

The **BTS** **Edge**

FEBRUARY 2010



Business Technology
Systems, Inc.

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

Protecting Your Data is Protecting Your Business

Kyle Restoule, Vice President TechNosis, Inc.

Every year it seems businesses rely more and more on electronic data, especially when it comes to the lifeblood of your company; Financial, Manufacturing, and Customer information. Not too many years ago a "Data Loss" was nothing more than a minor annoyance, but in today's economy it can be devastating.

The causes of data loss can vary; Malicious Attack, Software Corruption and Hardware Failure are some of the more common reasons. However, it has been estimated that User Error is responsible for as much as 88% of data loss events, and users error is most difficult to prevent.

There are many technology solutions that can reduce the risk of Data Loss, but unfortunately there is no silver bullet that guarantees nothing will ever happen to your vital information. Therefore the most important tool for protecting your electronic data is your Backup System. Here are a few of questions we ask our clients when analyzing their backup systems:

Do you have a backup system? This is the first and most important question we ask. You may be surprised to learn that there are still many companies who have no backup system in place.

What media do you backup your data to? There are several different ways to backup data: USB Thumb Drives, CD's and DVD's, USB Hard Drives, Internet based backup systems and Tape Backups are the most common. Each system has their own pros and cons as well as costs associated with them. The old adage "You get what you pay for" is certainly true here and you would do well to ask yourself "What exactly am I relying on to protect my business?"

Do you backup your data daily? You can never predict when a data loss event will happen so it's crucial that your data is backed up every day.

How long do you keep your backups? Some backup systems rotate as soon as 2-days, meaning if you don't catch data loss right away your information will be gone forever. Other systems rotate weekly, bi-weekly and monthly. The most robust systems are ones that allow media to be removed from the rotation and stored indefinitely.

Is your backup media stored off site? While it's very convenient to have your backup media right next to your server, even a small disaster like a burst water pipe or small fire can wipe out your entire company. Having your backups stored off-site is the safest and best approach

An analysis of your backup system is a great way to get started. Ask yourself these questions and begin putting a plan together, or contact a qualified Information Technology Professional and have an analysis done for you. Although it may not seem like the most crucial task on your agenda today, don't put it on your "I'll get to that next week" list. Remember, losing electronic data can cost you thousands of dollars or even your business.

"TechNosis is located in Appleton and Kyle can be reached at 920-243-3518 or kyle@technosis.biz"

The Sage logo consists of the word "sage" in a bold, lowercase, sans-serif font.

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

Steve can be reached at steve@bts-wi.com or call 920.882.5030.

Sage BusinessWorks Version 2010

Version 2010 will include the following features (compatible with Windows 7 Professional and Ultimate 32 bit)

Usability

- Copy user security when creating a new company (handy when creating the year end / payroll copy)
- Date and time stamp to each backup file
- AR invoice number increased from 6 to 9 characters
- New void checks interface

Compliance

- Encrypt the Social Security Number and Credit Card numbers in the system
- Security to allow some to view and edit the full number or only show last four digits

Features

- You can store more than one credit card number per customer and select the credit card to use for transactions
- Post invoice and part returns to the original sales account or sales adjustments
- Ability to edit (add, change) sales orders that have been partially invoiced
- New reporting system and new reports in all modules

Sage also has recorded demo's for version 2010 listed below in Webcasts

Sage BusinessWorks Service Packs

Version 2009 – Service pack 10 is current and includes the 2010 tax table changes.

Version 2010 – Service pack 3 is current and includes the 2010 tax table changes.

Service packs are available on Sage Software Online (www.sagesoftwareonline.com) to download and update BusinessWorks. These service packs incorporates all prior service packs and includes descriptions of the changes made in each release.

Sage BusinessWorks Webcasts

Recorded Demo's that can be viewed at anytime:

Sage BusinessWorks 2010 – New Reports, New Look, New Results! (NEW)

Sage BusinessWorks – Preparing for Payroll and Year End Processing (NEW)

More detailed information and registration can be found at www.sagewebcast.com

Found at www.sagesoftwareonline.com and part of your annual maintenance fees, the following free tutorials are available from Sage and available for viewing at any time.

