

## Partner Pulse | SEPTEMBER 2010

### Keeping Simply Accounting Partners Informed



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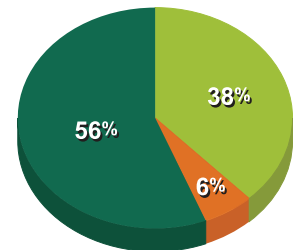
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## Previous Poll Results

What is your favorite part about your SAN membership?

- **Simply Accounting Accountants Edition**
- **Priority Access to Customer Support**
- **Other**



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Network on LinkedIn

# Simply Partnership 2010

**REGISTER NOW** for the  
educational event of the year  
for Simply Accounting partners.

Vancouver  
October 20-23, 2010

UPDATE FROM JENNIFER WARAWA



I can't believe it is September already. We're on the countdown to Simply Partnership 2010 and I really hope you are able to join us in Vancouver from October 21 – 23, 2010 for the best conference yet. If you have questions about the conference or why you really need to be there, visit the [Simply Partnership website](#) or reach out to [Amber Kenyon](#) and she'll give you all the information you need. We want to

do everything we can to get you there – you won't regret making the investment.

Exciting news! Keep your eyes open for Sage Simply Accounting 2011 product that will be coming your way on September 22nd – just a few short weeks. In this edition of the Partner Pulse, we have some important dates for you about the release. Make sure you sign up for one of the webinars we are hosting to show you the new features so you can communicate these improvements to your clients.

For those of you that want to play a greater role in shaping the future of Simply Accounting and our Sage Accountants Network program, we are looking for new Business Partner Advisory Committee (BPAC) members to serve for a two year term beginning October 2010. Our current BPAC has done an amazing job of moving us forward with various initiatives and ensuring the voice of the partner community is heard at Sage, but their term is coming to end so we are on the hunt for new members. We are currently in the process of standardizing the mission and purpose of BPACs across Sage and to give you a high level overview of the way we are currently looking at the role of the BPACs, I wanted to share this information with you, which is as follows:

- **Mission:** A selected committee of Sage partners representing the broad channel at large in collaboration with Sage leadership, working together and providing input on important opportunities and issues with the end goal of a win-win-win for the business partners, mutual customers, and Sage.
- **Purpose:** To provide a vital communication link between Sage, its clients and the business partner channel which Sage services, and to advise Sage on matters impacting and of mutual interest and concern of the client community and the business partner channel within the North American market. Issues addressed to include but not limited to sales effectiveness, product issues and needs, market conditions, competitive landscape surrounding the business, marketing and support. It will act as a sounding board and reviewing body for future product road maps and direction as requested by Sage.

If you read the above and it gets you fired up, please email [Amber Kenyon](#) and she will forward you more information and an application form. The first meeting with both the current BPAC and the new members will be on October 23, 2010 following the Simply Partnership conference.

Last week you saw Sage's announcement in regards to the new service plans for our mutual customers/clients. Our goal around these changes was to simplify our offerings, show our commitment to continuing to add value to our customers and at the same time lower total cost of ownership, which is something we have heard from our partner community is extremely important. Your existing clients that are on

UPDATE FROM JENNIFER WARAWA (CONTINUED)

Pro and Premium will only see a small annual increase of \$20 and existing Enterprise clients will see no increase at all. We are also pleased to continue offering EFT Direct to our Sage Accountants Network members at no charge, which we know is important. If you have any questions in regards to these changes and how they may affect your specific clients please reach out to your Account Manager at 866-665-2559 and they would be happy to help you.

As per usual, please feel free to reach out to myself or someone on my team if you have any questions, suggestions, feedback or great ideas - we always love to hear from you. We have a LOT going on so I recommend that you [join our LinkedIn group](#) so you can keep right up to date with "breaking news" on changes, releases and everything going on. That's where we keep our most engaged partners right up to date.

Sincerely,

Jennifer Warawa  
Director, Partner Programs  
[jennifer.warawa@sage.com](mailto:jennifer.warawa@sage.com)

ECONOMIC UPDATE

While the Canadian economy continues to grow, the momentum has slowed. In last month's newsletter we wrote that the Bank of Canada had forecasted 3% growth for the 2nd quarter, but the actual numbers from Statistics Canada came in at 2%. As a result, the central bank will likely not increase rates at its upcoming September meeting. Previously, a hike of 25 basis points to 1% was expected. Political debate has resumed on whether or not additional stimulus is warranted to keep recovery on the right path.

