The BTS Edge

MAY 2009

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.

Just Accounting Software? Not Anymore...

When someone asks me what our company does, the terms they are most familiar with is accounting software or product names such as Peachtree and MAS 90. I generally tell them that we provide accounting software, system selection and custom development. Not a great elevator pitch but it is difficult to describe what it is that we do. While we work in various industries including manufacturing, distribution, job/project costing, service, etc., some may call the products we work with ERP (Enterprise Resource Planning) software instead of accounting software or manufacturing software for example.

I really don't know how ERP describes what these products do for your business. I tend to call them Business Management Software Systems as they really help you manage your business regardless of the industry you are in. CRM for managing customers and prospects, accounting to manage the finances, inventory and order entry to manage the products you sell, manufacturing capability for those that manufacture and project management for those that have jobs/projects they manage.

Why discuss this? These "systems" if you will, support all aspects of our businesses, not just accounting. For most of us, these "systems" came about in the mid to late 80's when the personal computer ran affordable software applications to help us manage our businesses. Their primary purpose was accounting but has evolved in the last 20 years to Business Management Software Systems. We rely on them more than ever to process transactions, provide decision making information and to make us efficient, productive and profitable.

Do you treat your systems as overhead, a necessary evil or an important partner in your success? Much like your software, our goal is to be an important partner in your success whether that's finding the right software fit for your business or teaching you how to use these software tools.

The BTS Edge

If you would like to receive our quarterly newsletter by email, sign up at: www.bts-wi.com and choose "Newsletter" from the menu.

BTS Update

Sue Wolf attended Sage Insights reseller conference May 11-14 and will be bringing the latest information direct from Sage to share with you at our June 18th Mid-Year Users' Group.

We are working closer with our CRM partner to provide our clients with more CRM solutions (Act!, Sage CRM and Sales Logix) and other services you can learn about at our Mid Year Users' Group.

Steve attended the Spring ITA conference in Atlanta April 26-27 and was on the planning committee for the consulting and reselling track.

Steve represented AITP (Steve is the Vice President of the NEW Chapter) at the Camera Corner Connecting Point Tech Expo on May 12th.

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Are You?

While most of you have been using Sage BusinessWorks for some time, every time we meet with clients the "are you?" questions come up. So here they are. Are you...

- Using the Enhanced Tax Reporting and efiling in Payroll?
- Sending invoices and statements, electronically to your customers?
- Using price levels and/or customer specific pricing for inventory?
- Using the flash reports in all modules?
- Modifying forms to meet your needs?
- Do you know how to create a custom report?
- Using F9 for custom financial reports?

If you answered yes, your getting close to using your software to its fullest capability. If you answered no to any of the questions, either you don't need that capability or you need to contact us to find out how to utilize this feature. More "are you?" questions next quarter.

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Webcasts

Recorded Demo's that can be viewed at anytime:

A guided tour of the new features in Sage BusinessWorks 2009
Getting Started with Job Cost
Getting Started with Payroll
Getting Started with Inventory Control and Order Entry
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 KnowledgeSync

KnowledgeSync is business alerts functionality in BusinessWorks. The software is free but you do need to pay a $99 maintenance fee after the free 30 day trial to get updates to the alerts. 35 pre-configured email alerts are provided related to Accounts Payable, Accounts Receivable, Customers, Employees, Inventory items, quotes from Order Entry and Vendors. Visit www.bts-wi.com for the complete list of pre-configured alerts and a link to the free download.

Tutorials

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.

Accounts Payable Credit and Debit Memo's
Accounts Receivable Credit and Debit Memo's
Accounts Receivable Customer Refunds
Adding a New User
Customizing Forms
Custom Reports
Backup and Restore
Download and Install Service Packs
Releasing Stranded Users and Tasks
Vendor Refunds
Physical Inventory
Setting up Payroll Deductions

Did You Know?

You can submit product enhancement requests? Sage BusinessWorks reviews suggested features and changes in the system for each new release paying special attention to the most requested changes. Would you like something changed or feature or function added to BusinessWorks? Go to www.sagesoftwareonline.com and submit your Product Enhancement Request under the Feedback section.

Sage BusinessWorks Service Packs

Version 2009 – Service pack 5 is current. Service pack 5 includes the April Stimulus tax table changes.
Version 8.0 – Service Pack 8 is available. Service pack 8 included the April Stimulus 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.

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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.

