



1ST QUARTER
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SAGE ACCPAC ERP NEWSLETTER

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WHAT CAN EDI TECHNOLOGY DO FOR MY BUSINESS?

If you're like some folks, you've probably heard of EDI but aren't exactly sure what it is, what it does, or what benefit it can offer your company. In this article, we define EDI, evaluate its benefit, and take a quick peek at Sage Accpac Exchange – an EDI solution designed for your Accpac system.

So What is EDI Anyway?

Electronic Data Interchange (EDI) is the process of electronically exchanging data, or more specifically business documents, between companies. Business documents might include Orders, Invoices, Acknowledgments, and Advance Shipping Notice. EDI transmissions generally contain the same information that would be included in the "paper" version of the document. It's essentially an electronic conversation between two businesses ... or more accurately, between two business systems. Companies that send or receive documents from each other are referred to as "trading partners" in EDI terminology.

That Makes Sense, But How Does it Work?

To explain how it works, we'll use an example of a Purchase Order that has been processed in your system. Information from that Purchase Order is translated to a specific data format and submitted directly to your supplier's accounting system via the internet. In some cases, a Value Added Network (VAN) acts as an intermediary between you and your trading partner. In the most basic form, a VAN acts as a post office that receives transactions and routes them to the appropriate recipient. It's like a clearinghouse that simplifies communication between trading partners (i.e. you and your vendor or customer) and ensures that the data exchanged is structured and standardized.

What are the Bottom Line Benefits?

Primary benefits of EDI technology include accuracy and efficiency which can result in both direct and indirect cost savings.

Accuracy – errors are reduced because data is not being re-keyed into another system. Improved accuracy results in a host of benefits including elimination of excessive shipping charges and the cost of returns for incorrect orders.

Efficiency – electronic documents are delivered far more quickly than their paper-based counterparts resulting in faster order turn around, happier customers, and competitive advantage.

EDI can reduce direct costs such as paper/forms, postage, printers & toner, and document storage. Indirect benefits can include reduced lead times, more frequent inventory turns, better use of warehouse space, and improved cash flow (faster delivery, faster invoice, earlier payment).

Sage Accpac Exchange

Sage Accpac Exchange is an affordable EDI solution designed for your Sage Accpac ERP system. It utilizes the internet, open standards, and EDI software that provide you with flexibility to conduct business transactions with trading partners through a traditional VAN **or** through standardized, internet-based EDI services. It delivers secure, bi-directional communication using digital signatures and encrypted data with dual-key security. Learn more by clicking below to download the overview brochure or watch a pre-recorded demo online.



**MORE
INFO**

[Click Here to download the Sage Accpac Exchange overview brochure](#)

[Click Here to watch a pre-recorded video overview online](#)

CREATING CUSTOM FIELDS IN SAGE ACCPAC ERP

Since your business is unique, you've probably had moments when you wished you could easily create a new field within Sage Accpac that would capture data specific to your business or industry. Well, your wish has been granted with the **Transaction Analysis and Optional Field Creator** module.

Better Data, Better Reports

Originally introduced with version 5.3, the Transaction Analysis and Optional Field Creator module provides support for unlimited optional fields throughout all Sage Accpac applications. Not only can you easily add additional fields, but the information in your newly-created field is captured in the database which means you can also report on it. It's a simple way to customize your Sage Accpac system to capture and report on specific information you require for general ledger accounts, customer and vendor records, inventory items, order entry forms, invoices, and much more.

For Example ...

Let's say, for instance, you carry an inventory item that has an option to ship with a maintenance plan. You could create an optional field to define this plan in the inventory item master record. You would then set up a corresponding optional field on the Order Entry screen. You can even create a drop down box to provide order entry personnel with an option to select from multiple plans. This maintenance plan information would then be tracked and defined for customers, shipments, invoices, and all the way through to your general ledger.

Optional fields allow you to define unlimited text, amount, date, time, integer, number, and yes/no field entries across all Sage Accpac ERP applications.



For more information or to see a demo of this very powerful module, contact kgibson@srggsolutions.com.

PRODUCTIVITY TIP: USING EMAIL SIGNATURES IN OUTLOOK

In today's business environment, we rely more and more on e-mail for communication. While use of the traditional business letter (with a salutation and signature) may be on the decline, it's still important to know something about the people we correspond with. E-mail signatures can play a role in providing contact information, and in lending a professional tone to your messages. A signature is a customary, fundamental aspect of communication that we have come to expect and value. It adds a personal touch and an element of sincerity.

Typical information in an e-mail signature might include: Your name, Title, Phone Number and Extension, Email Address, and Company Web Address. The following steps will guide you through creating an email signature using Microsoft Outlook.

Step by Step: How to create an e-mail signature in Microsoft Outlook:

1. On the **Tools** menu, click **Options**.
2. Click the **Mail Format** tab.
3. Click the **Signatures** button.
4. Click the **New** button and begin typing

Creating a signature doesn't take long. It really depends on how plain or fancy you want it to be. You can quickly create a "Plain text" signature with important contact details or click "Edit" to create a more eye-catching, graphical signature that might include Pictures, logos, colors, and other formatting options. Once created, Outlook automatically applies your new signature to every new email message you compose.



[Click Here](#) for more detailed step-by-step instructions online.



Contact Us With Any Questions

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