

### **In This Issue:**

- ✓ Transactional Analysis & Optional Field Module
- ✓ AR Inquiry for ACCPAC Advantage Series
- ✓ Support Plus Reinstatement fees waived until December 24th
- ✓ Print Boss Update
- ✓ Advantage Series 5.3 Web Demonstration
- ✓ Using email to keep in contact with your customers
- ✓ Schedule of Events
- ✓ Technical Corner

### **Transactional Analysis and Optional Field Creator module**

Have you ever wanted to track something specific to your business from within ACCPAC? The Transaction Analysis and Optional Field Creator not only give you this ability but, you'll also be able to do extensive reporting on these fields.

The Transaction and Optional field creator allow you to customize Advantage Series and provide comprehensive reporting and analysis capabilities across your entire accounting system. You can manage information more effectively and easily obtain necessary data for analyzing business operations and practices.

**For example:** Let's say you manage an inventory item that has the option to ship with a maintenance plan. You could easily use option fields to define this plan in the item master record, you can even set up a table to allow a drop down selection of maintenance types and a beginning and end date for the plan duration. After you've set this up in inventory you would set up the corresponding options in Order Entry for order processing purposes.

Imagine being able to trace the optional field information you define for customers and items to your Order Entry orders, Order Entry shipments, Order Entry invoices, Accounts Receivable invoices through to your General Ledger journal entries and accounts! You can define unlimited text, amount, date, time, integer, number and yes/no optional fields for

use in all ACCPAC Advantage Series applications.

The Transaction Analysis and Optional Field Creator application allows you to define all the information you require for each General Ledger account, customer, vendor, item, transaction and transaction detail, making it easy to record and track data from the originating transaction through to your General Ledger.

For more information on this product or possible ways to utilize this powerful feature contact us at the phone number below.

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### **AR Inquiry for ACCPAC Advantage Series**

Collection calls are tough enough, but when you don't have the relevant information readily available, it makes the job that much harder. Imagine how much easier the task would be if you had a customer's complete credit history and all of the relevant Accounts Receivable and/or Order Entry information from ACCPAC in front of you. That's what you get with [AR Inquiry](#), the latest product offering from UniDevCo.

There are three components to AR Inquiry:

- Customer Inquiry
- AR Document Inquiry
- Customer Filer

The Customer Filter component provides the means for you to filter your customer records down to those that fit certain criteria. You can filter by Age of Receivable, Customer Group, Customer National Account or an individual Customer as well as a number of other credit related criteria. Use the query results to make your collection calls. Double clicking on each line calls up the Customer Inquiry.

The Customer Inquiry screen provides all customer information in a convenient, multi-tab display and you can decide to show only those tabs that are relevant to you or your staff. That information includes a complete credit history at your fingertips with options to show un-posted

AR documents, receipts and adjustments, non Day-Ended OE invoices and credit notes, and open OE orders. You'll see all information on payments, customer's average days to pay, returned checks and any balances that have been written-off, and you can add comments or edit existing comments for each customer which will be reflected in ACCPAC Accounts Receivable. With that level of detailed information so easily accessible, handling collections becomes a much more manageable job.

The AR Document Inquiry component allows you to look up any document by document number. This includes the ability to search for an invoice by invoice number without knowing the customer, which is not possible in ACCPAC without UniARInquiry.

AR Inquiry provides easy and unprecedented access to more customer information in ACCPAC than ever before. By implementing it or other UniDevCo products, you will find that you become far more effective, spending less time digging up the data you need. That means more time available for other tasks, or more time with your family. Either way, you win!

For more information regarding AR Inquiry or other UniDevCo programs please contact us at (604) 598-8480 or email [info@altitudeinfo.com](mailto:info@altitudeinfo.com).

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### Support Plus Reinstatement Fees Waived until December 24th!

#### Have you let your support plus lapse?

For the first time ever, ACCPAC is offering a promotion

that waives the reinstatement fees for clients who sign up for a **two year** contract (**saving you an additional 5%**). This promotion is valid for clients with expiration dates after October 1, 2003.

With Advantage Series 5.3 around the corner and some additional benefits available from ACCPAC there has never been a better time to renew.

#### Save with multi-year discounts!\*

Purchase a **2** year plan > Save 5%

Purchase a **3** year plan > Save 10%

Purchase a **5** year plan > Save 15%

### Support plus offers you the following benefits:

- Upgrades and updates for the term of your contract at no charge.
- Notification by e-mail when service packs are available for download
- E-Newsletter Bi-monthly (every other month) specifically focused on providing up-to-date information on the latest product features and enhancements in addition to tips and special promotions.
- Online account access to update your contact information, participate in forums and to join user groups.

Call today for a personalized quote.

Offer expires December 24, 2004.

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### PrintBoss Update

A special thanks to Wellspring Software for listening to client's feedback and incorporating two new features into their latest version of PrintBoss software.

