

# The **BTS** **Edge**

AUGUST 2007



Business Technology  
Systems, Inc.

Information to unlock the potential of your Sage Software from Business Technology Systems, Inc.



Steve Krueger is the president of Business Technology Systems, Inc., provides system selection, and BusinessWorks and MAS 90 consulting.

Steve can be reached at [steve@bts-wi.com](mailto:steve@bts-wi.com) or call 920.882.5030.

## **Experience...Sometimes it's better to learn from others.**

The school of hard knocks is a place I would prefer not to spend my time and money but sometimes unavoidable. When working with the number of clients we work with, we certainly have helped our clients out of a number of situations that could have been avoided. I thought I would share with you this quarter some things we experience far too often in hopes these situations don't become a story you tell about yourself.

**Backup** – Not a month goes by (it was a week a few short years ago) that a client doesn't need to restore data from a backup. With the number of options available for backup today, we are still surprised when a client doesn't have a backup in some form from the night before. The most common answer when asking a client if they have a backup is the backup hasn't been working. For how long? Usually months. Do you have life insurance, homeowners insurance, health insurance and auto insurance? Backup is one of the most important insurances a business should have. Find out today if you have a reliable backup and if not or you're not sure, put backup on the top of your to do list until it's resolved. Much like insurance, it only has value when you have it and you usually regret not having it when you need it the most.

**Upgrades** – Do you install every upgrade and update as soon as it's available? While living on the bleeding edge got its name because it's usually bloody and painful, most businesses today can't afford to be the test bed for vendors' new releases of software. Vista and new releases of Peachtree, BusinessWorks and MAS 90 should be given three months or more (or more importantly a service pack or two) before jumping on board. Let someone else do the bleeding and certainly check with your network and software providers before installing any upgrade or update to be sure of compatibility. Usually clients contact us after they attempted an upgrade, update or installed new hardware and usually they are contacting us with issues that could have been avoided with a quick confirmation beforehand.

**Continued on page 7**

## **Employee Spotlight—Sue Wolf**

Sue Wolf joined Business Technology Systems in 2006 as part of the acquisition of Virchow Krause Technology Solutions where Sue was a Manager. Sue has over 19 years of experience in providing business and accounting software solutions to various businesses throughout Wisconsin. Sue specializes in accounting system selection, implementation, training, and support.

Sue is a member of the WICPA (Wisconsin Institute of Certified Public Accountants), a board member for Mid-Day Business and Professional Women, and graduated from the University of Wisconsin-Oshkosh in 1987 with a degree in Accounting and Management Information Systems.

Sue was born and raised in Kaukauna and currently lives in Darboy. Sue has two children, Jason, 13, and Jessica, 10. Sue is very active in her children's boy and girl scouting activities and chaperones many of their outings. Her most recent adventure was a backpacking trip in Glacier National Park, Montana. She also enjoys watching her children's soccer games and tournaments.

Sue enjoys the outdoors and when she is not attending one of her children's sporting or extracurricular events, she enjoys traveling (usually to warm locations), camping, boating, golfing, biking, bowling and spending time with her family.



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## Sage BusinessWorks 8.0 Enhancement Summary

Version 8 is expected to be shipping in October. A document including screen shots of these feature changes is available for your review. Contact Steve Krueger at [steve@bts-wi.com](mailto:steve@bts-wi.com) or 920-882-5030 for more information.

**Enhanced Customer Inquiry Balance Drill Down** - Selecting the "Unpaid Invoices" in the Customer Inquiry not only displays a list of invoices that make up the balance (as it currently does in v7), but it now also supports further drill down to the invoice transaction inquiry. Gain additional visibility into customer's account including customer PO information, invoice adjustments, payments received and much more.

**Enhanced Vendor Inquiry Unpaid Balance Drill Down** - Similar to the Customer Inquiry, selecting the "Balance" hyperlink in the Vendor Inquiry now supports further drill down to the specific transaction inquiry for all the invoices the balance is made up of.

**System Wide** - The new alternating color scheme found in all Lookups improves readability and helps the user more easily review information contained within a single row.