Promotions Available

- Enroll in Sage Payment Solutions and save $1,100 on the Sage MAS 90 and 200 Cash Flow Bundle
- Add EES CRM users to the purchase of Sage MAS 90 or 200 Extended Enterprise Suite for $795 each!
- Optimize Your Sage MAS 90 and 200 Systems with Extended Solutions!
- 0% Financing on Migrations to Sage MAS 90 or 200 Extended Enterprise Suite
- Take Advantage of Sage MAS 90 and 200 v4.3 with the new Get Back on Track plan

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Uploading Wisconsin Unemployment Data is Easier Than Ever!

Are you required to upload your Wisconsin unemployment data to the Wisconsin Department of Workforce Development's website on a quarterly basis? Did you know that, starting with the first quarter of 2009, the DWD has tightened its requirements on the file format and what file formats are acceptable to upload?

Business Technology Systems, Inc. can help take the headache out of this tedious process. BTS has created a program that will export your employees' quarterly unemployment wages directly from MAS 90 or MAS 200 and save the data in a Plain Text (.TXT) format that is acceptable by the Wisconsin Department of Workforce Development (Wisconsin UI Format-Alternative 1).

So, if you want an easy way to quickly export and upload your unemployment data, please contact us today!

How to Set a Default for a Field in Customizer

Do you find yourself selecting the same options over and over in certain screens in MAS 90? Wouldn't it be nice if the fields would automatically default to your personal or company-specific settings?

If you have the MAS90 Custom Office module, you have the capability to do just that! With Custom Office, you can set defaults for fields within MAS90 to the settings you or your company desires. You can also move or suppress fields, make a field mandatory, change tab stops, add new buttons to launch other MAS90 tasks or other external programs, and so much more!!
For example, let's say that you always print the Payroll Employee Listing sorted by employee name instead of by employee number. If you want to have it default that way each time you access the screen, you would do the following:

1. Go to Custom Office>>Main>>Customizer Selection.
2. To select a panel in the Customizer Selection window, double-click the module, task and panel.
   Select Payroll>>Employee Listing>>PRWRAA [Employee Listing].
3. To create a new customized panel in the Customizer Panel Selection window, select the user and company the customization is for (or check the "All" checkbox for all users and/or all companies).
   To customize the screen for all users and your company code, select the "All" checkbox in the User field and select your company code in the Company field and press the OK button.
4. In the "Customize: PRWRAA.LIB-PRWRAA [Employee Listing]" window, double-click on the Sort Options data field to modify it.
   In the Drop Box Definition window, change the Default Value field on the Main tab from Employee Number to Employee Name and press the OK button.
5. Click the Close button in the upper right hand corner of the window to save the panel customizations and exit the Customizer window.
6. Test the Employee Listing to see that the Sort Options field defaults to Employee Name instead of Employee Number.

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Upcoming Events

Crystal Reports Class:

Details: This one-day, hands-on class covers the basics of creating and customizing reports and forms using Crystal Reports. You will learn how to design presentation quality reports with ease.

Date: August 2009 (Day TBD) 8:00am – 4:30pm

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: May 14, 21, and 28, 2009 1:00pm – 2:00pm

Date: June 11 and 25, 2009 1:00pm – 2:00pm

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: May 26, 2009 10:30am-11:30am

Date: June 11, 2009 or June 30, 2009 12:00pm-1:00pm

Recorded Demos:

Business Alerts Professional 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 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 and 200 Custom Office
Sage MAs 90 Paperless Office
Sage MAS 90 and 200 Credit Card Processing
What's New in Sage MAS 90 and 200 Version 4.3?
E-Business Manager for Sage MAS 90 and 200

Register online at www.sagesoftware.com/seminars

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.

Did You Know?

Free Access to Sage Software Online:

Did you know that users on a current Sage maintenance plan are entitled to free access to Sage Software Online? With Sage Software Online, you have access to Sage's knowledgebase and software support information, product service packs and program fixes, tax table updates, new release notices, and much more. To register for this free service, please access www.sagesoftwareonline.com or contact BTS for more information.

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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.

Peachtree Checks & Forms

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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Upgrade Your Decision-Making

Better Work flow, Communications, and enhanced Analytics - Peachtree by Sage 2010 Does More than Crunch Numbers

Peachtree by Sage 2010 offers key improvements that are essential to **keeping you ahead of the competition** in an ever-changing market. Peachtree 2010 has more flexible tools and personalized features designed to **increase productivity**, **and improve internal communications**, and **collaboration**; provide you with **enhanced analytical data**; help you provide **better, faster service for your customers**; and **keep your key information secure**. With Peachtree 2010, you can make more informed decisions, experience streamlined processes, and help get everyone working together more efficiently.

