The BTS Edge

NOVEMBER 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.

What else can I do?

In the last issue we focused on what you can be doing and how your system can support reducing expenses in tough economic times. This quarter, we will focus on what else you can do to manage sales, customers, vendors, inventory, shipping/receiving and financial reporting.

Sales – Do you have a customer relationship management system (CRM) or even a contact management system? Sage ACT!, Sage CRM, Sales Logix and Microsoft CRM are just a few of the options available to you. Management of existing customers and prospects, effectiveness of salespeople, marketing and sales campaign are just a few of the features. In a time when new customers are hard to find, management of your existing customers becomes critical and a CRM system will help you manage existing and prospective customers.

Customers – They are the lifeblood of your business but can also be very costly if not managed properly. Do you still print and mail invoices, statements, order acknowledgements or does your system electronically (via email or fax) deliver them for you? Increase your receivables turns by delivering documents faster, changing terms, requiring deposits or even doing electronic ACH for invoice payment. Are you communicating with customers via email, newsletter and website? How do you communicate promotions to customers? What do you have available for customers to do self service via the web for information, order status and provide them with education about your products and services?

Inventory - Do you know what to order and when? What could you have sold if you had it? Do you know what time of year to stock certain items and when not to? What inventory has been in stock for some time and how do you communicate to customers to clear it out at a discount? How do you predict when to stock inventory based on typical purchasing cycles?

Vendors – Do you know what your purchasing volume by vendor is and whether it's increasing? Do you use this information to obtain pricing and shipping discounts? Do you electronically communicate with vendors for purchase orders and order acknowledgements? Have you implemented ACH payments to vendors instead of printing and mailing payments?

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Employee Spotlight — Steve Krueger

Steve Krueger is the President and one of two owners of Business Technology Systems. Prior to the 2006 acquisition of Virchow Krause Technology Solutions by Steve and Joe, Steve worked with the team for three years and has a total of 21 years providing accounting software consulting services. His responsibilities with BTS include administrative and sales roles. Client responsibilities include system selection and requirements definition projects as well as BusinessWorks and MAS 90 support.

A lifelong resident of Wisconsin, Steve grew up in Ripon moved to Appleton in 1987 after graduating from Lakeland College in Sheboygan where Steve has a B.A. in Accounting, Business Administration and Computer Programming.

Steve serves on the board of the local AITP (Association of Information Technology Professionals), actively involved in ITA (Information Technology Alliance), President of his homeowners association and member of his church council.

Steve lives with his wife Dena and children Grace and Zach in Appleton. Steve's passions are golf, snowmobiling, boating, travel and his family.

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Version 9.0 (2009)

Version 9.0 (now called 2009) started shipping November 1st and will be showcased during our December 4th Year End Users' Group, Version 9.0 of Sage BusinessWorks includes many new features including:

- Customer Specific Pricing
- Detailed Tracking of Open Credits and Deposits
- Open Credit Detail Report and Open Deposit Detail Report
- Open Credit and Open Deposit Transaction Detail Drill Down
- Unlimited line items for Quotes, Sales Orders, Invoices and Purchase Orders
- Increased Sales Accounts on Transactions
- Enhanced Check Printing Options (Direct Deposit Stubs)
- Expanded Hyperlink Capabilities
- Enhanced Export Capabilities

Please see the BusinessWorks section of our website (www.bts-wi.com) for the complete pdf of Version 9.0 enhancements, attend our December 4th users group and also look for webcasts on version 9.0 coming soon.

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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.

Webcasts

Sage BusinessWorks conducts webcasts for your review as follows:

- Getting Started with Inventory Control and Order Entry – November 17
- Getting Started with Payroll – November 19
- Meet the growing demands of your company with Sage MAS 90 – BusinessWorks Ed. - December 9
- Sage Payroll PayCard - Flexible Electronic Payroll for All Employees – December 4, 11, 18

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
- 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

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
Backup and Restore
Install Service Packs
Releasing Stranded Users and Tasks
Vendor Refunds

Did You Know?

Sage Software Online (www.sagesoftwareonline.com) is included with your annual maintenance plan. Provided as part of your annual maintenance, Sage Software Online allows you to manage your account, search a knowledgebase for articles and solutions to BusinessWorks issues, submit email support requests, review tutorials , download service packs, review the BusinessWorks system requirements, print documentation and submit product enhancement requests.

