Solutions
for **Accounting** and **CRM**

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Summer Newsletter.

Issue 2 : 2019

What To Expect:

Welcome & what's new

Sage 200cloud Winter Enhancement

Why 170,000 businesses have adopted Salesforce to drive growth

Solutions welcomes new Act! clients

Migrating from Sage 50 to Sage 200

We are recruiting!

Welcome

2019 - We recognise the uncertainty of our political landscape and the legislative changes this brings to businesses as a result. At Solutions, we are leading the charge in discovering new ways to support our clients in maintaining legal compliance and remaining competitive, irrespective of what the future holds.

Allow us to keep you updated with industry news, product releases and exciting opportunities.

Jody Kendall
Customer Services Coordinator

Sage 50cloud Accounts v25.1

Sage 50cloud Accounts v25.1 is here, allowing you to easily and efficiently run your business. Benefit from ongoing focused investment in core functionality and gain improved cloud connections to Microsoft Office 365 and the Sage ecosystem.

Sage have made it their mission to develop their solutions ensuring they are future proof and support you with regulatory changes. MTD has now been enforced, meaning many businesses have moved to digital submissions. Sage have added functionality to Sage 50cloud Accounts v25.1 to ensure this change is simple for your business.

What's new?
- Attach documents to the VAT return
- Attach documents to Journals
- Access VAT return with users logged in
- Track bank reconciliation changes

Sage CRM 2019 R1

The release of Sage CRM 2019 R1 represents a continuation of Sage's investment in progressive developments that enrich this industry leading customer relationship management platform. Sage CRM can be integrated with your Sage accounting solution to provide Sales/Service Users with greater visibility of financial status and history data, and remove manual processes by automating the conversion of CRM quotations to Sage Invoices.

What's new?
- **Improvements to the web self service experience** - Enable your clients to access relevant data within your CRM database. For example, empower them to create (and check the status) of service requests.
- **Improvements to the Calendar List** - Filter the calendar view to display critical information in a more intuitive format, according to the personal preferences of each system User.
- **Improvements to the software development kit** - Ensure that Sage CRM remains compatible with your computing environment, with support for the modern Microsoft Operating Systems, SQL versions and Office Suite productivity applications.

To find out more contact our experts today: 0115 840 5075 | enquiries@solsforacc.co.uk.

Sage 200cloud Winter Enhancement

The Sage 200cloud Winter Enhancement is the latest in a series of releases for this advanced, cloud connected solution (3 per year to be more specific).

Sage 200 enables you to run a smarter, faster, more connected business. Eliminate downtime with 24/7 availability and boost productivity whilst enabling you to gain greater control over your business. Collaborate in real time, giving you the visibility and overview your business needs.

The Winter release of Sage 200 has been developed directly on customer feedback. Sage customers want a unique solution that simplifies their business processes and improves their user experience, creating a more productive business.

New features & benefits in Sage 200cloud

Go Cardless - The partnership between Sage and Go Cardless, a Direct Debit provider, has been enhanced to provide extra functionality removing the burden of late payments, improve cash flow and create greater predictability of cash positioning. Functionality includes the ability to schedule and collect payments by Direct Debit and set up Direct Debit from both invoices and directly within the product.

Improved Audit Capability - View important auditing activities and capture user actions taken on key data. This will help support internal audit processes and identify changes to supplier bank details and purchase requisitions.

Purchase Requisitions Enhancement - Save time and improve purchase requisition workflow, with the changes that have been made to the purchase requisitions customer journey, based on feedback from the initial release. These improvements include Mandatory Nominal Code / Supplier Account, Combined Budget Selection, Workspace improvements and more.

Microsoft Power Apps Connectivity - Microsoft Power Apps now has the ability to integrate with Sage 200. This service builds and uses custom business apps that connect to your data and work across web and mobile, without the need for custom development. You can save time as this integration expands access to key Sage 200 data.

Microsoft Flow Connectivity - Allows users to create and automate workflows and time-consuming business tasks across numerous applications and services. Automate simple push notifications, content management and complex business processes with clear examples of how to use Microsoft Flow with Sage 200. It also has the ability to automate and integrate Sage 200 into customer business processes.

Warehouse on Free Text Items - Non-stock holding customers often use warehouses to represent departments or locations within their business. This feature enables customers to use this information for purchases via free text items. It is beneficial as it improves the ability for companies to use warehouses for non-stock related processes.

For more information on the latest release of Sage 200cloud, contact our experts today on 0115 840 5075 or email enquiries@solsforacc.co.uk.

Why 170,000 businesses have adopted Salesforce to drive growth

As the world's leading cloud-based CRM system, Salesforce offers the tools you need to effectively manage your customer interactions, empowering your sales team with real-time client information. With the world's #1 CRM platform you can begin your journey to success.

