*info Newsletter
For Sage Accpac

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What's Inside

For Your Information

Sage Summit, the annual conference for Sage Software customers, will be held this year in Chicago, during the first week of November. You'll learn about software, connect with other users, and generate lots of new ideas for growing your business. Go to www.sagesummit.com for the latest conference information, including great rates at preferred hotels.

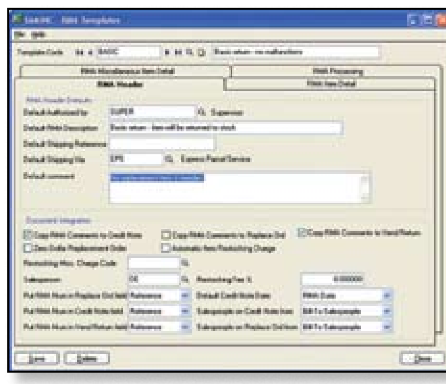
Enhanced SageCRM Integration

See page 4 for more info!

Streamline Returns With The New Sage Accpac RMA Module

Most organizations these days are finding the marketplace more crowded than ever. Competition for new customers gets stiffer every day, and you must work harder than ever to keep existing customers happy.

An inevitable part of providing good customer service is accepting returns. Reasons for customer returns run the gamut from the customer changing their mind to a defective item. Accepting returns is costly, but if properly managed, you can keep the administrative costs to a minimum while still making your customers happy. There is a new tool for Sage Accpac ERP that does just that—the Return Materials Authorization (RMA) module.



The RMA entry screen provides one-click access to related tasks.

Not only will the RMA module streamline the process of authorizing and receiving returns, the seamless integration with the other Sage Accpac modules keeps your inventory accurate and provides a complete workflow for items to be repaired, replaced, or returned to the supplier. Full automation of the process assures customer returns are turned around rapidly. Even your cash flow can improve when returns are handled efficiently. Let's learn more.

Centralized Returns Management

With RMA integrated, you can completely eliminate gaps in product tracking. Each activity related to a particular item is stored in your Sage Accpac system, from the initial purchase order all the way through to a return.

The power of the RMA module starts with a customer's request to make a return. You can generate return authorization documents to acknowledge the return and provide personalized instructions for the customer. When creating the return authorization, the system automatically assigns a unique number that is tracked through all the activities associated with the return.

Even when a customer is returning multiple items on an order, your customer service staff can process the return quickly by automatically generating the RMA from the original customer invoice, then removing the items that are not being returned. If a customer is returning items sold on multiple invoices, the RMA module can handle that on a single RMA document. Serial and lot tracking integration allow you to accurately record the product being returned.

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Streamline Returns With New Sage Accpac RMA Module CONTINUED

Once you receive the products being returned in the RMA document, each item will require further action. If you are issuing a credit, you can generate an Order Entry (OE) Credit note with the click of a button. If you are sending a replacement item, you can create the OE replacement order right from the RMA screen. You also can flag the item to be repaired and returned to the customer, or automatically create a purchase order return to send it on to your supplier for replacement or repair. You can do all these things right from the RMA entry screen with just the click of your mouse.

Track And Bill For Repairs

Items being returned may be under a warranty provided by either your own organization or a supplier. The RMA module can handle both of these situations. If the item is under warranty with the supplier, you can quickly and easily create a purchase order return document to send to your vendor.

In some situations, you may need to send the product out to a third-party repair agent. The RMA module keeps track of these agents and their designated repair facilities, so you never lose track of a customer's product.

For items that have been damaged in shipping, RMA offers a centralized place to record and track claims made against insurance with shipping carriers.

Tailor RMA To Your Company

A robust selection of setup options allow you to tailor the RMA module to your unique organization. RMA documents can be formatted to fit your needs, and you can define a default expiration period for RMAs.

User-definable status codes allow you to specify both internal and external status codes that make sense for your company and products. You also can add any custom fields you need to tailor the system to match your business processes. Crystal Reports® is built right into the RMA module, making it easy to create your own custom reports.

For security and control, you can designate the employees who are allowed to authorize returns. You also can store the name of the main contact person who handles returns for internal reference.

Setup options also allow you to define return policies for your items and any restocking fees or miscellaneous charges to be applied. You can even specify which lines of an RMA should generate automatic replacement orders.

Reason Tracking And Analysis

Perhaps the greatest benefit of an automated RMA system is the insight you can gain into the reasons that items are being returned. Tracking and analyzing the reasons for returns will allow you to take corrective action to prevent future incidents. The Fault Analysis report supplies the information you need to quickly identify product faults and take corrective action to eliminate repeat returns.

