Sage ERP Accpac Newsletter

Sage Authorized Partner

THE YEAR IN REVIEW

Every year brings new features, performance improvements, and better value for your investment in Sage ERP Accpac ... and 2011 was no exception. Here's a look at the year in review.

Sage ERP Accpac Version 6.0

The Sage ERP Accpac Version 6.0 release marked a significant update to the underlying technology. An update that paves the way for an ERP application that is transforming itself from a traditional Windows-based product to a modern web-based application. These technological changes make it easier to access your Sage ERP Accpac system using a web browser or mobile device as well as more straight-forward integration with other web-based software and services you might be using currently.

Version 6 also incorporates several of the most highly-requested features based on feedback from customers like you including the ability to lock fiscal periods by module, more insightful analytics with the new **Accpac Inquiry**, built-in business intelligence tools like **Sage Accpac Intelligence**, more efficient workflow processes throughout the application, and tighter integration with SageCRM.

> **Version 5.4 Retirement**
>
> As a reminder, support for Accpac Version 5.4 was discontinued as of April 1, 2011. Please contact us with questions about version support or upgrade assistance.

➡ Learn everything there is to know about Version 6 at **SageERPAccpac6.com**.

SageCRM Version 7.1

For a while now, SageCRM has been an integral part of connecting your front and back office. This year, Sage announced the launch of SageCRM v7.1 which boasts powerful new Social Media management tools, built-in e-marketing, iPhone integration, and the highly-anticipated Interactive Dashboard - a customizable workspace that helps you manage your appointments, tasks, activities, and anything else you need to get your job done effectively.

➡ Get all the details at **www.SageCRM.com/v7.1**

New Credit Card Processing Module

Sage unveiled the new **Sage Accpac Payment Processing Module**. Powered by Sage Exchange, it offers a complete credit card processing solution for all types of businesses. Seamless integration with your Accpac system means that you can process credit card transactions directly in Order Entry or Accounts Payable screens. There's no need to re-key data which makes transaction processing a snap, reduces errors, and enables quick and easy reconciliation. Perhaps best of all, it's **FREE** to customers on a current Sage Business Care plan.

✉ **Need Help?** Be sure to contact us with any questions about upgrading, updating, or anything in between!

6 TIPS FOR A SUCCESSFUL YEAR END
General Closing Procedures and Important Deadlines

1. **Create a New Fiscal Calendar** - Accpac allows you to begin entering transactions for the new year without closing out the current year. But you must first create a new fiscal calendar in **Common Services** before entering transactions for 2012.

2. **General Ledger Closing** - While it's a good idea to close modules and purge historical data in a timely fashion, your General Ledger can remain open as long as you need while awaiting final processing in other modules or audit adjustments.

3. **Check Your Version Number** - closing procedures can vary depending on the version of Accpac you're currently running. So be sure to check your version number and service pack before starting year end.

4. **Back Up Your Data** - before you begin any year end process, be sure to execute a complete back up of your database. You should also **test the back up** to ensure it was successful and the data is readable. The only way to "reverse" year end processing is to restore your data from a back up. So do it now!

5. **Check Data Retention Settings** - Accpac retains historical data based on the version you're running and the settings you've configured in each module. So it's a good idea to double check your settings so you don't lose important data during year end close.

6. **Remember, We're Here to Help** - As you begin year end closing procedures and prepare to start fresh in 2012, be sure to contact us if you need assistance during this important time of year. As your software and technology partner, we're here to help!

IMPORTANT DEADLINES & TAX INFORMATION

January 31, 2012 - Deadline to issue W-2, 1098, and 1099 forms to employees & independent contractors.

January 31, 2012 - Deadline for filing quarterly payroll & annual sales tax returns.

Depreciation and Section 179 Expense - Last year's Small Business Jobs Act (SBJA) of 2010 **increased** the Section 179 deduction to **$500,000.** The phase out threshold for qualifying Sec. 179 expenses increased to **$2 Million**, up from $800,000 previously.

Standard Mileage Rate - Beginning on January 1, 2011 through June 30, 2011, the standard mileage rate for operating an automobile for business use is **51 cents per mile**. From July 1, 2011 through December 31, 2011, the standard mileage rate increases to **55.5 cents per mile**.

HIRE Act Worker Retention Credit - if your business hired a previously unemployed worker last year, 2011 is the year you qualify for up to a $1,000 tax credit for keeping that person employed.

Informational Reporting of Employer-Sponsored Health Coverage - Reporting employee's annual cost of health insurance coverage on form W-2 is **NOT mandatory** until 2012. However, the ability to **voluntarily** report such information in 2011 using code DD in W-2 Box 12 will be included in the year end PUP.

__Note__: this information is intended as a helpful reference and is not to be relied on as tax advice from a licensed and qualified tax professional.

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2011 YEAR END FAQ'S
For Payroll and Electronic Reporting

To help you get a jump start on closing the year out smoothly, here are some of the most Frequently Asked Questions and answers related to Payroll Processing and Electronic Reporting.

When will the year end Payroll Tax Update (PUP) be available?

The January 1, 2012 Payroll Tax Update (PUP) is expected to be available December 20, 2011 and can be downloaded from the Sage Customer Portal. A user name and password is required in order to download the update.

What's included in the download?

It ensures that you have the most up-to-date tax rates for the new year. The download also provides an enhancement to support new rules in states that require multiple local tax rates to be assessed for employees.

Sage will update the PUP with any late-breaking legislative and tax rate changes, as necessary, throughout January 2012. Therefore, a second update will be provided on January 31, 2012 so be sure to check back if you download your first update prior to the end of January.