NEW (for version 2010)

Comprehensive Reports – Introduction and In Depth sessions

Quick Reports – Introduction and In Depth sessions

User Interface

Did You Know?

BusinessWorks uses F9 to create custom financial statements in Excel, Starship for shipping integration with UPS and Fed Ex and uses a third party application to help with hand held physical counts. Sage KnowledgeSync can give you 'alerts' when certain business conditions exist that you want to be aware of. Need BusinessWorks to do something it doesn't do or a report you've been looking for? Let us know as many simple solutions exist for BusinessWorks and if they don't, we can create them.



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

You can reach her at sue@bts-wi.com or call 920.882.5030.



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Sage MAS90 and 200 4.4 is Now Shipping!

Sage MAS 90 and 200 version 4.4 is shipping! From Core Financials to Manufacturing and Distribution, there is something for everyone in 4.4. Users will be able to work even more efficiently the way they want to, with additional features and enhancements focused on workflow and business process -- especially in the Inventory Management, Purchase Order, Bill of Materials, and Bar Code areas of their system.

Some of the new features in version 4.4 include the following:

- New Custom Office enhancements provide customizations that work with or without user interaction (clicking a button)
- Enable the use of Expanded Customer and Item Numbers by company, so that users can embed additional information such as city name or telephone number to more accurately identify their customers, and improve productivity with smart part numbers such as UPC, special handling or recycling codes, and more
- Turn data into actionable knowledge more effectively with additional Business Insights Explorer views for Inventory, Purchase Order, and Bill of Materials
- Increase accuracy and streamline workflows using features in Inventory Management, such as the ability to display the system's expected quantities during Inventory Counts so only the variances require updating
- Easier access to information using the new Desktop, with links to "Tell Us What You Think", training, support, the MAS Community Site, Customer eNewsletter, and more.
- Enhanced usability and workflow features and functionality from the Business Framework throughout most of the modules, such as Dual Grid Entry, Personalization, Right-Click Menus, Memo Manager, Hyperlinks, Custom Office, User and Date Time Stamps, Reports and Forms, Setup Wizards, Flexible Security, Batch Manager, and much more

You also will have access to the FREE Anytime Learning course on SageU, "[What's New in Version 4.4](#)" to learn about all the new features in this exciting new release.

Also new in version 4.4, the eBusiness Web Services module will provide an interface to allow third party application integration over the network and the Internet.

[Crystal Reports Training for Sage MAS 90 and 200](#)

When: March 11, 2010
8:00 a.m. - 4:30 p.m.
Where: 2323 E Capitol Dr, Appleton

For more information visit our website at www.bts-wi.com and click on Events Calendar.

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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.

Windows 7 Compatibility with Sage MAS90 and 200

At this time, the Sage MAS 90 and 200 version 4.4 and 4.3 Windows 7 compatibility testing is still underway. Sage expects information on Windows 7 compatibility to be published by the end of March 2010. As always, please consult the most recent version of the Supported Platform Matrix for details. According to the Supported Platform Matrix, Windows 7 is not supported for Sage MAS90 version 4.2 and lower.

New Fond du Lac County Sales Tax

On April 1, 2010, a 0.5% county sales and use tax becomes effective in Fond du Lac County. Therefore, you will need to manually add this new county sales tax to your MAS90 or MAS200 system. To do this, first set up a new Fond du Lac County sales tax code by accessing Library Master>Setup>Sales Tax Code Maintenance and then entering 0.5 as the sales tax rate. Second, create a new sales tax schedule to include the Fond du Lac sales tax code by accessing Library Master>Setup>Sales Tax Schedule Maintenance. Third, add the new sales tax schedule to all customers to which the new county sales tax applies.