Here are some examples of the actions you might take based on the insights you gain:

- You may discover that a large percentage of defective items come from a particular vendor and change your supplier as a result.
- If a manufactured item is often returned for defects in the finish, you might replace tools or materials involved in the process.
- If a particular item is returned with greater frequency than others, but for no specific reason, you may choose to remove it from your product line.

Effective Reporting

The RMA module includes all the reports you need to manage returns.

- The Credit Note report allows you to evaluate the revenue impact of returns.
- Customer and Item Return Rate reports allow you to identify problem customers and items and take corrective action.
- The External Status and Workflow Stage report provides accurate tracking of items sent out for repair.
- The Open/Closed Status report shows you the RMAs outstanding.

Fraud Prevention

The RMA module contains built-in controls to prevent abuse of the system. The system checks to see if an item has already been returned, or if a Credit Note has already been issued, ensuring the same item is not credited twice.

A Powerful Tool For Your Business

If a major part of your business is the sale of products, you will find the Sage Accpac RMA module to be the most important tool you add to your business management system this year. The addition of this one tool can enable you to:

- Enhance customer satisfaction with quick response to all return and repair requests
- Improve accuracy and control of your valuable inventory
- Increase your cash position with better management of damaged goods claims with suppliers and shippers
- Increase staff productivity with automated processes
- Improve the quality of your product line using the insight gained from the reasons for returns

If you would like to process claims faster, track inventory with greater accuracy, and optimize customer service performance, no matter how many returns appear at your door, give us a call to schedule a demonstration of the RMA module for Sage Accpac. ☆

Tips & Tricks

Faster Vendor Activity Report

If you Include Pending Amounts on the Vendor Activity report, it may take several minutes for the system to search for pending amounts.

If all transactions are posted, you do not need to check this box. If you don't have any pending transactions, or do not need to show pending amounts on the report, make sure the box is not checked. The report should now generate in a matter of seconds. ☆

Become More Proactive With The Alerts Server

The Sage Accpac Alerts Server and Alerts Library are powerful tools that transform the data in your Sage Accpac ERP software into business intelligence, proactively delivered to the people who need to know via your e-mail system. This summer, an enhanced version with new features and a larger library of alerts will be released. And for those organizations who have not yet purchased the Alerts Server, the enhanced version offers a *Lite* version that contains five free alerts so you can acquaint yourself with the power of this module before making a financial commitment. Let's learn more.

Alerts Server Benefits

Customer service is an important differentiator in a crowded marketplace. You can use the Alerts Server to automate customer communications, providing them with efficient, reliable, and attentive service. For example, you can automatically inform a customer of an increased credit limit, send them a birthday greeting, notify them an order has shipped, or remind them a large invoice is due.

Alerts can streamline internal processes as well, making your staff more productive and reducing costs hitting your bottom line. Purchasing can automatically be notified when stock levels fall below a certain amount on key inventory items. Accounts Receivable collections can be informed when invoices become seriously past due.

Alerts also can be used to audit internal processes and avoid fraudulent activities. You can alert managers for activities such as the addition of new general ledger accounts, item price changes, or deleted invoices.

Five Reasons To Use Alerts Server

① Alerts improve customer service and retention.

② Alerts keep employees and business partners informed for better decision making.

③ Alerts provide 24/7 response to changing business conditions.

④ Automated processes reduce delivery cycle time and accelerate revenue.

⑤ Existing alerts can be modified and new ones created without programming.

Alerts In Version 5.4

With the Version 5.4 Service Pack 2, over 20 alerts are included in the base Alerts Library. The new alerts cover a broad spectrum of Sage Accpac modules, so you can automate all your key business processes.

Here are some highlights:

