Sage Accpac ERP Newsletter

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Say Hello to Six-Point-O
A Look at Sage ERP Accpac Version 6.0

One of the primary objectives of the 6.0 release is to completely revamp the user interface and underlying technology, transforming Sage Accpac from a traditional Windows application to a modern web-based product. Through this transformation, Sage Accpac will reclaim its reputation as a technology leader while providing you with significant competitive advantage. Let's take a look at what you can accomplish once these building blocks are in place.

The Sage Accpac Portal

Whether you call it a desktop or a homepage, the new Portal is where you begin after launching Accpac. It embraces the role-based or user-centric design that has become very popular, enabling you to find the tasks and information relevant to your role quickly and easily. Functionality, screens, options, and reports displayed are all based on your login and security rights. That means you see more of the stuff you need and less of the stuff you don't. And with options to configure "My Shortcuts" and a selection of optional "Data Portlets", your personal portal is more customizable than ever before.

A Peek at the new Sage Accpac Portal in Version 6.0

Introducing SData

Sage Data, or "SData" for short, is a new communication and web services protocol based on the same standards used by major web-based companies like Google, Yahoo, and Amazon. SData is one of the most significant features of Version 6.0 because it completely changes the technological infrastructure for supporting mobile access, data synchronization, mashups, and integration across various applications. And while a detailed discussion of SData is probably too technical for this newsletter, you'll find a wealth of information at http://sdata.sage.com.

New Features Existing Customers Will Love

Aside from the technical stuff, Sage has incorporated several of the most highly-requested features based on feedback from surveys and site visits. These enhancements include the ability to **Lock Fiscal Periods by Module**, **more and better Reporting and Business Intelligence, and improved CRM Integration from Quote to Order**.

All of these enhancements confirm that the folks at Sage aren't content with 'good enough.' In fact, your investment in Sage ERP Accpac is getting more mileage than ever before and moving forward at a rapid pace to stay ahead of the constant change we see in the market today.

Take a peek at the new Sage ERP Accpac 6.0 with a short 5-minute video preview on YouTube. Or contact us with your specific questions … and keep an eye out for the official launch of Version 6.0 scheduled for sometime in December 2010.

The next 2 pages contain tools, tips and resources to help you get a jump start on closing the year out smoothly. As always, please don't hesitate to contact us directly with specific questions or to request assistance with your Sage Accpac system.

General Recommendations & Tips

Check Data Retention Settings - The number of years that Sage Accpac retains in historical data will vary based on the edition you are running. Plus, each company can be configured to retain fewer years than the maximum allowed. 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 - Remember, Accpac allows you to 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. Since you can create a new fiscal calendar at any time, it's a good idea to set it up early so you're ready to go when it's time to enter transactions in the new year.

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. And be sure to contact us if you'd like assistance in creating a data maintenance plan.

When will the next Sage ERP Accpac Payroll Update be released?

The January tax update is usually released in mid-December and will include the updated tax tables you'll need for next year, as well as everything you will need for filing your taxes this year.

Sage will provide more information as we get closer to the release date, but here are a couple of things to keep in mind:

- You don't have to close the year.

- We recommended that you install the tax update as soon as possible and preferably prior to the end of 2010.

- You have to install AND activate the tax update. Before activating, be sure to make a backup.

TIP: Regardless of your fiscal year, you'll still need to close out payroll for this Calendar year.

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. This point cannot be emphasized enough. 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.

1099 Processing - The Debate Rages On

The recently-enacted U.S. healthcare bill included a provision requiring businesses to file 1099 forms for any transactions with suppliers that are cumulatively worth $600 or more over the course of a year. This includes previously-exempted purchase of goods and services (like office supplies purchased from Staples for instance) which will dramatically increase the administrative burden and volume of 1099s that will be processed by all small businesses. However the debate

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rages on over the original intent of the provision vs. the ultimate impact on business. In fact, several politicians plan to introduce legislation to kill the new 1099 provision. Stay tuned for changes regarding this important debate throughout 2011. In the meantime, rest assured that your Sage Accpac system will be updated to ensure compliance, whichever way things go.

New Customer Support Portal

Earlier this year, Sage completely revamped their online support website for Accpac customers which is now located at https://customers.sagenorthamerica.com. The customer portal is your one-stop-shop for product updates, a support knowledgebase, and detailed documents to assist you in closing out the year.

You should have also received a new login and password for the site. If you didn't get the new login, you can reach the Portal Support Team by phone at **(877) 828-6372** or by email to customer.portal@sage.com.

Sage Accpac Online Community

The Sage Accpac Online Community allows you to connect online with Sage support experts, developers, and other Accpac customers just like you. You also get access to a wealth of information to guide you through the year end closing process including User Guides, Technical Documents, Product Updates, and training videos. Go to http://community.sageaccpac.com to sign up and participate in the conversation!

Important Deadlines and Tax Info (U.S.)

January 31, 2011 - Deadline to issue W-2, 1098, and 1099 forms to employees and independent contractors AND deadline for filing quarterly payroll & annual sales tax returns.

Depreciation and Section 179 Expense - The Small Business Jobs Act (SBJA) of 2010 **increases** the Section 179 deduction to **$500,000.** The definition of "Qualifying Property" has also been expanded under the act. Click here for details.

Standard Mileage Rate - Beginning on January 1, 2010, the standard mileage rate for operating an automobile for business use is **50 cents per mile**.

HIRE Act - The HIRE act of 2010 provides tax benefits to small businesses directly related to hiring employees and writing off investments in equipment. Click here for details about payroll processing and tax implications for year end.

