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Compliments of:



Headline News

Sage Software recently received recognition from two top industry publications. The company ranked in the top 30 of *Manufacturing Business Technology's Global 100* for the sixth straight year. And for the second year in a row, Sage Software was selected to the *Supply & Demand Chain Executive 100* for outstanding innovation in supply and demand chain services and technologies.

Time To
Migrate To
Sage MAS 500?

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for more info!

Delivering Top-Notch Customer Service

How much does it cost your company to acquire a new customer? In today's crowded marketplace finding good new customers is harder than ever. Many companies are competing for the same customers. Information overload from e-mail, direct mail, Web pop-ups, television, and radio is overwhelming and desensitizing your prospects. In this environment it is more important than ever to retain the customers you have. And don't forget, there are plenty of companies out there trying to entice your loyal customers away.

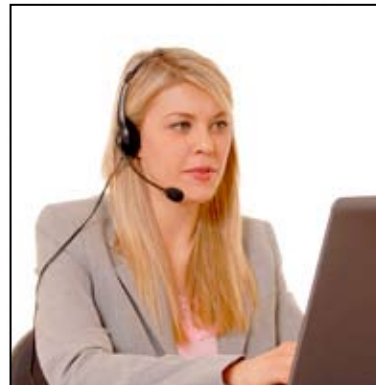
The path to consistently meeting customer expectations and delivering exceptional customer service is a customer-centric philosophy throughout your organization. Your staff must feel empowered and motivated to go the extra mile and deliver tailored, personalized service. Every customer-facing employee must have the information and ability to determine the customer's need, the best solution to fit the need, and to initiate the sales cycle. This is only possible if they have ready access to the in-depth customer information they need in order to respond to inquiries, identify new opportunities, and build closer relationships.

Over time, your Sage PFW ERP database has accumulated a broad array of customer informa-

tion that you can leverage. And even more important, Sage PFW has a variety of tools that allow you to quickly find the information you need to provide excellent customer service and maintain customer loyalty. Let's learn more.

One-Stop Shopping

The Sage PFW Customer Insights module delivers a wealth of information about your customers from several different Sage PFW modules, and displays it on one comprehensive, easy-to-navigate screen. Your customer's address, credit standing, special pricing, open quotes, orders, and invoices, and their order, invoice, and payment history are all available with the click of a mouse.



Exceptional customer service is key to maintaining customer loyalty.

Service representatives can review, revise, and update

information from this screen, empowering them to handle virtually any customer service situation that can arise. They can:

- ▶ **Update customer information**—address, contact, and ship-to information are all contained on one screen.
- ▶ **Quote customer-specific pricing and product availability**—price matrix, price specials, and contract pricing (process manufacturers only) are available for review, so that you can offer the lowest possible price while maintaining your profit margin. The price calculation

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tool can automatically determine the best price for the customer.

- ▶ **Revise an open order**—from the Orders View simply right-click to launch Sales Order Entry and make modifications to the order.
- ▶ **Convert a quote to an order**—double click or right click on any quote to launch Sales Order Entry, and quickly change the quote to an order, or make changes to the quote.
- ▶ **Verify available credit**—view real-time credit and aging information both textually and graphically. An Icon will automatically alert you if the customer is over their credit limit.
- ▶ **Research payment information**—a simple click on the payment and in seconds you can give the customer the invoice numbers paid by the check and when it was applied.

Your service representatives can handle virtually any customer need, and provide the requested information or action promptly and completely using the streamlined access provided by the Customer Insights module. Not only will you have addressed the customer's needs, you will have saved them time, a priceless commodity in today's hectic business world. Your staff will be able to handle a larger volume of inquiries as well, potentially lowering your overall cost of doing business while improving customer service.

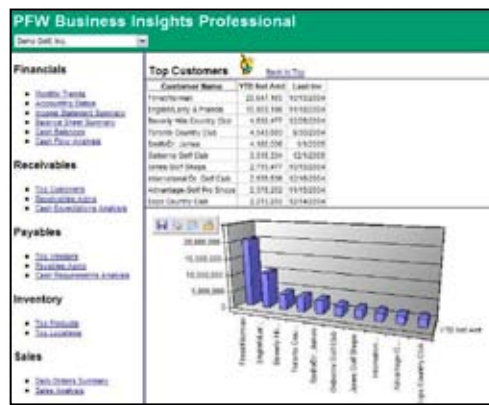
Store Unique Customer Preferences

With the powerful **Universal Notes and Attachments** feature in Customer Insights, you can create and attach notes to customers or even individual customer transactions to record special requests or customer preferences. For example, you could record the customer's preference to be called at a certain time of day, or note that they prefer to be contacted by e-mail.

