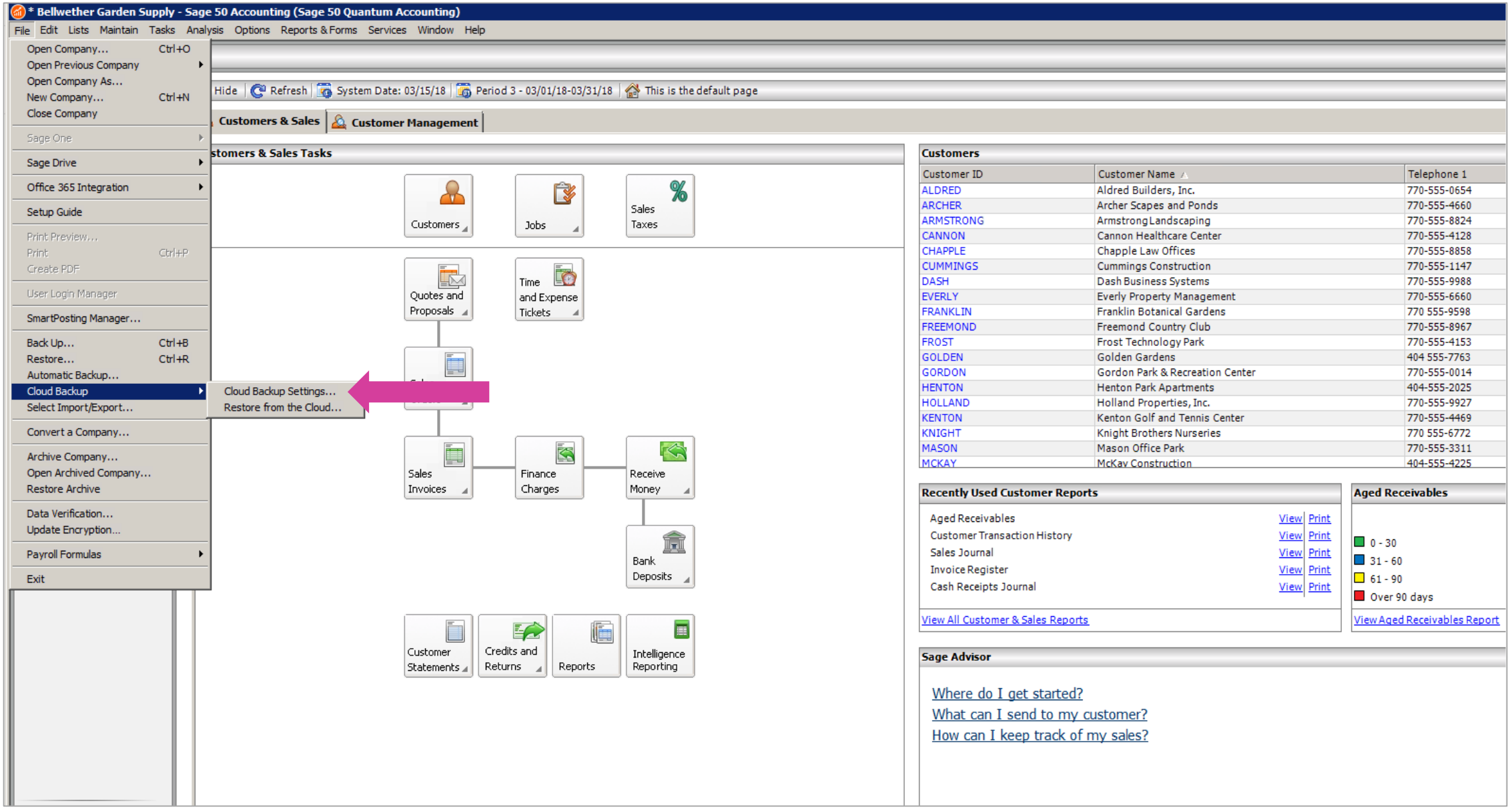
Polling question

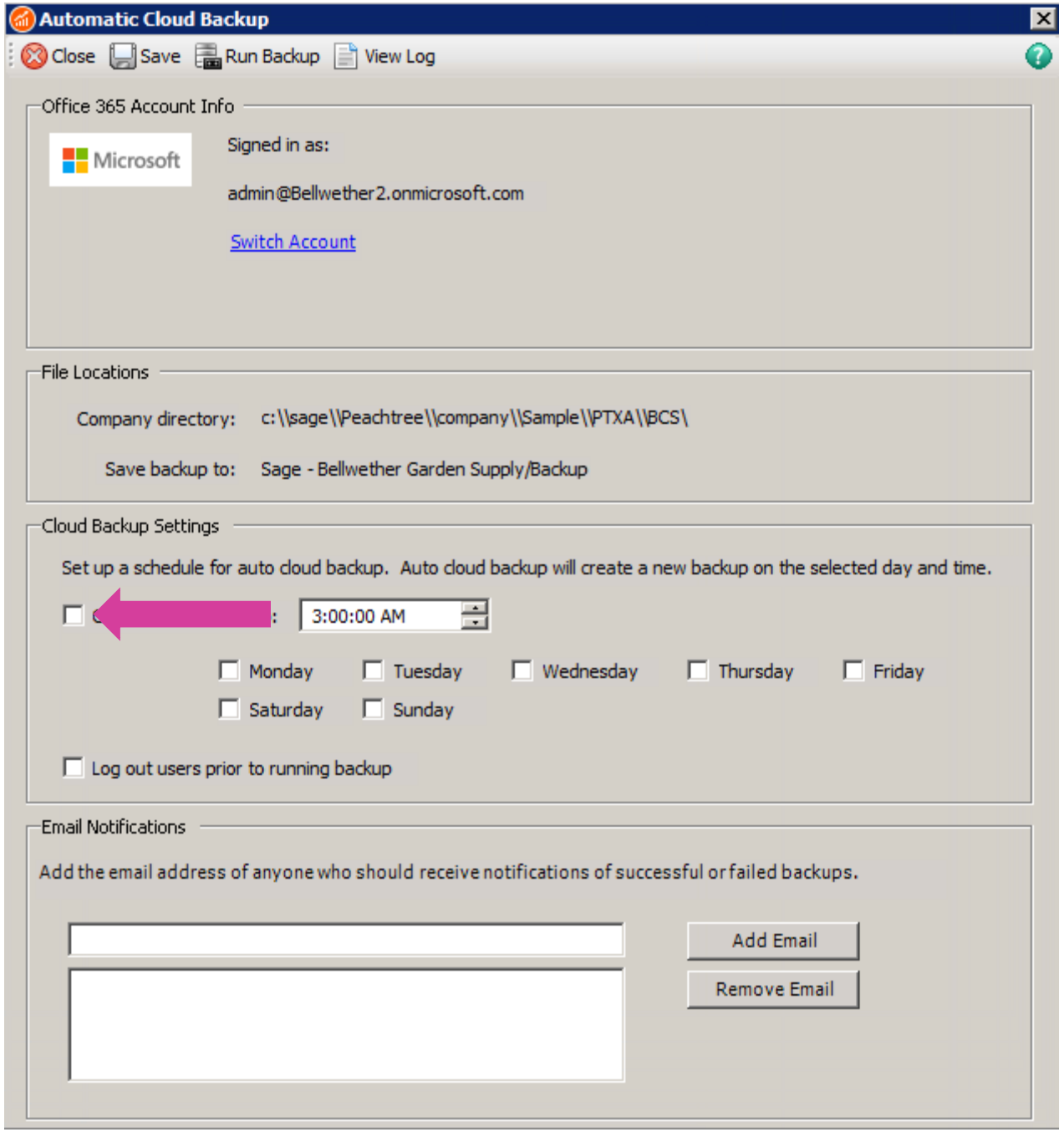
Do you backup your Sage 50 accounting data?