Fun Fact

The highest publicly reported amount of money paid for a domain name is \$7.5 million! Paid for business.com.  
<http://www.stunning-stuff.com/list-funny-facts/7.html>

Fun Prize

The man who invented it doesn't want it.  
The man who bought it doesn't need it.  
The man who needs it doesn't know it.  
What is it?

Email your answer to [editor.partnerpulse@sage.com](mailto:editor.partnerpulse@sage.com) for a chance to win a \$25 BestBuy Gift Card\*

\* All correct answers will be entered in to a draw, and one prize will be awarded

**PARTNER PROFILE**

With the changes to the Partner Pulse ahead (that's right – if you missed August's issue we announced that this version of the Partner Pulse will be released on a quarterly basis only) we're looking for a few partners who wish to profile their business. Send us an email and tell us your story. Your submission should include:

- A basic description of your business (time in practice, services offered, number of employees)
- Your favorite Simply Accounting tip or a benefit you enjoy of being a member of the Sage Accountants Network
- A story, anecdote or "day in the life" story
- A picture

Make it fun and share your business story openly. Partners, new and old, learn from your stories. It's a great way to get noticed and connect with partners in the community.

If you would like to be profiled, send an email to [editor.partnerpulse@sage.com](mailto:editor.partnerpulse@sage.com) and don't worry if you're not a writer – we'll work with you!

**Partner Profile Questionnaire**



**Partner:** Juan Castro

**Company Name:**

JCC Consulting Group, LLC  
157 Prosperous Place #2A, Lexington, KY 40509  
Office Phone: 859-543-1322  
Support Line: 859-576-8634  
Website: [www.thejccgroup.com](http://www.thejccgroup.com)

**Number of Years in Business:**

JCC Consulting Group was originally incorporated as JCC Enterprises in 2003, and then reincorporated as a multi-member LLC in 2008.

**Number of Years as a Simply Accounting Partner:**

We became a partner of Simply Accounting in the summer of 2010 but we have been a Sage Partner since 2005. We have been selling other software since 1999.

**Tell us more about your business:**

There are Five (5) of us:  
Kimberly Shemak – Office Manager, Marketing, Client Advocate  
Victoria Lawrence – Project Manager, Senior Implementations and Support  
Jeff Sizemore, CPA – Senior Implementations Specialist  
Francisco Castro, CLIU – VP Sales Manager – Hispanic Market/Small Business  
Juan Castro, MBA – President/Sales Public Sector

We have been doing software installation, support, training, business analysis, and business development for the non-profit and Government sectors since 1995. We started focusing on new small businesses within the Hispanic market in 2009.

We offer a wide variety of services such as: software sales and implementation, business consulting, hardware sales, bookkeeping, total non-profit management, fundraising, and Speakers Bureau.

**PARTNER PROFILE (CONTINUED)**

We serve small business as well and Nonprofits, Municipalities and Utility Districts worldwide. We are currently working towards our certification to become a Simply Accounting Solution Provider.

**What are a few of the most valuable things you have done (programs, training, reading, networking, etc.) to help you grow your business?**

The most memorable thing we did was implement a billing and accounting system for the Republic of Palau – this is our largest client to date. Our client retention is about 99%  
We have 9 out of 14 Area Development Districts in Kentucky as clients  
This year we are involved with the Alltec World Equestrian Games coming to Lexington, KY in September 2010  
Every year we participate in a Non-Profit Fundraising event. This year we supported the YMCA North Lexington Family Center

**How has being part of the Simply Accounting Partner Program impacted your business?**

Simply Accounting has given us the ability to meet a specific need we had in the Hispanic Community and for the many small businesses that have been seeking our support. The software is easy to use, easy to setup and configure and has great functionality and flexibility. We like that Simply Accounting is flexible enough to be used in many sectors within the small business community.

**What is your favorite thing about Simply Accounting?**

Flexibility. Simply Accounting can be used in a number of industries, making it a great tool for any small business.

