

## SWIFTPAGE INTRODUCES THE ACT! SUBSCRIPTION MODEL

**act!**<sup>TM</sup>  
**Subscription**

After almost 30 years as a 'perpetual licence' product requiring up-front purchase for each user, Act! CRM is about to move to a subscription model where organisations may pay monthly or annually without any capital investment.

The initiative has been introduced by brand owners Swiftpage to present clients with a broader range of options to purchase, but also to provide a long term solution to the problem of obsolescence. Act! users are often frustrated by compatibility issues in circumstances where they are using a version of the software that is not current.

Typical examples of the problem include compatibility with the Microsoft Windows 10 Operating System, and also the effectiveness of integration components with the Microsoft Office suite of productivity tools (especially Outlook, Word and Excel).

Subscription clients will always receive upgrades to the current version of Act! thereby eliminating the threat of obsolescence.

Although the option to purchase a perpetual licence will remain, we anticipate that there will be significant uptake of the Subscription model in Calendar quarter 2 of 2016. Perpetual licence owners will have an option to switch to the subscription model at any time, and those who wish to leave the subscription programme will be able to buy an option to retain their Act! license.

Welcome to our  
first newsletter  
of 2016!



Included in this issue:

- **Act! CRM & Sage 50 Integration**  
*Expose account status and invoice history in CRM. P2*
- **Mailchimp Integration with Act! & Sage CRM**  
*Manage email campaigns from within your CRM. P3*
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- **Case Study: Butlers**  
*Sage 50 Professional at work with Counterpoint. P7*

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We wish you all the  
very best in business  
for the forthcoming  
new financial year

## Act! Premium Cloud & Hosted Options now available

Not so many years ago, 'work' was a noun used to describe a place to which we could go to earn our living. In this context, 'work' is now more commonly a verb, used to describe a thing that we do wherever we may be, at any time of day or night and access to critical data on any digital platform is an expectation.

In keeping with the theme of customer choice therefore, Act! is also available as a pure-cloud based SAAS (Software as a Service) solution with a number of hosting options. For basic users, Act! Premium Cloud hosted by Swiftpage presents low cost entry to cloud based CRM. Clients' existing databases may be uploaded into a secure, high speed environment for access via any of the major browsers on multiple platforms including tablets and smartphones.

Where more flexibility, customisation, management and client support is required, Solutions for Accounting are able to host Act! databases in a 'Tier 4' secure data centre. This latter option provides us with the ability to easily manage database customisations, management and maintenance, and also to integrate add-on components.

### Need to know more?

Solutions CRM Consultants in our Nottingham and Derby offices are ready and keen to explore options for hosted Act! and the subscription model with you at your convenience.



## Integrate Your Accounts & CRM data in one location with AlphaLink

Solutions for Accounting have recently completed a number of implementations of the AlphaLink integration component, presenting Act! CRM users with visibility of detailed Sage 50 accounting data and empowering them to make better informed decisions.

For many years, Act! and Sage user organisations have demanded better integration between the two products. There had been high hopes for progress when Sage launched their 'SDATA' based link towards the end of their ownership of Act! However, users became frustrated by performance issues where the Sage 50 database contained anything more than just a few hundred records. Furthermore, the ability to perform analysis on Sage 50 data within Act! was extremely limited.

AlphaLink is a celebrated innovation that provides a high-performance link product that synchronises Sage 50 data into Act! database tables. This means that not only are performance issues eliminated, but Act! users can perform 'Lookups' based on Sage 50 data.

For example, it would be easily possible to create a Contact or Company List containing all records where the turnover exceeds a given figure and the account status is 'Open' but where the last order was placed prior to a determined date. In each element of this search criteria, the Lookup would reference data which has been synchronised directly from Sage 50.

The AlphaLink system also presents the user with the capability to create a sales 'Opportunity' in Act! and to nurture it through to 'Closed/Won' status. At this point the Opportunity may be passed seamlessly and electronically through to Sage 50 as a Sales Order where it may be picked up and processed by accounts staff.

AlphaLink maintains an unashamed focus upon driving profit through increased sales and reducing cost. The proposition includes an improvement in the effectiveness of marketing and sales operations by providing them with more valuable information, and the removal of manual process in passing sales transactions through to Sage 50.

**Act! CRM Consultants in our Derby office are able to provide demonstrations and further information at your convenience. They may be contacted via 0115 840 5075.**

# GOING MAD FOR THE MONKEY!



## MAILCHIMP INTEGRATION WITH ACT! & SAGECRM

It seems that CRM and eMail Marketing go hand in hand for many of our clients, and we're often asked to recommend a powerful but easy-to-use eMail Marketing system that integrates well with our CRM products.