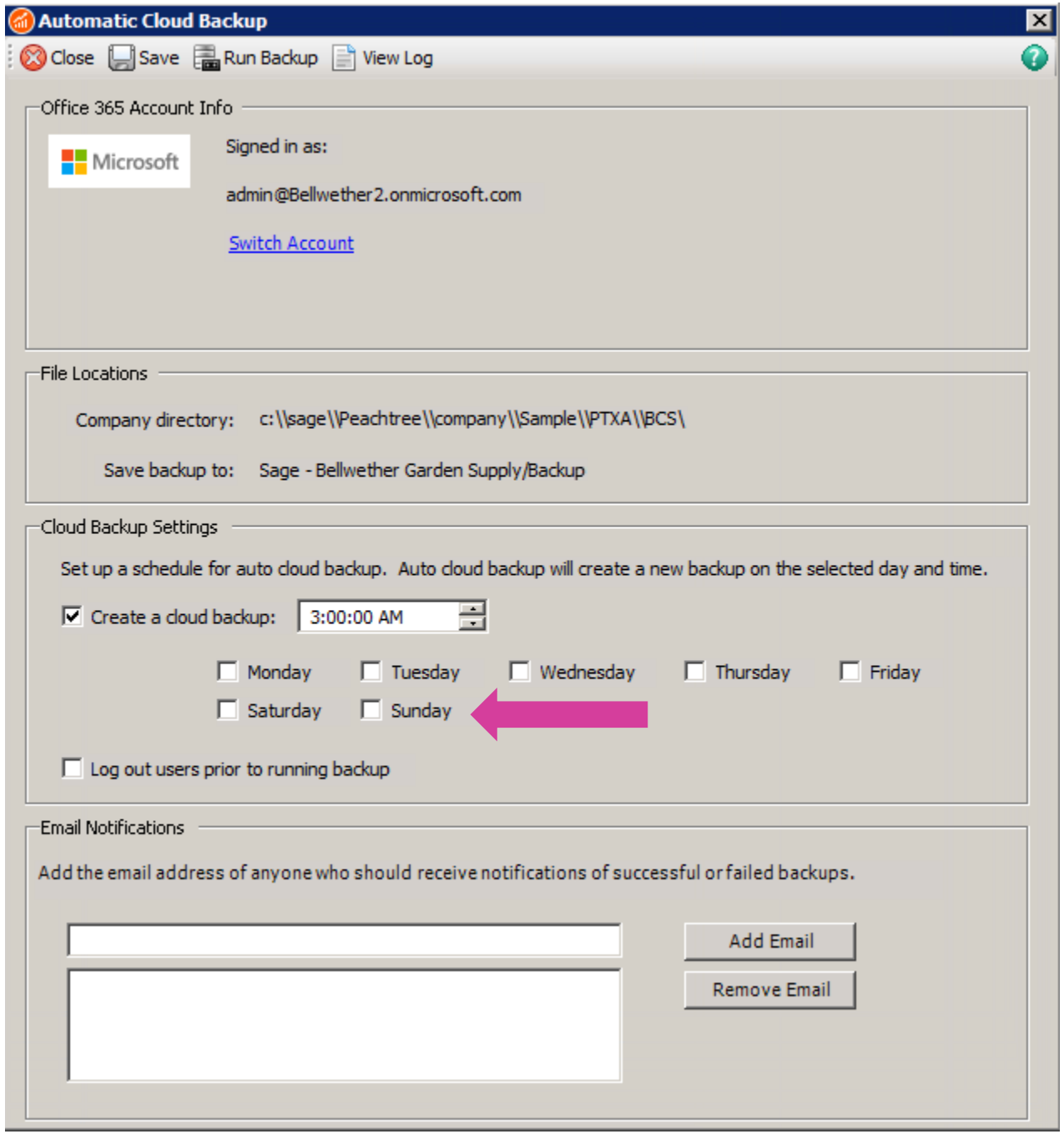
a) Yes

b) No

Cloud Backup


* Bellwether Garden Supply - Sage 50 Accounting (Sage 50 Quantum Accounting)
File Edit Lists Maintain Tasks Analysis Options Reports & Forms Services Window Help
Open Company... Ctrl+O
Open Previous Company
Open Company As...
New Company... Ctrl+N
Close Company
Sage One
Sage Drive
Office 365 Integration
Setup Guide
Print Preview...
Print Ctrl+P
Create PDF
User Login Manager
SmartPosting Manager...
Back Up... Ctrl+B
Restore... Ctrl+R
Automatic Backup...
Cloud Backup
Select Import/Export...
Convert a Company...
Archive Company...
Open Archived Company...
Restore Archive
Data Verification...
Update Encryption...
Payroll Formulas
Exit
Cloud Backup Settings...
Restore from the Cloud...
Hide Refresh System Date: 03/15/18 Period 3 - 03/01/18-03/31/18 This is the default page
Customers & Sales
Customer Management
stomers & Sales Tasks
Customers
Jobs
Sales Taxes
Quotes and Proposals
Time and Expense Tickets
Sales Invoices
Finance Charges
Receive Money
Bank Deposits
Customer Statements
Credits and Returns
Reports
Intelligence Reporting
Customers
Customer ID
Customer Name
Telephone 1
ALDRED Aldred Builders, Inc. 770-555-0654
ARCHER Archer Scapes and Ponds 770-555-4660
ARMSTRONG Armstrong Landscaping 770-555-8824
CANNON Cannon Healthcare Center 770-555-4128
CHAPPLE Chapple Law Offices 770-555-8858
CUMMINGS Cummings Construction 770-555-1147
DASH Dash Business Systems 770-555-9988
EVERLY Everly Property Management 770-555-6660
FRANKLIN Franklin Botanical Gardens 770 555-9598
FREEMOND Freemond Country Club 770-555-8967
FROST Frost Technology Park 770-555-4153
GOLDEN Golden Gardens 404 555-7763
GORDON Gordon Park & Recreation Center 770-555-0014
HENTON Henton Park Apartments 404-555-2025
HOLLAND Holland Properties, Inc. 770-555-9927
KENTON Kenton Golf and Tennis Center 770-555-4469
KNIGHT Knight Brothers Nurseries 770 555-6772
MASON Mason Office Park 770-555-3311
MCKAY McKay Construction 404-555-4225
Recently Used Customer Reports
Aged Receivables View Print
Customer Transaction History View Print
Sales Journal View Print
Invoice Register View Print
Cash Receipts Journal View Print
View All Customer & Sales Reports
Aged Receivables
0 - 30
31 - 60
61 - 90
Over 90 days
View Aged Receivables Report
Sage Advisor
Where do I get started?
What can I send to my customer?
How can I keep track of my sales?


