



# Sage Accpac ERP Newsletter

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## Go Global with Sage Accpac Multi-Currency

With the internet and other technology breaking down international borders, doing business globally is no longer reserved for multinational titans like Microsoft or Proctor & Gamble. Small and mid-sized businesses have been expanding their reach and tapping international markets for years. But new global opportunities can also present challenges when it comes to accounting for foreign currency transactions. So let's take a look at how Sage Accpac helps you tackle those challenges with Multi-Currency Processing capabilities.

### The Challenge

When companies that use different currencies transact business, at least one of the companies will have to translate a foreign currency to its home currency. But as you probably know, the value of currencies are always changing. This can create an administrative nightmare when it comes to properly valuing payables, preparing financial reports, and ultimately settling the transactions and posting to your general Ledger.

### All Currencies Are Welcome

From Pesos and Pounds to Euros and Yen, Sage Accpac Multi-Currency provides automated currency conversion making it simple to participate in the international marketplace. It also saves time and eliminates redundancy by allowing you to maintain an unlimited number of currencies and rate types. That means you enter the data once, then let Sage Accpac Multi-Currency processing handle the rest through the power of automation.

### Using Foreign Currency Extended Solution

With Multi-Currency processing for Sage Accpac, you can:

- Enter transactions in multiple currencies and print reports in either functional or source currency
- Process payments and receipts in the currency of your customers and vendors
- Restate outstanding currency
- Control how you record gains and losses, selecting from the Recognized Gain/Loss Accounting Method or the Unrealized Gain/Loss Accounting Method for each company

### Competing in the Global Marketplace

Competing for business in the global marketplace is challenging enough without the added hassle of manually tracking currency rate fluctuations, revaluations, and managing gains & losses. But with Sage Accpac Multi-Currency, you'll have the right tool to automate the process and get the job done smoothly and accurately.



[Contact us](#) if you'd like to learn more about using Multi-Currency processing for Sage Accpac ERP.

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## 5 Tips for a Successful Year End

**1. Back Up Your Data** - The first thing you should do before beginning *any* year end processing task is to execute a complete back up of your Sage Accpac data. You should also **test the back up** to ensure it was successful and the data is readable. Without a reliable back up, there is no way to restore your system to its original state should you need to undo a significant year end processing mistake. It's also a good idea to make another back up **after** you successfully complete the year end close.

**2. Payroll Planning** - Since year end Payroll is typically a significant undertaking, it's a good idea to **begin reconciling** all of your payroll tax reports to the general ledger **in early December**. This gives you a chance to catch errors early and avoid filing an amended payroll tax return.

**3. Download Tax Table Updates** - Download and install any necessary tax table updates for your Sage Accpac system. Tax table updates are available at the Sage [online support center](#). Prior to year end, it's also a good idea to order necessary payroll and tax forms. As an alternative to ordering forms, newer versions of Sage Accpac include the form headers and lines when printing government forms directly from the system.

**4. Review Module Options** - Each module is a little different with respect to year end processing. Also, data may or may not be cleared out based on your system's set up options. It's a good idea to review module closing options and follow a module-by-module checklist of year end processing tasks to ensure that everything is performed in the proper sequence.

**5. Gather Information Early** - Minimize the last minute scramble and stress of meeting deadlines by gathering important information before the end of the year. This can include information from vendors, employee address updates, and other changes that may have occurred during the year.

Contact us if you'd like to work together and develop a **'Personalized Year End Processing Plan.'**

### Review Your Reporting Needs

The challenging global economy that prevailed in 2009 has forced some companies to look at their business in a different way. For Owners and Managers that are responsible for assessing the health of operations, year end can provide a great opportunity to review your reporting needs and determine whether you have the right tools to make timely & informed decisions as conditions change.

If you find that the standard reports delivered 'out of the box' with Sage Accpac are not configured to meet your specific needs, let us know. We're experts at helping you make the most of the reporting tools you already own so you can enter 2010 armed with the knowledge, analytics, and detailed reports to make the right decisions and keep your business on course for success!

