

The **BTS** **Edge**

FEBRUARY 2008



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 Sage BusinessWorks and Sage MAS 90 consulting.

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

How to Select a New Accounting System

Now 7-8 years removed from Y2K, businesses are again looking to upgrade or replace their existing systems. Certain events like Y2K, not to mention the natural five-to-seven-year lifecycle of any system, typically call for a new system search. But businesses are driven by growth and acquisition, and the need for better, faster access to information may well drive your decision to upgrade your software.

Where do you begin?

First and most importantly is to create a steering/selection committee that is represented by individuals throughout the organization. This committee will be the resource to move the company through a successful selection by representing their functional area, defining the requirements, evaluating software against those requirements and be an advocate for the software chosen. Much higher success (based on completion of selection and implementation within a timeline) is achieved with a committee (six to 10 people) versus two to three.

Generally, these are the steps you should take when looking at replacing your existing systems:

1. **Document your needs** — Most companies will start searching for software when they really don't know what they're looking for. Thoroughly documenting your current processes and procedures will allow you to identify what really keeps your business running, identify opportunities for improvement and most importantly, keep you from forgetting critical needs. Gather this information by functional area (invoicing, job costing, payroll for example).
2. **Identify your key requirements** — The ability to print checks is not a key requirement, as all software can, but vendor price-list imports, seasonalized inventory levels, customer discounts based on sales volume and return material authorization are. By functional area, document the key items you need your system to perform. Don't forget reporting, as most businesses have very specific information they need in management reports to make daily business decisions.

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Employee Spotlight — Martin Cramer

Martin Cramer joined Business Technology Systems in 2006 as part of the acquisition of Virchow Krause Technology Solutions. His current responsibilities with BTS are in developing Crystal Reports for a variety of applications, integrating data into Sage MAS 90, Sage MAS 200 and designing and creating custom Microsoft Access applications to support our client's information management needs.



Martin was born and raised in Ohio, graduated from Ohio University in 1974, taught high school math for four years, became involved with computer programming since then and moved to Wisconsin in 1990. Martin lives with his wife Susan and son Steven in Oshkosh where they enjoy many sports including skiing in the winter and biking all other times of the year.

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Sage BusinessWorks 8.0 Enhancement Summary

Version 8 has shipped and you should have received your copy back in November. A document including screen shots of these feature changes is available for your review. Contact Steve Krueger at steve@bts-wi.com or 920-882-5030 for more information and installation assistance.

Below are the major system changes in 8.0:

- Enhanced Customer Inquiry Balance Drill Down
- Enhanced Vendor Inquiry Unpaid Balance Drill Down
- AP Invoices Paid by Credit Card
- Post adjustments to Credit Card Vendor Invoices
- Enter Payment Option
- Sales Tax IDs Assigned to Ship to Addresses
- Cash Account Register Report
- Reprint Closed Invoices and Sales Orders
- Vista Capable

Webcasts

Sage BusinessWorks conducts various webcasts for your review as follows:

- Making the move to Sage MAS 90 BusinessWorks Edition – March 13 (12 noon)
- Preparing your Business for Future Technologies – February 28 (12 noon)

Recorded Demo's that can be viewed at anytime:

- Sage Payroll Services for Sage BusinessWorks
- Streamline your business with the Sage BusinessWorks Order Entry and Inventory Control Modules
- Streamline your sales process and improve customer and vendor relationships by integrating ACT! by Sage with Sage BusinessWorks

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

Sage BusinessWorks Service Packs

Version 7.0 – Service Pack 10 is available. Service Pack 9 included 2007 year end updates and Service Pack 10 includes the 2008 tax tables.

Version 8.0 – Service Pack 1 is available (2008 Tax Tables)

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.

Promotions

Promotions ending on March 31, 2008 for existing customers:

Buy Crystal Reports or F9 and save 10%. Crystal Report's Version 10 for five users is \$595 pre discount and F9 is \$495 for single user and \$995 for multi-user pre discount.

Buy Starship and save 20%. Starship integrates BusinessWorks to UPS, Fed Ex, etc for shipping automation.

Did You Know?

BusinessWorks integrates with Act! for Customer Relationship Management (CRM) and with Starship for shipping automation with UPS, Fed Ex and more? BusinessWorks also uses Crystal Reports to create advanced reports that the custom reports function built into BusinessWorks can't handle. For custom financial statements, BusinessWorks integrates with F9 which is an Excel add-in for custom financial statement layouts in Excel with F9 integration to BusinessWorks financial data. See the promotions section for special pricing on Starship, Crystal Reports and F9.

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

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What Can Business Alerts Do For You?

