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For Your Information

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 register [click here](#).

Harnessing The Internet

Leveraging The Web For Marketing And Business Development

The Internet is a powerful force in the business environment, and it continues to evolve rapidly. Harnessing the power of the Internet marketplace is an essential part of an effective sales and marketing strategy. Your marketing strategy must evolve as the Internet evolves. In this article we offer some ideas for leveraging some of the many opportunities currently available.

Increase Traffic To Your Web Site

Of course it is important to have a Web site, a central point for customers to learn about your organization, but in order for prospects to find your company, your Web site must be near the top of a search engine's result set. You can accomplish this goal through Search Engine Optimization (SEO).

SEO requires careful thought and ongoing maintenance. You might consider hiring a consultant who specializes in search engine optimization. You can improve your ranking in search results through the proper use of keywords. Keywords, when used well, are one of the most cost-effective tools of online marketing. They can be placed in your Web site's content and tags, and should be the same terms that you consistently use in your marketing materials. Use keywords appropriately though; keyword stuffing or using a keyword too many times can be looked upon unfavorably by search engines and can actually harm your site's ranking.



Online Communities

Online communities are an excellent way for your organization to become more agile, in everything from running your software to finding best practices information for your industry. Have you checked out the Sage MAS 500 ERP Online Community? The forum is already generating lots of activity: <http://community.sagemas.com/sagemas/>. There are blogs with useful information from Sage executives and support staff, as well as a discussion forum. You can jump in and share your thoughts and perspectives, and get ideas from other Sage MAS 500 users on best practices, such as optimizing SQL Server or the pros and cons of moving to a 64-bit processor. You may even want to consider starting

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your own online community for your organization. There are online services available, such as Lithium.com, that can help you get started quickly.

Social Media

Social media is a powerful force that is growing rapidly. Utilizing this important marketing tool is not just smart, but is quickly becoming essential.

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.

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 become fans. If you are using Sage SalesLogix, you can use the e-mail marketing capability to invite customers to your Facebook Page. Or use Business Insights Explorer's mail merge capabilities to send the request. 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.

Relationships are at the heart of a successful social marketing strategy. You may find your time spent on Facebook feels less like marketing and more like customer service. When people ask for information, even if not related to buying your product, you need to respond to keep them engaged. Listen to what people are saying, good and bad, you may pick up ideas on how you can improve your business.

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 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.

Find Out What They Are Saying About You

There is a lot of chatter on the Web; customers, competitors, and associates may already 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>.

E-Commerce

If you are not already engaged in e-commerce, it may be a good time to re-evaluate your options. Even if you don't sell online, consider providing your customers with the convenience of checking their account over the Web, or risk the perception that your organization is out of step with technology. The e-Customer module for Sage MAS 500 makes it easy to get an integrated e-commerce site up quickly.

The e-Customer module is a business-to-business Internet storefront. Customers can order items from a general catalog that you customize for your Web site. Your customers receive the full strength of Sage MAS 500 product- and customer-specific pricing, and when new items are created in the Inventory Management module, the system will automatically update your Web storefront and add the items to the catalog categories you specify.

Perhaps even more compelling than the online ordering capability is online customer self service. You can give customers a secure view into their account activity, including their account balance, on-order balance, credit limit, and available credit. They can drill down to line-item content from the open-order view, and customers can even specify an account administrator to create and manage their own employee users.

We would be happy to talk to you in more depth about any of the ideas presented here for harnessing the Internet to make your business more effective. Please give us a call for more information.

The Flexibility Of The Sales Order Module

For organizations that distribute products, the process of entering and shipping orders may be one of the most labor-intensive activities performed. To help you maximize productivity and profit, the Sales Order module for Sage MAS 500 ERP is highly flexible and customizable and also offers a powerful set of pricing and order management features.

Customizable Order Entry

Sage MAS 500 provides dozens of fields for order entry, but chances are your organization does not use them all. A simple selection screen enables you to choose only the entry fields you need. You can customize by user, company, group, or site level. For example, a counter salesperson may not need the warehouse and ship via fields on their order entry screen. These fields can be removed for the counter sales person, while maintained on the warehouse worker's screen layout. The required fields can be placed in the data entry grid in the sequence that works best for each user. For ease of use, the main order information is always in view, while a tab system provides organized access to all the information related to the order, such as detailed delivery specifications and item information.

Workflow Options

Three main workflow options are available for order processing; Picking, Counter, and Will Call. Within each workflow many of the steps are optional. The Picking workflow is excellent for processing a large number of orders and it provides checks and balances for larger warehouses.

The Counter and Will Call workflows allow you to perform all the steps associated with picking the order, generating the shipment, and invoicing directly from the Process Orders screen. Inventory is immediately

reserved. The pick ticket may be printed at the counter, the will call desk, or released to the warehouse. The result is a fluid one-step order and invoice process to expedite your orders. To process payments for counter sales or will call, a click of the Payments button launches a new window where you can check credit status, enter payments, and even apply existing credit memos to the order. You can specify the payment type and complete the appropriate fields, such as check number or credit card number and expiration date.

