

In This Issue:

A New Year - A New & Improved Version

CRM - What's in it for me?

Enhance online sales history and reporting with Sales Analysis

Marketing Tip Free Offers - Do they work?

Schedule of Events

Technical Corner

Contact Us

A New Year - A New & Improved Version!

In February, we will begin scheduling upgrades for Advantage Series 5.3. Call today to be sure to get the time that is most convenient for you.

What's in Advantage Series 5.3

ACCPAC Advantage Series 5.3 is packed with exciting new features and benefits designed to help you succeed like never before! One of the most significant enhancements is the complete support that 5.3 provides for unlimited optional fields throughout all Advantage Series applications. Optional fields allow you to customize Advantage Series and provide comprehensive reporting and analysis capabilities across your entire accounting system. As a result, you can manage information more effectively and easily obtain necessary data for analyzing business operations and practices.

The new Transaction Analysis and Optional Field Creator application, available with 5.3, allows you to define all the information you require for each General Ledger account, customer, vendor, item, transaction and transaction detail, making it easy to record and track data from the originating transaction through to your General Ledger. Imagine being able to trace the optional field

information you define for customers and items to your Order Entry orders, Order Entry shipments, Order Entry invoices, Accounts Receivable invoices through to your General Ledger journal entries and accounts! What's more, you can analyze individual transactions as well as General Ledger account activities and balances.

Listed below are additional features in ACCPAC Advantage Series 5.3.

<u>System Manager 5.3</u>	<u>General Ledger 5.3</u>	<u>Accounts Receivable 5.3</u>
<u>Accounts Payable 5.3</u>	<u>Inventory Control 5.3</u>	<u>Order Entry 5.3</u>
<u>Purchase Orders 5.3</u>	<u>US and Canadian Payroll 5.3</u>	<u>Project and Job Costing 5.3</u>

Interested in seeing the new features? Schedule for an ACCPAC Webinar. [Click here](#) for details.

CRM - What's in it for me?

So you've heard a lot of talk about CRM recently. You might be asking yourself "How would CRM benefit my organization". In an effort to answer this question we've put together a list of the top 11 reasons why you might want to consider a CRM solution for your business:

- **Get your entire organization on the same page.** No more pockets of data in various places in the organization. As a business executive you can know at a glance if there are any pending sales opportunities, open case issues or past due invoices.
- **Manage Sales and accounts** - With ACCPAC CRM you can easily manage multiple accounts and opportunities, and automatically distribute leads to sales professionals around the world. Sophisticated workflow provides automated sales processes to guide sales people through proven selling methods. Automate your business processes to automatically trigger literature fulfillment,

follow-up appointments, callbacks, daily tasks and more. By analyzing the information available, you can recruit new clients and resell to existing ones.

- **Perfect for sales people in the field.** Today keeping mobile sales professionals connected and *in the know* represents your greatest challenge. With ACCPAC CRM, your team has on-the-spot access to the resources they need to close every sale. When they're online, the Web client provides a real-time link to their ACCPAC CRM data. Even without access to a cable or phone connection the team has access to pertinent real-time information via a personal digital assistant (PDA), WAP device or wireless phone. If your sales staff requires offline access to ACCPAC CRM data our SOLO synchronization utility consolidates the information quickly and easily, providing your sales people multiple options to access the same data.
- **Eliminate the guessing games.** With a ACCPAC CRM you can create an automated workflow with projection percentages attached to each step. Track how many prospects are at a demo stage, how many prospects have a written proposal and how many prospects are scheduled to close. This automated workflow capability will ensure that you have the most accurate sales forecasts!
- **Automated Workflow** allows businesses to automate pre-determined business rules across all channels, departments and employees. To help assess and design workflow ACCPAC CRM provides graphical views of the process and its development patterns. In combination with e-mail integration, workflow ensures that actions requiring attention or escalation are automatically being routed to the correct employees or partners.
- **Track the success of a marketing campaign.** ACCPAC CRM will allow you to assign, schedule and track marketing activities within a campaign—and view every detail of each campaign at a glance. ACCPAC CRM also provides the tools for marketing teams to easily create new target lists from selected criteria, re-use successful campaign lists or import mail-house lists. The integrated mail-merge function allows you to merge

documents with target-customer lists. Once these lists are created, ACCPAC CRM

Marketing automatically creates a record in the customer account, attaching the marketing piece to the account and document library for telemarketers and support representatives to access.

- **Document Library** provides a central repository for files from thank you letters to e-mail direct-marketing campaigns. Documents are contained in a central location giving an enterprise-wide reference site to materials sent to, and received from customers. ACCPAC CRM allows you to store white-papers, FAQs', marketing materials, technical documents, quotes, pricing—whatever it is the team needs—in the Document Library for immediate access to support resources.
- **Manage your time better** with an interactive calendar, which integrates with Microsoft® Outlook®, synchronizing tasks, appointments, cases and calls for all users. Users can pre-set onscreen reminder notifications, which alert them of pending tasks. Filter and sort options allow users to manipulate onscreen data to the individual's preferences.
- **Sales Management reports** to help you make better decisions about your sales force. ACCPAC CRM provides point-and-click reporting and graphs that allow sales teams access to data for on-the-spot analysis and evaluation. With ACCPAC CRM you'll always have the real time information you need. Start by assessing new leads, quoted clients, demographics and potential deals in the pipeline, then analyze your sales efforts and use that knowledge to refine your strategy.
- **Integration with your current accounting solution** - CRM integrates with ACCPAC Advantage Series and ACCPAC Pro Series "out-of-the-box" providing authorized ACCPAC CRM users efficient access to vital customer, partner and related transactional data.
- **Self service capability** - ACCPAC CRM Web Self Service allows customers to access or request services and support over the web. Customers can receive information based on their preferences, requests and histories, providing them a

single point of contact for information about your products and company through designed customer and partner portals. Allow your channel partners access to shared workflow, lead-tracking, inquiries, invoicing and customer information. ACCPAC CRM allows your customers 24/7 access to information they want.