**AP Invoices Paid by Credit Card** - Currently in order to record an AP invoice is paid via credit card, the invoice needs to be entered using a Credit Card invoice term at the time payable invoice is entered into Sage BusinessWorks. New with Version 8, you can record an invoice using standard invoice terms and later make a full or partial payment to the invoice using a credit card as a payment option. This allows for accurate tracking and aging of AP invoices while still providing the convenience and flexibility of paying the invoice with a credit card.

**Post adjustments to Credit Card Vendor Invoices** - You can now easily post invoices directly to the Credit Card vendor to account for interest, annual fees and other adjustments.

**Enter Payment Option** - Enter Handchecks has been renamed to Enter Payments and now provides the ability to quickly and easily select invoices for payment and print vendor checks from one convenient location.

**Sales Tax IDs Assigned to Ship to Addresses** - Up to three sales tax IDs can be assigned to each customer Ship To Address providing for faster more accurate sales tax data entry on quotes, orders and invoices.

**Cash Account Register Report** - The new Cash Account Register available in the Cash Management module is a useful reconciliation tool that displays in detail all the transactions that impact the cash account. It also provides the business owner the flexibility and security of allowing certain employees to view this information, while preventing employees from viewing other sensitive general ledger account information.

**Reprint Closed Invoices and Sales Orders** - You can now reprint closed invoices from the Order Entry Invoice Inquiry option and closed sales orders from the Sales Order Inquiry option.

**Vista Capable** - Sage BusinessWorks v8 is supported for use on the on the 32 bit version of Vista Business and Vista Ultimate. **Note:** Requires that Winhelp is downloaded from the Microsoft web site.



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### Promotions

Additional Users: 50% off until 8/31/07 then 25% off until 9/28. 50% off pricing is: Workgroup 1-user at \$497.50 or 3-user at \$997.50 until 8/31/07. Client/Server 1-user at \$297.50 or 5-user at \$747.50 until 8/31/07. Get FAS 50 (Fixed Asset) Asset Accounting for \$895 through 10/31/07. Special 40% offer to existing BusinessWorks customers including the license and first year of support. See your mailbox for information from FAS regarding webinars and ordering information.

### Did You Know?

The Sage Summit User Conference is being held November 3-6, 2007 in Chicago, IL. What a great opportunity to learn from Sage and other users so close to home. More information can be found at [www.sagesummit.com](http://www.sagesummit.com)

## BusinessWorks Service Packs

Version 7.0 – Service Pack 9 is available.

Service packs are available on Sage Software Online ([www.sagesoftwareonline.com](http://www.sagesoftwareonline.com)) to download and update BusinessWorks. These service packs incorporates all prior service packs and includes descriptions of the changes made in Version 7 service packs.

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Sue Wolf, CPA, is a member of the MAS 90 team.

You can reach her at [sue@bts-wi.com](mailto:sue@bts-wi.com) or call 920.882.5030.



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## The Power of F9

Would you like to be able to create custom financial statements while having the flexibility of an Excel spreadsheet? If so, then F9 may be the product for you.

F9 is a Financial Reporting application, which dynamically links Sage MAS 90/200 General Ledger data to Microsoft Excel. By employing a combination of simple cell formulas in Excel, F9 allows General Ledger data in Sage MAS 90 or 200 to be formatted into any desired financial report in the flexible and powerful environment of the spreadsheet. The F9 Report Wizard allows you to go from a blank spreadsheet to a fully formatted, hot-linked report in just seconds! F9 offers an unbeatable feature package, including drill down, multiple date ranges, lists of account segments, and report auditing. It also does all of this while being dynamically hot linked to General Ledger, ensuring that all numbers are timely, consistent, and complete.

## Sage MAS 90 and Microsoft Windows Vista Compatibility

Sage MAS90 and 200 versions 4.20 are now supported on computers using Windows Vista Business, Enterprise, and Ultimate editions. A document is provided on the Sage Software Support website to describe the detailed procedures required to run in the Windows Vista environment along with installation options that solve issues Windows Vista users may encounter. Additional procedures are also needed if you have first- or third-party applications integrated with MAS90 or MAS200.

