Welcome Back to the NextLevel Newsletter!

We know you haven't received a newsletter in awhile and wanted to bring you up to date with the "latest" at NextLevel. Our newsletters will now be distributed quarterly starting with this issue.

We were very busy in the first quarter of 2008 preparing for our 3rd annual Customer Conference which was held in Tampa, Orlando and Miami in March. It was a huge success with a great turnout in each location. Customers from all over Florida and the Caribbean joined us for a full day of learning, and networking with other Sage Accpac ERP users. With sessions like "Month-end and Year-end Procedures", "Customizing Crystal Reports", and our ever-popular "Accpac Tips & Tricks", our attendees left with a wealth of information on processing data more efficiently in Sage Accpac ERP. New this year, we offered the "Tech Desk", one-on-one technical sessions with the Accpac experts. Read what some of our attendees had to say about the conference:

- Although I didn't participate in the tech desk, whenever I approached anyone on NextLevel's staff with various questions they were all extremely helpful, clear, and willing to discuss further if need be.

- The sessions were great. I now know how to work with our financials to make them better.

- Going into Accpac and demonstrating each concept was very valuable!!

We hope you'll be able to join us next year in March when we host the 4th annual Customer Conference.

New to NextLevel

Although some of you have had an opportunity to work with our newest employees, we'd like to give you some highlights of their accomplishments:

Ghislana Sierra – Ghislana currently attends FIU and expects to be graduating next year. She came to NextLevel as an intern and has quickly become a vital part of our implementation team. As a Sage Accpac Certified Consultant, she is currently providing support and training for Accpac core modules, Bank Services and performs most of our Accpac DOS to Windows conversions. Ghislana has become proficient in customizing Accpac financial statement and is fluent in both English & Spanish.

Luis Rosero-Barros – Luis recently graduated from FIU in December 2007 and has been concentrating on becoming our latest resident expert in Accpac Project & Job Cost as well as Service Manager. He provides support and training for Accpac core modules and is proficient in customizing Crystal reports and forms. Luis performs many of our client's data conversions and is fluent in both English & Spanish.

Cesar Moline – Cesar has been involved in the Sage Accpac channel for more than 15 years with an emphasis on implementing and customizing Sage CRM (Customer Relationship Management). With over 20 years of IT experience, Cesar has spent much of his career in the IT aspect of Sage Accpac, providing network configuration, database management, and system administration and holds the following certifications: MCSE, MCDA, CNE and Sage CRM. Cesar is also fluent in both English & Spanish and has spent much of his career supporting clients in Latin America and the Caribbean.

Lisa McElroy – Lisa comes to NextLevel from a large Accpac reseller in California. Welcome to Florida, Lisa! While she is a Sage Accpac Certified Consultant, Lisa also has a background in IT management, systems administration, project management, and a host of other business management experience, including the following certifications: MCSE, MCP, CCA. During her 5 years of Accpac consulting in California, Lisa was exposed to a variety of industries such as wholesale, distribution, light manufacturing, service, entertainment, health care and non-profit.

Her expertise includes providing training and support in all Accpac core modules, and is proficient in customizing Crystal reports and forms and financial statements.

What Can EDI Technology Do for My Business?

If you're like some folks, you've probably heard of EDI but aren't exactly sure what it is, what it does, or what benefit it can offer your company. In this article, we define EDI and evaluate its benefits.

So What is EDI Anyway?

Electronic Data Interchange (EDI) is the process of electronically exchanging data, or more specifically business documents, between companies. Business documents might include Orders, Invoices, Acknowledgments, and Advance Shipping Notice. EDI transmissions generally contain the same information that would be included in the "paper" version of the document. It's essentially an electronic conversation between two businesses … or more accurately, between two business systems. Companies that send or receive documents from each other are referred to as "trading partners" in EDI terminology.

That Makes Sense, But How Does it Work?