Notes are made more powerful by the ability to have them automatically appear where and when they are needed. Your staff can be well-informed about a customer's preferences when they call through the use of Action notes. Notes also can have effective and expiration dates. For example, you may want to note a person's vacation dates and an alternate contact, and set it to expire when the vacation is over.

A note can be flagged to post with a particular invoice and maintain its association with the transaction in the history files. Perhaps you are shipping items to a customer outside of normal procedures, such as *on approval*, and want to make sure all staff is aware of the special nature of the transaction.

With the Universal Notes and Attachments attachment feature, any type of document can be attached to a customer or transaction. Attach a design or specification document provided by the customer to a particular order, for example.



Know who your top customers are with Business Insights Professional.

Access Details Quickly

In the Sage PFW Financial Explorer module, you can use the customer and document queries to quickly drill down through layers of information to get to the detail you need. Double-clicking on any numerical amount in a summary screen will quickly take you down to the next level of detail, all the way to the actual products and prices on a historical invoice. If a customer calls and wants the same product and price as on his last order, your staff can quickly retrieve the relevant information.

Keep Customers In The Know

If you are already using **Business Alerts** with Sage PFW, you know what a powerful tool this can be. Using a combination of the data in Sage PFW and your e-mail system, Business Alerts can automatically notify personnel when selected events occur. You may be using it now to keep your purchasing staff on top of low stock levels on key items, or to notify accounts receivable collections when a large invoice becomes past due.

Using Business Alerts to make sure you always have stock on hand when a customer calls can increase customer satisfaction and loyalty, but it also can be a powerful customer service tool. Imagine using it to alert a customer that a price special on one of their top items will expire in five days, or that the discount date on a large invoice is approaching. Customers will be impressed with the level of service you provide and appreciate the opportunity to save money.

Business Alerts can be used to notify customers of new order and invoice amounts, and even the expiration of a lot on a product they have purchased. If you are using the manufacturing modules, you can notify customers that their batch is complete and ready to ship. You can probably think of many other useful customer alerts based on the unique products, services, and procedures in your organization. Use Business Alerts to provide your customers with tailored customer service during every transaction. Call us for assistance in identifying and implementing the customer alerts you need to differentiate your organization.

Know Your Most Important Customers

For most organizations, sales closely follow the 80/20 rule, with 20 percent of customers being responsible for 80 percent of business. Everyone in your organization should know who your top customers are so that they can give them extra special care. The **Business Insights** module (Professional Edition) includes a Top Customers chart, which you can place on the desktop of every staff member. Choose the number of customers to display, and base the list on year-to-date or month-to-date revenue or net sales.

We've briefly shown how the Customer Insights, Business Insights, Universal Notes and Attachments, Financial Explorer, and Business Alerts modules and features of Sage PFW can be brought together to empower your customer-facing staff with the information they need to provide truly exceptional customer service.

Give us a call for assistance implementing a cohesive customer satisfaction program in your organization.



Stay On Top Of Government Regulations

The stunning collapse of Enron and other corporations as a result of management corruption has brought increasing government focus on regulatory safeguards. The highly publicized *Sarbanes-Oxley Act* (SOX) is just one of many. And while the primary target is large corporations, smaller companies are finding they need to adopt similar standards in order to obtain cost-effective insurance or outside investment, and to protect themselves from lawsuits. Organizations in health care and process manufacturing have particularly stringent regulations. Sage PFW ERP has a potent set of features and processes to help organizations stay in compliance.

Sarbanes-Oxley

While Sarbanes-Oxley aims to create checks and balances to prevent corruption and mismanagement, there is no standardized certification process or checklist. However, it centers on well-documented business processes and comprehensive audit trails. Several integral components of Sage PFW and an external tool that works with Sage PFW can help you meet these needs.

Business Desktop

The **Business Desktop** is the highly configurable launch pad for Sage PFW tasks. You can control access to information by customizing the Business Desktop for each individual or group, so they only see the tasks applicable to them. In fact, the Business Desktop can become their single location for all tasks, since you also can provide access to spreadsheets, contracts, images, shortcuts, and URLs. You can organize both the Sage PFW tasks and external files and programs into folders using the flexible Tree-View structure.

Security

With Sage PFW Security you can determine access to functions and data for each User or Group. View-only access allows users with this clearance to review information but not change it. Robust password control allows the administrator to reset passwords, control password expiration, number of allowed login attempts, and password format.

Universal Notes And Attachments

Use the Universal Notes and Attachments features to document special situations for individual transactions, attach contracts to customer or vendor records, or as pop-up reminders to make sure staff follow established procedures.

