

ADDING VALUE

WITH I.T.

Welcome

Welcome to the latest edition of the Smith Cooper IT Newsletter.

In this edition our lead story focuses on our nominations at the next Accountancy Age awards which is a prestigious event that we are looking forward to.

This month we have a brand new feature from our Sage Helpdesk Manager Lee Pearsall with his "Tip of the month" which answers a common helpdesk question, as well as a guide for the new office 2007 and an explanation as to what CRM is.

I hope you enjoy this Smith Cooper IT Newsletter and I look forward to receiving any of your feedback.

Charlotte

Introducing Microsoft Search Server!

As information created by desktop tools accumulates, finding it and using it becomes more complex. According to a recent study by the University of California, it is estimated that each person produces 800MB of new recorded information each year and a recent IDC study, found that information workers spend 48% of their time searching for that information!

Microsoft Search Server utilises the powerful Microsoft Search Engine and provides users with a simple interface which enables them to find and access relevant content quickly and efficiently, while at the same time maintaining file security and user permissions.

Search Server indexes common information sources such as file shares, Web sites, SharePoint sites and Exchange public folders to provide as wider search as possible.

For more information on this product contact our Microsoft team on 0844 669 9998

Smith Cooper and Sage are at the awards!



We are pleased to announce that both Smith Cooper and Sage have been nominated in a number of categories at the 2008 Accountancy Age Awards.

Smith Cooper has been short-listed for four of the most prestigious categories including Large Firm of the Year. Sage's solutions have also been nominated with 3 products in two categories, Mid-tier Software Package and Small Software Package.

Smith Cooper will go head-to-head with the biggest names in the accountancy world as their performance and growth are scrutinised by an independent panel of highly respected financiers and business leaders.

The firm, which now has nine offices across the Midlands, is the only company outside of the Big 4 to be short-listed in more than four categories at this year's awards.

The winners will be announced at a gala dinner and awards ceremony, which is taking place at Battersea Park Arena in London on 12th November in the presence of 1,300 guests.

Commenting on Sage and Smith Coopers Nominations Managing director of Sage's Accountants division, Greg Ford said:

"We're delighted to be finalists in the Accountancy Age awards for several products, in both the small and mid-tier software categories. This demonstrates the effort we put into making sure our software and services meet customers' needs for ease of use, value for money, reliability and functionality. It also provides reassurance to potential customers that Sage offers the highest possible standard of software and will meet their needs.

I'm also really pleased to see one of our accountant partners, Smith Cooper, being short listed in so many categories in these awards which recognise success and achievement across the industry."

Commenting on the nominations, Head of Business Solutions Richard Brewster said:

"The nominations for both Smith Cooper and Sage represent the high standards both companies have reached in their respective arenas. It is also great to see that two of our core Sage solutions "Sage 50 and Sage 200" are both nominated for awards. Hopefully the 12th will be a successful evening for both organisations but either way the nominations are cause for celebration."

For further information on any IT issue please contact **0844 669 9998** and we'd be happy to help

Office 2007 Getting Started



If you or your colleagues are starting to use the new 2007 versions of Microsoft Office Excel, PowerPoint and Word you know how much these programs have changed. The changes make working with the programs easier, faster, and more efficient, but getting used to the new style can take a while.

To help you get more comfortable and productive with the new look of the programs, Microsoft have put together a selection of training resources. The Getting Started Tabs allow you to bring up a Office 2003 interface and click on a function which will then be shown its location in Office 2007.

These can be found at the following address: <http://tinyurl.com/32h2px> for more information contact the help desk on 0844 669 9998

What is Customer Relationship Management (CRM)?

CRM is a process implemented by a company to handle its contacts with its customers. This process is used to gain an insight into customer's needs and behaviours in order to develop stronger relationships with them. CRM Software is used to support these processes, bringing together and storing disparate pieces of information on current and prospective customers. The information in the system can be entered and accessed by employees from different departments, such as sales, marketing, customer service and finance.

The rationale behind this approach is to enhance the quality of services provided to customers and to use the information stored in the system for targeted marketing and sales purposes.

So what IS CRM?

After reading that you are probably thinking what does this mean in English...

Well imagine knowing a customer in such detail that at any given time:

- You Know** how much business they did with you last month
- You Know** that it was 15% more than in the same month last year
- You Know** that this customer cares more about quality than price
- You Know** that they've had 4 customer service calls in the last 12 month
- You Know** the details of every communication you've ever had with them

This is CRM!

Our CRM team at Smith Cooper can discuss your requirements and advise of the best solution to meet your needs. Contact us at crm@smithcooper.co.uk

Smith Cooper Sage CRM Seminar

Derbyshire County Cricket Club.
Ring 01332374459 or email charlotte.beaumont@smithcooper.co.uk



Tip of the month

This month Lee Pearsall, Sage helpdesk manager answers a common question that we are asked on the helpdesk.

How to amend customer/supplier allocations in Sage 200?

When a transaction has been allocated on a customer's account you can use the 'Amend Allocations' routine to revise the allocation details, provided the customer account is an open item account and the allocation is not linked to an entry marked queried (however this does not include those marked 'F', finance charge invoice).

You can even use the routine if the supplier account is on hold. Although it displays a warning, you can still continue to amend the allocation.

Access the window

Choose Adjust Transactions > Amend Allocations.

Enter the details

- Select the customer 'A/C ref' you want to amend allocations for.
- Select the allocation details you want to amend.
- Click 'Edit'. The Customer Allocations window appears.

- Amend the displayed allocation details by changing the allocate column value to zero or click Reverse and select items to reverse.
- Click 'Save'.

Contact us

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