

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

NOVEMBER 2007



Business Technology  
Systems, Inc.

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



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

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

## There was life before the computer...

Our website has a section called "Events and news you can use from BTS". This section typically highlights our latest newsletter, Sage events, training sessions, user groups, etc. This newsletter is a more detailed version of that section of our website and provides you with information that will help you better utilize your Sage Software. This cover message provides you with information that is not necessarily specific to any one of the software systems profiled in the newsletter and covers a variety of topics each quarter.

Even in the information age, we should pause to consider what we did before computers. Credit goes to Mike Nowak of Coating Excellence who presented this to our Business Management Software Showcase back in June:

An application was for employment  
A program was a TV show  
A cursor used profanity  
A key board was a piano!

Memory was something that you lost with age  
A CD was a bank account!  
And if you had a broken disk,  
It would hurt when you found out!

Compress was something you did to garbage  
Not something you did to a file  
And if you unzipped anything in public  
You'd be in jail for awhile!

Log on was adding wood to a fire  
Hard drive was a long trip on the road  
A mouse pad was where a mouse lived  
And a backup happened to your commode!

Cut—you did with a pocket knife  
Paste you did with glue  
A web was a spider's home  
And a virus was the flu!

I guess I'll stick to my pad and paper  
And the memory in my head  
I hear nobody's been killed in a computer crash  
But when it happens they wish they were dead!

All of us here at BTS hope you have a happy and safe holiday season.

## Employee Spotlight—Tim Cook

Tim Cook joined Business Technology Systems in 2006 as part of the acquisition of Virchow Krause Technology Solutions. As a senior consultant with VKTS, Tim worked closely with the Commercial Accounting team and assisted with several Sarbanes-Oxley projects, in addition to his duties with the Technology Solutions team. Prior to joining VK in 1999, Tim was the Controller for Bond Food Products in Oconto, WI. Tim's broad experience makes him a valuable resource for our Sage MAS 90, Peachtree by Sage, and ACT! by Sage clients.



Tim, along with his wife Crystal and son Kessler, lives in Green Bay. Tim Graduated from St. Norbert College in 1994. He was born in Milwaukee and grew up in Hartland, WI. Tim enjoys skiing, playing Softball, and coaching Kessler's soccer team. He is an avid Packer fan and enjoys taking in St. Norbert College hockey games during the winter months.

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## Sage BusinessWorks 8.0 Enhancement Summary

Version 8 is shipping and you should receive your copy soon. A document including screen shots of these feature changes is available for your review. Contact Steve Krueger at [steve@bts-wi.com](mailto:steve@bts-wi.com) or 920-882-5030 for more information and installation assistance.

### Enhanced Customer Inquiry Balance Drill Down

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

### Enhanced Vendor Inquiry Unpaid Balance Drill Down

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

### System Wide

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

### AP Invoices Paid by Credit Card

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

### Post adjustments to Credit Card Vendor Invoices

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

### Enter Payment Option

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

### Sales Tax IDs Assigned to Ship to Addresses

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

### Cash Account Register Report

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

### Reprint Closed Invoices and Sales Orders

You can now reprint closed invoices from the Order Entry Invoice Inquiry option and closed sales orders from the Sales Order Inquiry option.

### Vista Capable

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

## Sage BusinessWorks Service Packs

Version 7.0 – Service Pack 9 is available.

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

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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](mailto:steve@bts-wi.com) or call 920.882.5030.

## Did You Know?

This will be the first year Sage BusinessWorks will be joining the Sage Software Year-End User's Group meeting hosted by Business Technology Systems? The opening session will focus on year end processing for W-2's, quarter and year end forms and getting ready for 2008 (tax tables). The second session will focus on a demonstration of the new features of Version 8.0. Go to the Users Group section of our website [www.bts-wi.com](http://www.bts-wi.com) for more information and register for this free half day session including lunch. This is our most highly attended event of the year.

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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](mailto:sue@bts-wi.com) or call 920.882.5030.



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## Barcoding and Wireless Handhelds

Are you looking for a way to streamline the shipping, receiving, and inventory processes within your company? Using radiofrequency devices and bar-coding, you can automate your company operations to collect data more quickly than ever before, and warehouse, shipping and receiving staff can record bar-coded items using completely portable radio frequency devices.

You can gather, validate, and verify an array of data in this way-- not only inventory physical counts, but also quantities, items numbers, and lot and serial numbers of goods shipped and goods received.

