

Migrating Sage Pro ERP to new Accounting Software

Understand your choices if you own:

Sage Pro ERP
SBT Accounting System
Accpac Pro
SBT Vision Point

Net@Work

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Migrating Sage Pro ERP

You have been using the same accounting system for many years. You may be happy or only slightly unhappy with it. Yet, from time to time, key employees complain that the current system isn't working for your business. Complaints may include slowness, inaccuracies, difficulty getting reporting, expense of getting upgraded to current features, burdensome processes, and an uneasy concern that technology has left you behind.

And now, you are getting calls and messages from the software publisher that it might be time to change.

Take a breath. Your company is not the first to face this choice. You can manage it if you understand the issues.

The Bell Goes Off!

Actually the bell sounded some time ago. Microsoft Visual Foxpro, the development language in which Sage Pro ERP is written released its last version in 2007 and announced that it would cease development. Extended support would be available for the product through 2015.

Sage continued to commit to the Sage Pro ERP product and released versions 7.3, 7.4, 7.5 and Sage Pro ERP 2010. Sage Pro ERP 2011 release is slated for April of 2011.

Will your Sage Pro ERP stop working on or before 2015? Absolutely not! Particularly, if you have already made the move to MS SQL Server user Lan Paks and MS SQL back-end database server, you are still in pretty good shape. We expect that system from the 7.x version will be stable for several years to come.

So Why Should I Change?

Here are the signals that you need to put new accounting software into your planning and budgeting:

- Your installed product is not supported by newly acquired hardware or devices. Every year you spend more in support for an old system. Your system is slowing down.
- Your users have a myriad of external spreadsheets and other applications to support processes. Reporting for some processes such as commissions, multi-currency, customer portals, shipping and manufacturing are performed outside of Sage Pro ERP.
- Your accountant expresses concern about continuing to work with an outdated package.
- Your business has changed with developments in the global economy but your software has not. You are importing/exporting goods instead of in-house manufacturing and local sourcing.
- The software needed heavy customizations years ago to accommodate your processes, but you suspect that there are other easier choices.
- You are asked to pay annual software assurance by Sage, but notice that the feature list of each release gets shorter and less relevant to your business.

The Final Reason to Consider Change...

Sage is making it easier than ever to engage with a product from the portfolio that suits your needs.

Thinking about whether to renew your Annual Software Assurance ?

Sage values its longstanding relationships. There are great promotional pricing options available to Sage Customers who are on Software Assurance to move to the right Sage solution.

If your Software Assurance is on plan, stay on plan. If your software assurance has lapsed, call today to find out how to "get back on track."



What's Next?

It's time for some serious thinking, planning, and accumulating of information for the possible change. There is no one-size-fits-all approach when modernizing applications; therefore it is critical that your consultant understand your business goals, vision, and challenges.

Critical considerations include:

- Budget (more about that later).
- Timing (have an advance team searching during your peak season, so you can implement during the slow months).
- Understanding staff capabilities and schedules.
- Reviewing your current hardware and network infrastructure.
- Identifying processes and functionality that can bring on competitive advantages.
- Consider departmental requests for information through-out your business including Sales, Purchasing, Production, R&D, Project Managers and other key areas of the enterprise.

Ready, Set, Go!

The single-most important factor in deciding what products to consider is knowing what your business sector is; Distribution, Manufacturing, Service, Retail or possibly none of the above. Identifying who you are as a company, will help you figure out which products to consider. And, knowing which feature sets and functionalities are non-negotiable will set you on a clear path.

To do this, you may want to form an internal project team who engages with your staff and gathers sample workflows

and reports in all relevant sectors of the company. This team defines criteria for informed decisions, monitors timelines and milestones in the decision path, and makes a big difference in moving through a confusing and sometimes frightening process. Engage your Sage Business Partner early. You already own a Sage product and have a partner who can help navigate the sea of products that you need to consider.

Migrating to a new ERP Product

Understand that even though you might be considering moving to another Sage product, the process mirrors many of the steps you encountered selecting Sage Pro ERP.

Creating a Budget

Your Business Partner generally needs to include 3 items in your proposal for migration. The investment includes; software, consulting services and in some cases hardware and network improvements.

Software – Your Business Partner will know the details of Sage's programs for leveraging your former investment in Sage Pro ERP to another product in the Portfolio. There are a number of products to choose from.

Consulting Services – Migrating your accounting system includes all of the following steps; Installation, Product Configuration, Piloting and Training, Developing Forms and Reports, Database conversion from Sage Pro records, Go-live and Ongoing Support.

You can control costs by deciding whether you want to take ownership of some of the processes, and on the level of mentoring your organization will need. While it may make sense that a smaller company needs fewer services, it is not always true, since there is less time in a small busy company for one or two people to champion the process.

Surprisingly, a significant line item in your budget may be database conversion. You will be asked how much data you want to pull over from Sage Pro including Chart of Accounts, Customers, Vendors, Items, Jobs, opening balances and prior years' of data.