The following sections contain information and resources that should help make your year end closing procedures a little easier. As always, please be sure to contact us if you need assistance.

## 2009 Compatible Tax Forms

Sage Checks and Forms division offers a complete selection of tax forms that are 100% guaranteed compatible with your Sage Accpac ERP system. Your total satisfaction guaranteed with a free reprint of full refund.

Visit <http://sage.checks-and-forms.com> for information and pricing or call (877) 580-9935.

For **Canadian Forms** visit <http://www.dhltd.com/accpac> or call (800) 497-1475.

**NOTE:** As an alternative to ordering forms, newer versions of Sage Accpac include the form headers and lines when printing government forms directly from the system.

## Sage Accpac Online Community

Last year, Sage launched the Sage Accpac Online Community. It offers a wealth of information to help you make the most of Sage Accpac. You can Download User Guides and Technical Documents, get Product Updates, watch training videos, get quick answers to common questions, and communicate with fellow Sage Accpac users through the community forums and blogs. You can even post your year end processing questions to Sage support experts and other users.

Go to <http://community.sageaccpac.com> to sign up and participate in the conversation!

## Online Support Center

The Sage Accpac Online Support Center is an extremely important resource for product support information, tax table updates, and other critical downloads. Access the support center at <http://support.accpac.com> (Login required).

## General Recommendations & Tips

Following are a few general recommendations to consider as you begin year end processing in Sage Accpac ERP:

**Check Data Retention Settings** - The number of years that Sage Accpac is capable of retaining in historical data will vary based on the edition you are running. In addition, each company may be set to retain a fewer years than the maximum depending on your specific settings. So it's a good idea to double check the settings for all company databases so you don't lose important data when creating a new fiscal year.

**Create a New Fiscal Calendar** - Sage Accpac offers tremendous flexibility for entering transactions across fiscal years. Therefore, you can begin entering transactions for the new year without having to close the current year. But you must first create a new fiscal calendar in Common Services before you can begin entering transactions. You can create a new fiscal calendar at any time so it's a good idea to set it up early so you're ready to enter new transactions.

**Data Management** - Year end is a good opportunity to "clean house" and determine whether it makes sense to purge old data you no longer need, create archive databases, or expand your storage capacity. Contact us if you'd like assistance in creating a data maintenance plan.

## We're Here to Help

It's hard to believe that it's already time to put 2009 behind us. As you begin year end closing procedures and prepare to start fresh in 2010, make sure to contact us if you need assistance with your Sage Accpac ERP system during this important time of year. As your software and technology partner, we're always here to help!



# The Road Ahead for Sage Accpac

Earlier this year, Sage shared its vision for your Sage Accpac system and revealed product development plans over the next couple of years. In this article, we'll take a peek at the future of Sage Accpac.

## First, a Bit of History

Sage Accpac has a long history of technological innovation dating back to the 1970's. The long term success of Sage Accpac is built on fundamental business principles - create value for customers and continually innovate. It's important to note that the drive for technological leadership is balanced by an intense focus on meeting customer needs ... because innovation for the sake of innovation is pointless. That's why the Sage Accpac design teams strive to understand how customers use the software to solve business challenges.

## Sage Accpac 2010

The release of Sage Accpac 2010 marks the culmination of customer research that has lead Sage to adopt "simplicity" as a guiding principle for upcoming releases. Customers want software that's simple to learn, simple to use, simple to implement and simple to upgrade. To deliver on this promise of simplicity, future releases of Sage Accpac will focus on:

**INTERCONNECTIVITY BETWEEN APPLICATIONS** - According to research, one of the biggest challenges with business management software today is lack of interoperability. While you may run several different software applications to meet the needs of your unique business, Sage Accpac is probably at the core. That's why Sage is introducing a common technology platform based on industry standards. This **Sage Web Toolkit (SWT)** will make it easy to build applications that integrate into Sage Accpac. Sage Accpac 2010 will be built around web portals that provide each user with a personalized page that contains functions based on his/her role. As a result, all

applications you use are more easily accessible, able to seamlessly share data, and have a consistent look and feel. Initially, enhancements to interconnectivity will focus on areas of most immediate need including enhancing quote-to-order entry processes and making business intelligence reporting available to all employees.