Is your business looking for a more efficient way to monitor the pulse of your company? Business Alerts Professional is an impressive module designed to keep you and your personnel "in the know". This innovative product utilizes your e-mail system to notify you whenever something significant happens in your Sage MAS 90 or Sage MAS 200 system. The notification that you choose to generate can be selected from a series of sample alerts which can quickly be tailored to suit your specific needs. Or you may choose to create custom alerts based on your company's unique criteria.

In addition to keeping your staff better informed, Business Alerts can also send e-mail notifications to your customers and vendors. This feature is especially useful for sending past due billing notices, shipping notices, low inventory alerts, and more.

When you acquire the notification capabilities of Business Alerts, your company can lower business cycle times, dramatically improve employee communication, and allow your customers to enjoy personalized attention with every transaction. Plus, with Business Alerts, your company's financial information not only remains within your reach, but your accounting database actively contributes to the efficiency of your business and to the satisfaction of your customers.

If you feel that Business Alerts may help your business to better monitor important or time-sensitive events, please contact your systems consultant for more information.

Special Promotions

- 20% off any Accounts Payable Extended Solution
- 50% off most Paperless Office Extended Solutions
- Sage Sales Tax, Powered by AvaTax – 20% savings through Feb. 29, or 15% savings through March 31
- Upgrade to Sage MAS 200 and get a \$400 user credit (regularly \$300 per user)
- 20% savings on Sage MAS 90 and 200 additional user licenses through Feb. 29, or 10% savings through March 31

Are You Keeping Your Sage MAS 90 System Current?

Have you upgraded to version 4.2 of Sage MAS 90 or MAS 200 yet? If not, then you may be missing out on all the new features and functionality it can offer. New in version 4.2 is the Business Insights Explorer module, which is included as an added benefit to your MAS 90 system. The Business Insights Explorer module is an easy-to-use inquiry and analysis tool that improves your decision-making by helping you identify opportunities, inefficiencies, challenges, successes, and more. You can even drill down and edit information at the transaction level directly from this module.

Sage MAS 90 and MAS 200 version 4.2 also has new inquiry tools and reporting capabilities to help make analysis and decision-making more straightforward. Enhancements throughout the software make data entry and navigation more natural and intuitive. If you are not on the latest version of Sage MAS 90 or MAS 200, now is the time to upgrade to take advantage of all the new features it has to offer!

Budgeting in Sage MAS 90

Did you know that the Sage MAS 90 and MAS 200 General Ledger module has the capability of tracking multiple budgets per year per general ledger account and contains different methods for entering and modifying budgets? You can use Budget Maintenance to view and compare any combination of budgets and actual activity from any fiscal year, and to maintain up to three budgets per year on an account-by-account basis. While viewing these selected budgets and activity, you can manually edit budget amounts or apply various change budget calculations that affect all budget amounts in a budget column. In addition, you can use the Calculate Budgets Wizard to revise a specific budget for the selected general ledger account based on another source budget or activity.

Budget Revision Entry allows you to enter changes to the selected budget for any number of accounts. The Budget Revision Entry window can be initially populated with revision entries that are created automatically based on options selected in the Select Accounts to Revise window. After the initial calculation, you can then manually change any budget amount and can also apply various change budget calculations to the budget amount of an account and periods. With Budget Revision

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

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Budgeting in Sage MAS 90...Continued from page 3

Entry, you are allowed to print a Budget Revision Register to verify the accuracy of the information entered before updating the budgets.

The Automatic Budget Copy feature allows you to quickly determine figures for one budget by copying and changing information from another source budget. For example, the source budget figures can be copied, increased or decreased by either an amount or a percentage, or replaced with an entered value to the "copy to" budget. You can also copy budget figures for selected fiscal year periods or a selected range of general ledger accounts. Unlike Budget Revision Entry, Automatic Budget Copy updates budgets immediately and does not produce an audit trail for budget changes.

Upcoming Events

FRx Desktop Hands-On Training Class:

Business Technology Systems, Inc. will teach you how to create exciting, presentation-quality financial reports using the powerful features of FRx Desktop.

Date: Tuesday, March 18, 2008

Time: 8:00am – 4:30pm

Place: Liberty Hall, Kimberly, WI

I Did It My Way: Customizing Sage MAS 90 and MAS 200 to Fit Your Business:

Custom Office is the most powerful personalization tool that Sage MAS 90 and MAS 200 have to offer to increase the productivity of your day-to-day tasks. Join us for this introductory session and learn how just a few minutes of your time can save you hours of data entry work, improve data security and accuracy, and improve information tracking.

Date: March 12, 2008

Time: 3:00pm - 4:00pm

Productivity and Efficiency Tools: An Introduction to Sage Extended Solutions:

Did you know that Sage offers features such as inter-company processing, direct deposit and positive pay? Join us for the one hour session to see how the most popular Extended Solutions have helped thousands of customers improve their business processes.

