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For Sage BusinessWorks

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Headline News

BusinessWorks Gold has been renamed **Sage BusinessWorks**. After you install Version 6, to run the application you will need to select the **Sage** BusinessWorks desktop icon or launch the software from the **Sage** BusinessWorks program group.

Sage BusinessWorks Version 6 includes a new **Information Center.** Version 6 users can gain ready access to the latest Sage Software news and announcements, tips and tricks, product alerts, and training and support information.

Sage BusinessWorks Version 6 Enhancements Rev Up Functionality

Sage BusinessWorks Version 6 begins shipping in October 2005. This latest release adds a number of enhancements to provide more efficient workflow, faster data access, and improved flexibility. Let's take a closer look at what Sage BusinessWorks Version 6 offers.

Improved Lookups

A number of improvements have been added to Version 6 that make it easier to quickly locate the information you seek.

New Search Criteria

You can create your own power searches using a variety of new search criteria including:

- **Vendor Lookups:** Sales Contact, Sales Phone, Sales Fax, and Sales email for Vendors.
- **Customer Lookups:** Finance Fax, Finance E-mail, Purchasing Contact, Purchasing Phone, Purchasing Fax, Purchasing E-mail, MTD Sales, and YTD Sales.
- **Purchase Order Lookups:** Drop Ship and Sales Order Number (for a related Purchase Order).
- **Order Lookups:** Drop Ship.
- **Part Lookups:** New long description field.

Sage BusinessWorks Version 6 adds new and powerful capabilities.

Quick Search View

The **Quick Search View** now allows you to display additional information such as the **Finance Contact** in the Accounts Payable, Accounts Receivable, and Cash Management modules; and **MTD Sales, YTD Sales,** and **Sales Order Drop Ship** in the Accounts Receivable, Order Entry, and Cash Management modules.

Inquiry Balance Drill Down

You're sure to appreciate the new drill down on open balance feature available in Customer Inquiry and Vendor Inquiry. You can quickly identify the invoices making up the open invoice balance, saving you from running a lengthy report.

Quick Find

A new **Quick Find** option has been added to all Inquiry options; it allows you to quickly locate a record with a minimum number of keystrokes.

New Cash Balance Inquiry

Cash Balance Inquiry can now be accessed directly from the Cash Management Accounts menu. This allows you to provide certain users with the ability to view the balance without giving them access to other General Ledger account balance information.

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ACT! by Sage
See page 4 for more info!

Compliments of:
Atlantic Software Alliance

Enhancements To Core Modules

Void Credit Card Payments

In Version 6 you can void Accounts Payable Credit Card Payments. With a single step, you can void the credit card payment, reinstate the original Accounts Payable invoice, reset the payment term to *none* and, if appropriate, automatically adjust the General Ledger account.

Report Sort Enhancements

The Account Detail, Journal Detail, and Detailed Trial Balance reports now have a *Sort By* option. This allows you to select up to three sort options per report, to better organize the data you wish to analyze. In addition, you may choose to sort in either ascending or descending order by Posting Date, Journal ID, Reference Number, Description Date, and System Date. Note: The System Date is only available on the Journal Detail Report.

Payroll And Accounts Payable Additions

In the Payroll module, a new payroll deduction calculation method, Percentage of Medicare Taxable Pay, was added. Also added in Accounts Payable is support for 1099 preparation; with Version 6, your 1099s will support Boxes 13 and 14.

PO And SO Module Changes

Many new and powerful features are being introduced with Version 6 to improve efficiency and add flexibility.

Purchase Order Automation

Version 6 allows you to create one or more Purchase Orders directly from a Sales Order, and provides you with complete control to determine the Parts, Quantity, and Vendor to order from. Flexible options during the creation allow you to order the item from someone other than the default vendor. Indicate that the PO will drop ship to the customer (using the customer's ship to address from the SO), and add additional parts, non-stock parts, or comments to the purchase order.

Managing the relationship between the purchase order and the sales order is simplified with the various improvements made to the inquiry options, reports, custom reports, custom spreadsheets, custom exports, and custom forms.