Hardware and Network - If you have been running older versions of VisionPoint or Sage Pro ERP (3.x to 6.x), it is likely that you may not have made requisite improvements to your hardware and infrastructure. Today's applications work best on hardware that has fast processors, lots of inexpensive memory, and adequate storage.

Early on in the technical discussion, you should consider the database storage software. In today's SME marketplace, Microsoft SQL Server reigns in many, but not all sites. You should note the programming language and database options available for other non-ERP applications used in your organization. Where possible, choosing similar platforms leads to faster and easier information exchange and thus lowers cost of ownership.

How much time will My Team need to plan on?

Great question with a simple

formula. For every one hour that your Business Partner spends on your project, plan to spend 2-3 hours. That means you will spend time planning the project, pulling data, training, and working with your in house team and business partner. And, we know that you still have to keep your business operations going. You might want to consider hiring part-time help during the transition, just don't use them for data entry new system or all that training will walk out the door at time of project go-live.

Even More Value

Today's ERP system is all about robust and flexible functionality and frequently the wish list discussions expand the ERP to other areas.

CRM (Customer Relationship Management) Today's accounting systems integrate to applications that extend the sales and marketing effort through Sales pipeline management from Leads to Invoices, Workflow for Customer Service and Supplier Management, and Marketing Materials management. These systems track your documents and discussions with customers, expanding the scope of your Customers' experience with your team.

Document Management Going green has never been made easier. Many businesses are seeing the need for more compliance and documentations on their Sales Contracts and Products, and now Processing and Filing that paperwork electronically is a snap. Scanners and intelligent workflow can be a cost-saver and time saver – a must-have in your IT budget for the future.

eCommerce and Web Your Marketing professionals will tell you - without a web presence you are nobody. Today's web presence frequently includes secure on-line ordering and up to date customer-based pricing online. When your Customer places that order, why should you re-key it into your accounting system? Following your own business approval workflow, you should be able to automatically review and approve orders from the Order Entry application in your ERP, as well as automatically update product status and tracking. Finally, Customer Portals narrow the distance for your key customers to their key data in your system such as product usage and outstanding balances.

Supply Chain products – Today's mega-sized Vendors require better electronic tools for doing business with them. Integrated EDI, automated file transfers between systems and web links are increasingly the requirements for doing business with the 800 lb gorillas of commerce. Going in that direction anyway? Complete the electronic cycle of buying and selling with a minimum of human touch points to manage headcount, reduce inventory levels and improve accuracy.

What part does Sage play in this decision process?

Sage has an expansive portfolio of ERP and CRM products to choose from. Well known products such as Sage MAS 90/200, Sage MAS 500 ERP, and flagship products such as Sage Accpac ERP and Sage ERP X3, as well as their companion CRM products such as Sage CRM and Sage SalesLogix are great choices to replace your Sage Pro ERP application.

Your Business Partner can guide you through the software evaluation process including scheduling web demos and focused planning sessions as well as Sage promotions in the product lines that are right for you.

De-mystifying the software world

You will hear a lot of industry jargon in talking to your colleagues and Business Partner about ERP software. *Integration, Workflow, Extensibility, System Architecture, Development versus Configuration* are the talking points of software selection. Know what these terms mean in the context of your business.

Other terms that become important are *On-Premise* versus *Hosted* or *SaaS* model (Software as a Service). Ask your Business Partner to explain the pros and cons for either type of implementation from the technical to the financial to the contractual angles. There are differences which can impact your business operations for years to come.

Let's Get Started Together!

Engaging with your Business Partner early in the Process. This is no longer a hush-hush process. Sage and its Partners know that you are smart and that you know the time has come to consider a change. Your IT plan can be short, or it can have milestones that span a multi-year plan. A great Business Partner will meet your pace. Technology is not going away – it is getting better and in some areas cheaper than ever before.

The more information you share about your business model and plans, the better focused your consultant can be on helping you achieve your goals. We cannot force a technology choice on you but can increase visibility through educational tools and discussion.

Ready to Discuss a Change?

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“Leaving our Sage Pro ERP accounting system for Sage MAS 500 ERP suite has proven to be an excellent strategic decision for Coihose Pneumatics in setting a new direction for financial reporting and streamlined operations.

Our business growth and requirements demanded that we leverage new technology to get better sales and production visibility as well as easier reporting. The Sage products did just that. Our project team knew both products well making the migration tasks easier than if we had picked a product outside the Sage portfolio.

Sage made it make sense to stay within their product suite and Coihose Pneumatics has reaped the benefits!”

Carmen Nunez-Oliveira, CFO
Coihose Pneumatics



Net@Work is a leading provider of business consulting and integrated software applications covering all areas of business for the enterprise. These areas include customer relationship management (CRM), accounting and financials, manufacturing, distribution, document management, human resources/payroll, enterprise reporting and electronic commerce. Partnerships with proven technology leaders, including Sage Software, Microsoft, Dell, HP, Citrix and Cisco, allows Net@Work to deliver a range of unbiased, integrated solutions that bring its clients every competitive advantage possible.

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