

## Sage PFW ERP

# The Source

Essential Insights to Make Better Business Decisions



### What's In This Issue

▶ [Letter from Sam Hunter](#)  
In these difficult economic times, the senior vice president and general manager of Sage PFW ERP invites you to take advantage of options and resources that can help you to make the most of your software.

▶ [Sage PFW Version 5.7—Even More Exciting Features!](#)  
Many enhancements have been incorporated into the latest version release as a direct result of your requests. This article outlines a few of the beneficial and time-saving features.

▶ [Why Upgrade to the Current Version of Sage PFW?](#)  
A few benefits to being on the most recent edition include improved security, efficiency, and performance, as well as easier troubleshooting and upgrades.

▶ [Expand Your Sage PFW Knowledgebase](#)  
Are you aware of all of your training options? Whether you prefer to attend live Webcasts or watch simple 15-minute tutorials, you'll be able to use your Sage PFW program to its full capacity when you know all the tips and tricks.

▶ [Plan Ahead to Avoid Costly Surprises](#)  
Have you been neglecting the budgeting process because it's too complex and time-consuming? Budgeting properly can prevent expensive surprises in the long run, and there is a module available that's designed to help!

▶ [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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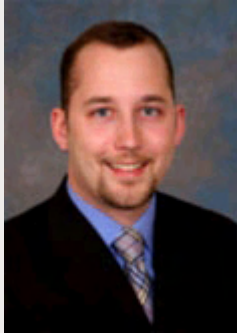
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### Letter From Sam Hunter



Dear Valued Sage PFW ERP Customer:

As you are well aware, we are living in very interesting times. The current economic conditions in which we are running our businesses have made it very challenging, to say the least. In speaking with many of our customers, I don't believe there is a single industry that is not affected in some way, shape, or form.

With that in mind, we here at Sage would like to take the time to thank you for being a loyal customer of ours. We've been delivering business productivity systems for over 25 years, and you have invested in a Sage solution to help run your business. As a result of our partnership, we've learned many things from customers like you and have made the commitment to improve our products continually with each release. We hope our latest versions prove that commitment and are assisting you in today's challenging business environment.

I would also like to take this opportunity to inform you about our recently launched, online community for Sage PFW customers. It's available at [community.SagePFW.com](http://community.SagePFW.com) and allows you to interact with other customers to share tips and tricks and better utilize your system. I hope you find it to be a valuable resource.

Thank you from all of us at Sage for being a valued customer and for trusting your business needs to our solutions.

Regards,

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Sam Hunter  
Senior Vice President & General Manager  
Sage

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### Sage PFW Version 5.7—Even More Exciting Features!

#### Additional New Ways to Save Time and Become More Productive, Personalize Your Experience, and Effectively Manage Your Business

Have you taken the time to review all of the new features available in Sage PFW ERP Version 5.7? Many enhancements have been incorporated as a direct result of your requests, recent usability reviews, and customer survey responses. Focus has been placed on simplifying your interaction with Sage PFW, allowing you to become more efficient in your daily tasks so you can focus your time on strategic projects, improving processes, and generating more profits.

One of the most exciting new features included in Sage PFW 5.7 is the enhanced Bank Book module. From updating the Reconciliation Screen to simplifying the reconciliation process by allowing you to import the bank statement file from your bank, Sage PFW 5.7 improves the reconciliation process.

The “Combine Like Items” feature saves you time as you look for the total percentage of a single ingredient when reviewing the Multi-Level Formula Ingredient Report by allowing you to choose to combine like components.

These features and many more are included in the February 2009 release of Sage PFW Version 5.7. Check out all of the new enhancements at [www.sagepfw.com/products/whatsnew.aspx](http://www.sagepfw.com/products/whatsnew.aspx) and download the full [Release Guide](#) for complete details on the new features and hardware requirements.

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### Why Upgrade to the Current Version of Sage PFW?