Sage MAS90 and 200 versions 4.10 are also now supported on computers using Windows Vista Business, Enterprise, and Ultimate editions. In order to obtain compatibility with Microsoft Windows Vista, certain features of MAS90 or 200 may not be fully functional in this version. Sage recommends upgrading to version 4.20 for users running Vista workstations.

If you are considering upgrading your computers to Microsoft Windows Vista, please contact your MAS90 software consultant to help you with this process.

## Support for MAS 90/200 Version 3.71 and Other Versions

Are you still on MAS 90 or MAS 200 version 3.71 or earlier? If so, you should be aware that support for MAS 90/200 version 3.71, which was released back in November 2002, is scheduled to expire soon.

Year-end updates to modules such as Payroll, Magnetic Media, and Accounts Payable and year-end tax table updates will only be available through December 2007. Therefore, there will not be any year-end updates for MAS90/200 version 3.71 in tax year 2008. Sage Software has stated, however, that they will continue to provide phone support for version 3.71 until December 2008.

For MAS 90/200 versions 4.0 and 4.05, they are still providing phone support and year-end program and tax table updates to this version until further notice. When Sage Software does decide to discontinue support, they will provide us with 12 months advance notice. Sage Software has, however, already stopped providing service updates to these versions of the software.

For MAS 90/200 version 4.10, phone support, year-end program updates and tax table updates are still available. Sage Software is also still providing service updates for this version, but they will now be released on a quarterly basis versus a monthly basis from 9/30/07 until the release of version 4.3.

If you are currently on an older version of MAS90 or MAS200, now may be the time to upgrade. Please contact your MAS90 software consultant to schedule an appointment.

### Special Promotions

- Get free integrated CRM for Sage MAS 90 and 200 when purchasing user licenses of ACT! or Sage SalesLogix
- Free ACT! Link integration to Sage MAS 90 and 200 and Business Object Interface (\$800 value!)
- Free DynaLink integration and Sage SalesLogix Standard Server – Includes Business Object Interface and Visual Integrator (\$6,000 value!)
- Save up to 20% on Sage MAS 90 and 200 additional user licenses
- 20% off Direct Deposit for Payroll or Accounts Payable and any related Direct Deposit Extended Solution
- Upgrade to Sage MAS 200 and get a \$400 user credit (regularly \$300 per user). Plus, get 15% off the Bar Code and/or StarShip module(s)
- Save 50% on Sage MAS 90 Level 3.x (DOS/UNIX) upgrades. Plus, 50% off a Silver Phone Support Plan
- 15% off the Visual Integrator module
- Save 10% when you upgrade to a Silver or Gold Phone Support Plan
- Free 90-day Silver Phone Support Plan trial offer

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Martin Cramer performs data conversions, Access programming and develops Crystal Reports.

Martin can be reached at martin@bts-wi.com or call 920.882.5030.

## Upcoming Events

### Efficiently Monitor the Pulse of Your Company with Sage MAS 90 and 200 Business Alerts:

Details: Business Alerts is an innovative product that utilizes your e-mail system to notify you whenever something significant happens in your Sage MAS 90 or Sage MAS 200 ERP system. In addition to keeping your staff better informed, Business Alerts can also send e-mail notifications to your customers and vendors. Attend this Webcast to see the ease and effectiveness of Business Alerts.

Date: Thursday, August 23, 2007  
Time: 12:00pm - 1:00pm

### How to Boost your Productivity with Sage MAS 90 and 200 Productivity Modules:

Details: Do you find that it is taking more and more time for you and your employees to keep your business systems up to date? Join us for this Webcast where we will focus on the productivity tools available in Sage MAS 90 and 200 and how they can save you time and increase productivity.

Date: Tuesday, August 21, 2007  
Time: 12:00pm - 1:00pm

### How to Escape from Self-Managed Sales Tax Compliance with the New Sage MAS Sales Tax Module:

Details: Find out how you can make sales tax compliance simple and accurate for your business during this interactive Sage MAS Sales Tax Webcast.