Date: March 5, 2008

Time: 3:00pm - 4:00pm

Sage MAS 90 and MAS 200 Executive Overview - Broaden your horizons!:

In today's competitive marketplace, it's crucial to have a flexible, scalable, and powerful accounting and ERP solution to make sound business decisions. Executives have neither the time nor the resources to pore over detailed reports to find their critical business information. Join us for this one hour presentation to see how you can leverage Sage MAS 90 and MAS 200 to run your business more efficiently and profitably.

Date: March 5, 2008

Time: 10:30am – 11:30am

The Convenience of Credit Card Processing for Sage MAS 90 and 200:

Attend this Webcast to learn more about the benefits of implementing Sage's Credit Card Processing (CCP) module powered by Sage Payment Services.

Date: February 28, 2008

Time: 12:00pm - 1:00pm

Register online at www.sagesoftware.com/seminars

Did You Know?

Preferences in User Maintenance:

Did you know that you can modify various preferences in Sage MAS 90 or MAS 200 on a user login basis? Under Library Master>Main>User Maintenance, you can use an implied decimal point when entering numeric values, enter the lookup limit of records to load when performing lookups, display amounts that reduce the balance in red text, enter the number of minutes of inactivity after which you want the user to be logged off automatically, and prompt the user for a company code when logging on to the system.

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

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Five (5) Peachtree Features to Help You Become More Efficient

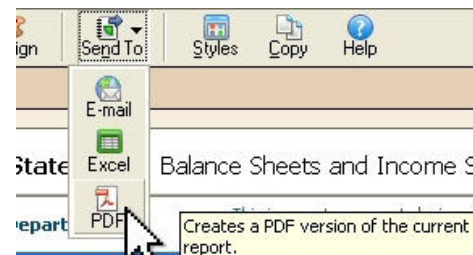
Here are a few features within Peachtree by Sage that you may or may not be aware can help you become more efficient in your day-to-day use of Peachtree.

- Use Memorized or Recurring Transactions for sales, purchases or General Journal entries that are repeated on a regular basis. For example, you could create a memorized Quote for common bundles of goods and services. Or, create a recurring Payment for that monthly rent check that is due each month. And remember.... You can begin creating a Sales Order or Invoice from the Quote area "on the fly". This permits you to use the memorized Quotes for Sales Orders or Invoices too!
- When performing data entry tasks, every keystroke matters. In Peachtree, you can customize the layout of many Task screens to hide those fields that aren't used or changed when entering transactions. Hiding the Customer PO and Sales Rep fields on the Invoice screen, for example, will save a couple of hits on the Tab key. This may not seem like much until you consider sitting down to enter 100 or so invoices before leaving for the day.
- Keep track of things with Action Items. Here you can set up alerts to trigger events and/or emails that tell you when inventory is low, invoices are due, or even when customer credit cards are getting ready to expire. The Event Log shows you activities based on the options you choose, and the To Do list can keep a record of your tasks that need to happen outside of Peachtree.
- Organize your business with Attachments. Starting with Release 2008, you can attach files to maintenance records (Customers, Vendors, Employees, Budgets, Items and Jobs) and tasks (Sales Invoices, Receipts, Purchases, Payments, and Payroll Entry). By storing your important documents and files with your Peachtree records, you can reduce time searching your computer or paper files for information. **But remember... the saved files are "read only" copies of the file at the time you attach them to your record. Changes made to the original file will not be seen when viewing these attachments in Peachtree.**
- While it may not save time on a day-in, day-out basis, having a backup of your important company files when you need it can be a tremendous boost. You can set the Backup function within Peachtree to remind you to create a backup of your files on a daily basis (or whatever time frame works best for you). Or, for that extra layer of comfort knowing that your company files are safe and secure at an off-site location, consider subscribing to the **Online Backup service** and have one less thing to worry about. Contact your Peachtree Certified Consultant for more information!

You can find more information on these features by searching for the following Peachtree Help topics: Memorized Transaction, Create a Recurring Entry, Design a Task Window Template, Action Items, Alerts, Attachments, Back Up Company Data, and Online Backup.

Peachtree - Tip of the Month

When previewing or designing a report or financial statement, you can click the **PDF** button on the toolbar to instantly create a PDF file. You can also accomplish this from the Reports & Forms menu by clicking the **Send To** button, and then click the **PDF** button. By default, the PDF will be saved in your Peachtree company directory, using the name of the original report/financial statement, with the day's date appended



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How to Select a New Accounting System

