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SAGE ACCPAC NEWSLETTER SEPTEMBER 2011

Customizing Sage ERP Accpac Inquiry

What's Inside

Headline News

Bring Your Own (BYO) Device

If you have yet to consider an employee-owned or "Bring Your Own" (BYO) Device Management Program – we suggest giving it some thought. With a program in place you'll be ready for any computer, smartphone, iPad or future device that comes along and employees will be more productive on the latest technology of their choice.

Learn more

Sage ERP Accpac Inquiry was introduced in Version 6.0 to provide faster access to information for everyone in your organization. Inquiry allows even inexperienced users to create personalized ad-hoc query lists in just a few minutes without knowledge of databases, programming or web technologies. In this article we take a closer look at using this useful new tool.

Decision Support

Inquiry helps uncover opportunities and highlight possible issues, enabling your workforce to execute appropriate actions in response to ever-changing business situations. The highly intuitive interface puts custom information access within easy reach of everyday non-technical users. It is quick and easy to create database connections, add fields and customize data. The query lists you create become part of your user interface in the new Sage ERP Accpac Web Portal.

Predefined Templates Included

The Inquiry tool comes with a number of predefined templates for accessing General Ledger, Accounts Receivable, and Accounts Payable data. In many instances you may find this tool can replace customized Crystal Reports. Upon opening a template, you will find the data arranged in a columnar grid, with the ability to select by up to three different criteria at the top. These capabilities alone will fulfill the needs of many of your staff members, but you can create new inquiries based on different data sets if you wish.

Customizing Inquiry

Here we give an overview of how you can customize Inquiry.

Where Inquiry Definitions Are Stored

When you work in Inquiry and customize the totals, the fields displayed, or the sort field, in the easy-to-use Web Screens, you are editing a template file. This is an XML file that stores all the information about what you are doing in Inquiry. You can take any of the included templates, edit them, and save them as your own with a new name. The templates are stored in the folder: C:\Program Files (x86)\Common Files\Sage\Sage Accpac\Tomcat6\portal \sageERP\inquiry60a\template. Under the template directory there are language directories to hold translated strings. Then under each language directory are directories AP001, AR001, GL001 and GL002 for the four categories of included templates.

Customizing Sage ERP Accpac Inquiry (continued)

Adding Additional Data To Inquiry

It is possible to add to the built-in templates to include additional tables or even to add additional data from other applications such as Inventory Control. Because these are XML files, if you have experience working with XML you will be able to modify them and create new ones, or we can assist you.

The XML template files can be opened in a text editor, allowing you to see the query definition. For example:

<QueryDefinition desc="xxFind customer documents" textID="txtARTemplateQryCustomer" domain-definition-file="arddf.xml">

The domain-definition-file (in this case arddf.xml), is the file that defines the data domain definition. This file serves two purposes. It defines all the fields with good descriptions, so it is easy for users to select the data they need. And it defines the database structure to the query engine so the data can be returned properly.

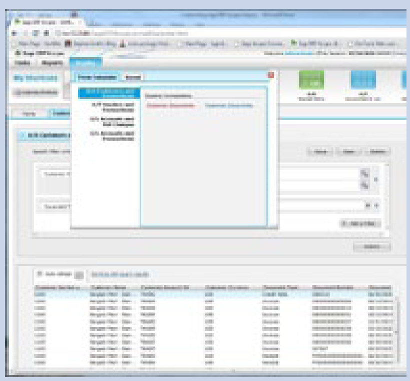
If you want to add some fields or tables to an existing data domain, you just need to edit the existing files to include what you are looking for. If you do this, beware that they may be overwritten on the next product update or version, so make sure you have a backup in a safe location (preferably a version control system).

Create A New Data Domain

If you want to create a new data domain, then you can take a copy of an existing ddf file and modify it. Next you need to take a copy of one of the template files and modify it to point to your ddf file. Finally, you will need to modify anything else in the template file to match what is in the ddf. One limitation of this process is that you cannot customize the categories in the Inquiry Menu from the Portal. Even if you create a data domain for Inventory Control, you will still need to place your template in one of the existing categories such as AR Customers and Transactions. Sage plans to move this into an XML file in a future version, so you will be able to create your own categories.

Give us a call if you would like us to create some custom templates for Sage ERP Accpac Inquiry that your team can use to make better business decisions.

ZOOM IN



The **From Template** tab includes the templates that are included with the system. The **Saved** tab contains the templates that you have modified and saved as your own.

2011 Inc. 5000

Net@Work listed as one of the nation's fastest-growing private companies

2011 Top Accounting Software / ERP Consultants:

Net@Work ranks as #1 Sage Software Partner and #8 Overall

Upcoming Events

Accpac User Group - NYC

Join us for breakfast, peer networking, and Accpac training. No Charge.