Upcoming Events for MAS 90 and 200

Paperless Payroll with the Sage Payroll PayCard:

- Details:** Offer your employees a cost-effective and secure way to receive their paycheck electronically with the Sage Payroll PayCard. Find out how easy it is to enroll and start offering your employees a new payroll benefit immediately!
- Date:** February 18, 2010 and February 25, 2010 1:00pm – 2:00pm

Reduce your EDI Total Cost of Ownership:

- Details:** See how other companies have reduced their EDI total cost of ownership up to 60%. EDI Transaction Manager for Sage MAS 90 and 200 and Sage MAS 500, powered by TrueCommerce, offers a fast, efficient, and secure way to electronically process your purchase orders and invoices.
- Date:** March 4, 2010 12:00pm – 1:00pm

Stay Ahead: Sage MAS90 and 200 Productivity Tools Bundle:

- Details:** Facilitate seamless integration between Sage MAS 90 or 200 data and other business applications, add indispensable functionality, and monitor and respond to critical business conditions. This session will demonstrate the power of time-saving modules: Visual Integrator, Custom Office, and KnowledgeSync.
- Date:** March 4, 2010 1:00pm – 2:00pm

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Did You Know?

Recalculating Aging for Customer Invoices:

Recalculating aging information for customer invoices can be done automatically before credit limit checking is performed, or based on a specified number of days compared to the last time the aging information was updated. You can also choose to automatically recalculate aging by selecting Always or By Number of Days at the Automatically Recalculate Aging field in the Accounts Receivable Options window.

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

You can reach Joe at joe@bts-wi.com or call 920.882.5030.



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HOW TO: Create Mail-Merge Sales Letters From Within Peachtree

Do you have some items on sale and need to create some excitement? Want to let your clients know about a new service you're offering? Send them a letter with all the details – and let Peachtree make it easy.

From the **Reports & Forms** menu, select **Forms**, then **Customer Labels and Letters**. In this scenario, you may want to start with our standard letter, Sales Special – it's at the bottom of the list on the left (the icon indicates Peachtree standard letters).



Highlight the Sales Special letter and click **Edit Letter Template**. On the Edit Letter Template window, you can set filter criteria and other options to tell Peachtree which customers this letter should go to and how you want them to look or print.

Click Edit on this window to open the template in Microsoft Word. Use the special menu bar to add Peachtree-specific fields in the letter – the fields are placeholders for data that will be pulled from Peachtree when the letters are created.



Change the text, add fields or images (like your logo), then click **Save As** and give your letter a new name. To create a letter for multiple customers at once, go back to the **Select a Report or Form** window, highlight your letter (make sure the **Forms** tab is selected), and click **Send Letter**. Peachtree will use the filter options you set earlier – or you can change them on the fly. Click the **Word** button to create the letters for printing or click **Email** to generate the letter and send it through your email program.

To create a letter for one customer, open that customer in the **Maintain Customer** window and click the **Letters** button on the toolbar. You can select any customer letter from the list and use the **Word** or **Email** buttons to create the letter.

Bonus Tip:

If you're planning to create, print and mail MANY letters, you may want to sort them by zip code. On the **Edit Letter Template** window, set the **Print Order** option to Zip Code and they'll be sorted for you!

[Crystal Reports Training for Peachtree by Sage](#)

When: March 10, 2010
8:00 a.m. - 4:30 p.m.
Where: 2323 E Capitol Dr, Appleton

For more information visit our website at www.bts-wi.com and click on Events Calendar.



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Upcoming Events...continued from page 4

Streamline Critical Business Processes with Sage MAS90 and 200 Extended Enterprise Suite!

Details: Attend this live, one-hour Webcast to see how Sage MAS 90 and 200 Extended Enterprise Suite can provide a complete system that delivers end-to-end capabilities and averts common business problems throughout your entire enterprise.

