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The Importance of Being a Proactive Customer

In this article, the senior vice president and general manager of Sage PFW ERP talks about shared responsibility of both customers and businesses to help support the success of our own organizations.

Upgrade to v5.7 Made Easy

Not sure if your current hardware and software can handle the upgrade to the latest version of Sage PFW? Refer to any of these sources to check compatibility!

New Version 5.7 Bank Reconciliation Import Feature

You can now import external files from your financial institution into the Bank Book module. Learn how to do so and how this system works.

Maximize Your Sage PFW ClientCare Plan Benefits

Did you know that your Sage PFW ClientCare Plan has more benefits than ever before? Read this article to learn more about new benefits that you're eligible for at no additional cost.

Check out the New Sage Webcast Center

The Sage Webcast Center has been redesigned to make it easier than ever to view Webcasts about Sage products and solutions. Get the details!

Network with Fellow Sage PFW Users

Facebook and LinkedIn users: You can now network with other Sage PFW users on your favorite social networking sites!

Sage Contacts

We want to hear from you! If you have any questions, concerns, or comments regarding Sage PFW, please let us know. Your feedback is valuable to us.

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The Importance of Being a Proactive Customer



Dear Valued Sage PFW ERP Customer:

A lot of times you read articles about how important it is for a company, a vendor, or a solution provider to be the best they can to meet their customers' needs. These articles always seem to stress the importance of good customer service, quality products, and a solid strategy as traits that companies should strive for as they produce their goods and services. But I would like to challenge all of us as customers to go one step further and become proactive in our behaviors towards those with whom we do business.

There are two main reasons this is not only important, but also necessary: 1) If we don't provide feedback and direction, companies won't know what is needed in future versions of the products and services, and 2) We won't receive the added benefits that will help us as customers. I have seen how this works from both sides of the model, and I can assure you it does work!

Putting myself in the position of being a customer, here is an example. The airline that I frequently fly sent me a packet of coupons to hand out to airline employees that perform quality work. In thinking about how this actually works behind the scenes, I'm sure the employees that receive them are given recognition or extra benefits when they turn them back into the airline. I make sure to carry them in my wallet and hand them out when I receive an exceptional customer experience. It's a great tool because I feel good about passing along the "thank you," and the employee gets an added reward. Even if there isn't a formal system in place, writing an e-mail or making a phone call to share good news can have as much of an impact as reporting a problem.

On the flip side, from a company's point of view, I was thinking about the surveys we send out to each of you. We send a variety of questionnaires to ask how we are doing when it comes to customer support, to find out if you are satisfied with us as a company and to learn how we can build high-quality products that include the features and enhancements you need to drive your business forward. To me, the latter provides vital information as it tells us how to prioritize our feature sets in every product we develop.

I encourage everyone who reads this to become more

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proactive in interactions with the businesses they work with. Not only will this help in the short term, as immediate issues are resolved and kudos are provided when appropriate, but in the long term it will pay back in spades as the products and services you receive on an ongoing basis become more tuned to your specific needs and contain features that support the success of your organization.

Regards,



Sam Hunter
Senior Vice President and General Manager
Sage

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Upgrading to v5.7 Made Easy

Are you planning the upgrade to Sage PFW v5.7? Not sure if your current hardware and software can handle it? Upgrading should never cause you to lose sleep, and we have made it easy for you to answer these questions.

The Compatibility Matrix lists the supported software combinations and minimum hardware requirements. This document is available to download from the Support Web site. The Upgrade Guide also contains details about compatibility as well as instructions on how to upgrade from prior versions. The Upgrade Guide can be found on the v5.7 CD as well as the Sage PFW Support Web site.

If you have not registered for the Support Web site, it only takes a few minutes to do so. Go to www.sagepww.com, select Support Logon from the right-hand navigation, and choose the option to Register now. Fill out the necessary information, and once submitted, an e-mail will be sent to you within a few minutes containing a temporary password. Log on to the Web site and create a permanent password. It's that easy!

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New Version 5.7 Bank Reconciliation Import Feature

Sage PFW version 5.7 has a new feature that allows the import of external .csv and/or .xls files created from financial institutions into the Bank Book module. There is a new System Setup in Bank Book called Reconciliation Import Configuration. The Reconciliation Import Configuration needs to be set up once to store the default settings. The bank account, import settings, and column numbers are then defined in a new menu called Bank Reconciliation Import.

When performing the Bank Reconciliation import (in either trial or final), the import file name needs to include a complete path. The path and/or filename default can be set in Reconciliation Import Configuration setup or defined at the Bank Reconciliation Import Parameter window.

The Reconciliation Import feature imports dates, check numbers, descriptions, debits, and credits. The debit and credit amounts can be in the same column or separate columns. For import files that have one column for both credits and debits, a negative amount indicates a debit, and a positive amount indicates a credit.

The steps to set up and perform the Bank Reconciliation Import are available in the article, "How to perform a Bank Reconciliation Import" (KB ID # 504795) in the [Sage Online Support Knowledgebase](#).