Date: Thursday August 16, 2007  
Time: 12:00pm - 1:00pm

### Improving Customer Service and Satisfaction with Sage MAS 90 and 200 Distribution Modules:

Details: Join us for this Webcast where we will focus on some of the key features and tools provided by the Sage MAS 90 and 200 distribution modules and how they can help you to provide a higher level of customer service and increase customer satisfaction.

Dates: Thursday, August 23, 2007  
Time: 12:00pm - 1:00pm

### What's New in Sage MAS 90 and 200 version 4.2?:

Details: Preview the latest enhancements in Sage MAS 90 and 200 version 4.2 including new customization and personalization features within Accounts Payable in addition to numerous customer requested enhancements. Also new to all customers is the new Business Insights Explorer module for comprehensive inquiry and analysis capabilities.

Dates: Thursday, September 6, 2007  
Time: 12:00pm - 1:00pm

### Reducing Cost and Time with Sage MAS 90 and 200 Paperless Office Extended Solutions:

Details: Join us in this live Webcast to learn how seamlessly digital document management can be added to your Sage MAS 90 and 200 system.

Dates: Tuesday, August 28, 2007  
Time: 12:00pm - 1:00pm

### Recorded Demo - Business Alerts Professional for Sage MAS 90 and 200:

Details: Learn how to use Business Alerts Professional to keep your finger on the pulse of the business.

## Did You Know?

### Accessing Master Console:

Did you know that you can see who is currently accessing MAS90 or MAS200 by selecting Master Console from the File menu? With this tool, you can determine the module and task being accessed by viewing the Module column and Program columns and determine all logged on users by viewing the User column.

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Joe Huettner, MBA, is the vice president of Business Technology Systems, Inc., and Peachtree team leader.

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Need checks or forms that are compatible with Peachtree? Contact us directly at 920-882-5030 or visit the link provided! Remember to reference our partner code **PT98261** to receive up-to-date discounts

<http://peachtree2.checks-and-forms.com/ptdforms.nsf/start.dsp?openform&partnercode=PT98261>



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## Introducing Peachtree 2008

*Peachtree is designed for people who take their accounting seriously. It helps small businesses get the numbers right so they can truly understand how their business is performing. For over 30 years, Peachtree has been a comprehensive solution based on real, double-entry accounting principles with screen-level security\*, audit trails, and automatic accounting checks, so you get the accuracy and control you need to improve your results*

### IMPROVED! Reporting Improvements

Now you can work with your reports more effectively and see more information. Easily select more fields to include on your reports, expand your filtering options and sort your reports by more fields than ever! You can also run key reports using any date range within the two open fiscal years. These key reporting changes, also with improved drill-down, will make working with Peachtree reports much easier, providing you with the business information you need for better decisions.

### ENHANCED! Forms Design Improvements

Now you have a more flexible way to customize your forms such as invoices, sales orders or quotes for a more professional representation of your business. Improvements include the ability to add fields, colors, logos and other information with a new, simple design screen. You can also modify the layout of our forms more easily.

### ENHANCED! Flexible Unit and Quantity Decimal Settings

You can now set up Peachtree so that you have different decimal setting for units and for quantities. For either the unit or the quantity, you can select the number of decimal places up to 5 places!

### NEW! Add Attachments

If you have files associated with information in Peachtree, such as customers, vendors, employees and inventory items, you can now save copies of these files in the Peachtree record to help you stay more organized. Most standard types of files are supported, including Microsoft® Excel® spreadsheets or Word files, photographs or scanned documents, so that you can include virtually any information.

### NEW! Broadcast Invoices

Save time on billing with the ability to create and send one sales invoice to multiple customers. Whether you bill multiple customers for the same product or service or bill the same customer multiple times over a period of time, you can now create one invoice or bill and send it to multiple customers in one step.