Drop Ship Flag

A new Drop Ship flag was added to Maintain Purchase Orders. When this flag is selected it allows better tracking of drop ship POs in Purchase Order Inquiry, Purchase Order forms, and various inventory reports.

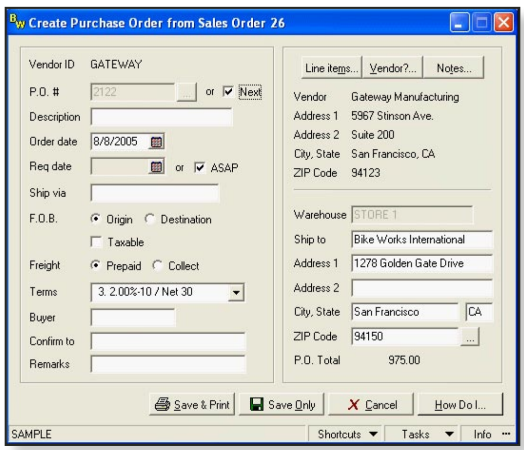
Convert Orders to Invoices

Now you can convert a Sales Order into an Invoice directly from the Sales Order option. This will prove handy when you need to modify the sales order prior to invoicing, since it will save you the step of returning to Invoice Entry when you've completed your changes.

Expanded Description

It seems you can never have enough room for notes and descriptions. A new 1,000 character field has been added to Maintain Parts to provide plenty of space to describe the details of your inventory items. The existing part description fields are still available for when you want to be able to customize the part descriptions further or need a portion of the part description to appear on certain forms and not others.

A new 1,000 character text block line item description field is also available for: Parts, Non-stock Parts, Visible Comments, Hidden Comments, Labor, and Miscellaneous Charges. The expanded description field can be optionally *included* or *excluded* on various reports and forms.



A new feature with Version 6 allows you to create one or more Purchase Orders directly from a Sales Order.

Edit Description In PO

You now can edit line two and line three of the part description from the Maintain Purchase Order option, providing for greater flexibility when creating and printing Purchase Orders.

New Form Fields

Several new fields are available to print on forms including: Text Block Word Wrap, Drop Ship, Sales Order Number for the PO, Ship Weight, PO Description, Line Item Discount Total, Original Line Item Price, Part Base Price, YTD Deductions, and YTD Other Pays.

Inventory Enhancements

The **Inventory Control Receipt Adjustment** can now optionally update the Vendor's Last Cost. The **Inventory Control Transactions Receipt** register now can be printed based on a range of vendors related to the receipts, instead of being based only on the part's assigned vendor.

Backup And Copy

We all know how important it is to back up the accounting data regularly. In Version 6, users receive a friendly reminder to backup when exiting Sage BusinessWorks or when performing a month-end close. If you have designated users responsible for backing up, you may disable this prompt to backup on exit from the System Preference or User Preference options for all but the responsible users.

Creating a duplicate copy of your company is now both quick and efficient using the Copy Company feature that performs a backup and restore as a single step.

Improved Installation

Since the installation and implementation of a new version can be complex, many companies are concerned at upgrade time. In Sage BusinessWorks Version 6.0, the installation process became a whole lot easier. Now, if you need to reinstall Sage BusinessWorks, the system will detect that the software was previously installed and will automatically install to the existing directory, thus minimizing any occurrence of multiple installations.

Please contact us with your questions regarding Sage BusinessWorks Version 6. ★

New Sage BusinessWorks ACT! Link Module

Your customers want a positive, personalized experience when they interact with your company. They expect you to be familiar with their industry, staff, pending orders, and the business they have done with you in the past. Similarly, you have important vendor relationships that require you to collect and store important bits of information. The new Sage BusinessWorks ACT! Link module allows you to track, cultivate, and promote the very business relationships your company depends on. It does this by linking ACT! by Sage with the Sage BusinessWorks accounting solution. Let's take a closer look at what the ACT! Link module can do for your business.