Salesforce is built in the cloud to eliminate risk and expense of traditional software. Trusted by more than 4 million Users worldwide, Salesforce allows you to become more productive regardless of your location, helping you focus on what matters most - customer success.

How can Salesforce benefit your sales team?

Sales Cloud - Find customers, close sales, and grow accounts faster.

Salesforce's Sales Cloud is a user-friendly leader in cloud computing. It provides all the tools you need to connect with customers from real-time marketing campaigns to intuitive deal tracking, all in one central location available at any time, on any device with an internet connection. Engage with customers earlier and close deals faster than ever before. Sales Cloud embraces technologies like mobile, relationship intelligence and collaboration enabling you to remain ahead of your competition.

Sales Cloud can dramatically improve your business

| +45% FORECAST ACCURACY | +40% SALES PRODUCTIVITY | +39% LEAD CONVERSION RATE | +34% SALES DEAL CLOSURE RATE | +32% SALES REVENUES | +32% WIN RATE |

Designed to help you sell smarter and faster, Salesforce can improve your business productivity and efficiency. Place your customer interactions at the core of your business with a comprehensive, customisable view of clients across sales, service and marketing to help you find selling opportunities. Gain the ability to collaborate with colleagues company-wide, share insights, business documents and more on every business record and contact. With this cloud only solution, access your most important data at any time.

Contact Management

Contact management, collaboration and marketing tools enable your sales team to close more deals faster. Salesforce provides a thorough overview of your customer's activity history, significant contacts, customer communications, and internal account discussions allowing you to control your business efficiently. Insights from your social media channels enable you to stay connected to the people and information you require to successfully close sales.

Opportunity Management

Streamline your sales processes with Salesforce and easily customise the mobile app to reflect your sales and forecasting stages, enabling you to drive progress, productivity, and consistency. Get a complete view of critical details in a rich timeline of your customer's activity and receive updates when action is needed.

Lead Management

View in-depth information regarding your CRM contacts whilst understanding best practice and relevant documents using Sales Path. Manage your campaigns across all channels with the ability to track the source of a marketing lead and having information at your fingertips gives your sales team the tools to become more successful.

Reports & Dashboards

Salesforce offers powerful tools that turn data into actionable insights that all employees within your business can access from any location. A real-time overview of your business is visible at a glance with Salesforce dashboards, giving you detailed reports that are easy to create and customised sales forecasting reports that are easy to build, enabling you to stay constantly updated.

Salesforce Mobile App

Improve productivity with the ability to turn your smartphone into a portable sales office. Log calls, respond to leads, work opportunities and check dashboards anytime, anywhere. With the Salesforce Mobile App quickly access your files and instantly connect with your colleagues. Browse, edit, and share all your files, including Microsoft Office, in just a few clicks.

Email Integration

The Salesforce and Outlook integration gives you a complete overview of your customers. Sync emails instantly keeping your entire business up to date with all communications. Lightning Sync keeps your Outlook, mobile device, and Salesforce calendars seamlessly aligned. Add rich context to every meeting invite and contact within Outlook quickly and easily.

Sage 200 Integration

Salesforce can integrate with Sage 200. This enables complete visibility across all areas of your business enabling you to focus on driving revenue. Seamlessly manage your sales cycle and increase your customer service capabilities whilst managing all your business processes in one place, without having to look across two separate systems.

Are you interested in Salesforce and require more information? Speak to our experts today on 0115 840 5075 or email enquiries@solsforacc.co.uk.

Solutions welcomes new Act! clients

In February an agreement was made to transfer the Act! CRM business interests of Preact Limited to Solutions!

Having been one of the first established and largest Act! practitioners in the UK, Preact sought to appoint a trusted specialist partner to take ownership of their Act! CRM customer base.

Solutions are widely recognised and respected as one of the most capable Act! CRM consultancies in the UK and international community, making us a clear and responsible choice for Preact to safeguard the interests of their Act! clients.

Since 11th February, contracted clients of Preact have been enjoying a single point of contact for order placement and support through Solutions. On-site services for implementation, training and consultancy is being delivered by our experts across the UK.

"We are thrilled to be working with those Act! user organisations who had been served so well for many years by Preact" says our Director of CRM Business, Will Ingleby. "Having interacted with Selom [Preact's MD] and his team on many occasions in the past, we've always shared a similar philosophy and a common approach to delivering customer service excellence. This acquisition just made so much sense to us; extending the community into which we can seek to deliver and support impactful Act! CRM solutions that drive improvement in clients' businesses."

Selom Bulla, Managing Director at Preact is equally positive about the move. "Due to an increasing focus on other areas, we felt the timing was right to pass the duty of providing a first-class service to our Act! customers onto an organisation we could trust to continue and improve on our work for the last 25 years. Solutions are an organisation that not only has one of the most experienced teams of Act! Certified Consultants in Europe, but also has a deep commitment to outstanding customer service. We are totally confident that our customers realise the very best of their investment in Act! going forward."

