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### Headline News

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 Sage MAS 90 users, and generate lots of new ideas for growing your business. Go to [www.sagesummit.com](http://www.sagesummit.com) for the latest conference information, including great rates at preferred hotels.

### Sage MAS 90 Sales Tax

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for more info!

## New SageCRM Integration Link

If your company is like most, different types of customer information are kept in two or more applications. This requires a fair amount of duplicate data entry to keep both systems current. This lack of a central view of customer information impacts the effectiveness and efficiency of both your front office customer service and sales staff, and your back office accounting and finance staff.

For example, when the sales team closes a sale, information must be entered into the contact management or customer relationship management system (CRM) and then be rekeyed into the accounting system by the accounting staff.

Sage Software has released a powerful new integration link between Sage MAS 90 ERP and SageCRM. It can spare you the unnecessary overhead cost of redundant data entry and help you reduce errors and keep information consistent between systems.

SageCRM is an award-winning customer relationship management solution that is flexible, customizable, and easy to learn. Here is a brief overview of SageCRM and details of how the new integration can benefit your company.

### About SageCRM

SageCRM is an on-site CRM solution that is both easy to use and fast to deploy with out-of-the-box but configurable business processes. It provides enterprise-wide access to vital customer information anytime so you can manage your business with an integrated approach to sales automation, customer care, and marketing.

### Sales Automation

SageCRM puts you in complete control of your sales pipeline, allowing sales team members to effectively manage, forecast, and report on all phases of the sales cycle. You can easily view and analyze all current and historical account details and activities, manage multiple accounts and opportunities, and automatically distribute leads to sales professionals—around the office or around the world.



Create sales orders and quotes within a familiar interface while tracking the opportunities within SageCRM.

SageCRM provides your sales team members with instant access to vital customer data, including reports and graphs, quotes, forecasts, and historical account details. They will be able to perform on-the-spot analysis, make informed decisions with the data to back them up, and eliminate bottlenecks that typically lengthen the sales cycle.

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# New SageCRM Integration Link For Sage MAS 90 CONTINUED

## Marketing Automation

Use SageCRM to plan, schedule, launch, and track marketing activities within a campaign. With full visibility into your marketing activities, you can evaluate which campaigns are most successful, ensuring the best use of your marketing resources.

## Customer Care Automation

SageCRM helps you build and maintain lasting relationships by delivering real-time access to the relevant customer data your staff needs to provide effective support. Imagine the power of having purchase, call, and escalation history, interactions, support cases, e-mail communications, and documents all centrally located and available to your support team. Build a knowledge base of problems and associated resolutions to speed call handling and improve your overall service levels.

## Web Self Service

Use SageCRM to allow your customers to log cases, access information, and request your firm's services and support over the Web at any time. You can create customized customer and partner portals to deliver information based on preferences, requests, and history.

## Integration With Sage MAS 90

The new SageCRM integration with Sage MAS 90 is seamless; you can look up customer contact information, enter a sales order, perform customer maintenance, and access other Sage MAS 90 information directly from SageCRM. The data between the two systems is synchronized automatically according to various parameters you specify.

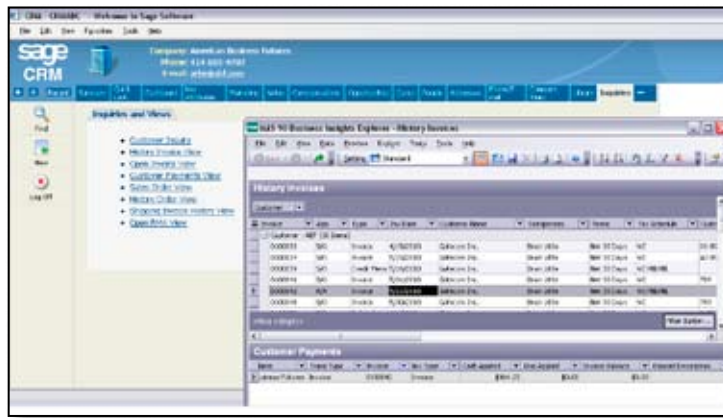
## Generating Accurate Quotes

Empower your sales team to work within SageCRM and generate accurate and detailed quotes and orders. There's no need for staff to learn a new order entry system, they will work in the familiar Sage MAS 90 Sales Order screens to generate orders and quotes.

From within SageCRM, staff can launch the Sage MAS 90 Sales Order Entry task and create quotes and orders as if they were working directly in Sage MAS 90. Orders and quotes will use the customer-specific pricing you've estab-

lished in Sage MAS 90. Inventory availability is displayed and updated just as it would be if the order were created in Sage MAS 90.

The advantages of performing this task from SageCRM are significant. As a quote or an order is generated, SageCRM records the activity allowing staff to schedule follow up meetings and track that opportunity as it turns into a sale. The order can be tagged to a specific marketing opportunity in SageCRM, allowing you to track the sales resulting from various campaigns, for example.