- **AP Invoice Discount Due:** sends a notification when an open Accounts Payable invoice with a discount amount over a specified dollar amount is due within a specified number of days.
- **AR Invoices Past Due by N Days:** includes all invoices that have newly become past due by 'N' days in an e-mail sent to the indicated person.
- **Credit Status Change:** notifies the specified person(s) when the credit status of a customer is changed.
- **Electronic Invoice for Order Entry:** when new invoices are posted, sends an electronic invoice to the customers' e-mail addresses.
- **Orders Not Shipped by Expected Ship Date:** this process monitors for orders that have not been shipped by the expected ship date, then notifies the indicated person(s) of this fact.
- **New Sales Order Exceeds $XX Amount:** this process monitors all open customer orders and notifies the indicated person(s) when the total of all open orders for a customer is greater than the specified amount.
- **General Ledger New Account Numbers:** sends a notification if new General Ledger accounts are added.
- **Inventory Item Price Change**: alerts the appropriate person when the pricing of an inventory item is changed.
- **Job Approaching Estimated Cost:** sends an alert when the following criteria are met: the Job Actual Costs (JTD) exceed 'N'% of the revised estimate, and the Job Status is not Completed, Closed, or Inactive.
- **PO Not Fully Received by Expected Date:** checks Purchase Orders against receipts and sends a notification if a PO has not been fully received by the expected date.
- **PO Greater Than $XX:** this process will monitor for purchase orders that exceed the amount specified, then send a notification to the indicated person(s).
- **PO Vendor Return of Goods:** this process monitors for returned items. When a returned item is found, an e-mail is sent to the vendor with the specifics of the returned items.

New Capabilities In Alerts Server 5.4

The Alerts Server has been made more flexible and easier to use. A new Process Summary lays out the step descriptions and conditions and scheduling options in a single report, making it easy to understand what the process is designed to do. The Custom Field function can be edited from the Process Summary, so you can quickly change values for your processes. Custom Fields can be added to the Query Builder as well, giving you more flexibility and power in defining your unique alerts.

E-mail format options also have been improved. You can choose either plain text or HTML formats. Simple HTML editing capabilities make it easy to see how the e-mail will appear when it is sent.

Sample Alerts In Alerts Server Lite

The Lite version of the Alerts Server is automatically installed with the System Manager module, at no additional charge, beginning with the Version 5.4 Service Pack 2. The following alerts are included:

- New Customer Welcome Alert
- GL Account Balance Exceeds Budgeted Amount
- Open Order Amount Exceeds $XX Amount
- Past Due Receivables Over *N* Amount
- Accounts Payable Checks Over *N* Amount

Alerts Server is a powerful tool to streamline your business processes. We can help with the implementation. Give us a call with your questions. ☆

In The Spotlight: Enhanced Integration With SageCRM

If you are currently using Sage Accpac ERP integrated with SageCRM (formerly Accpac CRM), then you are already enjoying the many benefits of front office to back office system integration. If you are not, now may be the time to consider adding SageCRM. Sage Software has recently enhanced the integration to further empower customer and supplier-facing staff with the information and tools they need to succeed.

When front and back office software solutions don't communicate with each other, contact information for your customers and vendors must be entered and maintained in both systems. As a result, your internal teams may not be operating as efficiently as they could be.

Customers who already integrate Sage Accpac with SageCRM are enjoying the benefits of providing their staff with a centralized view of customer and supplier information. With the release of Sage Accpac Version 5.4 Service Pack 2, the integration is significantly enhanced to provide more information relevant to front office staff. Let's learn more.

Vendors

A new Purchase Order Inquiry tab has been added to Vendors. You can view open purchase orders and drill down to the details of the items on the purchase order, as well as inquire into PO Returns, Credit Notes, and Item Purchase History. Access is provided to the Sage Accpac Purchase Order entry screen, allowing you to directly add or edit Purchase Orders. An RMA view provides access to the return authorizations assigned to the vendor and provides a drilldown to the details. A new Project Management view provides access to Project Management-related transactions for the vendor.

Order Entry

The ability to view details of Order Entry (OE) Credit Notes has been added to the OE Inquiry screen.

Project Management Inquiry

A new Project Management (PM) Inquiry capability has been added to provide access to project and job costing information. There are both customer and vendor-based views of project management information. In the vendor view you can view a list of project management-related transactions. In the customer view you can:

- View existing contracts and drill down to details
- View the projects associated with each contract and drill down to details
- View project transactions and drill down to details
- Open the Sage Accpac Contract Maintenance screen and directly add and edit contracts.

RMA Inquiry

In coordination with the release of the new Sage Accpac Return Materials Authorization (RMA) module, a new Return Authorization (RA) inquiry provides access to RMA documents. As with Project Management, inquiries are provided for both customers and vendors. From the customer view you can:

- View a list of return authorizations for that customer
- Drill down to details for each return authorization
- Drill down to see details of the return authorization's Credit Notes, Replacement Orders, and Vendor Returns
- Open the Sage Accpac RA entry screen in order to directly add or edit return authorizations.

The vendor view provides a list of return authorizations that have been assigned to the vendor, and provides a drill down to the details of the return authorization.

This extensive list of new inquiries plus direct access to additional Sage Accpac entry screens are designed to further empower your staff and increase productivity and effectiveness across the organization. Please give us a call if you have any questions. ☆

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