Authors and owners of the Act! product, Swiftpage Act! LLC are equally ebullient about the news. Vice President and General Manager Lindsay Boullin confirmed the vendor's approval. "Swiftpage has been working closely with both Preact and Solutions for over 6 years, although working with Swiftpage's predecessor, both companies have already been established as leading Act! consultancies for more than a decade. During this time, they have both been excellent partners, delivering consistently high-quality services to Act! CRM customers. Swiftpage is excited to be working even more closely with the team at Solutions because we have seen how their focus on delivering high value sales and marketing consultancy really helps their clients to improve and grow their businesses."

For more information on Act! CRM, Preact or Solutions contact our experts on 0115 840 5075 or email enquiries@solsforacc.co.uk

Migrating from Sage 50 to Sage 200

Are you finding your current accounting solution is struggling to cope with your volume of daily transactions making it restrictive and slow?

Knowing when to migrate from Sage 50 to Sage 200 is crucial in order for your business to thrive, allowing your accounting capabilities to grow and support your business. Although these two accounting solutions have similar basic functionalities, Sage 200's functionality far surpasses that of Sage 50.

Takunda Mushambi
Support Technician

The benefits of migrating:

Cost effective - Sage 200 allows you to add modules and users to suit your specific business needs so you only pay for the functionality you use.

Quick and easy access - With the Microsoft Office 365 integration in Sage 200 you can access all your customer account information straight from Outlook on your mobile, tablet or laptop.

A single view of your business - Sage 200 brings together financial management and business intelligence in one solution, making your team more efficient.

CRM Integration - Sage 200 has the ability to integrate with a CRM solution, this enables you to become more productive with greater visibility over your business and clients.

A tailored solution - With this scalable solution manage stock, projects, CRM, payments and manufacturing processes as well as connecting with third party apps.

MTD compliance - The latest version of Sage 200 is MTD compliant, ensuring you are Making Tax Digital ready.

The process of migrating:

1. **Installation:** Your dedicated Project Manager will be present throughout the installation of your new system. They will work with you to ensure the installation is painless, with minimal downtime or disruption.
2. **Test System:** Once Sage 200 is installed, it is important for us to check everything is running smoothly, with the system working the way you need it to.
3. **Data Migration:** We will work with you to ensure critical data is migrated into your new Sage 200 system whilst ensuring you take advantage of the enhanced features and functionality.
4. **Training -** We provide high quality Sage 200 training and will tailor your training session to best suit your business, which can be carried out at your offices.
5. **Live Migration -** When you are happy with the installation and training that you have received, we will set a 'Go Live' date.
6. **Ongoing Support -** Our fully accredited Sage support team have decades of experience supporting Sage 200 systems and will endeavour to assist your support requirements.

At Solutions, we understand that your business is constantly evolving and you need your software to support your growth. By naturally progressing from Sage 50 to Sage 200 you will have a more powerful, scalable solution with greater functionality. Bringing together your back-office systems enables you to have a complete overview of your business at your fingertips.

We are recruiting!

Solutions for Accounting and CRM have been leading Business Management Experts for over 20 years, with first class Sage Accounting and CRM expertise. Due to our continued growth and success, we are thrilled to be on the lookout for new talent and are always looking for ambitious, self-motivated and driven specialists to join our progressive and expanding team.

Our employees are important to us so treating our team well is a must. There are lots of perks to working in our forward-thinking, tech environment with our 45 member team always available to give each other a helping hand.

Benefits of working at Solutions include: a supportive and encouraging environment to continue and progress your knowledge and training, a competitive salary and package, private health insurance, various social occasions and, most importantly, plenty of cuddles and licks from our office dog - Freddie!

Team Solutions

Our Vacancies:

Sales Consultant - Sage Accounting Products: With two core accounting products within our portfolio, (Sage 200 and Sage 50) we are looking for another expert to sell impactful ERP and accounting solutions that deliver real business value to our clients.

CRM Telesales Executive: Working alongside sales consultants, account managers, marketing professionals and product specialists your role will be to sell impactful CRM solutions to businesses wishing to enhance their customer relationship and marketing capabilities.

CRM Implementation Consultant: You will be involved in the implementation of CRM solutions throughout the project including scoping the customer's requirements, designing and building the CRM system, training and 'go live' before handing over to our support team.

Digital Marketing Assistant: Working alongside our dedicated marketing team you will be responsible for developing and delivering our digital advertising and online presence in line with our marketing and sales strategy.

Admin Apprentice: Working alongside Nottingham College, there is a fantastic opportunity to join our admin team gaining hands-on experience and a reputable qualification.

If any of the above roles are of interest to you, or if you think you can bring something valuable to our team, please email your CV and covering letter to jobs@solutionsforaccounting.co.uk.