Here are just some of the improvements made to Peachtree by Sage 2010:

Unlimited Contacts: Peachtree now allows you to have an unlimited number of contacts for each of your customers. You can assign their company name, job title, phone numbers, e-mail address, address, and specify which contact is your bill-to contact and default ship-to contact.

Transaction History: See transactions in Peachtree that are related to a transaction you are currently viewing. If you are viewing a converted Quote and want to see what type of transaction it was converted to, simply click the new View Related Transactions link on the Quotes window and see a list of the transactions that are related to the Quote.

Enhanced Employee Recordkeeping: New fields and a new tab called Additional Info have been added to the Maintain Employees/Sales Reps screen. You can enter nicknames for your employees and also record more phone numbers. If you are using Peachtree Complete Accounting or higher, you can upload employee photos, enter more detailed demographic, emergency contact, and employment information, and enter performance review details and attachments. You can also set up alerts based on employee fields including birth date and hire date.

Sage Advisor: The Sage Advisor periodically gives you tips on features in Peachtree. These tips appear in the form of balloons, small windows, on your screen. Using the User Assistance window, you can control how long these tips appear on your screen before they disappear, as well as what level of experience these tips should target. There is also an Advisor History window that shows you what messages and tips you have seen.

Resource Center: This feature of Peachtree is your portal into the wider world of Peachtree Accounting. From here, you can learn about what's new in your release of Peachtree, upgrades, support, how you can get training for Peachtree, add-ons for Peachtree, and so on. To open the Resource Center, just click the box in the bottom left of the main navigation screen for Peachtree.

Peachtree Automatic Backup: Now, you can have the security of knowing that your Peachtree company data is protected by Peachtree's Automatic Backup feature. You can specify which company you want backed up, where you want it backed up to, and when and how often you want it backed up. Set up multiple backups if you want.

New to Peachtree Complete, Peachtree Premium Accounting, and Peachtree Quantum

Customer Management Center: Use the new Customer Management tab on the Customers & Sales Navaid to see all the information you want to know about a customer. You can choose which modules/lists you want to see, including new Totals and Finance Charge modules. Simply select the customer whose information you want to see and everything you want to know is right before you.

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Upgrade Your Decision-Making

Open Multiple Companies: Now, you can open several Peachtree companies at the same time, without having to close each one. When you open a second company, Peachtree automatically makes the first one inactive but shows it is still open in the Taskbar at the bottom of your screen.

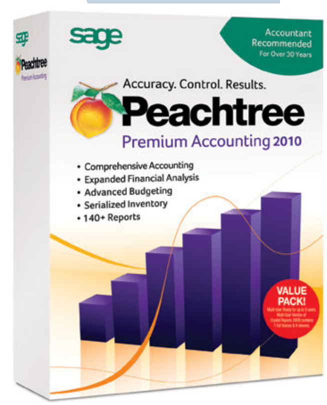
Security Enhancements: In the 2010 release, we made significant improvements to security, ensuring that your data is protected. These enhancements also help you manage users on the network.

User Login Manager: The User Login Manager, available from the Maintain, Users menu, shows a list of all users who are logged in to Peachtree, what windows they have open, and their status (active or idle). You can choose to view all users for a specific company, or all companies.

***Change Password*:** Changing passwords frequently is an important part of keeping your data secure. The Change Password window makes it easier to do so. This window is available from multiple places.

***Stronger Passwords*:** Peachtree now complies with PCI standards for password strength. New passwords must be at least seven characters, and they must contain a combination of numbers and letters. **Note:** When you first convert to Release 2010, any existing passwords you have will still work. But when you change your passwords, they must comply with the new password-strength rules.

New to Peachtree Quantum



Order Process Workflow (Tracking Transactions): Use the new Track It panel on transaction screens to assign statuses to transactions and assign transactions to users. The Track It panel has a History tab where you can view the history of a transaction - who it's been assigned to and the statuses it has had.

You can also set up notifications to be sent to users whenever the status or assignee for a transaction changes.

The new My Peachtree Inbox module on My Dashboard will allow users to see a list of transactions that are assigned to them. They can also reassign and change the status of transactions from My Peachtree Inbox.