Picking Options

The Create Pick List function provides a powerful dashboard for the warehouse manager; you have the option to pick by Order or by Wave. Wave picking allows you to print picking tickets based on warehouse zone to help warehouse workers pick more efficiently. You can set a variety of business rules to maximize productivity of pick runs. You can:

- » Set the maximum number of orders to pick for pick-to-tote environments.
- » Set sequence to allocate available stock, such as filling back-ordered items first or fill by order expiration date.
- » Set the system to automatically select lot distributions.

System Options

You can choose to activate several optional controls in the Sales Order module according to your business workflow. You can assign trade and payment term discounts, and credit limits for each customer. The system can be configured to check customer credit limits during order entry and be set to automatically release orders from hold when credit changes. The system also supports multiple sales commission plans, including split commissions. You also can configure kits to operate like regular items, then explode the components

when generating pick lists and invoices.

Pricing And Promotions

Flexible pricing rules allow you to configure the system to maximize profitability. You can define pricing structures by customer type or location, and create sophisticated pricing models, including contract pricing; price breaks based on quantity, monetary amount, weight, or volume; effective and expiration dates; and sales promotions. Blanket orders are supported to track and maintain customer contracts, and additional features are available when manufacturing modules are installed, including the ability to run Capable To Promise inquiries directly from order entry.

Whether you are considering implementing the Sales Order module for the first time, or want to further refine and customize your existing installation, we would be happy to help. Please give us a call.

((Tips & Tricks))

Message: "Cannot close a sales order with pending activity"

The status of a sales order can be changed to closed only if there is no pending activity against the order. Items on orders can be closed if there is no pending shipping or return activity, and the quantities are uncommitted. If a remaining quantity for the item exists on a pick list, it must be removed before closing. Here is how you can find and delete the item.

To search for open picks against the sales order: Expand Sales Order, Insights, and Explore, and then double-click Pick Lists. To delete a pick: expand Sales Order, Activities, and Picking, and then double-click Cancel Picks.

Line items may be manually reopened if the quantity ordered is greater than quantity shipped, less any quantity returned for replacement.



IN THE SPOTLIGHT: Upgrade Considerations For Sage MAS 500 Version 7.3

Sage recently announced a new policy for the support of older versions, and a new structure for delivering product updates to customers. Additionally, with the release of Version 7.3, new platform requirements are in effect for Sage MAS 500 ERP. With these changes, now is the time to consider migrating to a 64-bit platform. To assist you in planning your upgrade strategy, we will review the new support and product update policy as well as the benefits of the 64-bit platform and Microsoft SQL Server 2008.

New Structure For Support And Updates

Currently Sage is supporting up to five versions, which dilutes the effectiveness of support and development. Sage is moving to a policy of supporting just the current version and two versions back with the retirement of Versions 6.3 and 7.0 on September 30, 2010.

Sage also will schedule product updates every four to six months instead of the current monthly updates. The new product updates will provide value between major releases by including new features and usability improvements in addition to program corrections. Note that Sage will continue to fix any defects for customers as they occur, according to current escalation policies.

Supported Platforms

With the release of Version 7.3, Sage MAS 500 has been optimized to take full

advantage of SQL Server 2008, and will still support SQL Server 2005. Microsoft Windows Server 2008 and Windows 2003 Server are the supported server operating systems, and client machines can run on Windows Vista SP1 or Windows XP SP3.

Note: SQL Server 2000 and Windows 2000 Server and Client are being retired and are no longer supported.

SQL Server 2008 Benefits

In SQL Server 2008, a new Resource Governor allows you to define resource priorities for different workloads to achieve consistent performance. Policy-Based Management allows you to define a common set of policies for database operations such as query optimizations, backup, and index management.

64-Bit Processing Benefits

To realize the full performance benefit of 64-bit processing, the platform and all the applications need to be designed for 64-bit. Sage MAS 500 7.3 takes full advantage of the 64-bit platform through Microsoft SQL Server 2008. The 64-bit version of SQL Server allows you to allocate more RAM to server processes. This improves performance because SQL Server can work primarily in memory rather than accessing the hard drive.

An important point to note here is that Windows 2008 R2 is 64-bit only. So by upgrading to this operating platform, but not upgrading to SQL Server 2008 at the same time, you might actually experience a

performance degradation, because the 64-bit operating system has to do extra work to communicate with the 32-bit version of SQL Server.

The release of Version 7.3 is the ideal time to upgrade your platform for Sage MAS 500, especially if you are running any Windows 2000 products. The combination of 64-bit with the performance enhancements in Version 7.3 can result in a dramatic performance boost. Please call us for assistance.

Contact Information

Net@Work:

| | |
|-----------------|--------------|
| New York: | 212.997.5200 |
| New Jersey: | 201.735.9560 |
| Connecticut: | 203.272.5245 |
| Rochester: | 585.232.2270 |
| North Carolina: | 919.781.2900 |
| Texas: | 214.377.5924 |

www.netatwork.com

sage@netatwork.com

sage

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