Solutions for Accounting and CRM

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Autumn Newsletter.

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What To Expect:

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Welcome

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By the time it's over, 2019 may well prove to have been one of the most politically turbulent years in recent history. With that possibility in mind, UK businesses are facing an economic environment which has characteristics that are almost impossible to predict.

For these reasons, Solutions clients are demanding efficient and agile business management systems able to sustain growth whatever the future holds. In this issue we continue to support your drive to be competitive and secure by sharing details of impactful product enhancements, industry news and valuable advice.

Solutions Cloud!

These are exciting times at Solutions as we extend our offer to include a broader range of Software as a Service (SaaS) and 'cloud' products. We're now able to provide greater choice to our clients who see value in class-leading technologies that don't require heavy investment in IT infrastructure. Together with our established on-premise systems, our portfolio now includes solutions to meet the needs of all aspirant businesses.

With the ever growing cloud and cloud-connected product offerings within Sage Business Cloud and our CRM portfolio, we have decided to shorten our email domain to '@solutionscloud.uk' to emphasis the direction our business is heading. Keep your eyes peeled for more exciting news coming soon...

Sage 50 - Winter 2019 edition is on its way.

The latest version of Sage 50 is on its way with some exciting enhancements. Take a look at what's coming...

- **Construction Reverse VAT Legislation**: HMRC Legislative Change - VAT reverse charge for construction services will come into effect from the 1st October 2019.
- **Making Tax Digital Enhancement**: Following the MTD introduction, when submitting a VAT return you are required to enter your HMRC logon credentials each time. This enhancement will allow you to store these credentials to save re-entering for a period of time.
- **Sage Drive Enhancements**: Sage have reacted to customer feedback around Sage Drive and are working on performance enhancements to this service.
- **Installation Enhancements**: Sage are making enhancements to the data conversion aspect of the installation process.

Everyone should be MTD compliant and have submitted their first tax return. Please let us know if you have any issues by contacting our experts on 0115 840 5075 or emailing mtdinfo@solutionscloud.uk

MAKING TAX DIGITAL READY

Sage 200 Summer 2019 Release

The Sage 200 Summer 2019 enhancement is coming soon with lots of updated features.

New Microsoft Flows

1. Supplier Bank Details - The supplier bank details flow can automatically send emails to people notifying them of any changes to the bank details for supplier accounts.

2. Purchase Requisitions - The purchase requisitions flow can automatically send emails during the authorisation process.

- Authorisers will receive emails when they have new purchase requisitions that require authorisation.
- The person who submitted the purchase requisition will receive an email when it is authorised or rejected.

Bank Reconciliation Improvements

Following the feedback that Sage received directly from customers, they are announcing these improvements for bank reconciliation:

- You can now part reconcile a transaction, rather than the full amount. The remaining amount can be reconciled the next time you do your bank reconciliation. This transaction will be marked 'Part' to show it has been part reconciled.
- You can now see the URN of a transaction when you reconcile or unreconcile.

Scan and Attach Documents Feature Expansion

With the new release, you'll be able to attach files and scanned documents in Sales Ledger Transactions, invoice and credit note, through Confirm Goods Received and Confirm Service / Text Items Received, and in Delivery history for purchase orders and returns.

Reverse charge VAT for Construction Industry Scheme (CIS)

From October 2019, companies in the UK's construction industry may have to handle and pay VAT in a different way following the introduction of the new VAT reverse charge system for the Construction Industry Scheme (CIS).

For supplies of certain specified construction services, customers will be liable to account to HMRC for the VAT of these purchases instead of the supplier. The reverse charge will include goods which are supplied with the specified services.

sage 200

For more details about the latest release visit the 'news' section of our website or contact our experts on 0115 840 5075 or email enquiries@solutionscloud.uk

Act! Growth Suite - what's it all about?

Are you a small or medium-sized business looking for an easy-to-use CRM solution?

Do you need a CRM that can take care of your customer relationships, increasing productivity throughout your business?

Jumpstart your growth with Act! Growth Suite. This ultimate toolset will help you build relationships, increase engagement and fuel business growth. With combined CRM and Marketing Automation, Act! Growth Suite is a unified solution with everything you need in one place, supporting you in the running of your business.

Trusted by more than 4 million users worldwide, Act! Growth Suite enables you to create enduring relationships, maximise engagement and secure revenue growth.

Rich Customer Management

Easily find important customer details, emails, documents, notes, history, activities, and more by keeping them in one central location. Gain a complete view of your customer relationships and seamlessly transfer your customer information from your current CRM solution with ease.

With Custom Tables, easily manage detailed, industry specific data such as insurance policies, service contracts, mortgages, or projects. Custom Tables provide maximum adaptability allowing you to bring together complex data sets, unique business processes and specialised industry practices.

