EQUATION TECHNOLOGIES

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Sage ERP Accpac Newsletter

In This Issue:

The ERP Watchdog

Introducing KnowledgeSync for Sage ERP Accpac

If you were heads down dealing with the chaos of year end processing, you may have missed the announcement in November introducing Sage KnowledgeSync (Powered by Vineyardsoft) for Sage ERP Accpac. Like an electronic watchdog, KnowledgeSync keeps a close eye on your Accpac database, scanning for business events and conditions that you define. Perhaps best of all, KnowledgeSync will automatically take action once these pre-defined conditions are triggered. Here's why this technology can be an important tool for your business.

Sniffing Things Out

KnowledgeSync is a "monitor & response" system that watches for changing conditions within your business and automatically executes the appropriate response. On the "**monitor**" side of the equation, KnowledgeSync leverages familiar database alerts technology. You know, anytime inventory is running low, an accounts payable check exceeds a certain amount, a shipment is late, or accounts receivable collections are creeping up, someone in your company gets a real-time alert to their email, cell phone, fax machine, or other device.

Attacking the Issue

But when it comes to the "**response**," KnowledgeSync really excels. After all, it may not be good enough to simply receive an alert because you still have to stop what you're doing and take care of the situation … unless you have KnowledgeSync.

It works hand in hand with Sage ERP Accpac so once an alert condition is triggered, KnowledgeSync can be configured to take action. For example, it can automatically generate and fax/email a purchase order to replenish stock, run a report and email the results to you, send a reminder of an overdue invoice to your customer, and just about any other action you'd normally perform manually.

Don't You Have Something Better to Do?

Every minute of every person's workday matters. Any time you allocate an employee to do work that can be accomplished through automation, you're wasting precious time and resources. It just makes good sense to take a critical look at the tasks that each person performs and ask yourself **"could that task be automated?"** For example, if you're manually generating purchase orders when inventory runs low, tracking down late deliveries, or sending reminders when customer receivables are late, an investment in Sage KnowledgeSync can save you tons of time by automating those tasks.

While Sage KnowledgeSync comes with an extensive collection of pre-configured alert events (covering some of the most common business scenarios), the possibilities for automation using customized triggers and responses are limited only by your imagination. Plus, these automation events are built using a structured step-by-step process which means you don't have to be a technical wizard to build custom alerts and responses.

Contact Us if you'd like to learn more about this exciting new technology for your Sage ERP Accpac system.

Product Updates and News You Can Use

Here is a collection of recent developments and new online resources available to help you get the most out of your Sage ERP Accpac system.

Sage ERP Accpac is Becoming Sage 300 ERP

For the past several years, Sage has made incremental changes in their marketing strategy in an effort to more prominently feature the "Sage" brand while putting less emphasis on individual product names (Accpac, MAS, Simply Accounting, etc). Over the course of 2012, you'll see the final phase of this change which will include the renaming of Sage ERP Accpac to **Sage 300 ERP**. However, it's important to note that the name change will not affect your system or business in any way. **Bottom line:** New name, same great product.

New Business Intelligence Resources

In December of last year, Sage announced the acquisition of Alchemex Pty Ltd. - original developers of the Sage Business Intelligence platform that has become an important part of your Sage ERP Accpac system. To further demonstrate Sage's commitment to BI as a critical business technology, several online resources are now available to help you get the most out of the tools you already own including:

Accpac Business Intelligence Microsite - everything you need to know about using Accpac Business Intelligence including access to pre-defined report templates, product demos, and answers to Frequent-Asked Questions (FAQs).

Accpac Intelligence Microsite >>>

New! Business Intelligence Community - download support documentation, installation instructions, product tips and tricks, and interact with other Accpac business intelligence customers in online groups and forums.

Business Intelligence Community >>>

Version 6.1 Delayed

One of the most important changes to Sage ERP Accpac in many years has been the effort to migrate the product to a truly web-based platform. However, the effort to migrate the underlying technology while, at the same time, maintain system quality, capabilities, and performance goals is taking a bit longer than originally expected. As such, Sage recently announced a delay in the planned release of Version 6.1. We'll keep you posted as new details become available and Sage announces a revised release date.

Accpac Customer Support on Twitter

If you're one of the millions using Twitter, you might want to follow **@SageAccpacCS** where you'll get support tips, late breaking hot fixes, and information on Accpac events and customer webcasts. https://twitter.com/#!/SageAccpacCS

TOP 10 REASONS TO UPGRADE

If you're running an older version of Accpac and haven't had a chance to check out the newest Version 6.0, here's a resource that provides you with the most important reasons to consider an upgrade.

This one-page document provides a high level summary of the top 10 reasons to upgrade from Version 5.4 to 5.5, Version 5.5 to 5.6, and of course Version 5.6 to 6.0!

Download the Top 10 Reasons Now >>>

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Building Customer Loyalty with Sage CRM

You probably know that it takes much more time, money, and effort to acquire a new customer than to retain an existing customer. In this article, we'll explore a few ideas for leveraging the tools and data in **Sage CRM** to make the most of every customer interaction, build loyalty, and perhaps generate some additional revenue in the process.

Marketing AFTER the Initial Sale

For many businesses, customer relationships are considerably more profitable ***after*** the initial sale. Once a relationship has been established, cross-selling complementary products or add-on services is likely easier and probably requires less discounting. That's why marketing programs that are aimed at **current customers** can play an important role in building customer loyalty and a mutually beneficial relationship.

The Sage CRM Marketing component provides powerful tools to plan, execute, and evaluate the performance of customer marketing campaigns. You can segregate campaigns aimed at existing customers as well as track and measure every phase of the campaign from initial promo to closed sale.

Sage CRM also allows you to build a detailed profile of customers over the course of your relationship to ensure that marketing communication is relevant based on previous purchases, product preferences, and other important characteristics of your existing relationship.

Tools That Help You Stay in Touch

While some companies make contact with customers only when they're placing an order, the best-performing companies take a more customer-focused approach. They stay in touch often and realize that relationships are strengthened through a consistent presence and ongoing dialogue.

Using Sage CRM to schedule reminders, calls, meetings, and send holiday greetings can help blur the line between relationships that are "strictly business" and those that are more personal and ultimately foster stronger customer loyalty.

Access To Customer Account Data

All of that customer data within Sage CRM is rendered useless if it isn't easily accessible by the people that are the face of your business - customer service reps and sales personnel.

With **Sage CRM Mobile**, your staff will have information they need in the palms of their hands to resolve customer issues quickly, place orders efficiently, and keep customers happy - whether in the office or on the road.

And because Sage CRM shares data with your Sage ERP Accpac accounting system, sales & customer service staff can access information that's typically stored in the "back office" - like shipping status, accounts receivable, and credit limits. They remain in the familiar Sage CRM interface and avoid "waiting in line" for an answer from accounting or fumbling around in the accounting system.

Technology That Strengthens Relationships

While you may be using Sage CRM to track leads and manage communication related to ***new*** business, don't forget to leverage the same technology to strengthen ***existing*** customer relationships and turn customer loyalty into a competitive and profitable advantage!

Contact us if you'd like to learn more about using Sage CRM to strengthen customer relationships and loyalty.