**If you could share one word of advice or valuable lesson you have learned with the Partner Community, what would it be?**

Make sure you understand the clients' needs before focusing on the software. Spending time getting to know the clients' needs helps develop a long term relationship and the trust that will make a new implementation go much smoother.  
Every client wants to feel special. Spend the time to let your client see that you will be with them all the way.

**Best client story**

One specific client, unbeknownst to me was moving from a paper system to a computer system. When I asked if I could see his General Ledger, they brought me a large binder with very detailed entries, all done in pencil (just in case they needed to go over and correct something). When I asked for their Financial Statements, they showed me well developed Excel sheets. When I asked for the Subsidiary ledger, they brought out a collection of binders with the different transactions. Though the records were meticulous, they had never used a computer system to keep their financial information. The sad thing is that this organization had been in business for almost 20 years and it employed over 250 people.

**Quote Of The Month**

**Via LinkedIn regarding Partnership Conference**

**"The beauty of Controlled Release is we find issues before launch and they get fixed. Controlled Release is the best thing Sage has ever done!"**

- Jo Anne Mercer

**EXCLUSIVE PARTNER OFFERS**

**Partner Recognition**

**Simply Partnership Conference Awards**

If you have attended our Simply Partnership Conference in the past you are aware that part of the experience is the opportunity to be recognized. Through popular demand with the partners that attended last year, we are welcoming back our Award Luncheon where we have the chance to reward our partners who have gone above and beyond.

This year we are extremely excited to offer two unique awards designed to recognize our Sage Accountants Network members that have clearly embraced 3 of our Sage principles **Loyalty, Trust and Integrity** when dealing with their clients, peers and community.

Entrepreneurial Community Spirit Award - Would you like to nominate yourself, your organization or another SAN member in your community that has shown outstanding community spirit? This can be demonstrated by significant or ongoing volunteer support and contribution within the community to increase a greater well being. Tell us why this Sage Accountants Network member deserves to be recognized as a driving force to enhance the community and receive this year's **2010 Entrepreneurial Community Spirit Award**.

Outstanding Mentorship Award – When you think of a mentor, who comes to mind? We are looking for the most supportive, motivating advisor within our SAN. These individuals have invested their time to teach, train, coach and influence other users of Simply Accounting to better themselves with classroom, online or one-on-one training. If you fit this description or you know of another SAN member who does, complete the nomination for our **Outstanding Mentorship Award**.

If you are interested in nominating yourself or a peer for these prestigious awards, please follow the below link to the nomination application.

[http://www.simplypartnership.com/awards\\_luncheon.aspx](http://www.simplypartnership.com/awards_luncheon.aspx)

**Get An iPad for Recommending Simply Accounting!**



Have you signed up to receive Sage Spark Rewards? We know that as a Sage Accountants Network member for Simply Accounting, you recommend our product to your clients and we want to thank you. Many of our SAN members are busy referring

product, collecting points and redeeming for cool merchandise – don't miss out! Recently, one of our SAN members earned an iPad, but since her husband has claimed it she's busy saving her points for another one!

Earning points is easy; when you recommend Simply Accounting to your clients and they purchase directly through the Sage call centre, your client is entitled to a discount and you receive points for the referral! All your client needs to do is quote your SAN Member ID and we take care of the rest. But don't forget to [sign up](#) to be part of the program!

If you have any questions about the Sage Spark Rewards program, please contact your Account Manager at 1-866-665-2559 – [join today!](#)

**EXCLUSIVE PARTNER OFFERS (CONTINUED)**

**We're Looking For You!**

Are you outgoing? Are you energetic? Are you passionate about your business and passionate about using Sage Simply Accounting? If you're not shy about sharing your ideas and would like to play a critical role in representing Sage Simply Accounting partners, we're looking for you to join our Business Partner Advisory Committee (BPAC)!

The BPAC members are the first SAN members to hear about future initiatives, weigh in on product enhancements and business features, and contribute to the structure of our SAN program overall.

BPAC meets via teleconference once a month for approximately 1.5 hours. Additional time may be required if you also belong to a subcommittee specializing in product issues, training, regional networking, Partnership conference and more. BPAC tenure is two years.