Automatic Cloud Backup
Close
Save
Run Backup
View Log
Office 365 Account Info
Microsoft
Signed in as:
admin@Bellwether2.onmicrosoft.com
Switch Account
File Locations
Company directory: c:\\sage\\Peachtree\\company\\Sample\\PTXA\\BCS\
Save backup to: Sage - Bellwether Garden Supply/Backup
Cloud Backup Settings
Set up a schedule for auto cloud backup. Auto cloud backup will create a new backup on the selected day and time.
3:00:00 AM
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday
Log out users prior to running backup
Email Notifications
Add the email address of anyone who should receive notifications of successful or failed backups.
Add Email
Remove Email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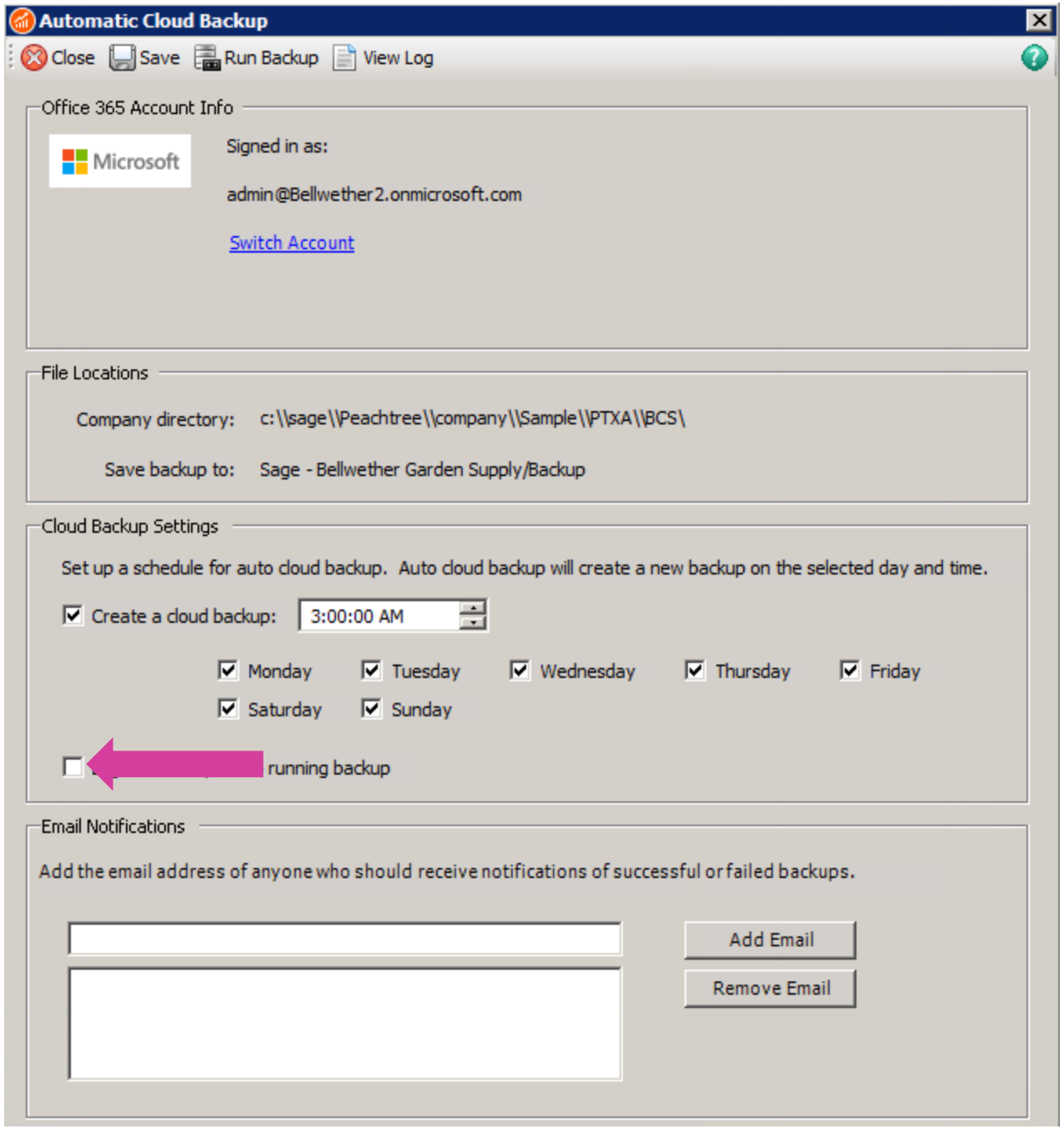
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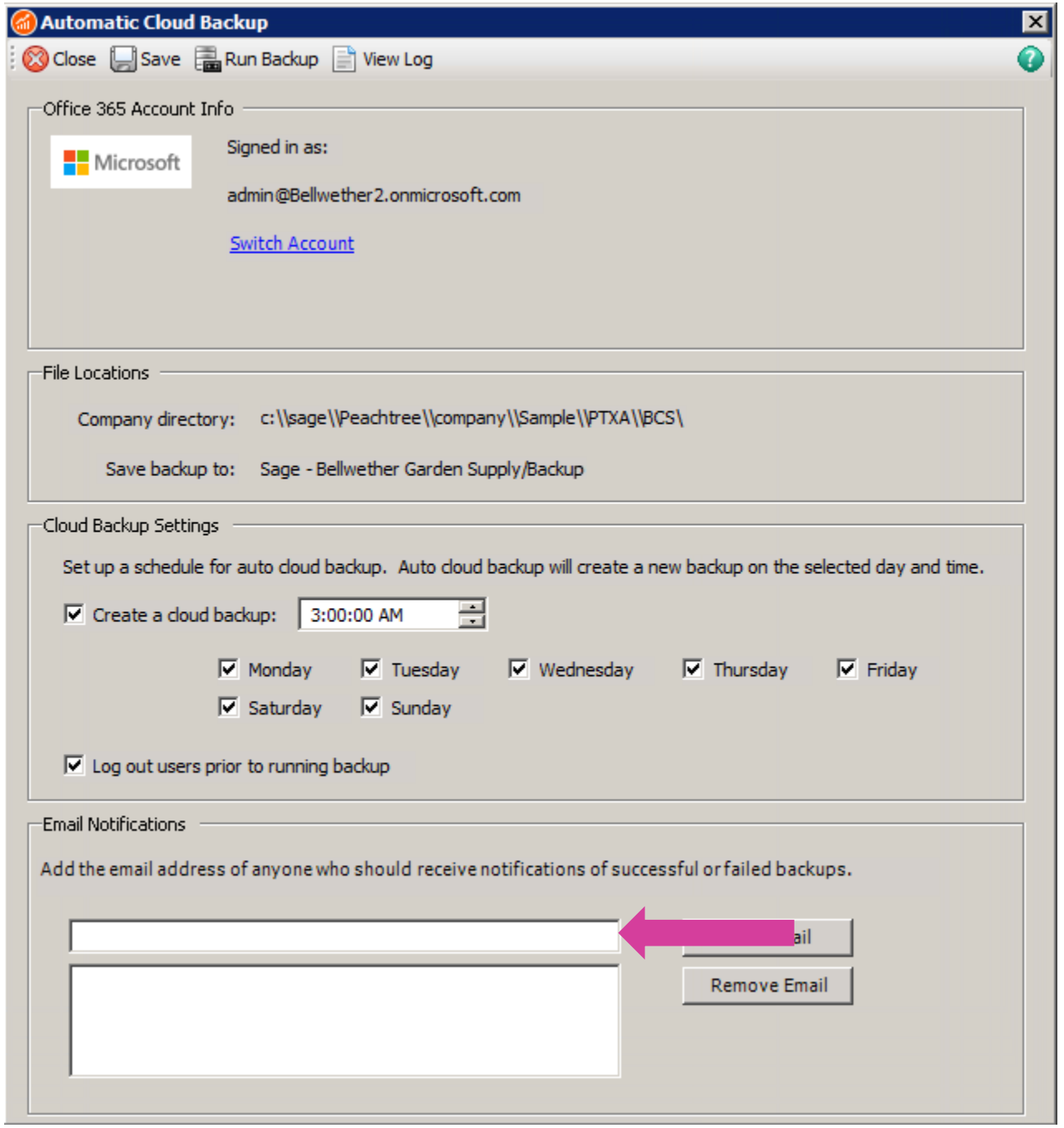
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Save
Run Backup
View Log
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Switch Account