To explain how it works, we'll use an example of a Purchase Order that has been processed in your system. Information from that Purchase Order is translated to a specific data format and submitted directly to your suppliers system via the internet (without re-keying data). In some cases, a Value Added Network (VAN) acts as an intermediary between you and your trading partner. In the most basic form, a VAN acts as a post office that receives transactions and routes them to the appropriate recipient. It's like a clearinghouse that simplifies communication between trading partners (i.e. you and your vendor or customer) and ensures that the data exchanged is structured and standardized.

What are the Bottom Line Benefits?

Primary benefits of EDI technology include accuracy and efficiency which can result in both direct and indirect cost savings.

Accuracy – errors are reduced because data is not being re-keyed into another system. Improved accuracy results in a host of benefits including elimination of excessive shipping charges and the cost of returns for incorrect orders.

Efficiency – electronic documents are delivered far more quickly than their paper-based counterparts resulting in faster order turn around, happier customers, and competitive advantage.

Direct and Indirect Benefits - EDI can reduce direct costs such as paper & forms, postage, printers & toner, and document storage. Indirect benefits can include reduced lead times, more frequent inventory turns, better use of warehouse space, and improved cash flow (faster delivery, faster invoice, earlier payment).

EDI Solutions for Sage Accpac

There are several integrated EDI solutions available as "add-on" components to your Sage Accpac ERP system. EDI solutions offer various features and price points depending on the complexity of your needs. Some feature real-time integration with Accpac order entry, can operate through a traditional VAN or through a standardized internet-based EDI service, and much more.

For a detailed discussion about how EDI can impact your business or to review the integrated EDI solutions available for Sage Accpac email joan.alexander@nextlevelis.com

Creating Custom Fields in Sage Accpac ERP

Since your business is unique, you've probably had moments when you wished you could easily create a new field within Sage Accpac that would capture data specific to your business or industry. Well, your wish has been granted with the **Transaction Analysis and Optional Field Creator** module.

Originally introduced with version 5.3, the Transaction Analysis and Optional Field Creator module provides support for unlimited optional fields throughout all Sage Accpac applications. Not only can you easily add additional fields, but the information in your newly-created field is captured in the database which means you can also report on it. It's a simple way to customize your Sage Accpac system to capture and report on specific information you require for general ledger accounts, customer and vendor records, inventory items, order entry forms, invoices, and much more.

Let's say, for instance, you carry an inventory item that has an option to ship with a maintenance plan. You could create an optional field to define this plan in the inventory item master record. You would then set up a corresponding optional field on the Order Entry screen. You can even create a drop down box to provide order entry personnel with an option to select from multiple plans. This maintenance plan information would then be tracked and defined for customers, shipments, invoices, and all the way through to your general ledger.

Optional fields allow you to define unlimited text, amount, date, time, integer, number, and yes/no field entries across all Sage Accpac ERP applications.

For more information or to see a demonstration of this very powerful yet easy to use module, contact joan.alexander@nextlevelis.com

Productivity Tip: Using Email Signatures in Outlook

In today's business environment, we rely more and more on e-mail for communication. While use of the traditional business letter (with a salutation and signature) may be on the decline, it's still important to know something about the people we correspond with. E-mail signatures can play a role in providing contact information, and in lending a professional tone to your messages. A signature is a customary, fundamental aspect of communication that we have come to expect and value. It adds a personal touch and an element of sincerity.

Typical information in an e-mail signature might include: Your name, Title, Phone Number and Extension, Email Address, and Company Web Address. The following steps will guide you through creating an email signature using Microsoft Outlook.

Step by Step: How to create an e-mail signature in Microsoft Outlook:

1. On the **Tools** menu, click **Options**.
2. Click the **Mail Format** tab.
3. Click the **Signatures** button.
4. Click the **New** button and begin typing

Creating a signature doesn't take long. It really depends on how plain or fancy you want it to be. You can quickly create a "Plain text" signature with important contact details or click "Edit" to create a more eye-catching, graphical signature that might include Pictures, logos, colors, and other formatting options. Once created, Outlook automatically applies your new signature to every new email message you compose.