Sage BusinessWorks Service Packs

Version 9.0 – Released November 1, 2009
Version 8.0 – Service Pack 5 is available. Service Pack 1 included the 2008 Tax Tables. Service Pack 5 includes all prior service packs.

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.

Budget Entry is a Snap Using GL Exchange!

Are you looking for an easier way to enter budget figures into MAS 90 or MAS 200 for your next fiscal year budget? Sage MAS 90 and Sage MAS 200 contains a tool called General Ledger Exchange that can import account, budget, and transaction information from external source files into the General Ledger module, and export information from the General Ledger module to external source files.

Using this tool, you can prepare your budget information in an Excel file or other file format and then use General Ledger Exchange to import the budget figures into MAS 90. The General Ledger Exchange Settings Wizard will walk you through the steps necessary to set up the options for importing the budget data. This information is then saved in an exchange setting so that future imports can be performed using the same exchange criteria.

Before importing your budget information, you can print a Test Import Listing to display the records that will be imported. Then, after importing, you can print the Import Log, which displays the imported records, as well as records excluded during the import.

Special Promotions

- New pricing strategy for lapsed Sage MAS 90 and 200 v. 4.3 customers
- Enroll in Sage Payment Solutions and save $1,435 on the Sage MAS 90 and 200 Cash Flow bundle
- Save big on the Sage MAS 90 and 200 Manufacturing bundle
- 0% Financing on migrations to Sage MAS 90 or 200 Extended Enterprise Suite

Copying MAS 90 Companies in Version 4.x

It is a good idea to copy your MAS 90 data files into a new company code at year end for backup purposes. In order to make backup copies of your data files in version 4.x, perform the following steps:

1. Go to **Library Master/Main/Company Maintenance**.
2. Enter the company code of the company you want to copy **to**. For example, if you are copying payroll and general ledger data files for 2008, you may wish to use **P08** as the new company code.
3. Type in the Company Name. For example, "MAS 90 PR and GL Data Files for 2008", and press the Copy button.
4. In the Source Company field, enter the company code that you want to copy **from**. This would normally be your active company code.
5. A list of modules should appear for you to copy from. Select the appropriate data and forms that you want to copy. For example, if you were only copying payroll and general ledger data, you would select General Ledger Data, Payroll Data, and Payroll Forms.
6. At the "Copy All Data Files to Selected Company?" prompt, select Yes.
7. Once the copying is completed, press Accept.

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Year-End Users' Group Meeting

It is that time of year again and Business Technology Systems, Inc. will again be hosting a Year-End User Group Meeting to prepare you for the end of the year. Topics to be covered include payroll and accounts payable year-end processing procedures, fringe benefit processing, W-2 printing, payroll reconciliation procedures, magnetic media processing, 1099 printing, and much more. We will also be holding several breakout sessions on other hot topics: MAS 90 4.3 and Sage KnowledgeSync, Payroll and HR Update, and Disaster Recovery Planning/Business Continuation Planning.

The Year-End Users' Group will be held on Thursday, December 4, 2008, from 8:30am to 12:30pm at Liberty Hall in Kimberly. If you would like to attend the user-group meeting, please contact Sandy Burrows at (920) 882-5030 or sandy@bts-wi.com to sign up.

In addition to the User Group sessions, Business Technology Systems, Inc. will be available to assist you with onsite W-2 or 1099 printing or magnetic media processing at year end. If interested, please contact your MAS 90/200 consultant today to set up an appointment.

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

Year-End User Group Meeting:

Details: Business Technology Systems, Inc. will review payroll and accounts payable year-end procedures and provide breakout sessions on other hot topics.
Date: December 4, 2008 8:30am – 12:30pm
Place: Liberty Hall, Kimberly, WI

Sage Abra for Sage MAS90 Customers:

Details: See how integrating Sage MAS 90 or 200 with Sage Abra HRMS, the industry-leading integrated software solution for HR and payroll management, will improve your HR and payroll efficiencies by keeping your HR and ERP all in one place.
Date: February 10, 2009 or February 24, 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: December 16, 2008 10:30am – 11:30am

Structuring Sales Commissions in Sage MAS 90 and MAS 200 to Fit the Specific Needs of Your Company:

Details: Join us in this session to discover advanced methods for calculating commissions based on more complex criteria. If you've ever had a need for commission structures that go beyond the ordinary, this is the session for you.
Date: November 26, 2008 or December 17, 2008 3:00pm - 4:00pm

Recorded Demos:

Sage MAS 90 and 200 Business Insights Explorer
Sage MAS 90 and 200 Material Requirements Planning
Sage MAS 90 and 200 Return Merchandise Authorization

Register online at www.sagesoftware.com/seminars

Did You Know?