Overview

The Sage BusinessWorks ACT! Link module provides powerful synchronization options allowing you to link a Sage BusinessWorks customer to an ACT! contact and then to share data between the two solutions. (To learn more about the ACT!, please review our article on page 4 of this newsletter.) In addition to linking customers and contacts, the ACT! Link module allows you to launch Sage BusinessWorks tasks directly from within ACT! and will record various Sage BusinessWorks transactions into the contacts' corresponding history file in ACT!.

Data Synchronization

Using the ACT! Link module, both your ACT! database and your Sage BusinessWorks database remain current and consistent, without the need to maintain two programs.

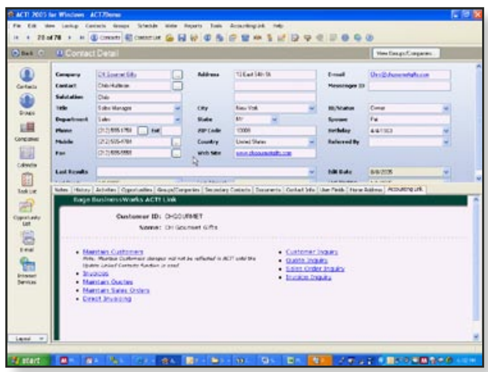
For example, at any time you can turn an ACT! customer into a customer in Sage BusinessWorks—with just the click of a button. This eliminates duplicate data entry tasks and ensures you and your team are always working with a current customer list.

You control the ongoing synchronization of customers and contacts between Sage BusinessWorks and ACT! solutions. You can elect to update all linked contacts or only a single contact. Choose from a two-way or a one-way update. The two-way update combines changes made in either product. If a field has been changed in both products, you will choose either the ACT! or Sage BusinessWorks value to "win." If you prefer the one-way update, you'll elect to update either from ACT! to Sage BusinessWorks or from Sage BusinessWorks to ACT!.

The ACT! Link module keeps track of each activity it performs in a log file. You can print or view the ACT! Link Activity Report at any time to review details of the ongoing synchronization.

Straightforward Setup

The ACT! Link module is simple to setup and configure, providing great control over the interface and synchronization options. A wizard walks you through the process, asking for information such as which tasks you want users to launch from ACT!, and which Sage BusinessWorks transactions you want to record in ACT!.



Connect your front and back office solutions with the new Sage BusinessWorks ACT! Link.

Customized Data Mapping

During the setup of the ACT! Link module, you can customize the data mapping by selecting the precise ACT! data field into which you wish to map a Sage BusinessWorks field. Many of the obvious field mappings such as Customer Name, Address, and Phone have been defaulted for you, but you are able to change these defaults to meet your business needs. Other data elements for which there is no obvious corresponding ACT! data field can be mapped into one of the ACT! user-defined fields. In this way, you can elect to view fields such as Customer Status, YTD Sales, or Customer Balance within ACT!.

Detailed Transaction History

Depending on how you have configured the link, a great deal of information can be shared between the two applications. Accounts Receivable transactions such as invoices, credit memos, and applied deposits may be recorded in ACT! history, as can instant checks generated from the Cash Management module and part returns processed in Order Entry. Quote and Sales Order transactions such as the creation and cancellation of a quote or the placing on hold of an order, can all be recorded to ACT! history. Similarly, when you add a new vendor invoice, print a vendor check, or receive against a purchase order, the ACT! Link module can send the information to ACT! history. The value of having this data in one location is realized as your sales force or purchasing agent is on the phone with a customer or vendor and has all the information they may need in one location.

Launch Tasks Within ACT!

With the ACT! Link module, users can launch Sage BusinessWorks tasks directly from within ACT!. This feature is more than convenient, it means your sales force won't need to navigate through the accounting software to uncover the data they need, reducing training time, and increasing productivity. As you would expect, the ACT! Link module respects your Sage BusinessWorks security setup, limiting task access to authorized users.

Some of the Sage BusinessWorks tasks that can be launched from within ACT! are: Maintain Customers, Customer Inquiry, Invoices, Maintain Orders, Maintain Vendors, Maintain Purchase Orders, and Purchase Order Inquiry.