Pervasive AuditMaster

Your Sage PFW security settings authorize user access to data, but within those boundaries, everyone is on the honor system. Unfortunately, not everyone is honorable. Sage PFW data is securely housed in a Pervasive SQL relational database. The **Pervasive AuditMaster** transactional intelligence and database monitoring tool takes security far beyond database access control. You can quickly identify the who, what, where, when, and how of every change to your database.

With Pervasive AuditMaster managers can discreetly review data entry activities and ensure that all internal controls are being followed.

Health Insurance Portability And Accountability Act (HIPAA)

HIPAA calls for administrative, physical, and technical safeguards for patient record keeping. Healthcare providers are required to clearly define roles for data access and provide a complete audit trail documenting access to, and modification of, patient data. Here again, Sage PFW Security and Pervasive AuditMaster give you the tools you need to efficiently comply with *HIPAA*. Your security settings in Sage PFW provide the clear definition of allowed access. Pervasive AuditMaster provides the technical means to establishing the safeguards, accuracy and speed required to meet *HIPAA* compliance and participate in a trusted network with other *HIPAA*-compliant organizations.

Electronic Records And Bio-Terrorism

If you are in an industry regulated by the Food and Drug Administration (FDA), you are probably aware of the 1997 Title 21 regulation allowing electronic records and signatures to be considered equivalent to paper records and handwritten signatures, when properly implemented. Individual documents and records must be securely stored and avail-

able for review by the FDA. An additional document providing clearer guidance was published in 2003. In addition, the Bio-Terrorism act of 2002 requires bi-directional lot tracing to determine every ingredient and the current location of ingredients, products, and by-products. If a recall is needed, it must be rapid and thoroughly document the final disposition of all recalled products. The FDA can require a list of all products that contain a given ingredient, where the ingredient originated, and the current location of the finished goods that contain it—and they can request all this information be provided within 24 hours.

Sage PFW addresses FDA requirements with precise inventory Lot Tracking capabilities. Individual lots of items are tracked in complete detail, including raw material and finished product expiration dates, quarantine dates, quality control status, and lot strength factor. If for any reason you need to recall lots, the lot recall report provides a complete audit trail—forward and backward—from raw materials through shipment, and helps minimize the scope of a recall, and manage it to a rapid conclusion. The software also can help reduce the need for recalls with quality control, comparative properties analysis, and vendor controls.

Food Allergen Labeling

The *Food Allergen Labeling and Consumer Protection Act of 2004* requires, among other items, the labeling of items that contain any of the eight major food allergens, beginning in 2006. The presence of the allergens must be indicated even if used only in flavorings, spices, additives, and colorings. The Sage PFW **Labeling** module provides a flexible-format label that can contain reportable materials and physical properties. Warnings or other standard text can be drawn in and printed anywhere on the label. The label content will automatically be updated from Formulas or Production as appropriate. Sage PFW provides you with the tools you need to stay compliant with government regulations. Call us for help configuring the software to meet your compliance needs. ★



Time To Migrate To Sage MAS 500?

Feel Like You Might Be Outgrowing Your Sage PFW Software?

A few indications might be that your company has been expanding rapidly, and your system just isn't keeping up the way it used to. You find that you're needing more complex reports than ever before, and they're becoming harder to generate. Or your distribution or manufacturing processes have diversified, and you're looking for more robust management options.

Growth Is Good

If any of these issues sound familiar, we have good news for you. With MIS Consulting as your business partner and Sage PFW as your business solution, it's easy to "move up" within the Sage Software family of products whenever the time is right.

Sage MAS 500 is a complete enterprise management solution, designed for fast-growing mid-sized companies. Built with Microsoft SQL Server, Visual Basic and Microsoft Office technology, it integrates business intelligence, order processing, distribution and manufacturing capabilities.

Like Sage PFW, Sage MAS 500 is a totally integrated system. The major difference is that it's designed for much larger enterprises, sort of like the increase in power you'd get switching from a V6 to a V8 engine.

Explore The Options

MIS Consulting implements both Sage PFW and Sage MAS 500. This makes us an ideal resource for helping you evaluate whether a transition is appropriate for you. After all, you probably wouldn't want to invest in increased system horsepower unless you can expect a reasonable return in the near future. MIS can help you determine where that break-even point will be, and also advise you on how a migration might work time-wise.

It's also possible that we can optimize your Sage PFW system to better meet your needs. Perhaps a few customizations will prove to be all that's necessary to keep your current system in place during several more stages of company growth.

Start out by calling us for a no-obligation consultation. We'll be happy to discuss how your current system is working, and explore various options. Contact us at 1-503-614-1919, or consulting@mis-c.com We look forward to hearing from you soon!



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