Key Features:

- Contact Management - Groups & Companies - Activity Tracking & Alerts - Custom Tables

Powerful Marketing Automation

At the heart of Act! Growth Suite is Act Marketing Automation (AMA) which enables you to automate manual tasks and multi-step processes that form complex marketing campaigns. With advanced CRM workflow, lead capture, high quality email marketing and forensic website visitor tracking, you can easily prioritise follow-ups, automate sales tasks, and complete interaction history. Turn real-time response metrics into sales actions and receive alerts when you have a new prospect, and gain a composite view of customer engagement in a single solution.

Differentiating the ways you communicate with prospects and customers can increase engagement and drive business growth. Engage prospects and clients with response-driven nurture marketing campaigns that are sent to targeted lists in Act! automatically using criteria and triggers you define. Information of new leads and a holistic view of all your prospect and customer marketing activities will help you close deals faster.

Key Features:

- Campaign Management - Template Editor - Lead Management - CRM Workflow - Response Metrics

Dynamic Sales Pipeline Management

Close deals faster and more often with dynamic sales pipeline tools. Gain the ability to easily manage opportunities using an out-of-the-box process or one you configure to suit your business. With every sales opportunity you can track products or services, status, days open, probability of close, documents, and more with ease.

View a complete, clear representation of your sales pipeline to show revenue, change your strategy, and quickly focus on efforts. In-context KPIs help you gain an understanding of the health of your pipeline at a single glance.

Key Features:

- Opportunity Tracking
- Pipeline Management
- Sales Process Automation
- In-context KPIs

Actionable Business Insights

Gain access to dynamic, visual snapshots of real-time metrics with interactive, graphical Act! Insight dashboards that cover individual, team, and business performance. Monitor sales, marketing and business health KPIs for smarter decision making. Have access to over 50 preconfigured reports or create custom reports with the report designer. Export reports to Microsoft Excel, PDF, and email for greater analysis or sharing with your team.

Key Features:

- Act! Insight Dashboards
- Custom Dashboards
- Over 50 reports
- Custom Reports

Does Act! Growth Suite sound like the perfect CRM solution for your business? Our expert team will help you understand how the system can be configured to support your business effectively. We help you through every step of the implementation process, from consultation and installation through to supporting your software and business once you are up and running.

act!™ act!™ Growth Suite

Are you interested in finding out more about Act! Growth Suite? Speak to our experts today on 0115 840 5075 or email enquiries@solutionscloud.uk

Could you make better use of Act!?

Join us for a free-of-charge half day presentation / User orientation event and learn how to get more value from your investment.

Wednesday 9th October - Nottingham
Solutions for Accounting and CRM HQ
www.solutionsforaccounting.co.uk

Thursday 17th October - Wycombe
Wycombe Heights Golf Centre
www.wycombeheightsgc.co.uk

Empower your Act! Users to drive business growth

- **Join** with other Act! Users and experienced product experts.
- **See what's new** in Act! and learn how to embrace the latest product features to help increase revenue and reduce cost.
- **Pick up 'hints and tips'** on how to improve the user-experience and increase adoption of Act! in your business.
- **Learn new ways** to produce powerful dashboards and reports in Act! with free, easy-to-use tools.
- **Witness the workings** of Act!'s powerful new marketing automation technology, and see how it could transform your business.
- **Check out** the new mobile applications and explore options to deliver real-time customer data to your field sales teams and remote workers.
- **See how** the new API can help you integrate Act! with Accounting software, Social Media, Event Management tools and hundreds of other applications.
- **Discover** hundreds of add-on components that can help unlock the power of Act! and dramatically extend its value in your business.

Refreshments and free parking included!

Places are limited at each venue and will be allocated on a first come, first served basis. There is a maximum for 2 person per organisation at each venue.

Register here:
solutionsforaccounting.co.uk/actevent

Learn more about Act! Growth Suite:
solutionsforaccounting.co.uk/actgrowthsuite

Leads & opportunities - what's the difference?

Sales terminology can be a minefield... Leads? Opportunities? Prospects? Lines can be blurred. Salesforce's Sales Cloud makes this easy and supports your sales processes with clearly defined definitions.

Leads - *A lead is a sales prospect who has expressed interest in your product or company.*

Leads allow you to store information in one place about the person (contact) you spoke with, the company (account) they work for and the products or services they're interested in (opportunity). Not only is it easy to capture a lead, but being one record in your Org, it's lighter on your data limits and saves time.

Once a lead has been recorded, more functionality comes into play such as the (Lightning only) Path, which can be configured to support your sales team in capturing the relevant information at the right time, as well as providing guidance for success.

After you've reconnected with your lead and they're showing an active interest in purchasing from you it's time to convert. Simply click the 'convert' button, choose whether to create new records or link to old, and off you go!