Learn more - [click here](#) to take a guided tour!

Enhance your online sales history and reporting with ACCPAC Sales Analysis

Sales Analysis keeps a complete online database of your customer and item sales history.

Why You Should Use Sales Analysis:

- Look up sales information by customer number, invoice number, item number, and more
- Online storage of invoices allows reprinting at any time
- Retrieves information from Accounts Receivable and Order Entry
- [Sample screen \(24 KB\)](#)

Key Features:

- Respond quickly to inquiries
- View sales of items
- View sales made to customers
- Reprint invoices
- Database compatible with Seagate Crystal Reports

Free Offers - Do they work?

Do you provide any type of sample or free offer to get new customers interested in your service? If you don't - you should consider it.

Here's why: The goal of marketing is to think long term. Clients who may have a minor interest today may turn into customers in two

months. Offering a free sample or service is an excellent way to build an inhouse database of future prospects. Remember, just because a client isn't in a position to buy today, doesn't mean that in 3-5 months you won't have a sale! As we say in marketing "timing is everything!"

Here are some suggestions:

Some companies offer a free sample and charge for shipping and handling to defray the cost. This system only works "if" you are confident about your product or service. If you offer a service you should consider writing some type of informative FREE report that educates your prospect about some aspect of your service. This report should be available to your prospects from your website. The people who want to read the report (which is like a sample) should have to fill out a lead form before getting access to the report.

Schedule of Events

These Live Webinars are conducted by ACCPAC experts using intranet "WebEx" technology and a voice-line for conferencing. ACCPAC understands addressing all customer questions is critical, therefore demonstrations are generally followed by an open question and answer session.

ACCPAC Advantage Series
January 20, 2005 10:00 AM PT
ACCPAC Project & Job Costing
January 25, 2005 - 1:00 PM PT
ACCPAC CRM - Customer Relationship Management
January 11, 2005 - 9:00 AM PT
January 20, 2005 - 11:00 AM PT
ACCPAC HR Series - Human Resource Solution for ACCPAC
January 19, 2005 - 9:00 AM PT
February 8, 2005 - 9:00 AM PT
Point of Sale
January 18, 2005 - 9:00 AM PT
ACCPAC eTransact - The ecommerce solution for ACCPAC
January 11, 2005 - 10:00 AM PT

What's new in Advantage Series 5.3

January 18, 2005 - 10:00 AM PT

ACCPAC CFO - Financial Optimizer

January 10, 2005 - 9:00 AM PT

Start times are listed in Eastern time zone.

[Contact us](#) at the number below or visit our website to register

Technical Corner

How can I make tax filing easier?

Introducing ACCPAC eFILE™

ACCPAC eFILE™ for Canadian Payroll provides a simple, cost-effective way for ACCPAC Plus and ACCPAC Advantage Series clients to file electronically. It's fast, easy and convenient! Users reduce processing times, complete year-end functions more quickly and accurately, and adhere to all regulations if the company has more than 70 employees.*

ACCPAC eFILE is compatible with ACCPAC Plus Canadian Payroll (version 6.5) and Advantage Series Canadian Payroll (all editions, version 4.2 and 5.1) for the 2003 reporting year. For the 2004 reporting year, e FILE will only support Advantage Series (all editions and only for version currently shipping on January 1, 2005). We will be notifying our ACCPAC Plus e FILE clients that the product will no longer support ACCPAC Plus after the 2003 reporting year.

*CRA (Canada Revenue Agency) has mandated a separate system for companies with less than 70 employees. This separate reporting system for companies with less than 70 employees is not compatible with ACCPAC eFILE.

Question: Can I change the length of account segments and account structures?

Answer: The length of the Account Segment can be changed through the Account Structure Change function in Account Code Change. The function can be accessed from the Tools menu or from the toolbar in Account Code Change. It is the last icon on the ToolBar starting from the left.

Only the length of the Account Segment can be changed. If the length of a segment other than the Account Segment needs to be changed, a new segment must be created and a new structure code using this segment must be created.

The following are the latest service packs available to download for ACCPAC Advantage Series 5.2:

System Manager Service Pack 4 sm041210.exe	Inventory Control Service Pack 4 ic041201.exe
General Ledger Service Pack 3 gl041130.exe	Order Entry Service Pack 5 oe041201.exe
Accounts Receivable Service Pack 4 ar041026.exe	Purchase Orders Service Pack 4 po041201.exe
Accounts Payable Service Pack 4 ap041201.exe	Project and Job Costing Service Pack 2 pm041103.exe

Please contact us to acquire and install these service packs.

Technical Tips on the Web

Altitude Information Systems is committed to providing you with superior customer service. Our dedication to your success has compelled us to post these tips monthly and to provide you with a library of tips on our website.

Click the following URL to visit our Tip of the Month Section.

<http://www.altitudeinfo.com/tipofthemonth.html>

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The Newsletter for Business Owners & ACCPAC Clients

January 2005 – Issue 13 - Page 5 of 5

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