Printing on Both Sides of an Invoice Form:

Did you know that you can print on both sides of an invoice form in MAS90/200 using a modified Crystal Report format? BTS can modify your existing invoice format to allow for printing of terms and conditions (or any other verbiage that you want) on the back of each invoice that you print out of MAS90/200. This will eliminate your having to buy pre-printed forms, because all the printing can be done on a plain sheet of paper from your duplex printer!

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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.

Payroll Options for Peachtree Users

A number of clients have recently asked questions about the ability to discontinue using the annual payroll tax service. They have wondered "what are the trade-off's with manually managing the payroll tax tables instead of paying for the annual service."

The quick answer is "It depends"! If you are not planning to generate your own W2's at year-end (many clients are providing their Peachtree data to an accountant or Peachtree consultant to generate the W2's) then it may not be necessary to pay for the service.

The primary benefits of paying for the three (3) available Payroll Tax Services are:

Option #1: **Peachtree Simple Payroll** **$249.95 / year**
(formerly known as Peachtree Payroll Tax Update Service)
This basic payroll solution is designed to simplify your payroll tax process. You maintain control of processing payroll when you want and we'll maintain your tax tables so you don't have to constantly keep up on regulation changes.

Option #2: **Peachtree Select Payroll** **$349.95 / year**
(formerly known as Peachtree Payroll Tax Update Service with e-Filing Advantage)
Contains all the benefits of Peachtree Simple Payroll, PLUS you will be able to e-file your quarterly and year-end payroll tax forms, and pay tax deposits electronically.

Option #3: **Peachtree Managed Payroll Powered by CompuPay**
This Full-Service Payroll option reduces the risk of payroll tax penalties, saves you valuable time, and relieves the burdens of processing payroll yourself. You are able to perform payroll processing on your schedule, access your company payroll information and get real-time reporting on a secure, online network that's available to you 24/7. Why chance payroll deposit and filing penalties? Peachtree Managed Payroll guarantees accurate, timely deposits and filings with federal, state and local agencies, or they'll pay the resulting payroll tax penalties for you! They back their promise as long as the information you provide is on time, complete, accurate and your account is properly funded.

For those considering the "Do-it-Yourself" model, here is some helpful information for you:

In-House Payroll

The "Do-it-Yourself" Tax Table Maintenance

We highly recommend that you subscribe to a Peachtree payroll tax solution to make sure you have up-to-date payroll tax tables. Also included in a subscription to Peachtree Simple Payroll or Peachtree Select Payroll are updated signature-ready payroll tax forms. For more information about what is included in a subscription, go to the in-house payroll solutions web page or call us for more information at 920-882-5030.

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Payroll Options for Peachtree Users

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If you prefer to calculate payroll taxes manually

If you don't subscribe to a Peachtree payroll tax solution, you will need to manually set up your payroll tax tables or manually calculate your payroll tax amounts and enter them for each paycheck.

Companies that don't use a Peachtree payroll tax solution typically calculate their taxes using a spreadsheet or pen and paper. We don't recommend either of these methods because they are prone to error and it can be very time consuming keeping informed of tax law and regulation changes.

Tracking tax law changes yourself

There are a number of options available to gain an understanding of which tax laws and regulations apply to your business and employees.

- You can review tax publications such as the Circular E from the IRS or similar documents provided by your state department of labor.
- You can have an accountant provide you with updated tax changes throughout the year.

Payroll Tax Forms

When taking the "do-it-yourself" approach you must also stay up-to-date on regulatory form changes (such as W2s). The signature-ready tax forms that are provided in Peachtree are not compliant or file-able unless you have a subscription to a Peachtree payroll tax solution.

