



2nd Quarter
2010

Sage Accpac ERP Newsletter

*In This
Issue:*

**The Best of
Both Worlds**

**Data Security
and Your
Customers**

**SageCRM 7.0
Available in
May**

**Focused Sales
Management
with SageCRM**

sage

Authorized Partner

The Best of Both Worlds

Sage Accpac and Microsoft Excel® Working Together

While Sage Accpac provides some fantastic standard reports, you probably turn straight to Excel when it's time to get your hands dirty, play with the numbers, and make important decisions. That's why we think you'll like the new Sage Accpac Intelligence module – an Excel-based reporting and analysis tool that draws data directly from your Sage Accpac database. Let's take a closer look.

A More "Intelligent" Accpac

Sage Accpac Intelligence provides Business Intelligence reporting in a familiar Microsoft Excel interface. With pre-formatted reports and built-in pivot tables, you'll be up and running quickly using what-if analysis and multidimensional OLAP cubes to make informed business decisions. Plus, you can modify existing report templates, create totally new reports, and save your settings & preferences, eliminating the need to update the spreadsheet each time you run a report.

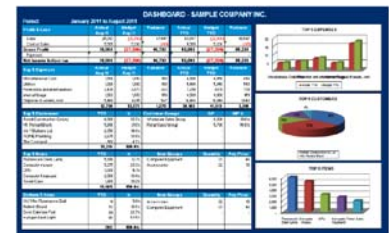
All Modules and Databases are Welcome

Accpac Intelligence can pull data from any Accpac module which means you can combine accounting, operations, CRM, and much more into a single location. This is an important distinction from the Accpac Financial Reporter which only looks at data from your General Ledger. And by pulling data directly from your system, Accpac Intelligence automatically recognizes your fiscal periods, chart of accounts, and detailed transactions.

Accpac Intelligence will also connect to external ODBC databases or third-party software applications consolidating vast amounts of raw data across your entire company into a single, comprehensive reporting platform. This will save a tremendous amount of time and the potential inaccuracies of manually extracting data and cobbling together reports from a variety of sources.

A Dashing Display

Accpac Intelligence includes Dashboard Analysis that provides a one-page summary of key business information like top customers, items, and expenses. "Dashboard Style" reporting is particularly useful in condensing vast amounts of data into a single snapshot that's easy to interpret at a glance (like the dashboard in your car!). You can view items in the dashboard in both text and graphical format so you get the information you need presented the way you choose. Plus, you get full drill down capability when you want more detail behind the numbers.



The Dashboard Analysis provides a one-page summary of key information.

Give It a Test Drive

Starting with Sage Accpac Version 5.6, Accpac Intelligence is included with your system and provides a **FREE single user license** so you can kick it around and experience first-hand the power of business intelligence reporting combined with the familiarity of Microsoft Excel. You can also get a preview of Accpac Intelligence through **Free Introductory Training** offered online at [Sage University](#) or you can [contact us](#) directly with your questions about this fantastic new feature for your Sage Accpac system.

Data Security and Your Customers

Today, nearly all businesses accept credit and debit cards as a form of payment. To protect your customers' sensitive data, the payment card industry has developed a set of standards known as the **Payment Card Industry Data Security Standard**, or simply **PCI-DSS**. As a merchant, you must be compliant with the new PCI-DSS requirements by **July 1, 2010** or risk losing your ability to process debit and credit card transactions. Let's take a closer look.

Becoming PCI-DSS Compliant

Developed & enforced by the 5 major credit card networks including Visa, MasterCard, JCB, American Express, and Discover, PCI-DSS requirements apply to all businesses that store, process, and transmit cardholder data. There are 12 requirements that fall into 6 categories as follows:

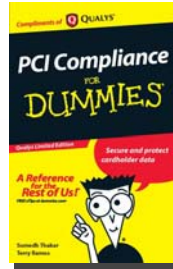
- **Build and maintain a secure network** - includes firewalls and passwords
- **Protect cardholder data** - data encryption and storage procedures
- **Maintain a Vulnerability Management Program** - anti-virus and operating system security
- **Access Control Measures** - covers both electronic and physical access and handling of sensitive data
- **Monitoring and Testing Networks** - schedule regular tests of security measures
- **Information Security Policy** - formalized security policy that's updated and distributed regularly

PCI-DSS Resources

There is a wealth of information and resources online to help ensure that you are compliant with the new PCI-DSS requirements by the July 1st deadline. In fact, Sage has developed a dedicated website for Sage Accpac customers at www.SageAccpacInfo.com/PCI.