First, you now have the option when creating PDF copies of your forms to make them searchable and to either have the fonts embedded or not. This gives you the ability to search a file that may contain a week, a month or a year's worth of a particular document, quickly locating the document that you are looking for. You will no longer need to maintain that cumbersome number file in paper format; you now have it available electronically.

Second, we all know that you can block a specific area of a form, for example the unit and extended price of an order confirmation when you want to use it as a picking slip, but what if you wanted to block item comments or instructions on one copy of the form but have them print on another copy of the same form. You can now do this by using the #Assigns command.

An already strong product that delivers incredible value has just gotten even better.

For more information about PrintBoss please contact us at (604) 598-8480 or email [info@altitudeinfo.com](mailto:info@altitudeinfo.com).

### **ACCPAC Advantage Series 5.3 Web Demonstration**

Check out the new features in Advantage Series 5.3! This webinar is designed to provide you with an overview of the new features offered in the latest release of ACCPAC Advantage Series. Conducted by an ACCPAC Advantage Series Specialist, these Webinars present a live demonstration of the powerful new features found in Advantage Series 5.3.

All Webinars start promptly per the scheduled time and run for approximately 60 minutes. Please note that a connection speed of 56 Kbps or faster is recommended for a satisfactory presentation experience.

#### **How to Register**

To register for a Webinar, please click on the following link to complete and submit the online registration form. We will remove the date from the list of available Webinars when it is full. We will e-mail a confirmation, including the Web URL and phone instructions, shortly after receiving your registration.

<http://www.accpac.com/campaigns/CForm.asp?camp=2033>

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### **Using email to keep in contact with your customers**

Do you keep in touch with your current and previous clients? Are you building an e-mail list of your potential customers? What about those prospects you've been meaning to contact? Why not consider sending out an email based newsletter.

An email newsletter is one of the most effective marketing tools you can use because it is quick, personal, and inexpensive. Many small businesses are using email newsletters to introduce themselves to new customers and to communicate with existing ones. By sending useful information on a regular basis, you can maintain constant contact without being annoying.

### **Creating an Email Newsletter**

Producing your newsletter doesn't have to be a major task. First, decide on the frequency of publication. Would you like to publish it monthly, bi-monthly or quarterly? This will probably depend on the available staff to create the document. Next produce a graphic layout. Consider creating a template or having your HTML developer create a template that you can use over and over. This way the person creating the document doesn't have to know HTML.

Now it's time for the content of your newsletter. Concentrate on topics that your readers will be interested in, not the ones that only you find fascinating. Try to use real-life applications. For example, you can describe past successes and maybe even interview a customer or two. This way, you tell your audience how you solved a problem that relates to them and conveys that you are a results-oriented professional.

### **Email Tips for Success**

1. Never send e-mail to people who have not specifically requested to receive your mailings (opted-in) or to those who are not your members is almost always regarded as spam.
2. Make signing up and unsubscribing easy and visible. You can put a form or a link to your form, on your home page. Or, ask customers if they would like to sign up when you speak with them. You may only want to ask subscribers for their e-mail address, first, name, last name, and perhaps one or two other questions to target your mailings, such as their interests or demographics.
3. Send a "Welcome" message to each new subscriber. Once someone subscribes, send him or her a welcome message immediately. Include a description of what they will receive, how frequently they will receive it, and how to unsubscribe.
4. If someone requests to be removed from your email list be sure to do so promptly.
5. Remind people that they subscribed. At the top of your messages, include a standard header each time you send a mailing. A short note like "Thank you for

subscribing to our newsletter. Here is our latest issue:" can make a big difference in reminding your subscribers that you are not sending them something that they did not request.

6. Include your physical address and phone number. Be sure to put your phone number and postal mailing address in your message. This gives your readers an opportunity to contact you by phone to place an order or inquire about your services. New federal legislation requires physical addresses on commercial e-mail messages.
7. Stick with it! Be sure to continue your monthly, bi-monthly or quarterly newsletters. Unless you keep in touch with your subscribers frequently, they may forget they signed up to receive your mailings. By sticking to a schedule, your subscribers begin to anticipate your messages.
8. Reply promptly to each inquiry or spam complaint. When and if you receive an inquiry or a spam complaint, respond to it as soon as possible. For spam complaints, include that persons' subscription information with your response.

If executed properly email newsletters can be an excellent way to communicate effectively to your clients, increase repeat sales and drive traffic to your website.

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### Schedule of Events

These Live Webinars are conducted by ACCPAC experts using intranet "WebEx" technology and a voice-line for conferencing. ACCPAC understands addressing all customer questions is critical, therefore demonstrations are generally followed by an open question and answer session.