Instead of time-consuming manual data entry, the data can be easily imported from the radio-frequency devices and brought into your Sage MAS 90 or Sage MAS 200 system for processing. The advanced features in the bar-coding program can virtually eliminate data entry errors, such as shipping the wrong product to customers. In addition, the bar-coding program can automate procedures for dozens of employees, and many businesses discover that bar coding pays for itself within a short amount of time. If you feel that your company may benefit from using radiofrequency devices and bar-coding, please contact your Sage MAS 90 and Sage MAS 200 consultant to get more information.

## Are You Prepared for Year-End?

It's hard to believe that year end is just around the corner! Business Technology Systems, Inc. will 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 of interest.

The Year-End User Group will be held on Thursday, December 6, 2007, from 8:30am to 12:30pm at Liberty Hall in Kimberly. If you would like to attend the user-group meeting, go to the Users Group section of our website [www.bts-wi.com](http://www.bts-wi.com) for more information.

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 Sage MAS 90 and Sage MAS 200 consultant today to set up an appointment.

## Copying Sage MAS 90 Companies in Version

Many Sage MAS 90 users copy their data files into a new company code at year end for backup purposes. The procedure for copying Sage MAS 90 data files in version 4.x differs from the procedures you used in version 3.x. 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 2007, you may wish to use **P07** as the new company code.
3. Type in the Company Name. For example, "MAS 90 PR and GL Data Files for 2007", 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.

### Special Promotions

- 50% off any Paperless Office Extended Solutions enhancement (no maintenance required) (\$800 value!)
- 20% savings on the Direct Deposit Extended Solution for Accounts Payable or Payroll
- Multi-Company General Ledger bundle – Save over \$7,000
- Save on Phone Support Plan Upgrades – 25% off a Gold Plan and 20% off a Silver Plan
- 20% off when you buy the Sage MAS 90 and Sage MAS 200 Payroll Module

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

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

## Upcoming Events

### 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 [www.bts-wi.com](http://www.bts-wi.com).

Date: December 6, 2007  
Time: 8:30am – 12:30pm  
Place: Liberty Hall, Kimberly, WI

### Inter-Company Processing Made Easy with Sage MAS 90 and 200 Extended Solutions:

Details: Find out how you can improve the speed and accuracy of your accounting processing for multiple companies. Join this free one hour webcast where we will introduce the many benefits and features of inter-company processing with Extended Solutions. This webcast will cover postings made in the General Ledger and Accounts Payable modules.

Date: November 27, 2007  
Time: 12:00pm - 1:00pm

### Is Your Business Intelligent?:

Details: Designed to provide instant visibility across your business, Sage MAS 90 and MAS 200's powerful business intelligence tools combine to create an all-encompassing information management solution. Sage MAS 90 and MAS 200's customizable report generation, inquiry, and analysis, and integration applications work seamlessly with your ERP systems. Learn how to increase your productivity, improve business financial reporting, and enhance existing functionality with comprehensive business intelligence tools.

Date: December 5, 2007  
Time: 12:00pm - 1:00pm

### Mastering Larger Shipments Using StarShip Freight for Sage MAS 90 and 200:

Details: Are you interested in getting the best shipping rates? Do you want to increase your efficiencies by integrating packing and shipping into your fulfillment process? Attend this webcast to see how our new Sage MAS 90 and 200 StarShip Freight module will help you efficiently integrate larger shipment fulfillment with carriers such as Roadway and Yellow Freight.

Date: December 18, 2007  
Time: 12:00pm - 1:00pm

### Sage MAS 90 and MAS 200 Executive Overview – Broaden Your Horizons!:

Details: 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. With Sage MAS 90 and MAS 200, it's never been easier to have the data you need at your fingertips-anytime, anywhere. 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: December 5, 2007  
Time: 10:30am - 11:30am

## Did You Know?

### Creating Crystal Reports Easily:

Did you know that Business Insights Reporter is part of your current Sage MAS 90 or Sage MAS 200 system? This tool uses wizards to easily guide you through the required steps to create a Crystal report. Select the font type, size, and text color, enhance the layout by applying lines, borders, and shading, and further enrich your reports with embedded pictures, diagrams, and logos.

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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](mailto:joe@bts-wi.com) or call 920.882.5030.