You'll also find complete details on the official PCI Security Standard website at www.PciSecurityStandards.org.

The Lighter Side of PCI-DSS



[Contact Us](#) and we'll email you a **FREE** copy of the e-book "PCI Compliance for Dummies."

This comprehensive e-book explains how to comply with PCI-DSS requirements, presented in plain English and in a light-hearted fashion.

Please be sure to contact us if you have specific questions about PCI-DSS compliance and your Sage Accpac system.

SageCRM 7.0 Available in May

Sage has announced that beginning in May 2010, SageCRM Version 7.0 in both the standalone and integrated versions (via Accpac Extended Enterprise Suite) will be available to customers using Sage Accpac 5.6. Some of the new features of SageCRM 7.0 include:

- **Interactive Dashboards** - customizable workspace to organize all your daily tasks and activities.
- **New User Interface** - an enhanced design offers greater personalization options
- **SageCRM Ecosystem** - an online community offering tips, tricks, and apps for SageCRM customers.

Contact us to learn more about SageCRM 7.0 or Accpac Extended Enterprise Suite.

KEN GIBSON | (613) 230-7744 | kgibson@srggsolutions.com



CONTACT US:

900 Greenbank Road, Suite 608 | Nepean, Ontario, Canada K2J 4P6 | www.srggsolutions.com | (613) 230-7744



SAGE ACCPAC ERP Extended Enterprise Suite Supplement

2nd Quarter - 2010

Focused Sales Management with SageCRM

Sales are the lifeblood of any organization. And even though your customers may not be spending as much as they did during a better economy, you can't afford to sit things out and wait for a recovery. It's important that you maintain focus and discipline around your selling strategies to drive sales both now and when the upturn comes. Let's explore how SageCRM can help.

Workflow and Pipeline Management

Automating your sales workflow using SageCRM helps to eliminate unnecessary paperwork and ensure that your sales teams are optimizing their time while adhering to standard, company-specific sales processes. With standardized workflow processes, you can prevent deals from falling through the cracks. Plus, sophisticated pipeline management tools provide a real-time snapshot of sales opportunities and sales team performance to ensure that you're directing resources to the deals that are most likely to close.

Lead Tracking & Reporting

With SageCRM, leads are tracked from your very first contact to final closure so that no valuable revenue opportunities are missed. You'll also benefit from detailed lead reports and analytical dashboards that ensure leads are being captured and followed up on properly.

Personal Productivity

As a salesperson, all the information you need to boost productivity and close sales faster is available in the SageCRM **interactive dashboard**. In this personalized workspace, you can manage your calendar, sales opportunities, contacts, and daily tasks from a single screen. With a simple drag-and-drop approach, you can personalize your dashboard and include information from Sage MAS 90 or 200 (like inventory stock

levels or customer credit status for instance) and even include links to frequently-used websites like LinkedIn or Google.

Sales Analysis and Business Planning

How is each department or sales team performing? Are they taking advantage of up-sell opportunities? Are you targeting the most profitable customers? These questions and more are answered using powerful analytical tools and reports that are available in SageCRM. Sales directors, managers, and executives can analyze sales performance and emerging trends in various regions and market segments. And by combining that data with information from Sage Accpac ERP, you'll have a 360-degree view of your business from the front- to back-office.

These are just a few of the ways that SageCRM provides the processes, structure and tools to help you achieve a focused sales management strategy and power through challenging times. [Contact us](#) if you'd like to learn more or to see a demo of the latest release - **SageCRM Version 7**.

Sage CRM Online Community

Sage has launched the Sage CRM Online Community where you can connect with other users, read insightful articles, comment on blog posts, and stay current on support issues. Plus you'll find a wealth of tips and tricks that will help you become more productive and make the most of your investment. You can visit the SageCRM online community at:

<https://community.sagecrm.com>