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- 3. Research possible solutions** — While Sage (Peachtree, ACCPAC, MAS 90/200 and MAS 500), Microsoft Business Solutions (Dynamics GP, NV and AX) and Intuit (QuickBooks) dominate the general software marketplace, many other software packages that work better in construction, manufacturing and point of sale for example may need to be researched. Two sources that have proven valuable include Carlton Collins www.accountingsoftwareadvisor.com and Sheldon Needle's www.ctsguides.com. You will find their versions of how to select software as well as recommendations for software packages to handle general needs and for industry-specific needs as well. Both Carlton and Sheldon have been longstanding experts in this area. Their web sites contain data to help you find the top vendors for your needs very quickly.
- 4. Request for Information** — This step involves sending vendors (six to eight) your key requirements and asking them to reply with their ability to meet your needs and the approximate cost for software and implementation for the user count you provide them. Once all replies are received, you will be able to easily narrow the field to the two or three top candidates.
- 5. Demo Script** — Now that you have your top two or three options based on the requirements, prepare a demo script which outlines your key requirements within a demo focused on your functional areas (invoicing/payroll/etc). You will dictate the items the vendor is to cover during the demo in a flow that most resembles your business (for example, enter the customer order, create the purchase order, receive goods, ship to customer, complete invoice, etc.)
- 6. Conduct the demo** — Using your demo script, schedule vendors for half-day or full-day demos so they can prove to you that they can deliver on what they have promised, allowing an apples-to-apples comparison of possible solutions.
- 7. Finalize Selection** — After the demos, you will usually find one system that clearly meets your needs over the others. Finalize the cost and timeline, including software, implementation, training, hardware and annual ongoing costs to fully understand your commitment of resources (cost and people).
- 8. Implement** — Selecting the right software is one thing, implementing it is another. Software is only a tool that takes proper training, resources (people) and procedures to be utilized for its intended needs. A proper implementation plan will continue you down the road toward success.

While companies with proper resources can perform these searches on their own following these steps, many choose to hire an outside facilitator with the experience, tools and templates to set a realistic timeline and provide expertise about vendors. Sometimes, solutions look good on paper and in a demonstration, but in practice, some companies offer much more in customer support and implementation after the sale is made.

Business Technology Systems has the experience to help you select your next system. Please contact Steve Krueger for an initial consultation at 920-882-5030, steve@bts-wi.com or visit us online at www.bts-wi.com to review system selection projects we have completed.

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

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Get your ACT! Together Before You Upgrade.

My last two articles have touted the 2008 version of ACT!, which was released last August. However, I've also tried to caution users to proceed carefully when considering a move from an older version to ACT! 2008. As I prepared for this article I noticed a lot of postings from existing users regarding their frustrations when attempting to upgrade to ACT! 2008. One of the unfortunate truths of the software industry is that upgrades, no matter which software you're talking about, can be painful. The pain of an upgrade can be mitigated with a well thought out plan. With that in mind, here are a few common-sense suggestions for your plan as you may consider moving to ACT! 2008.

UTILIZE A TEST SYSTEM – If possible, nothing is more valuable at flushing out potential problems than “live” testing of software. Install a separate instance of ACT! 2008. Make sure to maintain all the functionality of the old system. Convert a copy of your data. Don't rely on the preloaded test data that comes with the system for testing. Finally, create a demo script of all your existing processes. Make sure to include all your processes and reporting tools you use in ACT! in the demo script. Be sure to get input from all users if you are in a multi-user environment. Execute the demo script in the test system to acknowledge that each item can be successfully performed. Ideally, sign-off would be obtained from each user in a multi-user environment.

KNOW YOUR OPERATING SYSTEMS – This is especially critical if you have a multi-user environment. If you have moved to the Microsoft Vista operating system you will need to download a patch to make ACT! 2008 interact correctly with other integrated software such as Outlook. Create a list of all the machines, including the server, that ACT! 2008 will be installed on and note the operating systems. Perform due diligence to ensure that the operating systems are supported for use with ACT! 2008 and that the appropriate patches are installed.

KNOW WHAT SOFTWARE IS ALREADY LOADED - On your PC inventory from step 2 it would be a good idea to note what other software programs are loaded. Researching potential conflicts will save headaches in the long run. I read a recent post that a user upgraded to ACT! 2007 because he got a deal. He didn't know that ACT! 2007 wasn't compatible with Microsoft Office 2007. Other issues, such as conflicts with DLL files, are quite common.

KNOW YOUR HARDWARE – As software evolves it usually takes more “horsepower” to run. Be sure your PC's are well within the specifications for RAM and processor speed before attempting an upgrade. Adhering to the minimum specs will probably translate to minimum user satisfaction.

KNOW YOUR ENVIRONMENT - If you work remotely using a VPN, Citrix, or Terminal Services, make sure this is accounted for in your testing plan. Also if you synchronize data with a handheld device such as Palm Pilot, Smart Phone, or Blackberry, be sure to thoroughly test these devices before going live.

Just as I noted with the suggestions in my August article, this exercise, while requiring extra time and expense, will be worthwhile to ensure a relatively smooth deployment of the ACT! 2008 software.

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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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