What's New in the Year End Payroll Update?

In accordance with the Social Security Administration's 2011 specifications for electronic W-2 filing (EFW2), Codes DD (Cost of employer-sponsored health coverage - not mandatory for 2011) and EE (Designated Roth contributions under a Section 475(b) plan) for Box 12 have been added.

A new field has also been added to identify the Type of Employer as required by the SSA.

Lastly, U.S. Federal withholding changes have been increased to accommodate changes to the Social Security wage base for 2012 to $110,000.

How do I get a logon to access the Sage Customer Portal?

If you don't have a current logon to the Sage Customer Portal, go to https://customers.sagenorthamerica.com, click the "Logon (Sign Up)" link, and follow the on-screen instructions. If you're having trouble or need assistance, please contact (877) 828-6372.

Note: You must have an active Sage Business Care plan along with a current membership agreement in order to access the Sage Customer Portal. You must also have a current PUP subscription in effect in order to download the update.

Please contact us for assistance if your support plan or agreement has expired or if you have any other questions related to year end processing.

Additional Year End Processing Resources

- Installing and Activating a Tax Update
- Comprehensive Checklist for Payroll Year End
- Backing Up and Restoring a Database
- Year End Training and Self-Study Guides Online

EQUATION TECHNOLOGIES

The Road Ahead for Sage ERP Accpac

Looking ahead to 2012 and beyond, here are some of the developments and planned new releases to watch for related to your Sage ERP Accpac system.

Sage ERP Accpac Version 6.1

Sage ERP Accpac Version 6.1 is the next step in the product's journey to become a fully web-based application ... a journey that started in Version 6.0 with the introduction of web-based Desktop Portals, Dashboards, and Inquiry Tool.

With Version 6.1, many of the "core" modules will be available as web versions including General Ledger, Accounts Payable and Receivable, Inventory Control, Purchase Order, and Sales Order.

But more than just cosmetically moving thousands of traditional Windows-based screens to the web, Sage intends on making improvements and productivity enhancements along the way. Things like logical grouping of tabs instead of floating pop-up windows, expandable panels, screens that are customizable for each user, workflow enhancements, onscreen interactive video tutorials, and more.

Originally scheduled for release sometime during the 4th quarter of 2011, it was recently announced that Version 6.1 is being pushed back until sometime in mid 2012. Sage has acknowledged that completion of the web platform is taking a bit longer than originally expected. So keep your eyes out for Version 6.1 sometime in the middle of next year. We'll keep you posted.

Sage ERP Accpac Version 6.2

With Version 6.2, the entire Accpac system will be available as a web-based application. This release will also feature approval workflows, a Payroll web client, and new customization tools to personalize your Accpac system. Version 6.2 is scheduled for release in late 2012. However with the delay of Version 6.1, it's likely that Version 6.2 will be pushed back accordingly. Again, we'll keep you posted and provide more detail as it becomes available.

Sage ERP Intelligence Double Play
Promotion Extended Through 2011

Due to an overwhelming response to the Sage ERP Intelligence Double Play promo, this offer has been extended through the end of the year.

Here's How it Works: Current Accpac customers can purchase the Sage Intelligence Report **Designer** and **Connector** modules at a bundled price of $2,000. That's a savings of more than 30%!

All customers on a current Sage Business Care plan are eligible. **Offer ends December 31, 2011**.

[Contact Us](#) for details or to take advantage of this limited time offer.

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Customer Self-Service Portal in SageCRM

Your customers have access to more information than ever before. As a result, many of them are accustomed to finding the answers they need whenever and wherever it's convenient for them.

With all of the information available through Google, social media, and online forums, customer self-service has become a way of life. And that's where the **SageCRM Self-Service Web Portal** can play an important role.

What is the Self-Service Portal?

It's an add-on component to SageCRM that provides your customers (and partners or vendors for that matter) with web-based access to their account in your SageCRM database. That means they can log into their account using the web and do things like:

- Update shipping address and other contact information
- Track orders and shipments or review purchase history
- Request product information
- Submit a request for customer service

Of course, security controls and configuration options allow you to control the extent to which your customers can access data and perform functions.

24 x 7 Convenience

Perhaps the most important feature of the self-service portal is that it's available anytime your customers need it. Because let's face it, sometimes they just won't have time to call one of your customer service representatives during "normal" business hours.

And the fact that it's web-based doesn't hurt either. That means the self-service portal can be accessed in the office, at home, or on the road from a mobile device.

Customer Updates are In Sync

When customers make changes to their account using the Self-Service web Portal, your SageCRM database is automatically updated. That eliminates the need for manual data entry by one of your internal customer service representatives and ensures better accuracy.

What's more, your sales representatives can see that changes were made to the account which can provide a great opportunity to follow up with the customer with a personal call and reinforce the relationship.

The SageCRM Self-Service Web Portal can be an important tool in delivering a fantastic customer experience at a lower cost to your business. Contact us if you'd like to learn more.

E-MARKETING IN SAGECRM

One of the most popular and exciting additions to SageCRM Version 7.1 has been the E-Marketing functionality that was added.

This new feature allows you to create and manage email marketing campaigns directly from within your SageCRM application. You can select from more than 90 professional email templates, choose a group of customers or prospects, and send your campaign. Plus, all of the open, click, and bounce data is written back to your SageCRM database.

Check out the "Get Started with E-Marketing" video demo on YouTube or Contact Us to learn more about E-Marketing for SageCRM.