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Headline News

At the Sage Summit Conference this past November, the session *Industry Trends in Social CRM* was broadcast live over the Web. Presented by industry expert Brent Leary, the session provided valuable information on how to incorporate Social CRM best practices into your company's overall marketing strategy. The recorded Webcast is available on demand. To view click here.

Leveraging Social Media

Integrating Social Media Into Your Marketing Efforts

Social media—online communities where people exchange ideas, offer opinions, and stay connected with friends—is growing rapidly. In this era of increased competition for customers, social media has suddenly become an exceptional, low-cost marketing strategy for businesses of all sizes. Leveraging this important tool is not just smart, but is quickly becoming essential. In this article we offer some suggestions on getting started with social media marketing, and discuss the ways to integrate it in with your SageCRM system.

Social Media Marketing

Many people have a misapprehension that social media is only for the young. In fact, according to statistics published by iStrategyLabs in July 2009, the 55+ age group is the most rapidly growing segment on Facebook, and the largest segment of users is the 34-54 age group. And according to Facebook's published statistics, there are more than 5.3 billion fans of the more than 700,000 businesses that have active Facebook Pages. Through the effective use of social media, the Obama campaign was able to collect 13 million e-mail addresses, which then became contacts in their CRM system to be used for soliciting additional support. With these statistics, there is little doubt that there is a huge potential for developing your business through social media.

Getting Started With Social Media

The number of social media sites and methods can be confusing. A good place to start is with Facebook. From there you can expand into other social media such as Twitter, YouTube, and LinkedIn. As a business, you start by creating a Facebook Page, as opposed to a Profile used by individuals. Creating a Facebook Page allows businesses to collect Fans. You can link your Facebook Page to your company's Web site and to e-Commerce sites that sell your products. Ask friends and family to become fans of your business so you have a respectable crowd of supporters when you debut your page with customers.

When you are ready, invite customers to

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Leveraging Social Media

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become fans. You can use SageCRM e-mail marketing tools to invite customers to your Facebook Page. Then, engage your fans by posting comments on their pages and encourage them to pass the word about your fan page and company.

The personality of your Facebook Page should enhance the brand image of your Web site and other marketing pieces. "The pages that are most successful are the ones that really replicate the personality of the business," said Tim Kendall, the director of monetization at Facebook. Keep content fresh. Tell fans about specials and events, and regularly add photos, comments, and other useful information.

Because Facebook members complete profiles with information such as hometown, employer, interests, and education, it is tailor made for targeted marketing. Profile information can help you deliver messages to specific demographic slices. You also can create a Facebook ad, and as you do so add demographic criteria and keywords and see how many Facebook users fall into your target audience.

Relationships First

Relationships are at the heart of a successful social marketing strategy. "Relationships first, business second," is the motto of Mari Smith, dubbed The Pied Piper of the Online World by FastCompany.com. You may find your time spent on Facebook feels less like marketing and more like customer service. When people ask for information, even if unrelated to buying your product, you will need to respond to keep them engaged. Listen to what people are saying, the good and the bad—you may pick up ideas on how you can improve your business.

Find Out What They Are Saying About You

There is a lot of chatter on the Web; customers, competitors, and associates already may be talking about you. You may want to step in to keep the record straight. You can find out what people have said and get analyses of positive and negative feedback on sites such as **http://twitrratr.com** and **http://socialmention.com**.

Build An Online Community

Eventually you even may want to create your own online community as a meeting place for your customers. You can build a forum for customers to exchange ideas with each other regarding the use of your products or services, your executives can post blogs, and you can provide access to product support information. There are online tools available to help you get started, such as Lithium.com.

SageCRM Is At The Heart

Social media is a great way to get the word out about your company and products, and capture information about potential customers. SageCRM is the tool that helps you manage and leverage the results of your social marketing efforts.