<b>ACCPAC Advantage Series</b>
November 16, 2004 - 12:00 PM - ACCPAC Advantage Series
<b>ACCPAC Project &amp; Job Costing</b>
November 22, 2004 - 4:00 PM - Project & Job Costing Overview
<b>ACCPAC CRM - Customer Relationship Management</b>

November 12, 2004 - 12:00 pm - Experience CRM Nirvana: (AAS)
November 16, 2004- 2:30 pm - Experience CRM Nirvana: (AAS)
November 26, 2004 - 12:00 pm - Experience CRM Nirvana: (AAS)
<b>ACCPAC HR Series - Human Resource Solution for ACCPAC</b>
November 16 2004 - 12:00 pm ACCPAC HR Series Overview
November 24, 2004 - 12:00 pm ACCPAC HR Series Overview
<b>ACCPAC Exchange - EDI Solution for ACCPAC</b>
November 16, 2004 - 12:00 pm - ACCPAC Sales Optimizer
<b>ACCPAC eTransact - The ecommerce solution for ACCPAC</b>
November 18, 2004 12:00 pm - ACCPAC eTransact Overview
December 9, 2004 12:00 pm - ACCPAC eTransact Overview
<b>What's new in Advantage Series 5.3</b>
November 12, 2004 2:00 pm - What's new in Advantage Series 5.3
November 23, 2004 - 2:00 pm - What's new in Advantage Series 5.3

Start times are listed in Eastern time zone.

[Contact us](#) at the number below or visit our website to register

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### Technical Corner

#### **ACCPAC Missing Display Information after installing Windows XP Service Pack 2**

**Question:** After installing Service Pack 2 for Windows XP, My ACCPAC no longer displays the correct module names, license names, dealer, and CC names in the top right hand screen. Instead it shows:

```
Application (ObjectName)
Licensed to: User, Company
Dealer: Dear CC:QI
```

How can I fix this?



**Answer:** If you are running ACCPAC Advantage Series 5.2, the issue will be addressed in a future Service Pack for System Manager 5.2A, which should be released shortly. If you are running the latest version of ACCPAC, Advantage Series 5.3, the issue has already been resolved.

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### Advantage Series 5.2 - Corporate Edition

**Question:** My Picking slip does not print the original quantity ordered.

The Picking Slip report does not print the original ordered quantity.

For example:

1. From order entry screen, create order for 10 units of item XXX.
2. In Shipment entry, ship 14 units of item XXX.
3. Post shipment and print picking slip.

In the picking slip, "Qty Ordered" column shows 14 instead of 10.

**Answer:** In order for the report to show the original ordered quantity, user will need to modify the OEPICK01.RPT or ORPICK02.RPT and replace the QtyOrdered field with DtOrigQty field.

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### ACCPAC Options Number Change Compatibility with Version 5.2

**Question:** When I start my ACCPAC Options Number Change program generates an error message indicating that the program is not compatible with General Ledger Subledger Services 5.2A, Bank Services 5.2B and/or Tax Services 5.2A.

**Answer:** The ACCPAC Options Number Change programs are compatible with GL Subledger Services 5.2A, Bank Services 5.2B and Tax Services 5.2A but the [program prefix].ini file

may have to be changed to reflect this. This .ini file can be found in the associated program install directory.

Examples:

Account Code Change = sg.ini  
Customer Number Change = sr.ini  
Item Number Change = si.ini  
Vendor Number Change = sp.ini

If the Options Number Change program in question returns a compatibility warning or error message, update the appropriate .ini file to reflect the new GL Subledger, Bank and/or Tax Services modules.

Edit the [program prefix].INI file located in the \[program prefix]51A directory - where "program prefix" is the two character prefix for the program generating the compatibility message, using a text editor like Notepad.

If the Options Number Change program in question returns a compatibility warning or error message, change current version numbers in the "Version Support" section for General Ledger

Subledger Services 5.2A, Bank Services 5.2B and/or Tax Services 5.2A. It should look like this after

the change is made:

```
[Version Support]
GL General Ledger=52A
GP G/L Subledger Services=52A
BK Bank Services=52B
TX Tax Services=52A
AP Account Payable=52A
AR Account Receivable=52A
CP Canadian Payroll=51A
UP US Payroll=51A
IC Inventory Control=52A
OE Order Entry=52A
PO Purchase Orders=52A
```

Also, please install the latest service pack for all of the Number Change products.

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## Technical Tips on the Web

Altitude Information Systems is committed to providing you with superior customer service. Our dedication to your success has compelled us to post these tips monthly and to provide you with a library of tips on our website.

If you have suggestions on tips you might find useful please let us know by emailing [advisor@altitudeinfo.com](mailto:advisor@altitudeinfo.com).

Click the following URL to visit our Tip of the Month Section.  
<http://www.altitudeinfo.com/tipofthemoth.html>

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## Contact Us

Suite 307, 7297 - 138th Street  
Surrey, BC V3W OE5 Canada  
Phone: (604) 598-8480  
Fax: (604) 598-8481  
[advisor@altitudeinfo.com](mailto:advisor@altitudeinfo.com)  
email: [info@altitudeinfo.com](mailto:info@altitudeinfo.com)  
[www.altitudeinfo.com](http://www.altitudeinfo.com)



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