



Markle & Company
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SAGE ACCPAC ERP NEWSLETTER

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WHAT'S ALL THE TALK ABOUT BUSINESS INTELLIGENCE?

Business Intelligence, or "BI" as it's commonly called, is a popular buzzword in the software industry. But as technology has matured, today's BI is more than just a buzzword ... it's an affordable necessity for small and medium-sized businesses. In fact, you have a fantastic set of BI tools that are built right in to your Sage Accpac ERP software that can help slice and dice your way to better profitability and business growth. First, let's talk about what BI is exactly.

The Right Information at the Right Time

BI is an umbrella term that describes a variety of tools involved in the process of gathering & organizing data into graphical views and meaningful reports that enable quick and informed decisions. Put simply, BI delivers the **right information** in the **right format** to the **right person** at the **right time**. Without the tools that BI offers, it can be difficult to harness the volumes of data in your Sage Accpac system in a timely fashion. The resulting "information overload" can delay important business decisions. The ultimate objective of BI is to improve the relevance, timeliness and quality of useful information.

No "Techie" Required

One of the most important aspects of BI tools is that they enable **non-technical** users (like managers and executives) to create charts, graphs, and meaningful reports that interpret large volumes of data without the need for a technical degree. Too often key decision makers are forced to wait weeks or even months while the data they need is extracted and compiled by the IT department in a report that arrives well "after the fact."

It's Not Just for "The Suits"

One of the nice things about BI is that it works great as both a strategic **and** operational tool. Strategically, managers and owners can analyze trends, gross profit margins, and other key performance indicators. Operationally, departmental personnel can streamline procedures. Consider the example of a collections department that goes through a series of tasks, reports, call logs, customer notes, and possibly information in external spreadsheets to determine which customers are overdue. Using BI, all of those tasks and data can be consolidated into a single "Collections Dashboard" that provides a **graphical snapshot** of overdue customers along with "click of a button" access to underlying detailed account data when needed.

BI and Sage Accpac

Years ago, companies spent big bucks to purchase separate business intelligence software that "snapped on" to their accounting system. Today, Sage Accpac ERP provides sophisticated Business Intelligence tools that are built right in. Modules like [Accpac Insight](#) provide you with a high-performance analytics and budgeting. Also, Sage [Accpac Alerts](#) will monitor your system for time-sensitive events (example: low inventory) and send an automated email alert to the right person for quick and decisive action. Plus, Sage Accpac Version 5.5 introduced **new analytical dashboards** with "snapshots" that help you analyze, predict, and manage business performance.

Combining the power of BI tools with human business intuition will empower you with the ability to analyze trends, make tactical decisions and get a leg up on the competition. Contact us if you'd like to find out how to use BI in your business and what combination of tools works best for you.

SAGE INTRODUCES SAGECRM VERSION 6.2

In January, Sage announced availability of the new SageCRM Version 6.2. With the introduction of Sage Accpac Extended Enterprise Suite in 2008, SageCRM is embedded within Sage Accpac and has become an important component of your system. So let's take a look at some of the new features and how they'll benefit your business.

OK, GIVE ME THE TOP LEVEL STUFF

Expanded Relationship Management - a new "Related Entities" feature allows you to set up and manage relationships between multiple entities such as a holding company and its subsidiaries. You can also use this feature to manage multiple sales reps selling to various divisions within the same company (which can help identify cross-sell opportunities).

Enhanced Email Management - ensure professional communication with the enhanced SageCRM email editor with multi-lingual spell check capability.

Simplified Address Management - a new Address Maintenance screen provides an overview of links between companies, people, and addresses to reduce potential duplicate entries and minimize data maintenance and administration.

Branding Toolkit - a new toolkit allows you to change the look and feel of SageCRM to better match your corporate brand. Included are a number of pre-configured themes that can also be customized by the System Administrator.

[Contact us](#) for more information or a demonstration of SageCRM Version 6.2.



What's New in Version 6.2?

To learn more about the new features of SageCRM Version 6.2, download a copy of "[What's New in SageCRM Version 6.2](#)"

SAGE ACCPAC PRODUCT UPDATE:

French and Spanish Language Overlays Ready for Download

New French and Spanish language overlays are available for your Sage Accpac ERP system. Language overlays translate the financial and operational modules, as well as the Help text, into either French or Spanish. The language overlays are **FREE** and can be downloaded from the Sage Accpac Support Center at <http://support.accpac.com> (login required).