Our current BPAC members have done an incredible job and made a real difference with the projects they have handled but their tenure is ending and so now, we're looking for new, excited, enthusiastic, creative SAN members to join the BPAC! Don't be shy – we need new partners, old partners, accountants, bookkeepers, IT professionals and more!

If you would like to join the Simply Accounting BPAC, please send an email to [Amber Kenyon](#). We can't wait to hear from you!

**PRODUCTS & SERVICES**

**Important Dates!**

September 16	"2011 Launch News" email to SAN members
September 21	"What's New in 2011" Webcast
September 22	SAN members begin receiving download and registration information for Accountants' Edition 2011. CDs will also begin shipping.
September 23	"What's New in 2011" Webcast
September 30	"2011 Launch News" email to customer base
October 4	<b>Official Launch</b>
October 4	Direct sales and shipments commence
October 4	Daily webinars begin on how to install and activate Sage Simply Accounting 2011
October 6	Product on shelves at Staples.
October 12	Clients on Sage Business Care (formally SimplyCARE) begin receiving download and registration information for their upgrade.*
October 19 – 20	Partnership Pre-Conference in Vancouver, BC
October 21 – 23	Partnership Conference in Vancouver, BC

\*We will begin to ship the Sage Simply Accounting 2011 product upgrade to clients on Sage Business Care (formally SimplyCARE) on October 12<sup>th</sup>. The product will ship in 5 waves, over approximately a 6-week time period.

PRODUCTS & SERVICES

**Payroll Services Survey**

On an ongoing basis, we seek the input of our Sage Accountants Network members to help ensure that the products and services Sage offers meet the needs of our members and their clients. We are now conducting a survey about a potential new service from Sage and kindly request that you please take a moment of your time to respond. Please click the link below to begin the survey. Thank you in advance for your valuable feedback and thank you for being a Sage Accountants Network member.

[Take the Survey](#)

**Can't Miss Webcasts for Sage Simply Accounting 2011**

See what's new in Sage Simply Accounting 2011 with a demonstration from one of our Product Managers. See some of the new feature enhancements first hand as well as a quick explanation on the new download and activation process.

Tuesday, September 21  
1pm PT / 4pm ET  
[Register Now](#)

Thursday, September 23  
1pm PT / 4pm ET  
[Register Now](#)

**Important Changes to Service Contracts**

For anyone that missed the communication sent to our Simply Accounting SAN members on August 31, 2010 we wanted to reiterate an important upcoming change to our clients on the various SimplyCARE plans.

Beginning in October 2010, with the launch of Sage Simply Accounting 2011 we will no longer refer to our service contracts as "SimplyCARE". To streamline the messaging across all Sage products, and to make our offerings consistent across the board, with the launch of Sage Simply Accounting 2011 we will be introducing the new **Sage Business Care tiers**.

The change to Sage Business Care was designed to add maximum value in each and every service contract we offer. In some instances, more than \$700 worth of training, products, services and discounts have been added to the plan with minimal renewal cost increase. (Enterprise clients will have NO cost increase with their renewals.)

If you did not receive the "Important Changes" email at the end of August or would like a refresher, please download the [Important Changes Email](#).

PRODUCTS & SERVICES (CONTINUED)

**Sage Simply Accounting Limited Early Release – Successful Completion**

We had great participation with our limited early release program. We had 33 participants: 21 SAN members and 12 customers.

Participants in the Limited Early release program deserve recognition and thanks from the entire Simply Accounting user base, as they assume the role of pioneer to ensure the journey to the new version is perfectly safe for all.

We held three conference calls and received a lot of feedback from these, as well as from the dedicated online forum. Participants helped flush out some last minute issues with the Limited Early Release (which we addressed, of course!)

From the limited early release program participants helped us identify the following issues, among others, from SA2011 (due to be available in early October 2010):

- Renaming the Connection Manager service caused issues with multiple versions on the same machine. Status: **Fixed**
- Inventory item names with quotes or double quotes weren't being recognized as inventory items in purchases and sales. Status: **Fixed**
- Enterprise customers posting invoices to prior fiscal period using "fast posting" experienced the journal entries mistakenly post to the current year. Status: **Fixed**
- Random crashing when adding or removing lines on purchase orders. Status: **Fixed**

We greatly appreciate our SAN members and customers participating and contributing to this initiative. There are definitely issues that we would have preferred to have found ourselves in house and such scenarios have been added to our testing criteria – most important however is that the issues were indeed identified, and the participants in the program were not impacted in any negative fashion, thanks to the quick response of our R&D and Support teams. Our objective is to ensure that Early Release participants experience a zero risk conversion to 2011 – it's the least we can do for asking them to go "live" before everyone else.