The e-mail marketing features were expanded in SageCRM Version 6.2 to make e-mail communications more effective. Your sales and marketing staff can create more professional e-mails by using the spell check feature and incorporating HTML code. You also are able to develop strong and effective e-mail communications in multiple languages.

Your SageCRM Dashboard allows you to integrate external data sources of relevant information directly into the application. You can use this capability to help you stay connected by incorporating news feeds from social media sites.

Please give us a call with your questions.

((Tips & Tricks))

Creating A New Mail Merge Template In SageCRM

Note: The instructions below are for Microsoft Word 2003.

1. Decide the entity to be associated with the template. The entity will determine what merge view will be used, and consequently what fields will be available, when creating the template.
   Note: Entities that can be used for mail merges are: Case, Company, Person, Lead, Opportunity, Quote, and Order.
2. Open a record of the chosen entity. For example, to create a template associated with Cases, find a Case record and open it.
3. Right-click or hover over the **New** icon and select **Document**. Doing so will display the *Choose Letter Options* pages screen.
4. Select the **Create New Local Template** option. Click **Continue**. The *MergeBlankDoc.doc* file will open in Word.
   Note: If this document does not open after clicking Continue, an Open window will appear instead. Browse for the MergeBlankDoc.doc file.
   For Version 5.7, by default this file can be found in: C:\Inetpub\wwwroot\[CRM]\DocTemplates\Letters-A4\US.
   For Version 5.8, by default this file can be found in C:\Program Files \Sage\CRM\[CRM]\Library\Global Templates\US, where [CRM] is the name of the CRM instance.
5. To add the merge fields to the document, click the *Insert Merge Fields* icon.

Are You Missing Something?—Recap Of Releases

Are you running an older version of Sage Accpac ERP? You may have chosen not to upgrade to save the time and expense involved. However, with the efficiencies you gain in upgrading to newer versions it is likely you will quickly recoup those costs. A slower period in the economy is the perfect time to plan and execute an upgrade. Your staff may have more time for training and testing, and your organization will be positioned to add more business as the economy improves. In this article we will review the features and capabilities added in each of the past four Sage Accpac releases.

Sage Accpac Version 5.6

The latest release, Version 5.6, benefits from all the updates in previous releases plus includes even more functionality and features.

» Sage Accpac Intelligence helps you make better, faster decisions. You can quickly build reports using familiar Microsoft® Excel® and spend more time focusing on analysis and less time pulling data together.

» Built-in Accounts Receivable Inquiry tool helps accelerate collection efforts and improve cash flow.

» Improved workflow in Bank Services provides a clear view of your cash position.

» Reduce risk of penalties and fees through new Payroll functionality.

» Lower operations costs through better inventory management.

Sage Accpac Version 5.5

» The Business Intelligence Dashboard provides management with easy access to key performance indicators, such as accounts receivable aging and sales analysis.

» SageCRM is bundled with Sage Accpac to integrate your front and back office, delivering a complete view of your customers, and empowering your staff to work together to build profitable customer relationships.

» The ability to change, combine, and copy key masterfiles such as Customers and Item numbers provides flexibility.

» Ops Inquiry tool included with Order Entry saves time and reduces errors.

» Multicurrency revaluation enhancements and language overlays smooth global commerce.

» Faster data throughput and multi-user enhancements speed data entry and posting.

Sage Accpac Version 5.4

This great release focused on over 250 user-requested enhancements that improved usability, productivity, and reporting throughout the system. Here are just a few highlights of what you can do:

» Specify by customer if you wish to use the lower of contract prices or any special offers currently in effect.

» For convenience, assign customer item numbers to inventory items, and then use those numbers during order entry.

» To speed entry, copy an order from one customer to another, and then make changes.

» Check a customer's available credit based on pending transactions in both Accounts Receivable and Order Entry in addition to their aged transactions.

» Check the price of an item to ensure it is not below a specified cost or margin.

» Drill down at every level of the order, shipment, and invoice process to uncover the details behind your data.

» Find orders quickly with the ability to inquire into sales orders by order status.