Date: March 9, 2010 1:00pm - 2:00pm

Recorded Demos:

- Business Alerts Professional for Sage MAS 90 and 200
- eBusiness Manager for Sage MAS 90 and 200
- Sage MAS 200: Moving at the Speed of Your Business
- Sage MAS 90 and 200 Business Insights Explorer
- Sage MAS 90 and 200 Credit Card Processing
- Sage MAS 90 and 200 Custom Office
- Sage MAS 90 and 200 Extended Enterprise Suite: Unify Every Element of Your Business
- Sage MAS 90 and 200 Material Requirements Planning
- Sage MAS 90 and 200 Return Merchandise Authorization
- Sage MAS 90 Paperless Office
- What's New in Sage MAS 90 and 200 Version 4.2?
- What's New in Sage MAS 90 and 200 Version 4.3?

Register online at www.sagesoftware.com/seminars

Sage MAS 90 and 200 Promotions

- Off Plan customers can upgrade to Sage MAS 90 or 200 v4.4 or migrate to Extended Enterprise Suite and save 20% on lapsed Plan fees OR add-on modules
- On and Off Plan customers with a v3.71 Value Plan who migrate from Sage MAS 90 and 200 v3.71 to Sage MAS 90 and 200 v4.4 or Extended Enterprise Suite will receive a \$1,000 Plan reinstatement credit.
- On and Off Plan customers with an existing CRM product can trade in their eligible stand-alone CRM solution and receive 25% off migration to Extended Enterprise Suite
- On Plan customers save \$937 on the Productivity Tools Bundle: Custom Office, Visual Integrator and KnowledgeSync Enterprise. In addition, they receive the *Sage MAS 90, 200 and EES Fundamentals of Custom Office UDFs* Anytime Learning course for free!
- On Plan customers can enroll in Sage Payment Solutions and get a free Credit Card Processing module (\$1,100 value)
- On Plan customers save \$475 when purchasing Payroll and Direct Deposit together

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Choosing a CRM Solution

With Sage, you have the freedom to choose a CRM software solution that best fits your unique business requirements, you have flexibility in deployment methods (on-site or on-demand via the Web), and you have options to move easily between Sage CRM Solutions as and when your business evolves.

ACT! By Sage (Integrates with Peachtree, BusinessWorks and MAS 90/200)

ACT! is the #1 selling Contact and Customer Manager with 2.8 million users. ACT! helps you organize the details of your customer relationships in one place for a complete view of the people you do business with. Improve marketing effectiveness to attract new customers and get more from existing relationships. And, take action on sales leads with total visibility into the pipeline. Because ACT! is easy to learn and use, you can be more productive right away. ACT! is more powerful than e-mail or spreadsheet solutions, but easier to use—and less costly—than a CRM solution.

SageCRM.com

SageCRM.com is a comprehensive on-demand CRM solution for businesses seeking a low-cost, low-risk option. A fixed monthly price delivers everything: the CRM application, support, training, backups and updates. SageCRM.com also offers the flexibility to migrate to an on-site CRM software system as your business needs evolve.

SageCRM (Integrates with MAS 90/200 and included with Extended Enterprise Suite)

SageCRM is an easy-to-use, fast-to-deploy on-site CRM software solution with out-of-the-box but configurable business process automation. It provides enterprise-wide access to vital customer information anytime, anywhere so you can better manage your business with an integrated approach to field sales, inside sales, customer care, and marketing.

Sage SalesLogix (Integrates with MAS 90/200)

Award-winning Sage SalesLogix is a robust, highly-customizable CRM software solution that provides a complete view of customer interactions across sales, marketing, customer service and support, so your teams can collaborate and respond promptly and knowledgeably to customer inquiries and opportunities. With flexible access options, powerful process automation capabilities, and a highly customizable platform, Sage SalesLogix is a comprehensive solution that will help you achieve stronger sales and a more successful business, now and into the future.



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Appleton, WI 54911



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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.

To subscribe or be removed from our newsletter list, please contact Sandy Burrows at sandy@bts-wi.com.

Visit our website at www.bts-wi.com

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