### IMPROVED! Hide Navigation Centers

The Peachtree navigation centers have been improved to allow for a persistent "hide" option for the Business Status Center and other navigation screens. With the improvement, you can now work the way you want to and choose to permanently "hide" or "show" the Business Status Center and other pages like Employees & Payroll or Inventory & Services. This reduces the amount of information that you see and improves the performance when you start up Peachtree.

### IMPROVED! Saving Records and Transactions Performance2

Experience drastically reduced transaction and record save times when reports are open. Invoices, checks, sales orders, inventory items etc. all save faster when you're working with reports and screens at the same time!

### NEW! New Features Splash Screen

Now you can see all of the features that are new to Peachtree 2008 once you install it. The new splash screen shows you how to locate and use the new and improved features within Peachtree 2008. It brings together other great assets such as "show me how to" and "Flash Demo" from within the product Help, Web and other marketing areas. This allows you to get the most out of your product upgrade purchase.

### NEW! Detail Transaction Report

Peachtree 2008 now includes a comprehensive report providing all pertinent transaction information. This report will have all the attributes of the Find Transaction report and more! It will allow you to see the key information related to your transactions. This new report resides under the General Ledger reports area.

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## Peachtree 2008 – New and Improved Features by Product

Features	Peachtree Premium Accounting & Industry Solutions	Peachtree Complete Accounting	Peachtree Pro Accounting	Peachtree First Accounting
<b>Broadcast Invoices</b> <sup>1</sup>	√			
<b>Add Attachments</b>	√	√	√	
<b>Flexible Unit and Quantity Decimal Settings</b>	√	√	√	
<b>Forms Design Improvements</b>	√	√	√	
<b>Hide Navigation Systems</b>	√	√	√	
<b>Save Records and Transactions Performance</b> <sup>2</sup>	√	√	√	
<b>Details Transaction Report</b>	√	√	√	
<b>New Features Splash Page</b>	√	√	√	√
<b>Reporting Improvements</b>	√	√	√	√

\* – ‘Industry Solutions’ represents the available Peachtree Industry Solutions: Accountants’ Edition, Construction, Distribution, Manufacturing & Nonprofits.

**Disclaimers:**

1 Available in Peachtree Premium Accounting and higher.

2 Performance results are based on recommended system requirements and may vary based on configuration, size and content of data file, system, the record or transaction being saved and what screens and reports are open.

If you would like to see a more comprehensive comparison of the various Peachtree products available, visit the following weblink: [http://www.peachtree.com/peachtreeaccountingline/productmatrix.cfm?WT.ac=\\_compare.cfm](http://www.peachtree.com/peachtreeaccountingline/productmatrix.cfm?WT.ac=_compare.cfm)

Visit our website for up-to-date new and upgrade pricing at <http://bts-wi.com/btswicom/products/peachtree/promotions/default.asp>

Remember that Peachtree’s standard policy states that any version of Peachtree 2005 or earlier is no longer a supported product, for any operating system. Should you have any questions about Peachtree 2008 or if you wish to see a order or see a demonstration of the newest release, give us a call at 920-882-5030 today!

## MAS 90 Upcoming Events continued from page 4

**Recorded Demo – Integrating ACT! by Sage with Sage MAS 90/200:**

Details: See how joining the strengths of MAS 90 or 200 and ACT! by Sage Contact Manager, the #1 selling contact management system sold today, will improve your customer/vendor management and office productivity.

**Recorded Demo –Sage MAS 200: Moving at the Speed of Your Business:**

Details: Don’t let a good thing like growing your business, slow you down. If you have ten or more employees needing to simultaneously access your Sage MAS 90 system, an upgrade to Sage MAS 200 could improve your processing time by anywhere from 300 to 1000%.

**Recorded Demo – MAS 90/200 Credit Card Processing:**

Details: Learn about the features and benefits of implementing Credit Card processing and important tips on what you need to do to get your organization ready. See how easy it is to add the credit card payment option to Sales Order, Accounts Receivable and e-Business Manager.

**Recorded Demo – e-Business Manager for MAS 90/200:**

Details: See how you can easily add e-commerce capabilities to your Web site.

