Solutions
for Accounting and CRM

What's new in 2019...

Issue 1 : 2019

What To Expect:

Welcome

Welcome to our first newsletter of 2019... last year will be a tough one to top but we have a feeling 2019 is going to be a good one.

2018 was a successful year for the Solutions Team - we celebrated our 20th Birthday, expanded our team, hosted another amazing Solutions Showcase event for our customers and prospects, and took part in The Great Notts Bike Ride (for a 4th year) to raise money for our chosen charities. Having celebrated the success of last year, we are now leaping into the New Year with lots of interesting things in store for 2019.

The world of software is forever changing and we want to ensure you are kept in the loop. We have created a number of articles to help you stay updated and learn about recent progress in the software industry, including 'The latest release of Sage 200cloud', 'The best CRM for smaller businesses' and many more.

Sage 50cloud

The latest release of Sage 50cloud is here with a number of exciting enhancements:

- **Sage Bank Feeds Enhancement** - A Yodlee integration has been added to Sage Bank feeds, providing an increased coverage of banks.
- **Approvals for Sage Capture** - Sage Capture has been enhanced by introducing an approvals process to give greater control when posting transactions via Capture.
- **Concurrent Check Data and Backup** - Restrictions around check data and backup routines have been removed to allow you to carry out these processes whilst other users are logged in.
- **Reverse Bank Reconciliation** - A new ability to reverse a bank reconciliation.

Learn more about Sage 50cloud and the latest release by contacting our experts today on 0115 840 5075 or email enquiries@solsforacc.co.uk.

Sage Platinum Partner

The latest release of Sage 200cloud

The latest release of Sage 200cloud (Summer 2018 release) is here. This enhancement is one in a series of ongoing releases for this forward thinking, cloud connected accounting solution. Sage 200cloud is an on premise solution with cloud connectivity using the power of both desktop and cloud (through Microsoft Office 365).

Sage 200cloud has 3 key themes:

1. Connected data 2. Customer experience 3. Simplicity

Clients have asked and Sage have listened! This version has been developed directly on customer requests and feedback. Sage customers want a solution that simplifies their business processes and improves their user experience in order to become more productive on a day-to-day basis.

Features & Benefits

- **Payment Integration** - The ‘Pay Now’ functionality has been enhanced to include additional payment providers such as PayPal and Stripe. This makes it easier for customers to pay their invoices and transactions automatically reconcile to the ledger, saving customers time and reducing manual processes.
- **Go Cardless** - Sage have partnered with Go Cardless, a leading digital Direct Debit provider, creating improved cash flow and greater predictability of cash position. Schedule and collect payments by Direct Debit from within Sage 200cloud, removing the burden of late payments.
- **Sales Order Processing Enhancements** - Sage have enhanced sales order processing to enable cross-sell, preferred item, order history and frequently ordered items. Speeding up the data entry of sales orders and increasing sales opportunities by cross-selling items at the time the order was placed.
- **Customer Alerts** - Set up alerts on a customer account to show relevant information for that customer. This will present key customer information to Sage 200cloud users at the point of interaction with the customer.
- **Document Capture** - Gain the ability to attach invoices and other related documents to a purchase invoice or purchase credit, creating improved auditability during purchase invoice authorisation. Documents can be scanned, dragged from emails or loaded from a file.
- **Skype and Google Maps** - You can now Skype customers and suppliers directly within Sage 200cloud, improving communication with end customers. Google Maps allows you to view a customer or supplier address, making it simple to locate them and get directions instantly.
- **Spooler Enhancements** - Spooler items can now be filtered by report name, user, company, status or date range, creating improved performance when viewing it. With the new filter system, it will become quicker and easier to find documents.

Winter 2018 enhancements

• Full Go Cardless integration • Outlook Pay Now • Microsoft flow integration • Purchase requisitions improvements • Improved Auditing capabilities • Bank Reconciliation improvements • VAT return enhancements

Keep an eye on our website for full details about this release when it’s available!

Do you want more information on Sage 200cloud? Speak to our experts on 0115 840 5075 or email enquiries@solsforacc.co.uk.

