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What's Inside

Headline News

E-ChannelNews, a daily electronic magazine for the computer reseller channel in Canada, has announced their *2009 Canadian Reseller Choice Awards*. Sage Accpac ERP received top honors in the accounting software category.

STAR-INFO

Newsletter for Sage Accpac Extended Enterprise Suite

Business Intelligence Tools

Mining Your Sage Accpac Data For Better Business Decision Making

Business intelligence (BI) is a term you hear often these days. In this article we cover the definition of business intelligence, why it is important to you, and the excellent tools available for Sage Accpac ERP that give you access to intelligence about your business.

Business Intelligence Beginnings

According to Wikipedia, the term Business Intelligence was first used in 1958 by IBM researcher Hans Peter Luhn. He defined it as: "The ability to apprehend the interrelationships of presented facts in such a way as to guide action towards a desired goal." Luhn foresaw that computers could be used not just to collect and crunch numbers, but to provide analysis to support decision making.

To put it into practical terms that you can directly relate to your Sage Accpac solution, business intelligence refers to computer-based techniques used to gather and analyze business data, such as sales revenue by products or departments, or associated costs and income. All businesses have a wealth of untapped information. The trick is to locate relevant information quickly and easily, then summarize and analyze it to obtain predictive views of business operations that support better decision making.

Sage Accpac BI Tools

There are several tools available for Sage Accpac that give you access to business intelligence. They all interface with Microsoft

Excel®. Excel is, of course, the tool of choice for accountants, and no doubt you already export Sage Accpac data to Excel for analysis. But if you spend a lot of valuable time on manual repetitive tasks, like copying, pasting, exporting, and formatting in Excel, you may want to consider using one of the BI tools available. These tools give you the benefits of your familiar Excel interface as well as report templates that automatically pull and refresh data from Sage Accpac.

The three modules available for Sage Accpac are:

» Financial Reporter
» Intelligence
» Insight

You may want to use one or more of these tools, depending on your specific business need and your role in the organization.

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Business Intelligence Tools

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Sage Accpac Financial Reporter

If your reporting responsibilities are primarily in analyzing General Ledger data, the Sage Accpac Financial Reporter is a great option. Report design is completed in Excel, and you can easily report on Optional Fields in addition to standard database columns. The Financial Reporter comes with the General Ledger module, so there is no additional purchase required. Reports can be designed so you can drill down to detailed transactions in the General Ledger module, making it easy to trace the source of questionable amounts or posts.

Sage Accpac Intelligence

New with Sage Accpac Version 5.6, the Intelligence module provides you with easy-to-use report templates for financial, strategic planning, sales, purchasing, and inventory data. The templates help you get started quickly, so rather than spending time creating custom reports, you can be analyzing information.

A **Dashboard Data View** is included to allow executives to view high-level information both textually and graphically to help with daily and long-term planning. The reports feature Top-N reporting on customers, items, and expenses, and comparative profit and loss figures for current month and year-to-date.

A single user **Report Manager** license is included in the Version 5.6 upgrade that will allow you to author new reports, filter and aggregate data, and set security for reports. Additional licenses can be purchased as needed for your organization.

If you have staff members who do not need to create new reports, but just need to be able to change filters and parameters for existing reports, you can purchase **Report Viewer** licenses for them.

The **Report Connector** is an add-on for the Intelligence module that allows you to consolidate data from multiple companies, or connect external data from other sources via ODBC.

Using the **Analysis** add-on you can create OLAP cubes that enable multi-dimensional analysis of large volumes of data, and overcome Excel row limitations. For in-depth analysis of trends and what-if analysis using Excel pivot tables, this add-on also provides you with ready-to-use data cubes that enable multi-dimensional analysis of your data. Included with the Analysis add-on are the Inventory, Sales, and Financial cubes.