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Maximize Your Sage PFW ClientCare Plan Benefits

Did you know your Sage PFW ClientCare Plan has more benefits than ever before? To better serve you, we wanted your ClientCare plan to provide even more value to you and your business. As a result, your ClientCare plan now comes with these additional training opportunities through Sage University—**without any increase in cost:**

- **Unlimited access to the Tech Tuesday Realtime Learning courses.** Keep up with the latest technology and services Sage has to offer through online Learning Courses. You'll meet and interact with speakers, consultants, and product experts who can help you get the information you need to get the most out of your Sage PFW software.
- **Unlimited access to the new Business-Building Realtime Learning courses,** which are specifically designed to provide important information to help you better manage all aspects of your business.
- **Up to two Private Tutor Sessions** created just for your company. These personalized, interactive online training sessions are designed to meet your specific training requirements. Created expressly for your company, Private Tutor sessions are an easy way to get started with a new module or become better versed at utilizing functions you use regularly.

Please visit [SageU](#) to view all of the training opportunities available to you and your employees. Take full advantage of the unlimited access to the Tech Tuesdays and Business-Building Webcasts to ensure that you and all of your employees get the most out of your Sage PFW software. In addition, your two Private Tutor sessions per year can help you meet any specific training requirements that are outside the scope of the Tech Tuesday Realtime Learning courses.

By now, you should have received an e-mail from Sage describing all of the new training opportunities. The e-mail contains a link that will take you directly to the Customer Logon screen on Sage University, where you will be prompted to create your profile. It will automatically populate the Promotional Code, which will allow you to sign up for the Tech Tuesday and Business-Building courses at no charge. If you have not received the e-mail, please contact the ClientCare team at 888-473-5135 option 2 or send an e-mail

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to SagePFWClientCare@sage.com requesting the link.

We hope you are already taking advantage of all of the benefits your ClientCare Plan has always offered such as:

- Unlimited Toll-Free Telephone Support
- Automatic Version Upgrades and Regular Service Pack Updates
- Access to Sage Online (Support Knowledgebase, troubleshooting templates, installation guides, year-end tips, as well as technical bulletins for Sage PFW)

If you have any questions regarding your ClientCare Plan, please contact the ClientCare team at 888-473-5135 option 2, and they will be happy to assist you.

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Check Out the New Sage Webcast Center

The Sage Webcast Center has been redesigned with easier-to-navigate product drop-down menus. This redesign and a simpler interface makes it easier for you to view Webcast topics about our products and solutions that are of interest to you! As always, Webcasts are free to registrants!

[Visit the Sage Webcast Center](#)

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Network with Fellow Sage PFW Software Users

The Sage PFW team is proud to announce that you can become a fan of Sage PFW on Facebook and can join our group on LinkedIn. By joining these social networks, it is easier than ever to network with fellow users and receive updates about your Sage PFW software.

If you are already registered on these sites, just click the links below. If you are not using these services, why not join? They are both free to join as a standard user, and these sites are a great way to keep in touch with colleagues and friends.

Please click on the links below and join us today.

Facebook page:

[Sage PFW ERP](#)

LinkedIn page:

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We want to hear from you! If you have any questions, concerns, or comments regarding Sage PFW ERP, please let us know. Your feedback is valuable to us.

Sales and Customer Care

888-473-5135
[Info Request Form](#)

Customer Care

800-854-3415 (Ext. 4156)

Support

800-333-5242
sagepfwsupport@sage.com

Customer Community and other Social Networking

Pages Valuable resources are available for all Sage PFW software customers. This customer community is designed to enable you to engage and interact with Sage PFW professionals and other users through a variety of different communication forums and tools. Register at Community.SagePFW.com today!

Or visit our new social networking pages on [Facebook](#) and [LinkedIn](#)!

Learning Services

Get the most out of Sage PFW through a variety of training options. Whether you prefer classroom training, online classes, or one-on-one training, click on the link below to point you in the right direction to get the help you need in the format you prefer.

877-920-9600 (Option 2)

[Visit Sage University](#)

Sage Webcast Center - New!

The [Sage Webcast Center](#) has been redesigned with easier-to-navigate product drop-down menus and a simpler interface. The new design makes it even easier for you to view Webcasts about Sage products and solutions. As always, all Webcasts are free to attend!

Product Updates

Download files containing patches, the latest service releases, and other updates for your Sage PFW software

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through [Sage Online](#). You can also access this site through your Sage PFW software by selecting Help > Sage PFW on the web > Select Support > Customer Login > Sage PFW under the Mid-Market section. Just log on to the Web site using your user name and password; if you don't have your user name and password, use the "register now" option > Select Support > Sage PFW and scroll to the section for downloads.

Mail

56 Technology Drive
Irvine, CA 92618

Web site

www.sagepfw.com

Feedback

Receiving feedback from customers who actually use the product on a day-in, day-out basis can help us identify features that can make your tasks easier. If you have an idea or suggestion for something that you would like to see on our Web site or within Sage PFW, please e-mail us at:

SagePFWEnhancements@sage.com

Customer Loyalty

We hope that you find the Source Newsletter both helpful and informative, as your business success is important to us. With this said, we want to make the Sage PFW Source the best resource for you. Please feel free to provide us with your feedback, information ideas, or anything else you would like so that we can keep providing you with outstanding products, services, and information to help your business succeed. Your success and satisfaction are our top priorities. Please contact us at customer.loyalty@sage.com anytime we can help you receive the extraordinary service you deserve from either Sage or your Sage Business Partner.

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