The best CRM software for smaller businesses

Are you an SME looking for a solution to help support your increase in productivity and revenue? Act! CRM and Sage CRM are two different solutions that support SMEs as they grow. Focus on the most important aspects of your business and accelerate your sales performance with these CRM solutions.

act!™

Act! CRM is the world's leading contact and customer management system for smaller businesses. It allows you to organise all your customer information in one central location, accessed on demand by customer-facing staff. Act! CRM can be hosted in the cloud, giving you secure access to vital business data anywhere, at any time.

Build meaningful relationships with customers through email marketing and contact management features enabling you to drive sales forwards and enhance your business performance. Gain the freedom to tailor this solution to your specific business needs creating an adaptable, connected workspace accessible on the go.

Fuel business growth by keeping your deals moving in the right direction with unique sales process automation. Track profitability of products, lead source and status for every opportunity, giving you clear visibility of your pipeline. Improve productivity across your business and spend more time on what you value most - your customers.

sage CRM

Sage CRM provides end-to-end visibility and data you can trust, allowing you to make informed business decisions based on accurate, real-time information. This web-based package saves you time, enhances communication and increases customer satisfaction helping you accomplish more with your business.

Gain a clear overview of your data helping you avoid the duplication of work and costly mistakes, allowing you to handle customer relationships effectively. Empower your sales team to efficiently manage their time by scheduling reminders and appointments, ensuring your business is constantly on track.

Make every interaction count by staying on top of your customer records within Sage CRM, providing critical information to help you deliver the highest level of customer service. Improve customer satisfaction and encourage customers to stay loyal. Boost customer retention, whilst gaining new ones with the help of Sage CRM.

Both Act! CRM and Sage CRM have the ability to integrate with Sage 50cloud and Sage 200cloud, allowing you to manage all aspects of your customer interactions more efficiently. Achieve a competitive advantage in your marketplace by seamlessly accessing important financials information at your fingertips.

Work smarter, not harder with these simple, adaptable, affordable CRM solutions for growing businesses. Act! CRM and Sage CRM can allow you to manage your entire business and contact base in one central location, helping you build meaningful relationships with your customers.

Learn more about the benefits of Act! CRM or Sage CRM by contacting our experts today on 0115 840 5075 or email enquiries@solsforacc.co.uk.

Sage Business Cloud Financials - roadmap

Much more than just cloud accounting, Sage Business Cloud Financials provides an award-winning integrated office to help support your company with multi-dimensional business management.

This leading 'touchless' accounting system understands your process, learns your business and provides you with insights on where to focus your time, investment and resources, allowing your business to grow and gain a competitive advantage in your marketplace. It's designed to put you in control of growth and cash, gain flexibility helping you easily manage finances and deliver exceptional customer service and experience.

Built on the Salesforce platform, unique tools better manage customer interactions and empower your sales and marketing teams with real-time, client information. Combine this CRM solution with Sage Business Cloud Financials to help support you with the power and intelligence of your business. Work at any time, on any device to maximise your sales teams spend and productivity.

Features of Sage Business Cloud Financials

- Intuitive, integrated and collaborative
- On-demand, live clarity of projects and profitability
- Robust analytics and accurate reporting
- Flexible subscription billing and accurate invoicing
- 100% functionality on mobile devices anytime, anywhere
- Live reporting on real-time results

sage

Financials

Every month Sage release an update to enhance its functionality, so you will always be one step ahead.

Product Roadmap - What's coming

Automation at Heart - Highly customisable process flows that drive optimisation through automation of all your tasks. This creates a seamless experience for critical functions such as contract management.
Beyond reporting - Visual, easy to digest results and insights are delivered in real-time to each area of your business with relevant context of the business function.
Always compliant - Strategically built for compliance, such as Making Tax Digital (MTD), Brexit outcomes and work on iterations as changes happen.
Cash flow management - Driving end-to-end visibility with suggestions, insights, and actions delivered in the medium that the user chooses, such as credit control.