As Act! CRM is now owned by Swiftpage, themselves authors of leading eMail Marketing technology, the integration of their own Act! eMarketing (AEM) within the Act! CRM product is seamless and powerful. Not only does the tool provide a simple 'drag and drop' HTML template editor and full visibility of Open and Click responses to emails, but automated follow-up actions can be managed by 'Smart Tasks'. For example, a Sales User may be automatically alerted by an Activity Alarm to circumstances where a Contact has opened and/or clicked hyperlinks within a marketing email, thereby confirming interest and justifying a follow-up communication of an appropriate kind.

However, although Swiftpage eMail Marketing technology was also integrated with SageCRM, the acquisition of Act! switched the Swiftpage development focus to that product, leaving SageCRM users without a rich integrated eMail Marketing experience.

A highly popular solution has arrived with SageCRM v7.3 in the guise of global SME eMail Marketing leader, Mailchimp.

Mailchimp is the fastest growing eMail marketing platform in the world with the broadest user base, and there is good reason for this. Its user interface is sublime; extremely easy to get to grips with yet immensely powerful. Mailchimp makes it easy for users to customise templates via simple drag and drop, or upload their own professionally created custom templates.

All the standard features that one would expect of an eMail Marketing tool are included such as Open and Click through tracking, opt-out management, subscriber list management and an HTML form builder. The platform is also extended to offer a broad array of additional standard features and cost options such as integration with social media, Google analytics (to track email respondents as they are nurtured beyond the hyperlink on their journey through your website towards your ultimate goal) and extensive testing and reporting capabilities.

Mailchimp is also able to be integrated with Act! CRM via an addon component, meaning that existing Mailchimp users who are new to Act! need not switch to AEM.

### New to eMail Marketing?

Mailchimp and Act! eMarketing both offer extensive tutorials as well as free-to-use entry level versions.

AEM offers Act! users the facility to send unlimited emails to up to 500 Contacts within a month. Mailchimp enables the synchronisation of up to 2000 Contacts from SageCRM or Act! into the system, with the ability to send up to 12,000 emails per month **for free!**

At Solutions for Accounting, we have our very own in-house eMail Marketing expert trainer. Will Ingleby has been working with eMail marketing systems (including Mailchimp and AEM) for over 10 years and has provided best-practice guidance and training on the technology to representatives of over 1,000 businesses.

Call us now on 0115 840 5075 to see how we can help get you started with your first eMail Marketing campaign, or to offer assistance in driving more value from your digital communication endeavours.





Are you in Construction or a business that uses job costing? Find out how construction specific software can benefit your business.

Solutions for Accounting are an accredited partner and reseller of Eque2's construction and contracting systems. A trusted Sage Developer, Eque2 integrates construction-specific functionality with Sage's popular accounting products to build a range of innovative solutions that span small to medium enterprise organisations

With four members of the Solutions team recently passing their Construction For Sage accreditation exams, we are pleased to be able to offer a range of software modules that integrate seamlessly with Sage accounting products to meet the specific needs of construction companies

We understand that, working in the construction or contracting industry, you need proven software that provides full visibility and control right across business; software that provides the foresight to ensure that projects complete on time and to budget, while margins are retained

#### How our Construction Solutions for Sage can benefit your business:

- Construction specific functionality including:
  - Job Costing
  - Contract and variations budget control
  - Retentions management
  - Application and valuations for payment
  - CIS and subcontractor management
- Powerful ICA advanced reporting module (Microsoft Excel-based reporting tool)
- Meet HM Revenue and Customs legislation
- Reduce duplication by cutting out lengthy manual processes
- Full integration with Sage 50 Accounts, Sage 200 Accounts and Sage Payroll solutions

**For more information about our range of software solutions for the construction industry call 0115 840 5075**



Accredited  
Partner in  
Construction  
Software

# THINK SAGE ADD-ONS. THINK SOLUTIONS.

## PURCHASE REQUISITIONS MODULE - SAGE 200

Our Solutions Purchase Requisitions Module for Sage 200 allows multiple users to create purchase requisitions without the need to access Sage 200. The module is a web-based application so that anybody within the organisation can access the system to create purchase requisitions wherever they have an internet connection.

### Features

- Links directly to Sage 200 to upload supplier information, product lists, warehouses, VAT rates, nominal codes and more to the requisitions system.
- Purchase requisitions posted straight into Sage 200 following authorisation.
- Extensive administration options to allow the system to be configured to suit the user's needs.
- Deep authorisation rules to allow hierarchical and co-signing of requisitions before being passed into Sage 200.
- Users have the ability to add stock items, free text, additional charges and comment lines into a single purchase requisition.
- Users can be assigned to a department and access restricted accordingly.
- Authorisers can edit users' requisitions and add or remove items.
- Email alerts to authorisers.