Thank you,  
Alistair Ellis  
Senior Product Manager

**Need Help?**

Online chat support is fast, friendly and at your finger tips!

Why wait on hold if you don't have to?  
[Try chat today!](#)

**TRAINING AND SUPPORT**

**Daily Support Webcasts**

Starting October 4th, Customer Support will be running a daily webcast on how to install, register and activate Sage Simply Accounting 2011. These webcasts will be at 2pm ET / 11am PT and are open to all clients (regardless of Sage Business Care status.) Clients will receive information on how to register for these webcasts with their product email. Registration access will also be made available online after October 4th.

**Knowledge Base Help**

Here are two articles to help resolve installation errors should you encounter them:

1. Error 1701, 1721 or 1722 when installing Simply or an update: Are you getting a 1701, 1721 or 1722 error when you're trying to install Simply Accounting 2010 or an update for the 2010 program? If you answered yes to this question you'll probably need the most updated version of Windows installer. To see the fix to this issue please [click here](#).
2. Error "The installation source for this product is not available. Verify that the source exists and that you can access it" when installing a Product Update for Simply Accounting 2010: Installing a product update for Simply Accounting 2010 and getting this error message? Try following the steps outlined in [this](#) knowledgebase article to resolve the issue.

**ACCOUNT MANAGER TERRITORIES**



From left to right  
**Back:** Simon Kibugi, Francois Foglierini, Jennifer Warawa, Lisa Harding  
**Front:** Cesar Guerra, Amber Kenyon, Emilia Iacob

For partner-related inquiries, please contact the Business Partner Team or your Account Manager at 866-665-2559. Press Option 1, then Option 5.

**Ontario and USA Partners:**

Cesar Guerra, cesar.guerra@sage.com  
Phone: 604-207-9480, extension 23313

**Alberta and British Columbia Partners:**

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**Strategic Account Manager for Certified Consultants:**

Amber Kenyon, amber.kenyon@sage.com  
Phone: 604-207-9480, extension 23327

**SIMPLY ACCOUNTING INTELLIGENCE / EXCEL TIPS**



**Tip #1**

**Would you like to be able to protect a worksheet but unprotect selected cells so they can be edited?** Here's how you do it with Excel 2007

The cells you are going to "Unlock" are the cells you want to be able to edit.

**To Unlock the cells**

Select the cell you want to be able to edit

(Hold down ctrl to select multiple cells)

From the Home tab, in the Cells group, select the drop down arrow under Format Deselect "Lock Cell" (so you are now Unlocking the cell)

OR

If you prefer, you can right click on the selected cell/s

Select Format Cells

Select the tab at the top called Protection

De-select the box for Locked

Select OK

**Protect the worksheet**

From the Review tab, in the Changes group, select Protect Sheet

Enter in the necessary (password etc)

You will now only be able to edit the "Unlocked" cells

**Tip #2**

**Is there a way to add a chart to some data without going through the Chart Wizard?**

Yes, using a keyboard shortcut.

**Process: Excel 2003 and 2007**

Here is how to do it:

There is a very simple keyboard shortcut that can create a bar chart graph with the push of one button. The example today will use a table containing six months worth of sales figures:

1. Using the table above, select cells A1:B7
2. Press the F11 key.

A new chart is automatically added as a sheet, with this new sheet inserted in front of the sheet your data is on. You can further customise your chart by changing the colour and layout options.

NB: the chart that is added is based on your default chart options.

**Simply Accounting Intelligence Tip:**

If you or your customers are using Simply Accounting Intelligence for the first time, you might be asked to set up Simply Accounting Intelligence users. Please watch the video "How to Assign User Access to Simply Accounting Intelligence" on the [resource centre](#) to learn the steps of setting up Simply Accounting Intelligence users.

COMIC



"Splendid new laptop, Miss Frimley! How on earth did you raise the funds?"