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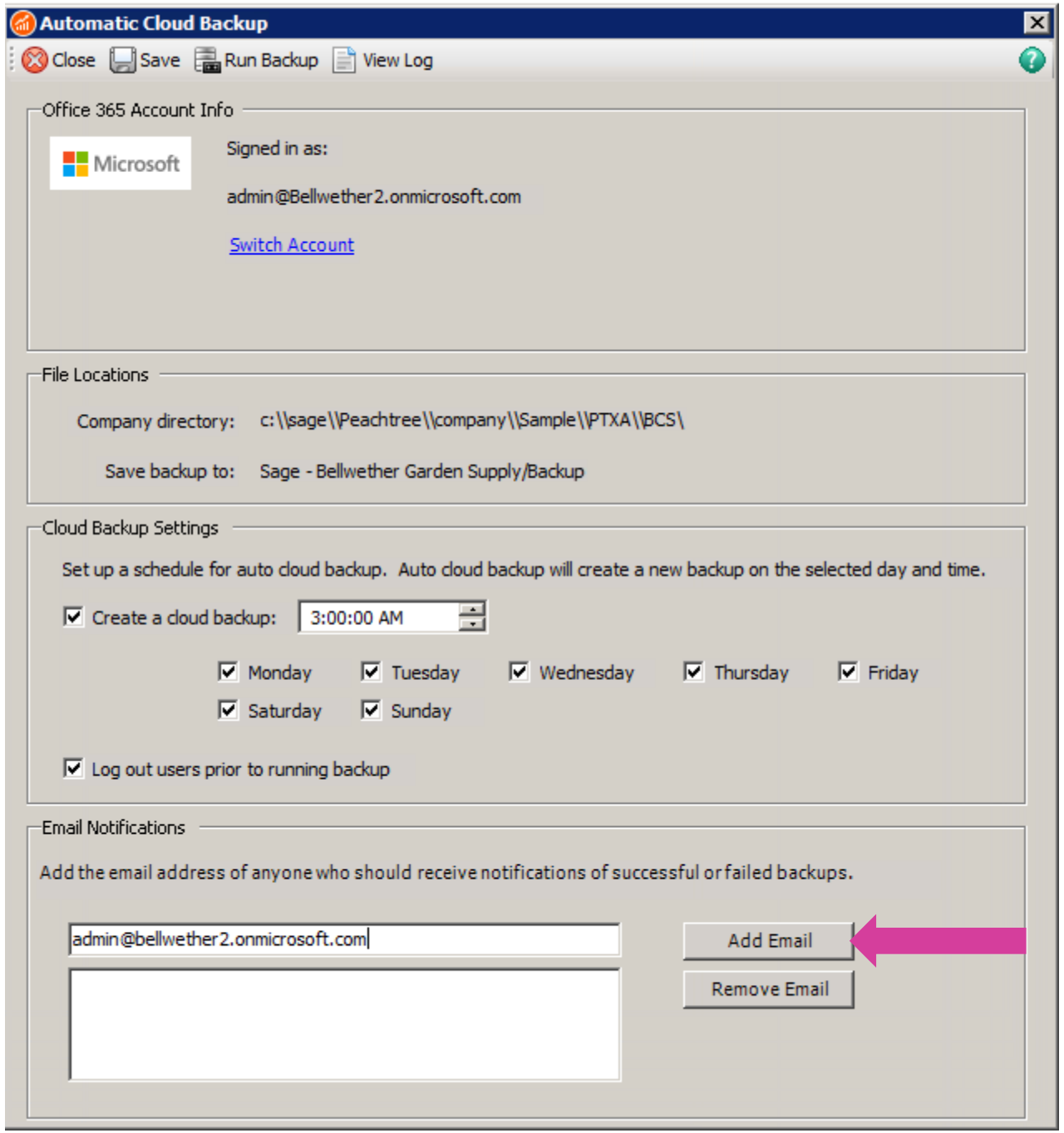
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Save
Run Backup
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Microsoft
Signed in as:
admin@Bellwether2.onmicrosoft.com
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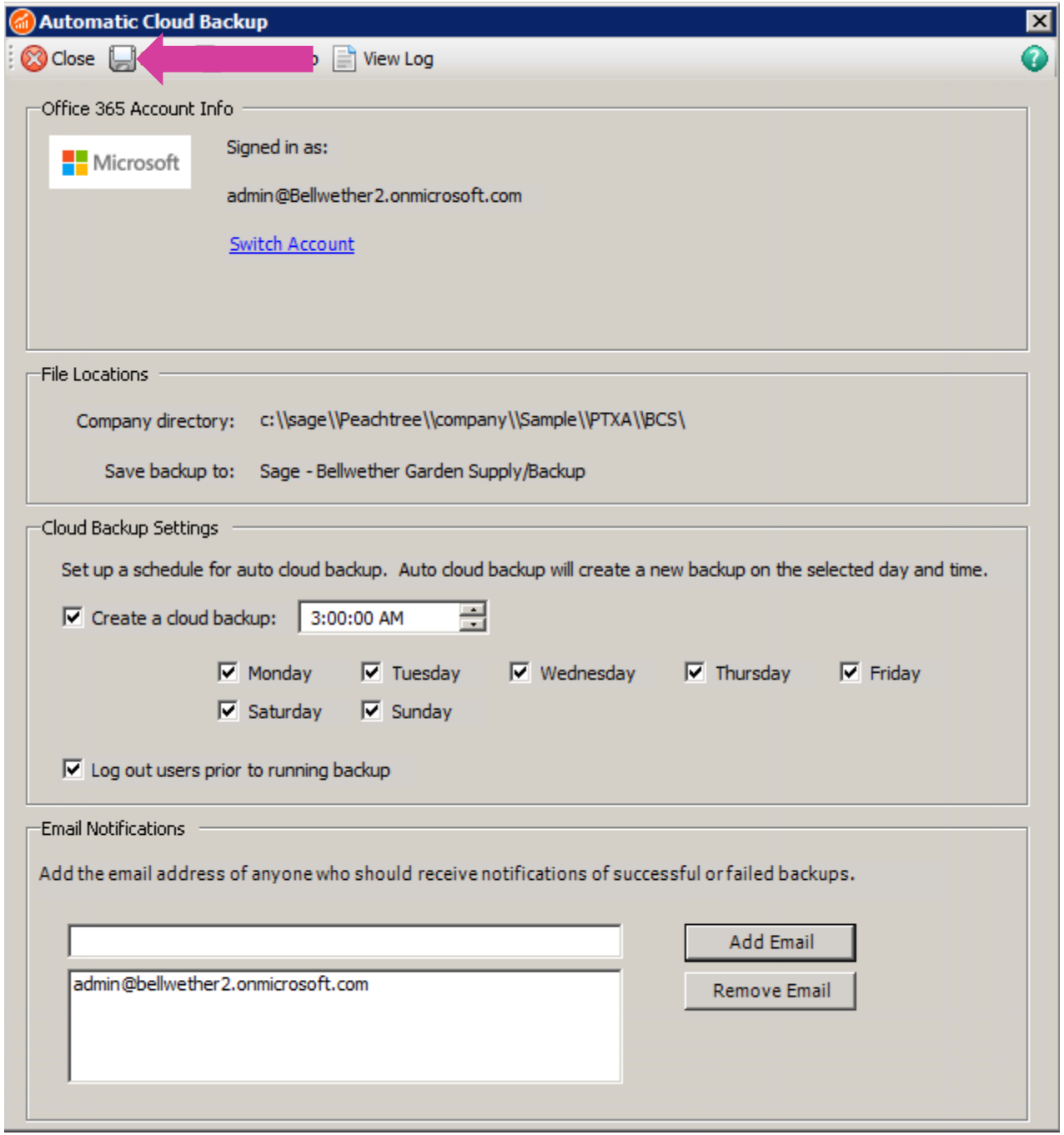
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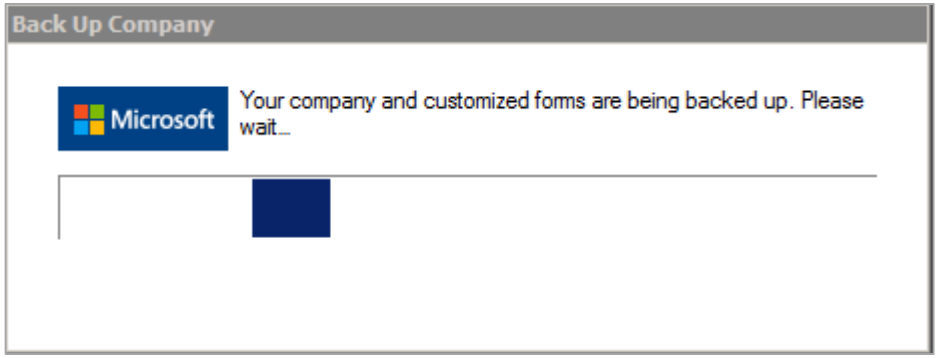
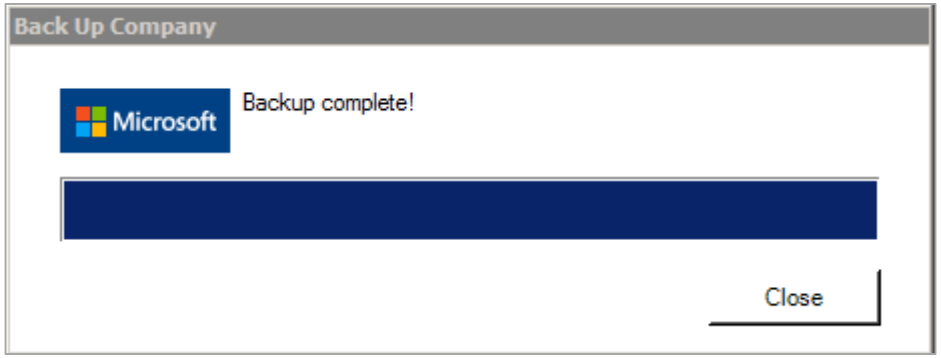
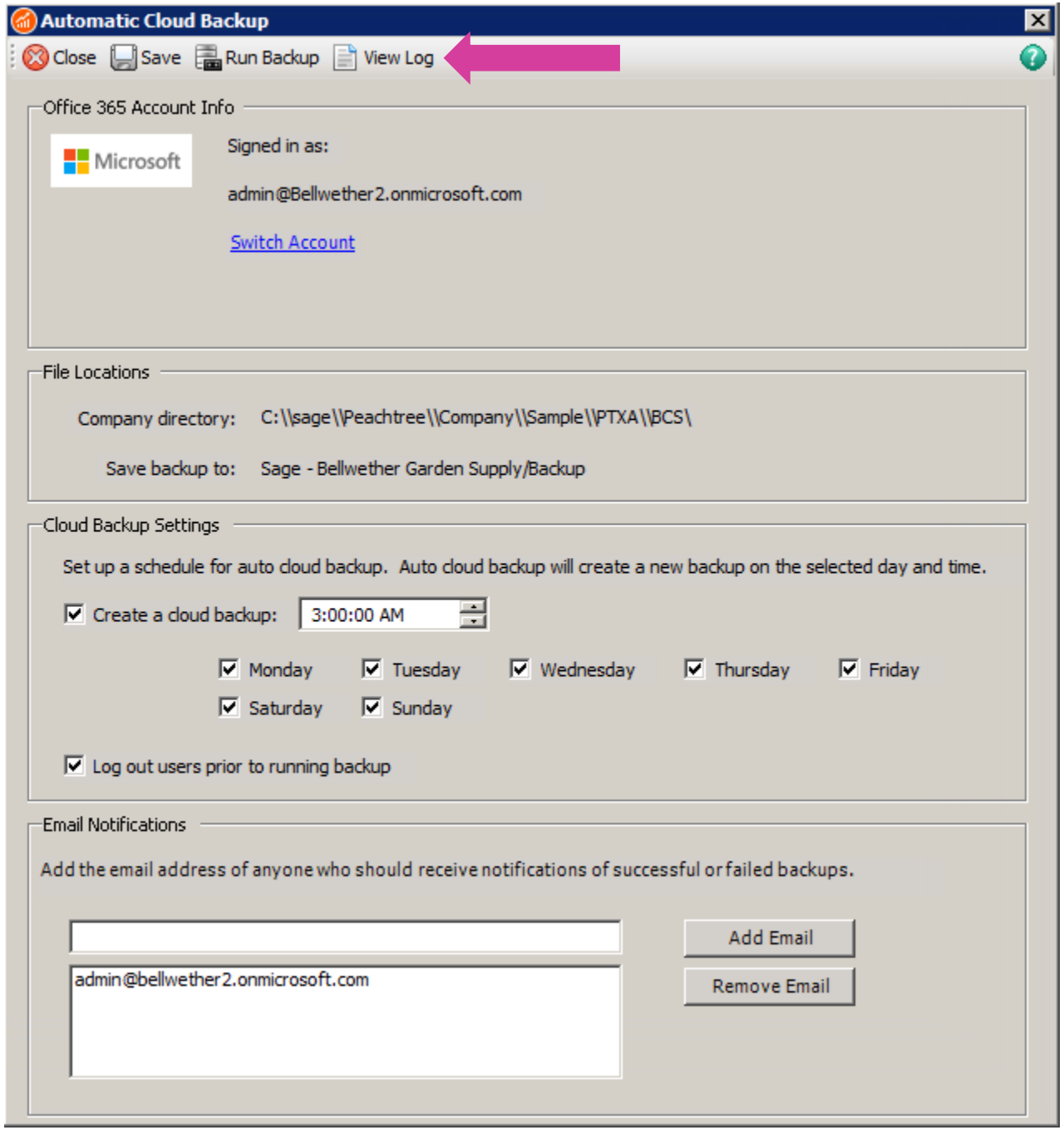