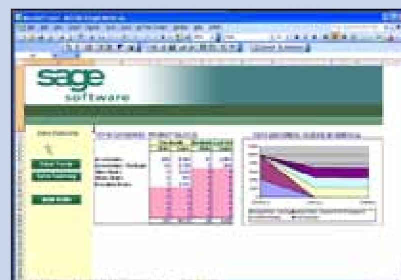
The Inventory cube allows you to analyze year-to-date stock-on-hand quantities, purchase and sales order quantities, and actual stock values by inventory group. The Sales cube gives you sales quantities, gross profits, and amounts by customer, product, and salesperson over multiple fiscal/calendar years.

The Analysis add-on provides the ability to perform multi-level drill-down into the required level of detail and includes a Trend Analysis Graph.

Sage Accpac Insight

For enterprise-level organizations needing automated report distribution; strong security measures to protect sensitive data; and complex budgeting and consolidation, Sage Accpac Insight is the BI tool of choice. Based on the familiar Excel interface, Insight can produce sophisticated reports across multiple cost centers and consolidate data across the enterprise. Sage Accpac transaction data, and any other data you require for reports, is transferred into a powerful data warehouse. The data warehouse allows reports that crunch a lot of data to be produced very quickly, without impacting the performance of your Sage Accpac system. Insight also is designed so that employees in remote offices and different departments can manage, distribute, and collaborate on data from a single, unified source. Insight reports can be deployed over the Web to key personnel throughout your company, or sent as an Excel file that they can review on demand.

ZOOM IN



Graphical views of data like this one from Sage Accpac Insight give managers an instant picture of business conditions, to support effective decision making.

CRM Business Intelligence

Important business intelligence about your customers' buying patterns and your sales team's conversion rates can be gained by mining your SageCRM data. The Intelligence and Insight modules both can pull data from SageCRM to be used in reports right along with sales history data from Sage Accpac. You also can use the tools built in to SageCRM to gain fast intelligence. SageCRM reports deliver at-a-glance sales information to enable executives to make critical business decisions and conduct effective business planning as conditions change. Dashboards provide instant insight into business and employee performance.

Please give us a call to learn more about any of these solutions.

Preserve Customer Loyalty With SageCRM Customer Care

Good customers are hard to find, especially in current economic conditions. This makes retaining the customers you have more important than ever, and one key to retaining them is to provide excellent customer service. Your SageCRM system is more than a powerful tool for tracking and closing leads. After the sale is fulfilled, the tools within SageCRM Customer Care give you the ability to provide superior customer service, increase customer satisfaction, and preserve your loyal customer base. Let's take a closer look.

SageCRM Customer Care automatically escalates a case if it remains inactive for longer than the predefined period of time. This powerful automation ensures that nothing falls through the cracks.

Case Tracking

At the heart of Customer Care is Case Tracking. You can track everything from technical support questions to items missing from shipments. To create a new Case you simply click on the New Case action button, find the customer, and enter the details. The screen can be customized to collect the specific data you need to quickly resolve customer issues. Depending on the workflow you define, workflow action buttons appear, allowing you to advance the case to the next step.

Workflow Automation

The flexible workflow automation capabilities of SageCRM allow you to fully define customer service processes and escalation points for your organization. Typical statuses or steps you set might include: Logged, Investigating, Waiting, and Resolved. If the case remains inactive longer than the period of time you predefine, SageCRM will escalate the case, sending an e-mail notification to the manager you designate, alerting them to the condition. This powerful automation ensures that each case is handled expeditiously.

Real-Time Monitoring Of Service Levels

The current service level for each case is easily visible with a traffic-light monitoring column in the Cases Tab. This makes it easy for customer service staff to identify cases in need of immediate attention.

Customer Communication

It is important to communicate case status to customers. Customer Care enables you to view all previous communications related to a case, and schedule calls, record notes of conversations, and send e-mail updates.

A 360-Degree View

Customer service professionals can be more effective when they have fast access to every detail relating to the current customer. SageCRM provides 360-degree visibility into customers by bringing together sales data, customer service information, and transaction data from your Sage Accpac system.