Date: September 20, 2011
Time: 8:30am - 11:00am ET
www.netatwork.com/AccpacUserGroup

Accpac Lunch & Learn - Seattle

Taking your Accpac Install to the Cloud – What You Must Know. No Charge.

Date: October 18, 2011
Time: 11:30am - 1:30pm PT
info@netatwork.com

Upcoming Webinars

Why the Cloud & Managed Services Are Becoming a Necessity
www.netatwork.com/ManagedServicesWebcast

Time Tracking: How you can get rid of manual timesheets, spreadsheets & manual approvals.
www.netatwork.com/TimeTrackingWebinar

Sage CRM 7.1

New Features Help Your Teams Collaborate More Effectively And Win More Business

Is your organization taking advantage of the SageCRM software that comes with Sage ERP Accpac? In this article we review the significant benefits of an integrated Customer Relationship Management System and take a look at the new capabilities in SageCRM Version 7.1.

A Global View

SageCRM is more than just a great productivity tool for your sales and marketing staff. Integrating SageCRM with Sage ERP Accpac supports your entire organization in managing customer relationshipsófrom initial marketing campaigns and lead generation, through the process of quoting and winning the order, and finally to order fulfillment and customer service.

The integration of SageCRM and Sage ERP Accpac across your organization can transform your business as your staff works together more harmoniously and effectively. Duplicate data entry is eliminated. Your team can accurately identify customer requirements and fulfill them quickly and profitably. Integration with your financial system allows accounting staff access to critical customer information so that overdue receivables can be reduced, as your accounting and sales teams work in unison.

SageCRM Capabilities Overview

SageCRM is designed to help you build long-lasting customer loyalty and generate repeat sales. Built-in tools allow you to analyze, forecast, and report on key sales data. Marketing automation allows you to create, schedule, and track marketing campaigns. Letís look more closely at the key capabilities.

Customer Care Automation

The ability to retain your hard-won customers is a critical success factor in todayís competitive market. SageCRM Customer Care tools give your team access to a complete view of customer data, including: purchases; call and escalation history; support cases; e-mail messages; and sales opportunitiesóenabling your team to provide efficient and personalized customer service.

Sales Force Automation

You automatically can distribute leads to your sales professionals based on criteria you define. Visual tools make it easy for your sales force to manage current and historical account details, activities, and opportunities. Point-and-click reporting and graphs give sales teams access to real-time data for on-the-spot analysis and evaluation.

Marketing Automation

Powerful yet easy-to-use marketing tools make it a simple matter to schedule and track marketing activities within a campaign. Each detail of a campaign and the results are visible, providing a single source of prospect information, eliminating guesswork.

Microsoft Outlook Integration

SageCRM is tightly integrated with Microsoft® Outlook® and Exchange. Changes made in Outlook are synchronized to ensure they are appropriately reflected in SageCRM.

SageCRM Version 7.1 Enhancements

Now more than ever, companies need to maximize workplace effectiveness, drive staff productivity and put the customer at the heart of their business processes to stay ahead of the competition. SageCRM Version 7.1 includes new features to help your organization thrive.

Total Campaign Management

Campaign management in SageCRM now includes full campaign workflow so organizations can map campaigns to their business processes for consistent execution. You can execute multi-channel marketing campaigns and then clone them for easy re-use.

Interactive Dashboard Enhancements

In Version 7.1, you can create tailored company dashboards for key accounts in SageCRM, re-size and reposition gadgets to view the data in the way that suits your needs, and even drill down to detail when required.

Communications Enhancements

New real-time synchronization between SageCRM and MS Exchange delivers a seamless calendar management experience in Version 7.1. You will appreciate your always-up-to-date appointments, tasks, and contacts within SageCRM–on your smartphone, laptop or desktop PC. System administrators benefit from a new single point of entry where they can manage existing Exchange users and add new users.

New Report Charts

In SageCRM Version 7.1 your at-a-glance business insights, report charts, and graphics now have more visual impact. It is easy to see comparisons, patterns, and trends in your data to support more informed decision making.

Sage E-Marketing For SageCRM

Version 7.1 includes a fully integrated e-Marketing system that enables you to execute high-quality, targeted email marketing campaigns. The e-Marketing system is a Web Service that requires an

Sage CRM 7.1
(continued)

additional subscription. You can create drip marketing campaigns quickly and easily. The software automatically tracks open, click and bounce rates, enabling you to deliver hot leads to the sales team and calculate accurate ROI. A simple three-step wizard guides you through the process of creating an e-marketing campaign with ease. A selection of 90 templates helps you get started quickly. Follow-up call lists automate the connection between email and telesales.

Please give us a call with your questions regarding Sage CRM Version 7.1.