**ROLE-BASED PORTALS** - each user can design his/her own personalized portal by dragging and dropping tasks and applications anywhere on the screen. The workflow will reflect each users role even when it traverses multiple systems. You'll virtually eliminate the time wasted opening and closing windows and waiting for various applications to launch. You'll feel as if you're working in a single unified system even if data or functionality is located in separate applications.

**BUSINESS INTELLIGENCE ON EVERY DESKTOP** - With the planned release of version 5.6 in late 2009, Sage will be introducing **Sage Accpac Intelligence**. This business intelligence and reporting suite is based on Microsoft® Excel® and will put powerful inquiry and analysis tools on the desktop of every Sage Accpac user. Sage Accpac Intelligence also supports web-based distribution of reports and full multidimensional analysis. When you combine this new tool with Sage Accpac 2010's role-based portals, each Accpac user will have access to relevant BI information. For instance, an accounting clerk would see a dashboard of aged receivables/payables and AR/AP balances. On the other hand, Senior Executives would have instant access to top ten customers, sales, returns, and other important metrics right on their desktop.



## Sage Accpac Vision and Product Plan

[Contact us](#) for a copy of the 11-page product plan for more detail about Sage Accpac 2010.

"THE #1 SAGE ACCPAC ERP PROVIDER IN BOTH THE U.S. AND CANADA"

## CONTACT US ...

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## A Closer Look at CRM Reveals Clear Benefits



One of the key components of the Sage Accpac Extended Enterprise Suite is **SageCRM** which provides tools that support your Sales, Marketing, and Customer Support activities. If you need better sales pipeline visibility, want to find new revenue opportunities, or would like to improve customer service, then read on to learn more about CRM.

### What is CRM Anyway?

CRM is an acronym that stands for Customer Relationship Management. It's useful to think about CRM software as technology that helps you manage customer relationships in an organized way. CRM software, like SageCRM, provides tools like contact and lead management, sales pipeline reporting, meeting scheduler and task reminders, call center automation, and marketing campaign management.

Perhaps most important is that ALL customer and prospect interaction is entered into a single CRM database that's part of your core Sage Accpac system. Without the tools that SageCRM offers, you might find that silos of sales and customer information are trapped in Excel spreadsheets, hand-written in a notebook, or stored on a mobile device.

### One View = Better Customer Service

From the outside, your customers look at your business as a single entity even though they may deal with various personnel in different departments. If your sales team is working with outdated product pricing or a manufacturing team lacks visibility to recent quotes, you may be setting the stage for an unpleasant customer experience.

But with Extended Enterprise Suite, all customer interactions are unified into a single database - both front and back office. That means everyone in your company is working from the same data, following the same workflow, and breaking down departmental barriers. Integrated data translates into more accurate reports, better decisions, and a complete 360-degree view of your operations. The ultimate goal of CRM is to use information collected by all departments to improve the quality of services provided by your company.

### Eliminate the "Blind Spots"

While there are several CRM software solutions on the market today, you have an advantage as a Sage Accpac customer because SageCRM is **embedded** in the Extended Enterprise Suite. Why is that important? Because research shows that significant "blind spots" still exist after stand-alone CRM implementations that don't address back-office connectivity. That means sales and customer service is using one tool while accounting and operations are using another. But with Sage Accpac Extended Enterprise Suite, everyone in your entire organization is using the same system, breaking down departmental barriers, and eliminating blind spots.

### The Benefit is Clear

Specific benefits cited by companies that have adopted an integrated CRM strategy include more timely and targeted customer communication, improved employee productivity, shorter sales cycles, improved visibility into business performance, more accurate sales forecasting, greater cross-sell & up-sell success, better-informed marketing decisions, and fewer customer problems.



### Front-to-Back-Office Integration

[Contact Us](#) to request a copy of this white paper that discusses the benefits of an integrated front- and back-office solution like Sage Accpac Extended Enterprise Suite.