Sage Accpac Version 5.3

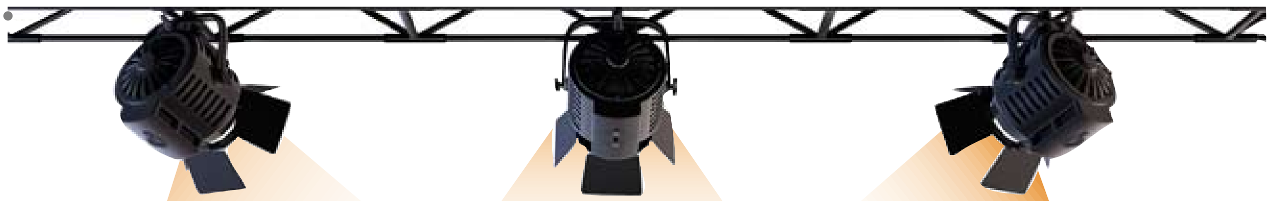
» The Payroll module is enhanced with the ability for staff to enter their own time remotely; a new Employee Activity window provides a detailed view of employee statistics and checks; and improvements to EFT Direct Payroll including support for additional calculations for multiple bank accounts.

» A new Receipt Inquiry window allows you to view customer receipts by a variety of statuses and transaction types.

» Integration of Purchase Order and Project Costing—track committed and actual quantities and costs by project, contract, and category.

» A new Payment Inquiry window allows you to view Vendor payments by a variety of statuses and transaction types.

Are you ready to upgrade? We would be happy to assist you in planning a smooth upgrade that is sure to give your organization a tremendous productivity boost.



IN THE SPOTLIGHT:

End-To-End Automation With Developer Partner Solutions

Sage Accpac ERP is a powerful tool for automating accounting and business processes. It streamlines operations and helps sales, marketing, finance, and operations work as a single team to keep customers happy and your business competitive. But what about other business processes, such as warehouse automation, advanced manufacturing, or paperless document management? A benefit of owning Sage Accpac is the broad portfolio of integrated business automation products that are available from Sage Authorized Developer Partners. Here we provide some highlights.

Warehouse Automation

For high-volume distributors, warehouse automation is essential to controlling costs and maximizing the productivity of warehouse personnel. Today's wireless warehouse solutions are affordable and highly functional. Track every movement of your stock as it flows into, out of, and within the warehouse, and post the resulting transactions into your Sage Accpac distribution modules.

Manufacturing

Manufacturers' software needs vary greatly depending on the types of products they manufacture. Solutions are available to handle Make to Order, Make to Stock, Repetitive, Discrete, and Job Shop environments. Product configuration systems are available for custom manufacturers, and Material Requirements Planning (MRP) solutions help make sure the right materials are available when needed.

Document Management

Archiving your accounting and operations documents electronically can provide a quick return on investment. Not only are there the savings in paper and printer ink, there is also the space allocated to filing cabinets, and the time staff members spend finding and retrieving documents and delivering them to the appropriate party. Available solutions electronically capture documents, automates the routing and distribution of documents, reports, and forms, and provide instant retrieval from your desktop or over the Web.

Service Management

If part of your business includes servicing customers in the field, robust service management solutions can help create end-to-end automation for your business. Solutions are available for electrical, plumbing, HVAC, construction equipment, electronics, and mining. Features include job quotes and invoicing, resource scheduling, solution databases, and warranty and maintenance agreements.

Electronic Data Interchange (EDI)

If you are in an industry that sells to large retailers, such as apparel, sporting goods, or toys, you may be required to transmit and receive documents electronically. Cost effective solutions are available to help you automate this process. Supported forms include 850 Purchase Orders, 810 Invoices, and 856 Advance Ship Notices (ASNs).

These are just a few of the many Developer Partner Solutions available for Sage Accpac. If you have areas of your business that are not fully automated and integrated with Sage Accpac, give us a call to discuss the solutions available.

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