Launch Business Insights Explorer from within SageCRM to uncover detailed customer account information.

## Keeping Information Current

As your sales team members are speaking with a customer, they can record an address change, add a new contact, update an e-mail address—essentially anything they could do from within Sage MAS 90 Customer Maintenance. The advantage is that the two systems are automatically synchronized. This means the information is updated in both Sage MAS 90 and SageCRM.

## Insightful Queries

In an earlier issue of this newsletter, we introduced you to the powerful new Business Insights Explorer (BIE) tool that is now part of Sage MAS 90 version 4.2. You'll have access to BIE within SageCRM, allowing you to navigate, sort, query, and drill down into Sage MAS 90 from within SageCRM.

From the Inquiries tab in SageCRM, you can launch various BIE views. And just as you could if you were working within Sage MAS 90,

you can customize each BIE view, drill down into related underlying data, and even create new views.

With this integration link you can deliver selected back office data to your front office workers. Now your sales staff can answer customer questions without delay and without troubling your accounting staff.

## Business Rules And Security

The business rules you've established in Sage MAS 90 are honored within SageCRM. For example when creating a sales order, users will

be notified if a customer is on credit hold or has exceeded the credit limit.

The role-based security established in Sage MAS 90 is enforced within SageCRM.

## Fearless CRM

You may have heard horror stories about long, expensive CRM implementations. No such worries with SageCRM. You'll find SageCRM easy to deploy, easy to learn, and

easy to use. It's easily customizable to the way you do business, so your team can be productive right from the start. The innovative Training and Coaching tool within SageCRM assists users in getting started quickly using quick tips, videos, and wizards.

## Availability

SageCRM is available for Sage MAS 90 and 200 version 4.2 and higher. Call us for details and a demonstration of the power of SageCRM.

With the addition of this latest integration, you now have three CRM integration options available for your Sage MAS 90 solution: SageCRM, Sage SalesLogix, and ACT! by Sage. Call us to discuss how you can increase your efficiency by integrating your front and back office systems. ★

# Keep Your Data Secure

**D**ata security has always been a top concern of businesses. Threats seem to be everywhere: viruses, malware, natural disasters, power surges, disgruntled or simply careless employees—and the list goes on. What are some practical steps you can take to ensure the security of your company's valuable data? In this article we offer a few suggestions for securing your Sage MAS 90 ERP database and the rest of your company's electronic data.

## Access On A Need-To-Know Basis

Your employees must have access to your company data to do their jobs. However it's prudent to tightly control that access.

Sage MAS 90 gives you an exceptional level of control over who has access to various programs and tasks, and even allows you to control what type of access a user has. For example, some users may have full-access rights while others have view-only rights.

With Sage MAS 90 role-based security, you assign users to one or more roles. Examples of roles you can create are: customer service representative, payroll entry operator, or sales manager. You'll then assign specific access rights to each of these roles. Assigning access rights consists of applying security control attributes such as: Full Control, Create, Modify, Delete, and View Only to each role and task combination. In this way, for each task within a particular role, you have complete control over who can create, modify, or delete entries.

One convenient, secure, and effective way to provide your staff with the Sage MAS 90 information they need is to use the new Business Insights Explorer (BIE) tool. You can create a view for each role, or even for each user, containing just the data they need to perform their job effectively. The security you have set up is enforced within BIE, ensuring that users cannot access information they are not authorized to view.

## Strong Passwords

Did you know that a blank password (no password) is more secure than a weak password, such as 1234? Many users select a password because it is easy to remember, but criminals can easily guess a simple password. On com-

puters using Windows XP, an account without a password cannot be accessed remotely by means such as a network or the Internet.

However, we are not recommending that you use a blank password—we simply want to stress the danger of using a weak password. Sage MAS 90 supports what are often termed Strong Passwords, and it makes sense to take advantage of this capability. So just what makes a password strong?

While the definitions vary, a strong password typically has a minimum length of seven characters and includes upper and lowercase letters, numerals, or symbols. Sage MAS 90 allows you to enforce strong passwords and also to set a number of days until password expiration. This will require users to select a new password every 30 or 60 days, for example.

## Building Best Practices

The International Organization for Standardization (ISO) and the International Electrotechnical Commission (IEC) have adopted an information security standard document: Code of Practice for Information Security Management—ISO/IEC 17799 for short.

The standard is lengthy and highly informative. To simplify it greatly, the standard is based on three principles:

- ▶ **Confidentiality**—ensuring that information is accessible only to those who are authorized.
- ▶ **Integrity**—safeguarding the accuracy and completeness of information and processing methods.
- ▶ **Availability**—ensuring that authorized users have access to information when required.

