GWA Business Solutions Inc.

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Sage Accpac ERP Newsletter

In This Issue:

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Introducing Sage Accpac ERP Version 5.6!

Sage Accpac ERP Version 5.6 has arrived and it's packed with new features like the new Sage Accpac Intelligence for financial analysis, improved bank reconciliation and accounts payable processes, and customer-requested inventory tracking improvements including completely redesigned lot and serial tracking capability. Let's take a closer look.

Sage Accpac Intelligence

The new Sage Accpac Intelligence product leverages a familiar Microsoft Excel interface allowing you to slice, dice, and analyze your Sage Accpac financial and operational data to make quicker, more informed decisions. It combines grids, reports, and graphical dashboards that present the data in as much, or little, detail as you need. Several standard reports and templates are delivered out to the box and are easily customizable. Or, you can create new reports using the included Report Manager.

Improved Workflow in Bank Services

Managing multiple companies, bank accounts, and currencies can become very time consuming without the right tools. That's where Bank Services for Sage Accpac comes in. The improved workflow in Version 5.6 delivers a more straightforward way of reconciling your accounts. In addition to a new user interface, new features include better tools for separation of duties, an improved reversal process, and a Bank Entries Posting journal that provides an audit trail and keeps a history of posted transactions so you can review them even after posting. Plus with new reports and better integration with the General Ledger, you'll finish month-end reconciliation faster than ever.

Lot and Serial Tracking

As you probably know, tracking your inventory by serial and/or lot numbers can dramatically improve your inventory traceability and allows you to more effectively manage product recalls, returns, and charge-backs. That's why Version 5.6 introduces a completely redesigned serial and lot tracking workflow along with several customer-requested functional improvements. Plus, serial and lot tracking are now tightly integrated into 1 bundle, resulting in better transaction tracking and faster performance. You'll also discover:

- Improved serialized inventory and lot costing methods traceability
- Mask structure per item, rather than per system
- Ability to allow quantity to be different at the item level rather than the system level
- Auto-allocation of serials and lots

A Bunch of Other Great Stuff

In preparation for Version 5.6, over 5,000 customers and partners were consulted through on-site visits, surveys, interviews, and observational studies. The result is a collection of customer-requested enhancements, technology upgrades, and other useful features that can be very important in helping you to make the most of your investment in Sage Accpac.

That's why we encourage you to Contact Us for a copy of the **SAGE ACCPAC VERSION 5.6 RELEASE GUIDE** with the full details and discover all the great new features available for your Sage Accpac system!

New A/R Features Well Received

Continuing our focus on Sage Accpac Version 5.6, we'd like to introduce a few changes and new features in accounts receivable. For starters, Accounts Receivable 5.6 comes standard with 3 powerful inquiry forms that were only available with **AR Inquiry** (previously a separate purchase). Throw in a few enhanced A/R reports and we think you'll like what you see. Let's take a closer look.

Customer Inquiry

The old **Customer Activity** form has been replaced by a new **Customer Inquiry** form. Customer Inquiry provides all of the information and functions of the former Customer Activity form (including drill down and document history) PLUS additional capabilities including:

- Separate tabs (with drill down) for adjustments and recurring charges.
- Document details and application history are now contained in one tab. You can also open the new **Document Inquiry** tab (see below) to view details like ship-to information, taxes, and exchange rates.
- Separate tabs for Orders, Invoices, and Sales with full drill down capability if you're using Order Entry. You can also double click an item number on the order entry sales tab to view Contract Pricing in Inventory Control.
- Additional tabs make it easy to find information like Ship-to, Credit Status, Address, Comments, and Activity/ Stats in Accounts Receivable for a selected customer.

Document Inquiry

This new form displays all information and transactions related to a specified document. You can drill down to Document Inquiry from all A/R transaction entry forms and to Customer Inquiry to view information about the customer associated with the document. If you use Order Entry, you can also drill down from order numbers or shipment numbers in Document Inquiry to launch the original order or shipment.

Customer List

Customer List lets you apply a wide selection of customer criteria to create a variety of reports to meet your specific needs. For example, you can:

- Print an aging report of overdue customers by due date or document date and filter results by credit limit.
- Print reports using any number of **optional fields** that you use to track and identify customers.
- Print a list of customers by territory for sales, a report of customers whose accounts are inactive, and a list of customers by comment follow-up date to ensure timely communications.
- You can drill down from a Customer List Summary to the new Customer Inquiry form to view more details.

Enhanced Reports

3 reports have been enhanced in A/R including Aged Trial Balance, A/R Statements, and Customer Transactions - all of which are easier to read and provide new sort/filter options.

SageCRM - More Than Just a Sales Tool

It's easy to think of CRM, and CRM software, as a tool that the salespeople use. But great CUSTOMER RELATIONSHIPS (the "CR" in "CRM") are built on much more than sales. So let's take a look at some of the other components of SageCRM that will help you deliver a wonderful and consistent experience with every customer interaction.

Marketing

For many businesses, customer relationships are considerably more profitable ***after*** the initial sale. Implementing marketing programs aimed at current customers can be an important advantage in building customer loyalty and mutually beneficial relationships.

SageCRM Marketing empowers your marketing team with tools to plan, execute, and evaluate the performance of targeted marketing campaigns. You can segregate campaigns aimed at new business vs. those that are targeted to existing customers as well as track and measure every phase of a given campaign. SageCRM Marketing also allows you to build a detailed profile of your customers over the course of your relationship to ensure that marketing communication is highly relevant. With the right information, your marketing team make can design effective promotions based on a customer's previous purchases, product preferences, and other important characteristics of your relationship.

Customer Care

Sales and marketing bring new customers to your business, but your Customer Service department keeps them with you for the long haul. SageCRM Customer Care provides your customer service personnel with fast access to service requests, call and escalation history, recent customer communications, support cases, email communication, documents sent and received, and much more. Plus, all service and support activities are captured in SageCRM so that you start to build a knowledgebase of common issues and resolutions. Your service reps can then use that knowledgebase to quickly resolve common challenges. Whether you sell products that require technical support or offer service agreements that continue well beyond the initial sale, SageCRM Customer Care provides the tools you need to manage resources, quickly resolve issues, track customer requests, provide high quality service, and build long-lasting and loyal relationships. And with all of that information at their fingertips, you customer service reps will have a better opportunity to cross-sell complementary products and services.

Mobile Access

If you have service personnel that work in the field, then all that great customer information stored in SageCRM is rendered useless unless you can provide access to your field personnel. That's where SageCRM Mobile Solutions comes in. Using a PDA, your field service reps have real-time access to customer contact information, account history, and can schedule follow up activities and appointments. Or you can use the web to access the same features … even if you're not connected, you can work offline and synchronize with the SageCRM database later.

By enabling sales and service personnel to securely access SageCRM using the web or mobile device, you'll ensure they have information available to resolve customer issues quickly, place orders efficiently, and keep customers happy.

SageCRM is just another reason that Sage Accpac Extended Enterprise Suite provides you with a 360-degree view of your business. Contact us if you'd like to learn more or to discuss the benefit of upgrading to Extended Enterprise Suite.