Back Up Company
Microsoft
Your company and customized forms are being backed up. Please wait...


Back Up Company
Microsoft
Backup complete!
Close


Automatic Cloud Backup
Close
Save
Run Backup
View Log
Office 365 Account Info
Microsoft
Signed in as:
admin@Bellwether2.onmicrosoft.com
Switch Account
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Company directory: C:\\sage\\Peachtree\\Company\\Sample\\PTXA\\BCS\
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Saturday
Sunday
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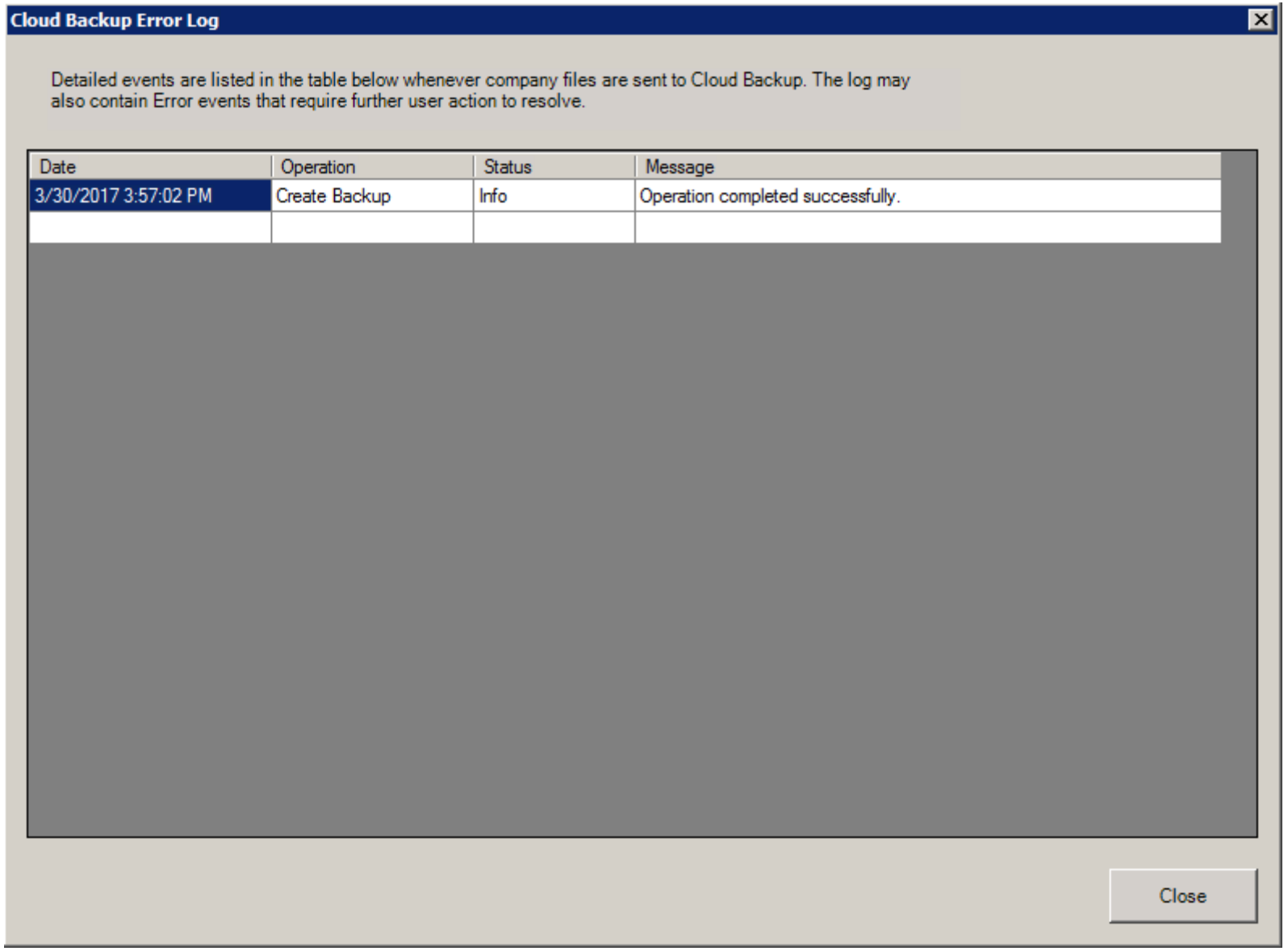
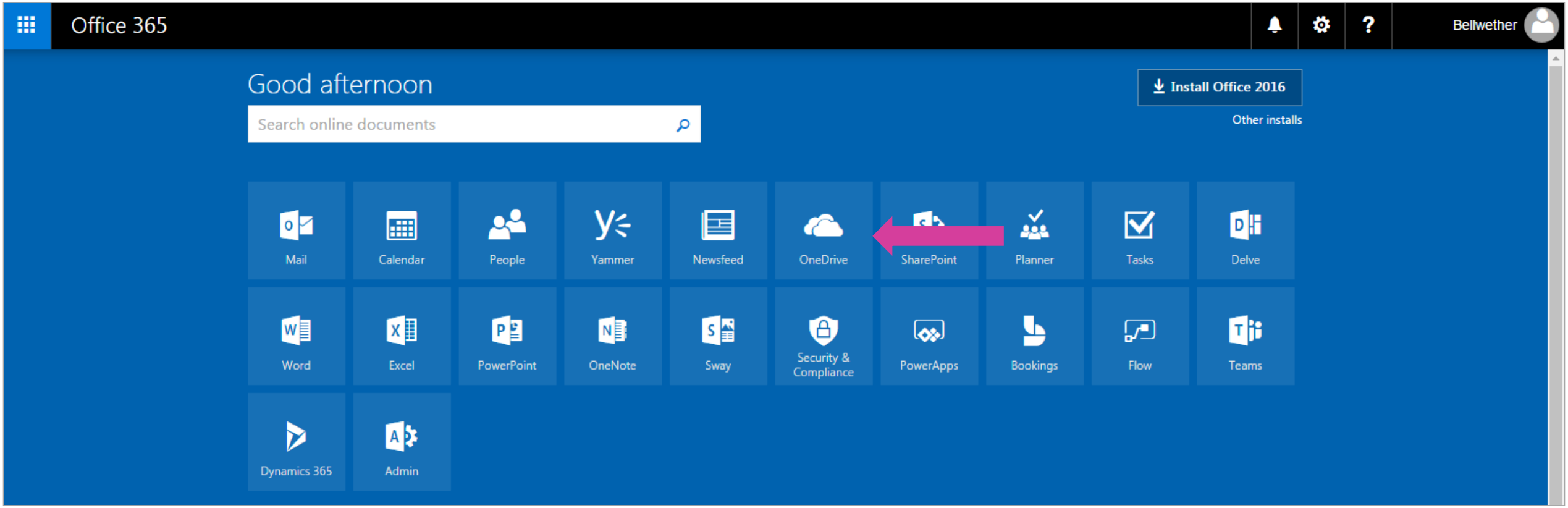
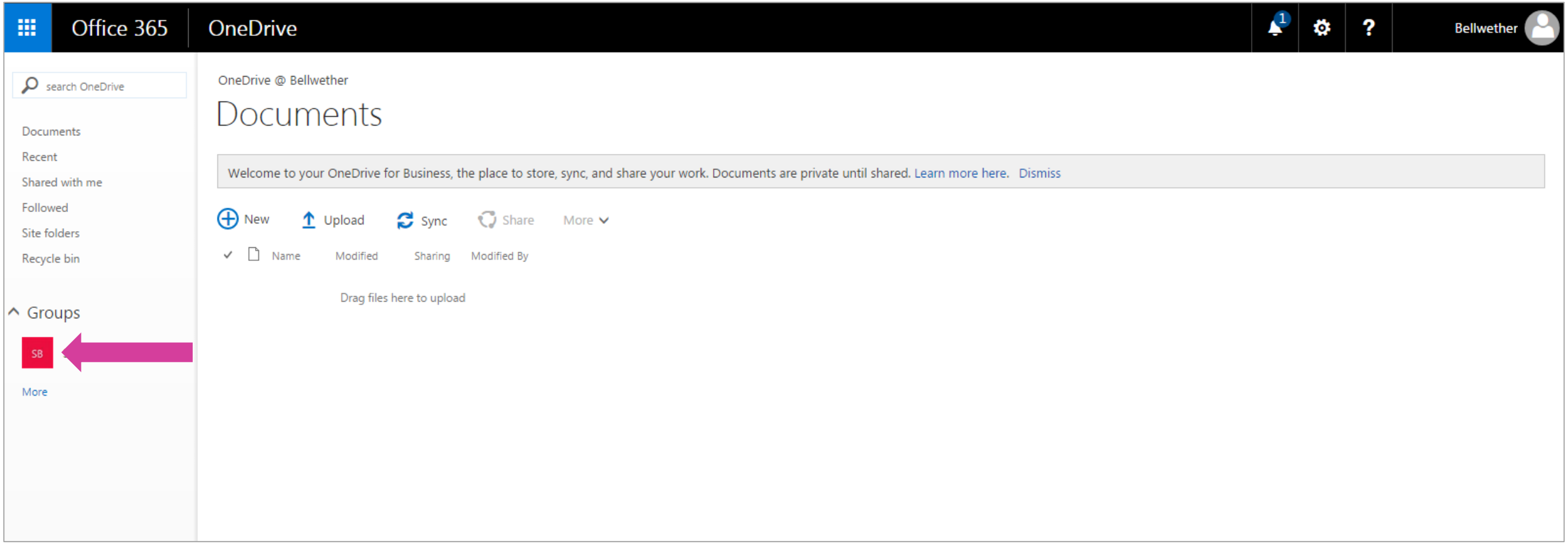
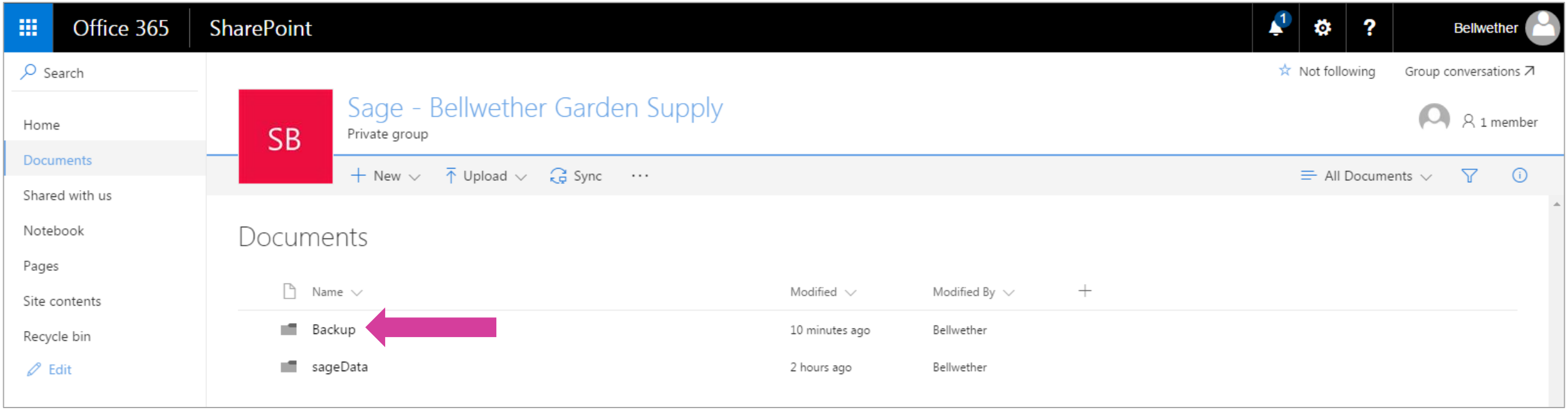
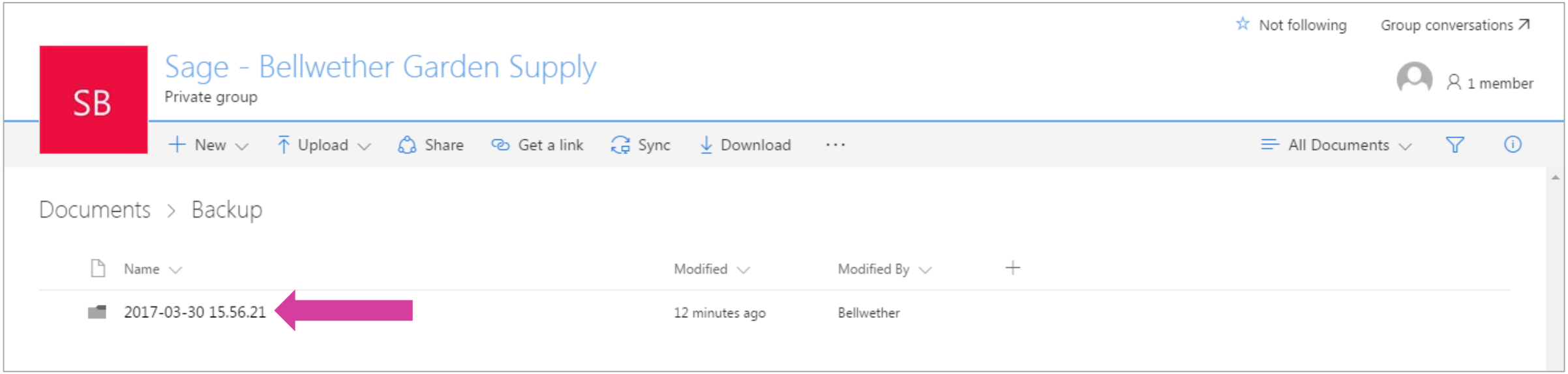
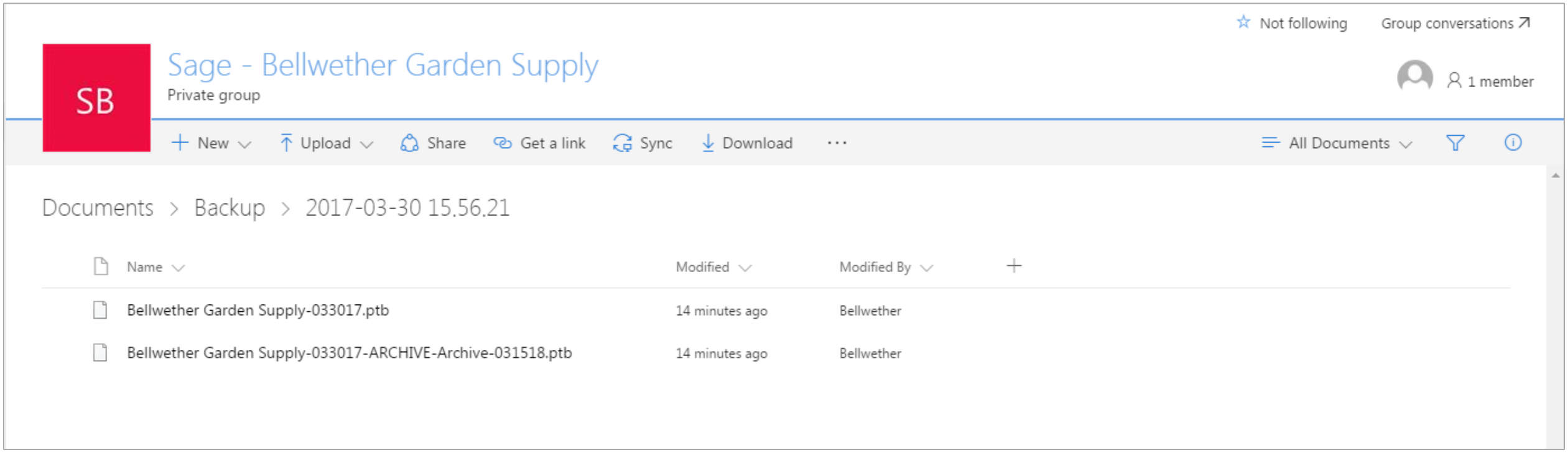

