SMITH & ALLEN CONSULTING

SACI ProCare: Making the most of your ERP investment

Managed support, training, and care for Microsoft Dynamics GP and Microsoft Dynamics 365 Business Central.

Integrated business management software that aligns with your strategic goals… and helps you meet them.

Having the right support and training is the key to realizing the best ROI on your ERP systems and business intelligence software. At Smith & Allen Consulting, Inc., we believe that controlling your costs and empowering your employees is critical to your success, so we've created the SACI ProCare Program.

ProCare for Dynamics GP

Keep your Dynamics GP environment stable, current, and productive, whatever your timeline for the future.

ProCare for Business Central

Get the most from Business Central as Microsoft releases new capabilities, with the same dedicated team.

This annual program lets you control your budget. With ProCare Premier, which includes upgrades, support, and training, you'll likely have your needs covered for the entire year.

- Maximize the adoption of your ERP system without worrying about the cost.
- Enable users to leverage the full potential of Dynamics GP or Business Central immediately.
- Supplement your IT support staff with ERP support specialists from SACI.
- Free support, training, and updates based on your plan.*

With our ProCare plan, you can easily tell your staff, "When you need training or support, just call SACI," without worrying about your budget. In addition, our top plans include detailed usage reports, so you'll know how the training and support are being applied and stay informed about the overall usage of your program.

We know that every company and department is different. We've designed SACI ProCare so that you can choose exactly the level of service you need. No matter which plan you select, you'll receive the outstanding customer service that the professionals at Smith & Allen Consulting, Inc. are known for, which is always reflected in our passion for what we do.

*See plan inclusions.

SACI PROCARE

Why Use ProCare?

ProCare lets you make the most of your Dynamics GP or Business Central investment and improve it every month.

1

Manage costs

Budget your ERP expense on an annual basis.

2

Leverage training

Professionally train your entire staff, and postpone additional hires with the right training.

3

Stay current

Build in your upgrades and take advantage of new features.

Use what you've already paid for

Many users have modules they've paid for but don't use. Implement advanced features without expensive consulting fees and improve your initial ROI with modules such as:

Dynamics GP

- Fixed Asset Management
- Multicurrency Management
- Encumbrance Management
- Intercompany
- Analytical Accounting
- Safe Pay

Business Central

- Fixed Assets
- Multicurrency
- Intercompany and Consolidation
- Deferrals
- Cost Accounting
- Approval Workflows

Training pays you back

- Improve employee motivation, morale, and retention.
- Avoid costly in-house cross training and the loss of institutional knowledge.

Skip the frustration of infrequent tasks

- 1099s and year-end close
- Modifying Management Reporter, Power BI, or other reports
- Applying service packs, updates, and release upgrades
- Ad-hoc requests from auditors

Get consultation

- Interface with your IT department on ERP-related issues.
- Consult with IT during upgrades, server migrations, and new installs.
- Partner with you and your other vendors when considering technology changes:
  - Software purchases and customizations between your ERP and other products (CRM, payroll, EDI, and more)
  - Electronic interface with your bank
  - Mobile devices that require ERP data

When you use SACI ProCare, you eliminate the ongoing "buying process." With a signed agreement, we go out of our way to "over-deliver" and become the partner who helps you meet your goals and ensures your business moves forward. You can rely on us to make recommendations that are purely in the best interest of your organization.

SACI PROCARE

What's Included

E-mail and Telephone Support

We know you want to talk to someone who knows more about your system than you do, and that fast resolutions create satisfied users. Over 90% of the time, you'll speak with your dedicated support representative, so you won't have to re-explain your environment and unique issues each time. You also won't be passed to different technicians for each module, because problems are often inter-related.

Training

Whether your system is newly implemented or you need to train new employees, you can rely on SACI for Dynamics GP and Business Central training. We have in-depth knowledge of both systems and of Management Reporter, but more importantly, we understand the teaching process and know that not all software technicians are teachers. We don't simply impart information. We provide your employees with actionable knowledge, so they can do their jobs better and move your business forward.

Our live, web-based, one-on-one training sessions are presented by one of your consultants and scheduled around your needs. For example, it may suit you and your employees to attend five one-hour sessions rather than a single, longer class. On-site or in-person training in our office may also be available.

Report Creation & Editing

This component of ProCare provides you with exactly the reports you need. We can customize reports to meet your specific needs, and we can create the charts, KPIs, analytics, and dashboards you need.