Even if your company is not interested in ISO certification, the best practices laid out in ISO/IEC 17799 are worth considering. Visit the ISO's Web site at [www.iso.org/iso/en/prods-services/popstds/informationsecurity.html](http://www.iso.org/iso/en/prods-services/popstds/informationsecurity.html).

## Back It Up

Without a doubt your company has established backup procedures for its servers. Be certain to periodically test your ability to restore from a backup and invest in secure off-site storage. Should you ever find yourself in need

of that backup, any costs and inconveniences you experience maintaining a usable back up will be well worth it.

## Beware Of Malware

It is likely that you have strong anti-virus software installed and running on your company's network, but there are other sinister threats to your system lurking.

Malware, short for malicious software, is software designed specifically to damage or disrupt a system. Malware finds its way onto your computers stealthily. Spyware is the most common class of Malware, but there are others such as zombies, keyloggers, and dialers. While not technically Malware, Phishing scams are on the increase. Internet Explorer 7 has a built-in Phishing filter, plus there are several other low and even no-cost malware and phish-catching software options available.

Let us know if we can help you address your company's security concerns. ☆

## Vista Compatibility

**C**urrently, Sage MAS 90 and 200 Version 4.2 does not support the Microsoft Windows Vista operating system. In June 2007, a Version 4.2 Service Pack will be available that provides Vista-capable support. Sage integrated products and most third-party products will be Vista-capable by September 2007.

Sage MAS 90 and 200 Version 4.1 does not support Vista, currently. In July 2007, a Version 4.1 Service Pack will be available that provides Vista-capable support. Not all Sage integrated products and third-party products are updating their prior versions for Vista support. If you are running Version 4.1, we highly recommend that you purchase new equipment with the Microsoft Windows XP operating system.

Note: No prior versions of Sage MAS 90 and 200 will be supported on Windows Vista. ☆



## In The Spotlight: Sage MAS 90 Sales Tax



**S**age Software has partnered with Avalara to create a useful module for Sage MAS 90 ERP: Sage MAS 90 Sales Tax. Powered by AvaTax, Sage MAS 90 Sales Tax is a sales and use tax calculation service that works in the background of your accounting system via a secure internet connection. This integrated Web-based sales tax calculation service helps ensure you're always collecting the accurate tax amounts, regardless of where you are selling.

### Rising Complexity Of Sales Tax

With more than 8,000 jurisdictions across North America collecting sales tax from business owners, the task to stay compliant with tax laws can be overwhelming. Some jurisdictions have different tax rates for different products. Others charge tax at a different rate over a certain dollar volume. And with state, county, and city jurisdictions all overlapping, sometimes it's hard to know exactly what taxes to collect for a particular street address. Add to this the fact that any jurisdiction can decide to change their rates at any time, and you have an enormous number of variables.

With all this complexity, it makes sense to leave tax calculation to a specialist in getting sales tax rates right—Sage MAS 90 Sales Tax. Powered by AvaTax. The service keeps in touch with all the jurisdictions to stay on top of rate changes, and tracks the proper combination of applicable jurisdictions for every street address in the country, so you don't have to. This service is particularly beneficial to organizations with offices in multiple jurisdictions or with remote sales teams.

### Straightforward Integration

A major benefit of this Web-based service is the simple but powerful integration with Sage MAS 90. When a new button in Sales Order entry is pushed, the system connects to the AvaTax service to calculate the correct tax amount based on the latest rates, and places the proper sales tax amount on the order and invoice. The AvaTax databases reside on Avalara servers and are updated continually, ensuring that you're using the most current information every time you create an invoice. You don't have to worry about updates or downloads to install. The AvaTax service is transparent and seamless in your normal work flow.

### Full Government Reporting

Sage MAS 90 Sales Tax. Powered by AvaTax, provides all the information you need to complete and file required tax returns. An optional service provides automatic filing of tax returns—or you can download information into Microsoft Excel at any time and file your own.

### Reduce Audit Exposure

Budget deficits in many states are causing government agencies to go looking for additional sources of revenue. Many are choosing to bump up the number of audits in the hopes of finding uncollected revenue. By using AvaTax, your organization will have the peace of mind of knowing sales tax has been properly calculated.



SAGE MAS 90 SAGE MAS 200  
SAGE MAS 500

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### Flexible Pricing Model

Sage MAS 90 Sales Tax. Powered by AvaTax, is priced based on transaction volume, making the service affordable no matter what your sales volume. You pay a monthly fee based on an estimated transaction volume. A transaction is an invoice. You are only charged once per invoice, even though the invoice may call on AvaTax data several times. If the transaction estimate is exceeded, you have the option of upgrading to the next level of service or continue at the previous basis by paying a small per-transaction fee.

Are you ready to simplify and streamline the calculation, collection, and reporting of sales tax? Give us a call with your questions Sage MAS 90 Sales Tax. Powered by AvaTax. 