Register online at [www.sagesoftware.com/seminars](http://www.sagesoftware.com/seminars)



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Tim Cook is a member of the MAS 90 and Peachtree teams.

You can reach Tim at [tim@bts-wi.com](mailto:tim@bts-wi.com) or call 920.882.5030.

## Act! 2008 is coming!

Sage has announced that ACT! 2008 will be shipping by the end of August. This 20<sup>th</sup> Anniversary version has been tooled to work with the Microsoft Vista operating system. A powerful new dashboard feature is the highlight of the new version. The dashboard is customizable on a user by user basis and displays graphically the information a user wants to see. The new features are primarily geared toward sales managers and sales force management.

While it is the job of every software company's marketing department to make users crave the latest and greatest software package, most software consultants would suggest a tempered, planned approach to installing an upgrading your software packages. One problem users seem to have found with upgrading the ACT! software is that it is difficult to do without the assistance of a certified consultant. If you are considering an upgrade from older version of ACT! (ACT!2005 or prior), and you will be attempting to do so without the assistance of an ACT! consultant, you will be well served to research the internet. A great start is [www.act.com](http://www.act.com) and [www.actblogger.com](http://www.actblogger.com).

Travis Campbell, a certified ACT! consultant and creator of Actblogger.com, suggests you ask the following questions before considering an upgrade to ACT!

### What new features in the software will...

- Make me or my organization more productive.
- Make me or my organization smarter about the data in my database.
- Give me or my organization a competitive edge
- Help me or my organization make customers and prospects lives better.

### How will the existing configuration carry over to this new version?

- Will it support the operating system I'm running?
- If using templates, and mail merges, will it support the version of my word processor.
- Am I using any add-on or enhancement products, and if so, are they supported on the new version. If not, when will an update be available, and what will it cost (many are free)?
- The Database itself, have others experienced problems upgrading their database for this new software, can I perform a test migration of my database to see if there are any problems before putting it 'in production'?

These are common sense business questions that apply much more broadly than just for an ACT! upgrade. Previewing the performance of a business critical software application, while taking extra time and expense, is a worthwhile exercise to ensure a smooth deployment of an upgrade.

## Experience...

continued from page 1

**Planning** – When's the last time you sat down and reviewed your business operations? It's difficult to find time to spend time on the business when you spend so much time in the business. Clients are saving time and money by using electronic forms delivery (email of invoices, purchase orders, statements, etc) and electronic payment methods (accounts payable checks and accounts receivable via ACH or credit cards) and paperless (how much paper does your accounting system generate?). Learn from other's experiences by saving time and money on many of your daily activities that traditionally haven't added value to the business, but with today's technology, are making a significant impact on your operations and customer and vendor interactions. Too often we talk to clients about the issues they are facing and they didn't know their system could easily resolve them or that other businesses had already adopted new time and money saving technology. Spend some time on planning by scheduling a Business Technology Review today. Its free but every client who has done one now has a plan to resolve their business issues.

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## In this issue

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The BTS Edge is presented in a generalized form-professional advice is available from the Business Technology Systems team, profiled throughout this newsletter.

If you have questions or comments on this newsletter, please contact Steve Krueger, Business Technology Systems, at 920.882.5030 or [steve@bts-wi.com](mailto:steve@bts-wi.com).

To subscribe or be removed from our newsletter list, please contact Sandy Burrows at [sandy@bts-wi.com](mailto:sandy@bts-wi.com).

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### Experience...

#### Sometimes it's better to learn from others.

**Page 1**

- Employee Spotlight - Sue Wolf

### The BusinessWorks Edge

**Page 2**

- BusinessWorks Version 8
- Service Packs

### The MAS 90 / 200 Edge

**Page 3**

- The Power of F9
- Sage MAS 90 and Microsoft Windows Vista Compatibility
- Support for MAS 90/200 Version 3.71 and Other Versions
- MAS 90 Upcoming Events

**Page 4**

### The Peachtree Edge

**Page 5**

- Introducing Peachtree 2008
- Peachtree Checks & Forms

### The ACT! by Sage Edge

**Page 7**

- ACT! 2008 is coming!