Sage KnowledgeSync Alerts and Workflow Solution
A Wise Solution in Any Type of Economy

Whether the economy is truly recovering or not is certainly up to debate. However, over the past few years many of our Clients learned firsthand, the definition of the words “streamlining” and “diligence”. They learned that while prompt invoicing and collections was more important than ever, they could not justify paying a person to handle these tasks. So too they learned how to set up automated monitoring of inventory levels to help reduce inventory costs without increasing the likelihood of a stock shortage and lost sale.

Every minute of every person’s workday matters – and now is the time to take a critical look at the tasks that each person performs and ask yourself “Could that task be automated, and thus free-up that person’s time for more productive activities?” If, for example, you have people on staff whose responsibilities include generating and delivering invoices or statements, issuing POs for vendors, or tracking down late deliveries, consider an investment in software that could automate these tasks.

Sage KnowledgeSync, an Alerts and Workflow solution, is just that kind of software. KnowledgeSync is a “monitor & response” technology whose purpose it is to monitor the changing conditions within your business and automatically execute the appropriate response. Have a new order that’s just been placed? KnowledgeSync can check credit status and inventory levels and notify Customer Service, the salesperson and even the Customer in the event of a problem. Stock levels running low? KnowledgeSync identifies the item and emails the inventory manager so they can place a purchase order with your supplier. Add the supplier to the original alert and you give them a head start on filling the order. If you want key analytical reports on your desk or in your email when you arrive to work in the morning (or even the night before) KnowledgeSync does that too.

But streamlining your staff’s time and activities through the automation of repetitive tasks is only half of your battle in a challenging economy. The other half is diligence – or, as Mark Twain said, “Put all your eggs in one basket and watch that basket.”

“Watching” your business – whether it’s monitoring receivables that are overdue for payment, taking advantage of early-pay discounts from your suppliers, or identifying stock items that have had excessive price increases – is more important today than ever before. The difference between $100,000 in overdue receivables and $10,000 in overdue receivables can be the determining factor in a company’s survival.

And that’s where KnowledgeSync again enters the picture. With KnowledgeSync, monitoring your business for “exceptions” – those day-to-day anomalies that can collectively determine the viability of your organization – is not left to chance. KnowledgeSync comes pre-configured to monitor hundreds of common business conditions, and gives you the ability to specify an unlimited number of additional “trigger points”. When these conditions do occur, KnowledgeSync sends alerts to the appropriate people via any device – cell phone, pager, email, fax, or dynamic dashboard. And beyond sending alerts, KnowledgeSync triggers the creation of intelligent workflow – follow-up actions that ensure that you respond in the manner most appropriate to the business event that occurred.

IN THE SPOTLIGHT:

Locking Fiscal Periods In Version 6.0

Sage ERP Accpac Version 6.0 allows users to lock fiscal periods for all modules, or a specific module. Let's take a look at the benefits and functionality of this new capability.

Lock Fiscal Periods By Module

In previous versions, you could only lock or unlock fiscal periods for all modules. With the new capability, modules can be locked down in sequence, preventing posting to operational modules while allowing you to complete processing in financial modules. This added level of security will prevent unauthorized or accidental posting of transactions to specific fiscal years and periods separately for each module (e.g. AP, AR, etc.). The feature has been implemented so you will no longer need to spend time trying to locate transactions that are creating out of balance conditions.

Smooth Transaction Flow

To ensure the proper flow of transactions, the operational modules must be locked before locking financial modules. So when operational transactions in Order Entry, Purchase Order, and Inventory Control are all entered and posted for a period, you can lock these modules for that fiscal period. In this way the normal process of report printing and reconciliation in the financial modules – AR, AP, and General Ledger can be completed at your convenience and with confidence that no new transactions accidentally can be posted to them.

Bank Services is the other area to consider in transaction flow. Data flows back and forth between Bank Services, AP, AR, and Payroll, so all of these modules should have their fiscal periods locked at the same time.

Security For Fiscal Periods

Users must have security rights to the **Maintain Fiscal Calendar** task to lock and unlock fiscal periods and modules in the Fiscal Calendar. You can specify what the user experience will be when they try to enter a transaction into a locked period. Within Common Services, you can select for users to receive either an error message or a warning message. With the error message, the user will received an error message and be prevented from creating a transaction. If you select a warning message, the user can still proceed and bypass the warning and post to a locked period.

Fiscal Calendar Report

To accommodate the new options, the Fiscal Calendar report now prints in landscape format. It prints information for all periods, including the Adjustment and Closing periods, in rows, and includes a column for each activated Sage ERP Accpac module.

Locked Periods When Upgrading

When upgrading to 6.0, fiscal year locking is defaulted as follows:

- For fiscal years that were active prior to upgrading, the fiscal periods will be locked or unlocked for the new programs in Version 6.0, consistent with the locks in the earlier version.
- For fiscal years that were inactive prior to upgrading, fiscal periods will be locked for the new programs in Version 6.0.
- If activating applications in Version 6.0 for the first time, for all fiscal years, the default status is unlocked.

Please feel free to call us with your questions.

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