Are you interested in finding out more about Sage Business Cloud Financials? Speak to our experts on 0115 840 5075 or email enquiries@solsforacc.co.uk.

Act! Marketing Automation is here...

Act! Marketing Automation (AMA) is a new standalone solution that integrates with Act! enabling you to automate manual tasks and multi-step processes such as email and social media campaigns. This brand new comprehensive email marketing system has advanced CRM workflow, lead capture, and campaign management. It allows you to easily prioritise follow-ups, automate sales tasks, and complete interaction history.

With Act! Marketing Automation it becomes simple to optimise the different ways you communicate with prospects and customers, maximising engagement and driving business growth. Ensure you are informed of new leads, any follow-ups are prioritised and gain a holistic view of all your prospect and customer marketing activity, helping you close sales faster.

Comprehensive marketing campaign management

Enhance your customer lifecycle by focusing on retention and customer loyalty with the help and assistance of automated outreach at each stage of your campaign. Allow AMA to do the hard work with response-driven nurture marketing campaigns - all automatically delivered to targeted lists in Act!. Campaigns can be triggered based on criteria you define, giving recipients a highly personalised experience.

Set up simple ad-hoc emails or drip marketing* campaigns for one-off communications as and when they are needed. Share campaigns on your social media channels to extend your reach and embed your social media profile links within your campaigns to drive traffic to your social networks.

*A drip marketing campaign involves sending marketing information to customers continuously over a long period of time, in an attempt to nurture prospects or leads.

Key features:
• Email marketing • Drip marketing • Response-driven nurture marketing • Social sharing

Visual workflow designer and interactive template editor

Produce impactful, mobile-friendly email campaigns with the interactive template editor. You can customise colours and fonts, and add free high quality stock photos from a library that provides over 500,000 options. Use any one of 25 sample templates or import and edit your existing HTML templates with the WYSIWYG editor.

Create custom nurture streams with the visual campaign workflow designer, providing graphical representation of your communication flow. You can preview email campaigns before sending them with both mobile and desktop views to ensure all your images are perfectly placed and content is correct and fully optimised.

Key features:
• Interactive template editor • WYSIWYG editor • Visual workflow designer • Mobile and desktop preview

act! Premier Trainer
act! DIAMOND BUSINESS PARTNER 2018
act! marketing automation

Effective lead capture, scoring and nurturing

Grow your audience with effective lead capture forms and surveys that feed contacts and responses automatically into CRM. With advanced forms and surveys, you can gain further actions in your CRM solution. Notify those who use the system and create activities and opportunities automatically as recipients respond.

Identify your most interested prospects with lead scoring based on campaign engagement, survey/web form responses, and website interactions. Prioritised leads are pushed into CRM groups automatically for easy sales follow up.

Key features:

• Lead forms • Surveys • Lead scoring • Multi-stage lead profiling

Time-saving CRM workflow with prioritised sales follow-up

Automate workflow between sales and marketing teams maximising engagement at every stage of the customer journey. Watch as AMA turns real-time response metrics into sales actions. This alerts you when you have a new prospect, prioritising follow-ups, and delivering a combined view of customer engagement in one central location. Create activities and opportunities based on campaign and website interactions or completed lead forms and surveys.

Key features:

• CRM workflow • Prioritised sales follow-up

Real-time response metrics and actionable customer insights

Gain an understanding of what is working and how you can improve your marketing strategy over time with real-time metrics covering the amount of opens, clicks, and comparative stats per campaign. Individual campaign results go straight into your CRM contact records for a detailed interaction history. You can perform A/B tests to pinpoint subject lines that create the most impact and content to improve the effectiveness of your campaigns.