Keeping up to date with the current version of Sage PFW ERP allows users to stay on top of the everyday changing world with significant software enhancements. Each release includes feature enhancements requested by customers, and Service Packs may include features as well as minor software changes. Service Packs are easily downloaded and installed from the Sage PFW Web site: [www.sagepfw.com](http://www.sagepfw.com). Each new release is tested on the most current hardware and software available. A compatibility matrix is published in an Upgrade Guide so you can best determine future hardware and software purchases. The Upgrade Guide is available on the Version 5.7 CD, and customers with a current support plan can also download the Upgrade Guide through the [Sage PFW Knowledgebase](#).

#### Other benefits:

- Upgrading allows users to improve efficiency and system performance
- Troubleshooting is easier when calling in for technical support
- Up-to-date security enhancements make sure your system is running as safely as possible
- Helps with managing day-to-day operations
- Keeps you compatible with newer software programs and hardware such as Microsoft® Vista®, printers and print drivers

These are just a few of the benefits your company should consider when making the choice to upgrade. Call us today at 888-473-5135 for more information!

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### Expand Your Sage PFW Knowledgebase

Do you have a new employee whom you need to train or just want to update your skills? Tech Tuesdays are back! Take advantage of live Webcast classes created and presented by Sage PFW ERP Customer Support specialists. Each course details specific product functionality, tips, and tricks that are employed by Support and includes a live demonstration of the topic. Questions are also encouraged during the presentation. A list of the upcoming courses can be viewed at:

[www.sagesoftwareuniversity.com](http://www.sagesoftwareuniversity.com)

Do you have a procedure that you process once a year—such as voiding an AP check with the incorrect date—and can't find where you jotted down the instructions? Customer Support has created Mini-Tutorials for you to review at your leisure. These tutorials are prerecorded procedural demonstrations. Each recorded session is about 15 minutes long and can be viewed 24/7. Customers with a current support plan can access the mini tutorials by logging on to [Sage Online](#), select Sage PFW, and scroll down to the Mini-Tutorial section. The Support team is just starting to compile a library of procedures to record, so keep checking back for new topics.

We are always open to suggestions and topics for new Tech Tuesday courses and new Mini-Tutorials. Please submit your suggestions to [sagepfwsupport@sage.com](mailto:sagepfwsupport@sage.com).

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### Plan Ahead to Avoid Costly Surprises

Have you been neglecting the budgeting process because you think it's too complex and time-consuming? That could be a mistake. Budgeting properly can prevent expensive surprises in the long run, and **Sage PFW Premier Budgeting** can help. This powerful module integrates seamlessly with your Sage PFW ERP system, providing a foundation for even more insightful business planning.

#### Add-on module turns raw data into critical business intelligence

Whether you prefer top-down, zero-based, activity-based, or rolling quarterly budgeting, Premier Budgeting helps improve the efficiency, accuracy, and timeliness of your collaborative budgets while freeing valuable time and resources.

Additional benefits of Premier Budgeting include:

- **Accurate budgets** that support both simple and complex calculation methods, as well as multiple budget types.
- **Flexible, comprehensive, and sophisticated software** that puts you in control so you can satisfy your unique business requirements today and easily adapt to future changes.
- **Comprehensive budget management**, which enables easy consolidation of budget plans and spreadsheets with dissimilar formats.
- **ODBC Compatibility** to give you access to all important non-GL data no matter where it's housed on your system.

[Learn more](#) or [view an informative Flash demo](#) of this powerful module.

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### Sage Contacts

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#### Sales

888-473-5135

[Info Request Form](#)

#### Customer Care

800-854-3415 (Ext 4156)

#### Support

800-333-5242

[sagepfwsupport@sage.com](mailto:sagepfwsupport@sage.com)

#### Customer Community—**New!**

A valuable resource has just become available for all Sage PFW software customers. A brand-new 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](http://Community.SagePFW.com) today!

#### 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.

[Visit Sage Software University](#)

877-920-9600 (Option 2)

#### Product Updates

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

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**Web site**

[www.sagepfw.com](http://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](mailto:SagePFWEnhancements@sage.com)

**Customer Loyalty**

We hope that you find the Sage PFW 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 is our number-one priority. Please contact us at [customer.loyalty@sage.com](mailto: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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