Opportunities - *Opportunities track your sales and pending deals.*

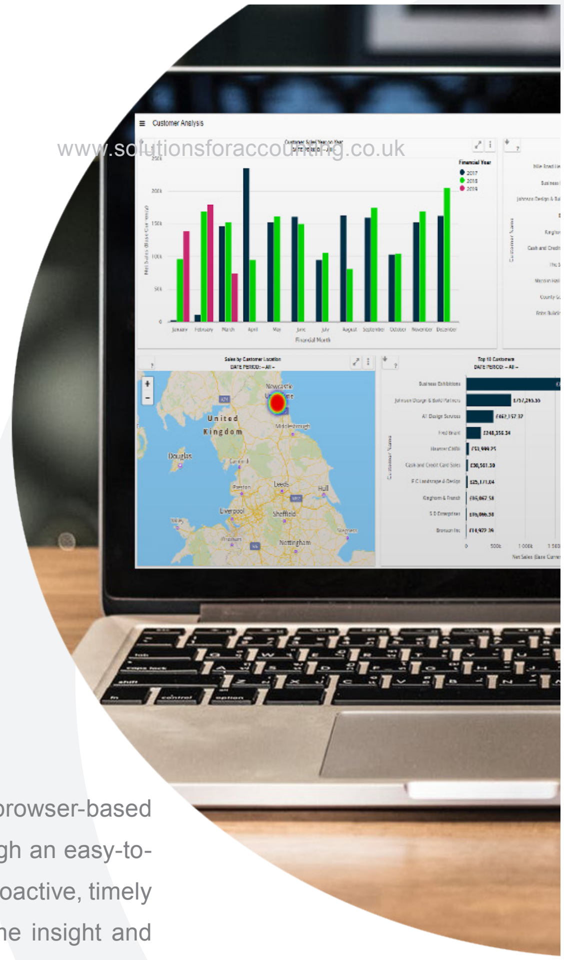
Lead generation and prospecting is focused in the lead object of Salesforce's Sales Cloud, the pursuit of the sale is managed within the opportunity.

You can use Path functionality to track sales stages and provide guidance for success. Opportunities hold related product records against them allowing you to track what is being sold, the quantity, and the price. This becomes super-powered when using reports with a group based on stage and products. The products on the opportunity automatically update the 'amount' field, making it simple to keep track of the value of each opportunity.

Quotes hang off the back of opportunities and you can have multiple quotes related to a single opportunity. This allows for the creation of PDF documents holding your branding, terms, and the products the client requires. If there are multiple renditions of the quote, you can choose which quote record is correct and synchronise this with the opportunity, updating the products and amount on the opportunity record.

Leads and opportunities are separated by not only the information held on them but where they are used in the sales process. If this is the first time you're reaching out to a prospect, they're a lead. If you're in negotiation or on the verge of submitting a quotation, they're an opportunity.

Are you interested in learning more about Salesforce? Contact our experts today on 0115 840 5075 or email enquiries@solutionscloud.uk



Panintelligence for Sage 50 & Sage 200

Do you need a single reporting tool to view all your data from multiple sources in one place?

Panintelligence (Pi) for Sage is an analytics and business intelligence application, compatible both with Sage 50 and Sage 200. Effectively and accurately report on data from Sage and access real-time data to monitor KPIs and make key decisions. Proven to give you the quickest return on investment, our experts will get you set up and ready to go in no time.

Pi for Sage is a pre-configured, off-the-shelf dashboard solution that is fully browser-based and allows you to present data in visually appealing charts and graphs through an easy-to-use User interface. Gain a clear overview of your data enabling you to make proactive, timely and informed business decisions to improve performance. Pi offers real-time insight and allows for collaboration across your business.

This dashboard solution presents data in a readable format, and the HTML application works across multiple devices including mobile phone and tablet, empowering you to access your data whenever, wherever. Drill down into underlying data at the click of a button and quickly access updated, critical information required when making informed decisions.

- Export to Excel or PDF
- Easy to use and install
- Schedule email reports
- Fully GDPR-ready and secure
- Full access control to all users
- Copy and paste data to Excel
- KPI tracking and automated alerts
- Drill down into the fundamental data
- Can be used with any SQL database

Panintelligence for Sage 50 and Sage 200 can be securely accessed through any modern browser or device and can turn complex Sage data into easy-to-read charts and graphs, allowing you to gain business insights and inform future decisions.

Panintelligence for Sage is accessible on the go and allows you to view live, updated data at any time on any device. Self-serve your own information within a secure environment and get a single view of the truth with accurate data. The choice of over 100 pre-configured reports can pick up your data the minute it changes, automatically populating your chosen report or dashboard with accurate information.

Are you interested in exploring Pi for Sage further? We can assist you through every stage of the implementation process, from consultation and installation to supporting your software.

sage 50 panintelligence sage 200

Speak to our experts today on 0115 840 5075 or email enquiries@solutionscloud.uk