TIPS & TRICKS

Scheduling Recurring Transactions

In business, certain things occur regularly like lease payments and insurance. For these transactions, you can rely on the **Recurring Transactions** feature in your Sage Accpac System. Here's how:

1. Open the **Scheduling folder** in **Common Services**, then double-click the Schedules icon.
2. At the top of the screen, type a **Schedule Code** and **Description** for this transaction.
3. Select whether you want to **schedule a reminder** and who will receive notification (if "Specific User" is selected, enter his/her ID)
4. At the bottom of the screen, select the **frequency** of recurrence (daily, monthly, etc.)
5. Click the **Add** button
6. Open AR, AP, or GL and **attach** your recurring transactions to the **schedules** you've created.

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SO, WHAT'S THIS EXTENDED ENTERPRISE SUITE ANYWAY?

By now, you've probably heard about the new Sage Accpac [Extended Enterprise Suite](#) ("EES") that was rolled out in the middle of 2008. EES consolidates your financial, operational, sales, marketing, and customer support functions into a single application. If you're wondering what components make up the suite and the benefit it offers, read on and learn more about this exciting option for your Sage Accpac ERP system.

What Makes Up the "Suite"?

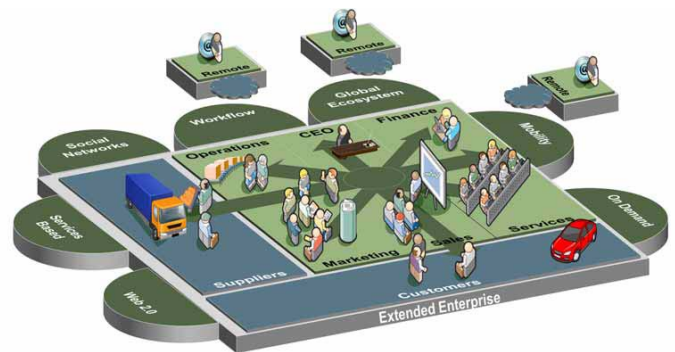
At its core, EES represents the marriage of **SageCRM** in the front office with Sage Accpac ERP in the back office. Throw in the new Analytical Dashboards feature and tighter integration with **Sage Accpac HRMS** and Sage **FAS Fixed Assets** and you've got the powerful new Extended Enterprise Suite that delivers a complete view of your entire business from sales to accounting and from the warehouse to customer support.

How Does That Help?

Many cutting-edge technologies of yesterday were the exclusive domain of large enterprise companies. A complete end-to-end system was cost-prohibitive for most small and mid-sized businesses that often struggled with a patchwork of disparate software and departments that operated in functional "silos." But the technology of yesterday is now mature, accessible, and affordable ... something that's appealing to companies of all sizes.

What Will My Business Look Like When It's EXTENDED?

[SageCRM](#), formerly a separate installation with unique hardware and database requirements, is **now embedded** within Sage Accpac ERP. That means everyone in your



Sage Accpac Extended Enterprise Suite eliminates departmental "silos" and provides a complete 360-degree view of your business.

company is working from the same data, following the same workflow, and breaking down departmental barriers to improve efficiency. Integrated data translates into more accurate reports, better decisions, and a complete 360-degree view of your operations.

It transforms your business from a **restricted** enterprise with departmental bottlenecks to an integrated and free-flowing **extended** enterprise.

Other Nice Benefits

In addition to providing operational simplicity, Extended Enterprise Suite takes the complexity out of software purchase, maintenance and service. EES is priced per user (not by module), giving each user **total access** to all suite functionality (**Note:** special pricing is available to existing Sage Accpac customers that want to upgrade). Also, the functionality from **10 Sage Accpac Options** that formerly required separate purchase and installation are now built in to the Extended Enterprise Suite including GL Security, new inquiry features, Lot Tracking with Serialized Inventory, and others.

Stay tuned for future newsletters that will explore EES in more detail. In the meantime, please [contact us](#) if you'd like to learn about EES sooner rather than later.