Central Knowledge Base

Solutions to common problems or questions can be stored centrally in the Knowledge Base, providing easy and immediate access to this bank of information. Once a case is resolved, you can link the Solution or Knowledge Base article to the case. Powerful search technology enables users to find Knowledge Base entries quickly and easily, ultimately resulting in improved customer service.

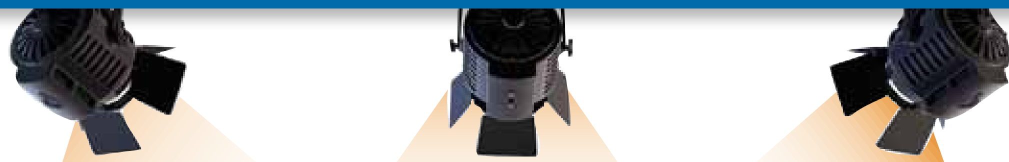
Reporting Tools

Built-in reporting provides for easy analysis of customer issues, and allows you to quickly identify open issues requiring attention. For example, the Cases Open By Company report lists all the open cases for a customer, and includes a graphical depiction of case status. All reports include hyperlinks where appropriate, allowing you to drill down to uncover further details about a case. Existing reports can be fully customized, and new reports can be created from scratch using wizard-based report customization tools.

Customer Self Service

The SageCRM Self Service Portal allows customers to interact directly with your Customer Care system. Many customers prefer to search for their own answers using your Knowledge Base, and they can add their own cases and review the status of their open cases without waiting on hold. SageCRM Web Self-Service can be incorporated into a company's existing corporate Web site, providing a seamless customer experience at a lower cost to your business.

Please give us a call for more information.



IN THE SPOTLIGHT:

Benefits Of Integrated E-Marketing

A boon to small and medium-sized business, E-marketing provides access to the mass market and offers the potential to create personalized marketing at an affordable price, unlike TV or print advertising. In this article we discuss integrating your E-marketing efforts with your SageCRM software.

Benefits Of E-Marketing

In addition to being an inexpensive marketing tool, E-marketing provides other significant benefits. It gives you the ability to reach anyone in the world who has Internet access. You can track and measure results; gain information about customers' responses to your campaigns; and personalize your messages based on what you learn. With E-marketing you can create interesting campaigns using music, graphics, and videos. Or you could send your customers a game or a quiz—whatever you think will capture their attention. Smart e-mail marketing has given sales and marketing teams the powerful ability to impact the purchase decisions of prospects.

An Effective Tool

Many people think of E-marketing as simply the delivery of an HTML formatted e-mail message to customers and prospect lists. However, the real power of e-mail marketing is the ability to understand the behavioral patterns of customers and prospects so you can begin to focus content around topics of interest and solutions that match. Integration between your SageCRM software and your e-mail marketing application is the perfect way to achieve this with minimal effort.

E-Marketing Requirements

Implementing a software solution is the best way to engage in E-marketing. The following is a list of some capabilities to look for when choosing a solution:

- » Mass e-mail delivery
- » Open and click-through monitoring
- » Automatic update of unsubscribe requests
- » Simple to use HTML editor that accommodates external templates
- » Spam-checker for outbound e-mail
- » Ability to deliver dynamic content based on CRM values
- » A/B test function to increase success rates

Available Solutions

Integrated E-mail marketing software solutions are available that can deliver timely messages to recipients who value them. A tight integration with SageCRM allows all recipients' actions to be written back to the contact record, showing an accurate history inside of SageCRM of each contact's interaction with your e-mail campaigns, and in the Sage Accpac customer record.

You can use data from SageCRM to create targeted HTML messages with dynamically produced content. Bounced e-mail messages and unsubscribe requests are automatically updated into the SageCRM contact record, saving you data entry, and helping you to remain compliant with anti-spam laws. The SageCRM contact record also can be updated with open clicks and survey responses, giving you more precise groups to target.

Give us a call for more information on E-marketing solutions available that integrate with SageCRM.

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