The new Transactions by Tracking Status module on My Dashboard will allow you to see how many transactions are currently at a certain status and how much money is tied up in these transactions. It will also provide a graph of this information.

My Dashboard: The My Dashboard tab on the Navaids allows you to customize Peachtree for the way you work. You can add modules, lists, and access points to your My Dashboard tab. You can have multiple tabs within My Dashboard if you want to. This allows you to set up access to information and tasks in Peachtree that suits the way you work.

Special Pricing - Valid through May 31, 2009

Peachtree 2010 UPGRADE	SRP	Upgrade Only Price	Upgrade / Payroll Tax Bundle Price
Vertical MU	$1199.99	$789.99 (Save $410)	$989.99 (Save $470)
Premium MU	$1199.99	$789.99 (Save $410)	$989.99 (Save $470)
Complete MU	$699.99	$539.99 (Save $160)	$739.99 (Save $220)
Vertical SU	$499.99	$409.99 (Save $90)	$609.99 (Save $150)
Premium SU	$499.99	$409.99 (Save $90)	$609.99 (Save $150)
Complete SU	$299.99	$269.99 (Save $30)	$469.99 (Save $90)
Pro	$199.99	$179.99 (Save $20)	$379.99 (Save $80)

Free shipping of upgrades through May 31, 2009!

Call us today at (920) 882-5030 to place an order or to discuss further the new and improved features offered by Peachtree by Sage 2010.

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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 or call 920.882.5030.

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Getting into the ACT! of Social Media

While social media outlets such as Facebook, Twitter, and Linkedin may be new to some of us, the phenomenon that is social media has actually been around since 1997. While it took a little while to get rolling, social networking has evolved from a snowflake to a snowball into what is now pretty much an avalanche of information/opinion sharing.

It wasn't until about 2003 that Social Networking Sites (SNS) began to gain traction with sites like MySpace and LinkedIn. These sites offered users not only the ability to connect with other users of similar interest, but a forum for sharing opinions and promoting one's own agenda. As SNS continues to mature it has most recently entered the age of the "micro-blog". Twitter and Predicto have revolutionized SNS by coupling traditional blogging with the text messaging.

In terms of the business world, social network sites have become significantly important for a couple of reasons. The first is that while initially social network sites were embraced by the "younger, tech-savy" generation, the demographics of SNS users is changing drastically. An article by Peter Corbett on istrategylabs.com January 5, 2009 cites that membership for 35 – 54 years at Facebook are "DOUBLING roughly every two months". On April 29, 2009 Nielson Mobile reported that 49% of Twitter users are over age 35. This is significant because it indicates that the decision makers of both businesses and families can be reached through SNS. Successfully leveraging social network sites for marketing is not a new idea, but initial attempts were somewhat fruitless due to the demographics of the user community and the difficulty to penetrate into social network sites. Part of the SNS evolution has been a change in the user mindset that they are much more willing to be "linked" with "friends" they don't know. More and more users are voluntarily "following" corporate Facebook and Twitter "friends". Thus, the barrier of penetration of the community is being overcome.

A second significant feature of SNS as it pertains to the business world is the sounding board it provides users. The obvious and ideal scenario is for a business to leverage SNS users to promote their goods or services, after all there is no better marketing than a satisfied customer. The feedback that a business can receive from SNS users could be a very valuable tool in understanding consumer attitude toward their brand as well as their market in general. SNS can also provide an easy way for a business and its customers to directly communicate with each other in a community setting.

So what do social network sites have to do with ACT! At this point, not a whole lot, but this article is serving notice that SNS integration will be coming to ACT! just as it will likely be coming to a lot of different aspects of your business. The ACT! User Community has several discussion threads on this topic. Some pertain to how Sage should build ACT! to interact with SNS, but the more valuable discussion, I think, is still how businesses should use social network sites. Once that becomes more defined then the tools to leverage SNS can be built.

If you are interested in getting involved with discussions about social networking and the impact it may have on your business I invite you to go the ACT! User Community page at www.act.com and access the ACT! Leadership Blog. Two threads in particular prompted me to discuss this topic. The first is "Social Media and Your Brand" by Erica Bassett which promotes a discussion of how SNS and blogs can impact your brand. The second was "Social Media – Marketing Campaigns or Collaborations" by Kim Joseph which begins to discuss ways SNS can be leveraged and why social media doesn't fit traditional marketing ideas.

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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.

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