### Benefits

- Easy access from remote locations.
- Retain administration control of user rights.
- Saves time on processing.
- Saves money as it reduces the requirement to purchase additional Sage users.
- Sage 200 look & feel saves on training time.

For more information about our **Solutions Additions** range or to arrange a demonstration contact:

**Kathy Warner** - Partner Programme Coordinator

[kathyw@solutionsadditions.co.uk](mailto:kathyw@solutionsadditions.co.uk)

Tel 0115 840 5075

# SAGE 200 STANDARD ONLINE: STRAIGHT FORWARD ONLINE ACCOUNTING

- **Straightforward and cost effective online solution that grows with your business**
- **Greater control for your business with intuitive tools for managing your finances, stock & reporting**

## **Obtain complete control over your finances**

Greater control of your business as it becomes more complex with robust budget and cash flow management

## **Easy implementation and immediate ROI**

Risk free implementation allows you to get up and running quickly with no upfront software costs, so you'll be able to gain quick return on your investment

## **Powerful reporting tools**

Instant insight with powerful Excel reporting tools that help you analyse trends and business performance

## **Software that grows with your business**

Get the features and functionality you need when you need them, with scalable software that grows with your business. Add or remove users, companies and reports to match your business's ever-changing requirements

## **Access to our award-winning support**

Benefit from our world class support, with access to fully accredited product experts, wherever you need help or advice

**Do you need help finding the right solution? Contact us on 0115 840 5075**



# CASE STUDY

Sage 50 Professional and CounterPoint.



**“We couldn’t have grown the business without Solutions for Accounting behind us.”**

*Sally Thomas, Office Manager at Butlers*

**System upgrades, a new Point of Sale tool and ongoing support are allowing Butlers to offer an enhanced service to its customers as it moves to larger premises and into new markets.**

Butlers is an electrical suppliers and contractors company, which was established in 1959. It provides domestic and commercial electrical testing, installation and maintenance, and recently began offering Solar PV systems and home automation of appliances. In April 2015, the company officially opened its new premises in Sleaford, Lincolnshire, which includes a state-of-the-art showroom. Butlers won Business of the Year 2015 in the Sleaford Town Awards.

## OUR BRIEF

Having outgrown its existing premises, Butlers was moving into a larger, all-purpose facility and needed a software solution that could support the company’s growth plans. Sally Thomas is the Office Manager at Butlers, whose responsibilities include purchasing and payroll. She said: “We were looking to upgrade our existing Sage system for our new premises and we also needed a reliable ePoS system for the new showroom. We spoke to Sage and they recommended Solutions for Accounting to us. We arranged a consultation with Solutions for Accounting and representatives from the company came to speak to us. They had a very nice approach. It wasn’t pushy at all. They clearly explained our options and the modifications that could help our company move forward.”

## THE SOLUTION

Solutions for Accounting recommended upgrading to Sage 50 Professional and incorporating CounterPoint, an electronic Point of Sale/till solution that bolts on to existing accounts software. The installation of the new software coincided with Butlers’ move to its new premises and after two days of installation, Solutions for Accounting provided two days of staff training to ensure Butlers’ team were fully up-to-date with the new system.

## OUTCOMES

“The transition went very smoothly and the system was set up exactly how we wanted it”, said Sally. “The results have been fantastic. Before, customers had to pay with cash or a cheque but CounterPoint has allowed us to take card payments. It has modernised the company and not only made things a lot easier for us but for our customers, too.”

As well as providing on-going support, Solutions for Accounting will be integrating an add-on to CounterPoint in the autumn. WorkPoint will allow Butlers’ engineers to electronically enter job sheets and quotes and electronically manage the stock. This will mean more efficiency and accurate stock control, as well as cost and time savings. Sally continued: “We’re very pleased with the work Solutions for Accounting has done for us. I would like to thank the team for their personal service and the support they have provided.”



# POWER AHEAD WITH SOLUTIONS FOR ACCOUNTING

We deliver integrated financial management and CRM software solutions to help drive business growth. Our award winning consultancy, installation and support services will ensure maximum system efficiency and stability, enabling you to maximise productivity and growth



## Top 10 Sage Business Partner

- Consultancy
- Project Management
- Installation
- Customisation & Modification
- Report Writing
- Training
- Support

“Since moving our Sage support to Solutions for Accounting over four years ago, all the indications have been that this was the right decision for our business”

*Roger Smith, Conveyor Units*

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