If you would like more information about the various options available to manage your payroll environment, please call us at 920-882-5030 and a Peachtree consultant will be happy to help!

Still need to order your 2009 Payroll Tax Service? Don't wait until December 31st! Call us today at 920-882-5030 so you are ready for 2009!

Did You Know?

Crystal Reports 2008 (Now available with Peachtree 2009 products)

Experience a better end user report viewing experience, enhanced report designer productivity and advanced information visualization capability. You can now add dynamic lists of values for your parameters when running a report. This capability allows you to pick a specific record from your database (i.e. A specific customer ID or name) make it easier to generate the specific report you desire. Look for a future webinar to review the features offered by Crystal Reports 2008…. Or call us at 920-882-5030 to discuss these features today!

What else can I do?

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Shipping/Receiving – Do you ship via UPS, FedEx etc and need to apply shipping charges to invoices and provide tracking numbers to customers? Is this a manual or automated process? Do you bar code items for receiving, picking and physical inventory? Do you know what orders to ship when inventory is received?

Reporting/Financials- How's your business doing and when do you know? The 10th or 15th of the next month? What information do you need on a daily basis to run your business and how much effort is expended to get it? Is your system pushing information to you or do you have to pull it via reporting and inquiries? Do you have cash flow reporting, budget and prior year comparatives? Still using Excel?

Need answers to these and other questions facing your business?

Let us know how we can help. Our website is constantly updated with information you can use regarding your Sage Software products. Please take a moment and visit www.bts-wi.com and let us know other ways we can be of value to you.

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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ACT! 2009—The "Outlook" on Sage's Latest Release...

August 2008 saw Sage software release the 11th iteration of its ACT! contact management software. While it is a little early to deem it the "best version yet", it does include some compelling features that have long been desired by veteran users. Rather than adding "Bells and Whistles" to ACT! 2009, it seems Sage has truly focused on making some of the existing features better. They have targeted new users by once again improving the program's interface with Microsoft Outlook. They have also made very practical enhancements to the "Look-up" feature and database maintenance functions. These improvements should make getting on board with ACT! attractive. The question for existing users is whether or not these enhancements provide enough value to warrant the expense and potential pain associated with an upgrade.

I've used ACT! for about 12 years and if there was one thing I wished ACT! did better it was to keep track of e-mails to my contacts. They got close in version 10, but it appears they have nailed it in ACT! 2009. Not only will the e-mail you send from Outlook and attach automatically to your contact record, but you won't need to have the ACT! open. Outlook will automatically pass it to the database. Even better, they have added the "En Masse Attachment" feature, which will allow any e-mail to be quickly attached to an ACT! contact, and an "Outlook Rules Integration" feature which allows you to manage e-mail received in your inbox from an ACT! contact.

Another complaint I had about ACT! was that it didn't have good integration with my Outlook Calendar. This has been addressed with the "One Click Calendar Copy" feature. Sage has also added a feature which allows activities to be scheduled in ACT! from e-mails in Outlook. The ACT! Scheduler also automatically copies your ACT! and Outlook calendars, keeping them up to date without any manual interaction.

Sage has also made a relatively small but powerful enhancement to the "Look-up" function. They have added "Search Operators" to the "Look-up", greatly enhancing the search capability. In addition to the search operators, all the different record types can be searched from the same look-up window. You can now search "Company" records from a look-up launched from a "Contact" screen. They have also added a "Previous Search" feature which maintains the nine most recent searches.

A couple of less glamorous, but still important, enhancements were made to the administrative aspects of ACT! 2009. First user names are now shown on the screen, assisting ACT! administrators with knowing who is logged into the database. Also, attachments can be excluded from back-ups, reducing the time it takes to back-up ACT!, as well as the amount of disk space required.

For new users contemplating CRM software, I'd have to say this version of ACT! is definitely worth previewing, especially if you depend on Microsoft Outlook, but feel you need more CRM tools. For existing users, the question of upgrading really depends on the version you currently own. Any users owning an unsupported version of ACT! should definitely consider this upgrade. Users on versions 2007 or 2008 will probably only be compelled if they see value in the new Outlook or look-up features.

For more information or assistance with ACT! 2009, please contact us at Business Technology Systems.

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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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