Notice for Accpac Version 5.4 Customers
January 2011 Will be the final tax update

Earlier this year, Sage notified all Payroll Update Plan (PUP) subscribers that after the 2010 tax year, Sage ERP Accpac Version 5.4 will no longer be supported. This is particularly important because it means no additional tax updates will be made available after 2010.

The last Accpac 5.4 Payroll Tax Update for Canadian Payroll and US Payroll will be January 1st, 2011. Based on recent customer feedback, this will be a full update that includes updated forms as well as tax table changes provided for 2010 tax filing. Due to "last minute" updates issued from certain US tax authorities towards the end of the 2010 calendar year, there is a possibility for a January 31st, 2011 Tax Update or hot fix for the 5.4 US Payroll Tax Update only.

Contact us if you'd like to discuss an upgrade to Sage Accpac Version 5.5 or higher in order to continue receiving full support and product updates for your system.

Taking Full Advantage of Sage Accpac 5.6

With Sage Accpac 6.0 on the horizon but not yet released, we thought we'd take a moment to share a few tips to help you get the most out of your current version 5.6. So let's jump right in.

Free Training

Get employees up to speed using the "What's New" Anytime Learning course designed specifically for Version 5.6. This online tutorial walks you through all of the great new features and provides ideas for putting them to work in your business. Best of all, this course is offered at no additional cost to you.

Simply go to www.SageU.com/accpac for details.

Take THAT to the Bank

System Manager Bank Services in Version 5.6 is significantly improved with a more straightforward way to reconcile your accounts and finish month-end in record time. The new user interface is simplified for greater flexibility and more efficient daily task management. You can also take advantage of new functionality such as bank security resources for separation of duties, an improved reversal process, and a bank entries posting journal.

Better Inventory Management

You'll discover fantastic improvements in inventory manage-ment including, an optimized Inventory Valuation report, a new Internal Usage form, additional costing and transaction creation options, Item Inquiry and Drilldown functionality, and a new field to track posting dates for transactions. Version 5.6 also takes **Serialized Inventory and Lot Tracking** to the next level as this functionality has been completely redesigned to improve workflow and performance and add customer requested functionality.

Leverage the Power of SageCRM 7.0

Earlier this year, Sage announced that the new SageCRM 7.0 was available for customers running Sage Accpac 5.6. With SageCRM 7.0, you'll bridge the gap between your front and back offices with features like the "AR Collections Manager." It's a fantastic feature that makes it easy to prioritize and manage customer collections and rapidly convert outstanding invoices into cash in the bank.

Go to http://www.sageaccpac.com/products/crm to learn more about SageCRM - an important part of the Sage Accpac Extended Enterprise Suite.

Voice of the Customer - Loud and Clear

Many of the new features added in Sage Accpac 5.6 were the result of customer-requested enhancements collected via surveys, interviews, and onsite observations. One of the most important tools that Sage uses is an innovative idea management website at www.sageaccpac.com/feedback. So go online today and ensure that your voice is heard!

Excel Tips and Tricks

The new Sage Accpac Intelligence module is an Excel-based reporting and analysis tool that draws data directly from your Sage Accpac database. If you're inter-ested in a resource full of fantastic tips and tricks in Excel, email us and we'll send a copy of the "**Excel Tips & Tricks Booklet - Volume 1**"

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Email Marketing with a Personal Touch

For some companies, email marketing is a one-way street … you send your message and cross your fingers hoping someone will respond. But what if they don't? Do you know how many people opened the email or clicked on a link? Do you have the information you need to follow up with a more relevant or timely message? If not, it's time to think about integrating your email marketing effort with the data in your SageCRM system.

A Quick Look at Email Service Providers

First, it's useful to understand what an email service provider (**ESP**) is. An ESP essentially does the heavy lifting, allowing you to send an email campaign to hundreds, or even thousands, of recipients through their servers. Once your message goes out, an ESP also provides detailed reporting that includes delivery success, open rates, clicks, and even details about the actions of specific contacts on your list. These reports provide invaluable information about the effectiveness of your messages and campaigns.

A 2-Way Conversation

When you use an ESP that's integrated with your SageCRM system, you transform email marketing from a one-way "blast and pray" to a 2-way conversation with your customers and prospects. That's because all of the valuable open, click, and other data is written back to your SageCRM system. Now when you pull up those hot prospects you've been pursuing for months, you'll see which contacts are interacting with your email, what

products they're interested in, whether they've forwarded your message to a colleague, and even those that have opted out (so you don't spend time chasing your tail!). Best of all, the data is sitting right there in the CRM system you probably use every day.

Post-Click, It's Personal

When you combine email campaign responses with notes from phone conversations and meetings, you have the insight you'll need to stay in touch with customers and prospects with relevant communication. You can even create a call list of "hot" prospects based on their open and click activity to ensure you follow up in a timely fashion … without ever leaving SageCRM.

Other ESP Benefits

There are several worthwhile benefits of using an ESP including the ability to manage bounce backs to keep your list clean, automatic opt-out links to ensure CAN-SPAM compliance, ability to send email surveys, and much more. Most also provide turnkey email templates for those that want professional-looking communication without messing around with HTML.

Go Online and Take a Look

A couple of popular Email Service Providers that integrate with SageCRM are www.swiftpage.com and www.communigator.co.uk.

Contact us to learn more about **SageCRM** - an important component of the Accpac Extended Enterprise Suite.