Minimum Requirements

The ACT! Link module requires Version 6 of the Sage BusinessWorks solution. The Accounts Receivable or Accounts Payable module is required. The Order Entry, Inventory Control, and Purchasing modules add optional functionality. In addition, you must have ACT! 2005 or ACT! 2005 Premium edition (Or soon-to-be-released ACT! 2006 or ACT! 2006 Premium).

Perfect Partnership

The ACT! Link module connects your front office, your customer service and sales functions, with the heart of your business, your Sage BusinessWorks accounting system—in a way that maximizes the best attributes of both. The result can be seen in streamlined operations as users have access to sales and accounting information from a single location, allowing them to deliver high quality service in the most efficient manner possible. Call us for complete details.

In The Spotlight: ACT! by Sage

Have you considered a contact management solution (CMS) for your organization? Could you benefit from a closer relationship with your customers and vendors? If so, ACT! by Sage could be the solution for you. With the release of the new ACT! Link module (please see our article on page 3) integration now exists between the popular ACT! contact management solution and the Sage BusinessWorks accounting solution. In this article we'll take a high level look at the power of the ACT! and what this solution has to offer your organization.

Instant Access To Customer Information

The ACT! database allows you to store complete contact information including notes, history, email, attachments, and more. With more than 60 standard contact fields and the ability to create more of your own, you can customize your solution to match the way you do business. When you're away from the office, you can access your ACT! database on either a Palm OS or Pocket PC handheld device.

Effective Organization

ACT! software provides many different ways to organize your information. One of the simplest methods is to organize by Contact, and include a notes section that automatically includes the date and user, as well as notes of any length. Microsoft's Word and Excel documents can be linked to the Contact record, making it very easy to find out what you've sent the contact. You also can create new Word documents that have ACT! contact data merged into them. The ACT! solution also includes user-defined fields that are valuable assets for holding your company-specific information. You can organize and manage your data by interest, company, project, and more. You can quickly assign contacts to groups and subgroups making it easy to target subsets of your Customer or Vendor data for personalized mailings or phone calls.

Scheduling And Calendar

One of the most useful aspects of the ACT! contact management solution is its ability to remind people of when an Action, such as a follow-up phone call or meeting, should be performed. You can schedule recurring tasks easily, and will receive immediate notification if a newly scheduled activity conflicts with an activity already on your calendar. You can choose to share your calendar with other ACT! users to allow you to schedule appointments convenient to all attendees. A complete calendar system helps to organize your daily tasks. The ACT! solution can also integrate with your Microsoft Outlook or other email system, thus allowing your messages to be sent directly from the ACT! software.

Opportunity Tracking

Salespeople will benefit from the sales Opportunities Tracking capabilities enabling them to better capitalize on leads. Sales opportunities are tracked by Contact and contain Dollar Amounts, the Active Sales Stage, and other sales or product information. Sales managers will appreciate the various sales reports that can provide information about prospects, amounts, and close dates that are in the sales pipeline.

Collaboration Between Users

The ACT! solution is an ideal tool to foster collaboration between you and your staff. With a shared database, you're assured that each user is working from the most current information and has access to notes and history that provide them with a complete picture of each contact. With five security levels, you can limit access to sensitive information to only those who need to know.

ACT! 2005 Premium For Workgroups

ACT! 2005 Premium for Workgroups edition uses Microsoft SQL Server 2000 Standard Edition for a high degree of scalability. With sophisticated capabilities such as the ability to view user availability, send meeting invitations, and manage resources such as conference rooms, ACT! 2005 Premium edition is a powerful tool for managing your contact database and keeping ahead of the competition.

While the ACT! solution allows you to share data with up to 10 users, ACT! 2005 Premium for Workgroups is the solution to consider if you have more than five users accessing a single database, and your company could benefit from the expanded functionality that this version offers.

An Integrated Solution

Now that the ACT! Link is here, integration between BusinessWorks Version 6 and the ACT! solution couldn't be easier—making ACT! by Sage the clear choice for your contact management solution. Call us for more details. ★

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