Cloud Backup Error Log
Detailed events are listed in the table below whenever company files are sent to Cloud Backup. The log may also contain Error events that require further user action to resolve.
Date
Operation
Status
Message
3/30/2017 3:57:02 PM
Create Backup
Info
Operation completed successfully.
Close


Office 365
Bellwether
Good afternoon
Search online documents
Install Office 2016
Other installs
Mail
Calendar
People
Yammer
Newsfeed
OneDrive
SharePoint
Planner
Tasks
Delve
Word
Excel
PowerPoint
OneNote
Sway
Security & Compliance
PowerApps
Bookings
Flow
Teams
Dynamics 365
Admin


Office 365
OneDrive
1
Bellwether
search OneDrive
Documents
Recent
Shared with me
Followed
Site folders
Recycle bin
Groups
SB
More
OneDrive @ Bellwether
Documents
Welcome to your OneDrive for Business, the place to store, sync, and share your work. Documents are private until shared. Learn more here. Dismiss
New
Upload
Sync
Share
More
Name
Modified
Sharing
Modified By
Drag files here to upload


Office 365
SharePoint
Bellwether
Search
Home
Documents
Shared with us
Notebook
Pages
Site contents
Recycle bin
Edit
Not following
Group conversations
SB
Sage - Bellwether Garden Supply
Private group
1 member
New
Upload
Sync
All Documents
Documents
Name
Modified
Modified By
Backup
10 minutes ago
Bellwether
sageData
2 hours ago
Bellwether


Not following
Group conversations
SB
Sage - Bellwether Garden Supply
Private group
1 member
New
Upload
Share
Get a link
Sync
Download
All Documents
Documents > Backup
Name
Modified
Modified By
2017-03-30 15.56.21
12 minutes ago
Bellwether


Not following
Group conversations
SB
Sage - Bellwether Garden Supply
Private group
1 member
New
Upload
Share
Get a link
Sync
Download
All Documents
Documents > Backup > 2017-03-30 15.56.21
Name
Modified
Modified By
Bellwether Garden Supply-033017.ptb
14 minutes ago
Bellwether
Bellwether Garden Supply-033017-ARCHIVE-Archive-031518.ptb
14 minutes ago
Bellwether

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Best for solving!

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sage summit US
Atlanta May 9-11, 2017 | Georgia World Congress Center
Business Builders, Build On!
#SageSummit

sage
Questions??

Thank you!

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