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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## **Peachtree by Sage 2008 — The Most Significant Change Ever!**

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

### **IMPROVED! Reporting Improvements**

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

### **ENHANCED! Forms Design Improvements**

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

### **ENHANCED! Flexible Unit and Quantity Decimal Settings**

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

### **NEW! Add Attachments**

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

### **NEW! Broadcast Invoices**

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

### **IMPROVED! Hide Navigation Centers**

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

### **IMPROVED! Saving Records and Transactions Performance<sup>2</sup>**

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

### **NEW! New Features Splash Screen**

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

### **NEW! Detail Transaction Report**

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

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## Peachtree by Sage 2008 – New and Improved Features by Product

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

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

### Disclaimers:

1 Available in Peachtree Premium Accounting and higher.

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

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

Visit our website for up-to-date new and upgrade pricing at

<http://bts-wi.com/btswicom/products/peachtree/promotions/default.asp>

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

## Sage MAS 90 Upcoming Events continued from page 4

### Save Time and Reduce Check Processing Costs with Sage MAS 90 and Sage MAS 200 Direct Deposit Extended Solutions:

Details: Come see what thousands of employers are using to save time and money. Learn why the electronic payment Extended Solution for Sage MAS 90 and Sage MAS 200 provides a direct and secure method for paying your employees. Plus, the benefits don't stop there ...

Date: December 11, 2007

Time: 12:00pm - 1:00pm

### Recorded Demos:

Business Alerts Professional for Sage MAS 90 and Sage MAS 200

Distribution Solutions for Sage MAS 90 and Sage MAS 200

Integrating ACT! by Sage with Sage MAS 90 and Sage MAS 200

Sage MAS 200: Moving at the Speed of Your Business

Sage MAS 90 and Sage MAS 200 Credit Card Processing

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

e-Business Manager for Sage MAS 90 and Sage MAS 200

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

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

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



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## Integrating Your ACT! by Sage with Other Business Applications

For years ACT! has had links to Sage's accounting software packages, which allows the synchronization of basic contact information between the accounting database and Act! database. These links also allowed you to "launch" into the accounting software to perform tasks such as order entry or perform customer billing. The links were good, but left much to be desired in terms of total integration.

ACT! had the same type of relationship with Microsoft Office applications as it did with Sage's accounting software. The integration was decent, but left much to be desired.

However, as Sage has moved to Object Oriented Programming as the standard for ACT! as well as Sage's Accounting Software, the integration between CRM and other business applications has improved significantly. Business objects allow the softwares to transfer information more efficiently and allow this information to be displayed in much more desirable formats.

For instance, an ACT! user with their system integrated to MAS90 can now see virtually all critical accounting information pertaining to a customer in real-time without ever leaving the ACT! software. Sales orders, invoices, payments, and return merchandise authorizations can all be viewed with drill-down detail from the contact record without ever accessing the accounting software. Portals to functions within the software are available when needed, so tasks such as creating sales orders or invoicing can be performed seamlessly.

In addition to improving their integration with the accounting packages, the folks at Sage have listened to the user base and have put integrating ACT! functionality with Microsoft Office products at the top of the priority list. The main emphasis has been to make ACT! more friendly with Outlook. With the release of ACT! 2008 almost all the functionality that the ACT! e-mail editor has are now available if Outlook is chosen as the default e-mail program. This means things such as To-Do's, notes, and appointments can be set directly from an Outlook e-mail and attached to the contact record. The calendaring features are still not completely integrated, but a product line manager at Sage assured a group of users at Sage Summit in Chicago that they are working hard to overcome the challenges associated with integrating the ACT! calendar with Outlook.

Apart from Outlook, ACT! has made Mail Merging easier with Microsoft Word and well as adding a mail merge feature for Excel. This very handy feature for creating forms that require excel functionality, as often times sales quotes or order sheets do.

For more information on ability to integrate ACT! with your business applications please contact us at Business Technology Systems or visit [www.act.com/products/accounting](http://www.act.com/products/accounting).

## Sage BusinessWorks Tutorials

Sage Software Online Support now has mini-tutorials for common tasks in Sage BusinessWorks. Logon to [www.sagesoftwareonline.com](http://www.sagesoftwareonline.com) and use these helpful tutorials:

- [Accounts Payable Credit and Debit Memos](#)
- [Accounts Receivable Credit and Debit Memos](#)
- [Accounts Receivable Customer Refunds](#)
- [Adding a New User](#)
- [Backup and Restore](#)
- [Install Service Packs](#)
- [Releasing Stranded Users and Tasks - New!](#)
- [Vendor Refunds](#)

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

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

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

Visit our website at [www.bts-wi.com](http://www.bts-wi.com)

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