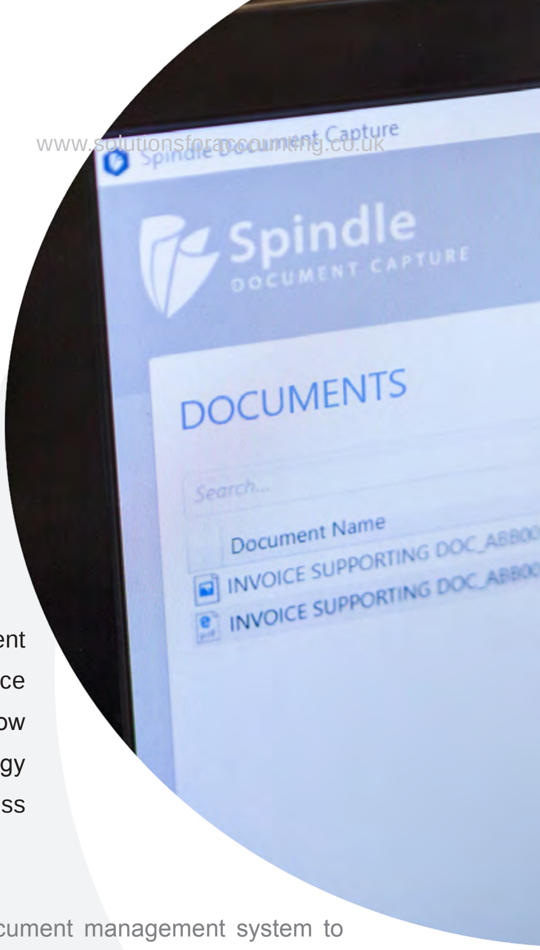
Key features:

• Real-time campaign metrics • A/B testing (test specific elements of two campaigns) • Website activity tracking and analytics

Act! Marketing Automation has 3 different plans - Select, Complete and Advanced. The tools you require can determine which plan is best for you.

Select has essential marketing automation features to engage your customers and grow your business. Complete has more robust features and time-saving CRM workflow, connecting your sales and marketing efforts. Advanced has the most amount of features and valuable consulting services to fast-track your success.

Interested in Act! Marketing Automation and want to find out more? Contact our experts today on 0115 840 5075 or email enquiries@solsforacc.co.uk.



Spindle Purchase Invoice Recognition - what is it?

Introducing a guest blog by our friends at Draycir. Draycir create specialist software to improve your business processes enabling you to work smarter by reducing costs, improving cash flow and streamlining operational efficiency.

Spindle Document Management from Draycir now offers an IDR (Intelligent Document Recognition) module for Sage 200cloud called Spindle Purchase Invoice Recognition (SPIR) using advanced OCR with in-built approvals and workflow management. Users can take advantage of all the benefits of cloud-based technology to enhance their business processes making it easy to use and implement, access updates automatically and reduce costs.

Thousands of users in the UK are already benefiting from this complete document management system to distribute outbound documents (such as sales invoices, statement, remittance advices etc) and capture inbound documents (such as purchase invoices, order confirmations, delivery notes). The Spindle Document Management suite can now be extended to automate the data entry of Purchase Invoices into Sage 200 with Spindle Purchase Invoice Recognition (SPIR). With seamless integration, once the Purchase Invoices are created in Sage 200, the original Purchase Invoice documents will also be archived and available to view from within Sage 200.

Spindle Purchase Invoice Recognition (SPIR) has been developed in collaboration with market leader IRIS (A Canon Company) to bring an enterprise level solution to the SME market. Included in Draycir's intelligent document recognition solution are many essential requirements for organisations to benefit from:

- An intuitive and user-friendly system
- Ability to quickly drag-and-drop, scan or browse files to capture documents
- Ability to view all related documents in Sage 200
- In-built Approvals/Workflow management view, review and approve documents outside of Sage 200
- Approvals mobile app (coming soon)
- Automated 2-way and 3-way matching against PO and/or GRN
- Reduce tax errors by taking VAT value directly from purchase invoice
- Cloud-based technology delivering automatic updates
- Cloud hosting removes need for additional hardware purchases
- Developer API coming soon to allow the IDR engine to be integrated with other platforms

DRAYCIR®

Spindle Document Management

Gain more information on Spindle Purchase Invoice Recognition (SPIR) by contacting Solutions on 0115 840 5075 or email enquiries@solsforacc.co.uk.