SACI Report Viewer (Basic) DYNAMICS GP

All levels of ProCare include a number of reports that can be customized with your company logo and exported to Excel or as a PDF file, including Balance Sheet, Financial Trial Balance, Income Statement, Cash Flow, Checkbook Balances, AP Aging, AP Top 10, AR Top 10, Net Change of Bank Accounts, Mini Balance Sheet, Mini Income Statement, Vendor Card Info, Customer Card Info, and GL Account Numbers.

SACI Custom Import Utilities DYNAMICS GP

With ProCare Premier or Custom, you'll get SACI's Custom Import Utilities: Excel to GL, Excel to Bank Reconciliation, and Excel to Accounts Payable. They're free to use for the duration of your SACI ProCare subscription.

Service Packs, Updates & Usage Analysis

We recognize the importance of keeping your system up to date, and we'll do that for you. With the latest service packs and updates in place, problems are fixed quickly and efficiently when they do arise, reducing possible downtime and frustration.

Our quarterly usage analysis statements help you understand exactly how much training and support is being used. They also show which functionality is being used, or not being used, so you can take full advantage of your ERP investment. *(Premier and Custom plans.)*

What's Included, continued

StepByStep Document and Video Libraries

Our exclusive StepByStep libraries offer quick and easy solutions to the most common questions. Created by SACI professionals, these user instructions include clear, concise steps and screen shots, and the videos walk users through each process with instructional narration. *(Premier and Custom plans.)*

Quarterly Backup Testing

We find companies are good at making backups; however, they often fail at testing them to ensure accurate restoration, usability, and completeness. Each quarter, SACI will restore your most recent database backup in our test environment and match it to important reports. We'll send those reports to you for proofing and verification. If a restoration is ever needed, this feature could easily offset the cost of your ProCare coverage.

Lunch & Learn

Quarterly one-hour, relaxed presentations at your location, with lunch provided by SACI. Topics may include year-end closing, 1099s, Excel refreshable reports, pivot tables, custom reminders, advanced SmartList, KPIs, and how using advanced ERP features can save you about 40 hours annually. We try to cover topics that will help the entire accounting department make the most of your investment.

Year-End Closing

Year-end closing can be nerve-wracking, and many clients are nervous about the process. With SACI ProCare, we'll handle it for you. First we confirm that your database is ready for year-end closing, and we run a full backup to start. We follow the recommended step-by-step process after hours, so we don't interfere with your normal business operations. Finally, we confirm the numbers upon completion. Why worry over this critical process when you can rely on SACI to handle it?

Upgrades

When you register for ProCare Premier or Custom, we'll keep you up to date on the latest upgrades and versions, whether that's a Dynamics GP version upgrade or a Business Central release. With upgrades included, most clients find this feature offers the best ROI.

Return on Investment

The SACI ProCare plans help you ensure the best return on your Dynamics GP or Business Central investment: predictable annual costs, a team that already knows your environment, and an ERP system your people know how to use.

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Plan Details

Feature	ProCare Premier	ProCare Custom
E-mail & telephone support	Unlimited support incidents	Unlimited support incidents
Training	Unlimited online classes	Unlimited online classes
Report creation & editing	Included	Included
SACI Report Viewer (Basic), Dynamics GP	Included	Included
SACI Custom Import Utilities, Dynamics GP	Included	Included
Service pack & update installation	Included	Included
Quarterly usage analysis statements	Included	Included
StepByStep document & video libraries	Included	Included
Quarterly backup testing	Included	Included
Quarterly “Lunch & Learn”	Included	Included
Version upgrades / release updates	Included	Included
1099 assistance & year-end closing	Included	Included
Total annual fee	Upon request	Upon request

What counts as a support incident?

- Failure of the software programs to perform in accordance with the related documentation in any material respect.
- Any encountered error that affects software program performance.
- Specific questions about the software operation or feature capabilities.

Support incidents are not intended to address design-related questions, explain the procedures outlined in the software documentation, or take the place of training or consulting services.

Quarterly usage statement analyses include

- Class registrations and classes taken
- Number of support incidents used, contact person, and reason
- Dynamics GP or Business Central modules used and not used
- Transaction usage by module

Get your price in minutes

ProCare is priced to fit your company: your number of companies and users, the modules you use, your reporting tools, and any third-party add-ons. Use our ProCare price calculator at **saci.com/procare-**

Talk to us about ProCare for your Dynamics GP or Business Central environment.

Questions? Contact
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