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What's Inside

Page 2

Previewing Sage BusinessWorks
Version 9 CONTINUED

Page 3

Create Personalized Communi-
cations With Mail Merge

Tips & Tricks

Page 4

Self-Service Offerings From
Sage Software

Have You Ever Said?

I really like Sage BusinessWorks
but I need.....

- A Customer Comparison Report
- A nested Bill of Materials
- Part Labels with Bar Codes and Scanning
- Better Inventory Management
- Credit Card Processing that posts to Sage BusinessWorks
- Integration to my Web Store
- Customized Order Entry

These solutions and dozens
more are available...

Contact ABC for further infor-
mation.

Previewing Sage BusinessWorks Version 9

Sage BusinessWorks Accounting is designed to help small businesses manage their accounting with ease and speed. Sage BusinessWorks Version 9 is scheduled for release later this year and includes features based on the requests of customers like you. In Version 9 you will find ways to improve productivity, manage your business more effectively, and gain easier access to data. Let's take a closer look.

Customer-Specific Pricing

Do you offer special pricing to your best customers, or a special discount to a customer who orders large quantities of certain products? Sage BusinessWorks Version 9 adds customer-specific pricing for parts—you assign the part price for the individual customer right in the customer maintenance screen. This saves time in data entry because you will not need to look up the special pricing, and you improve customer service by ensuring that you always charge the customer the correct price.

For quicker setup of customer-specific pricing, you can copy part prices between customers or import the part pricing for a group of customers simultaneously.

Detailed Open Credits Tracking

If you've ever ended up with more than one open credit or deposit on the books at the same time for a particular customer, you'll have noticed that they are tracked as a lump sum. Individual transaction tracking for



unapplied credits and deposits is introduced in Version 9, making it easier to identify the source of a credit or deposit.

Open Credit Detail Reports

Along with the new transaction detail, two new reports make it easy to reconcile credit and deposit information. The Open Credit and Open Deposit Detail Reports display all transactions that affect the open credit or deposit balance for a particular customer. This is a great tool for reconciling Accounts Receivable at the end of the month.

New Drill-Down Capability

Sage BusinessWorks Version 9 also adds a drill-down capability into a credit or deposit balance. If you have a customer on the telephone, the new Drill Down functionality

(continued on page 2)

Previewing Sage BusinessWorks Version 9

(continued from cover)

allows you to quickly access all the details that make up an open credit or deposit balance.

Note: the new transaction-level features for open credits and deposits apply only to transactions entered after the software upgrade is installed.

Unlimited Line Items

If your business buys and sells many small items, you may have run up against the 99-line limit in Sage BusinessWorks when entering quotes, sales orders, purchase orders, and invoices. With Version 9, the inconvenience involved in creating more than one sales order transaction for an individual customer with more than 99 lines on their order is eliminated. The new release provides for an unlimited number of line items per transaction when entering quotes, sales orders, purchase orders, and invoices.

More Sales Accounts

Sales Accounts are an important way of segmenting your sales so you can subtotal revenue by product line or other category that is significant in your business. With Version 9 you can have up to 999 unique sales accounts on a single transaction and up to 999 sales accounts can be defined in Accounts Receivable for more flexible, automated categorization of sales transactions.

Enhanced Check Printing

Most organizations need to print a combination of checks and direct deposit stubs when they generate payroll. New in version 9, you can select to print regular payroll checks on payroll check stock and Direct Deposit Pay Stubs on plain paper. There is no need to create separate payroll batches to do so. And you even can print a single Check Register containing your entire payroll run.

New Hyperlink Capabilities

Your work will go much more quickly when you take advantage of new hyperlink capabilities in Version 9. Often, when reviewing accounting information, you are prompted to send an e-mail with a question related to the transaction you are viewing. With the new hyperlink capability, you automatically can create an e-mail to the particular customer or vendor contact, directly from within the inquiry window. The e-mail hyperlink is available in the following locations:

- » Accounts Payable: Vendor Power Search and Vendor Inquiry
- » Accounts Receivable: Customer Power Search and Customer Inquiry

Hyperlinks also provide you with quick access to invoice balance details. You instantly will be able to jump to invoice information from: Accounts Receivable/Post Receipts, Accounts Payable/Manual Invoice Selection, and Accounts Payable/Enter Payments.

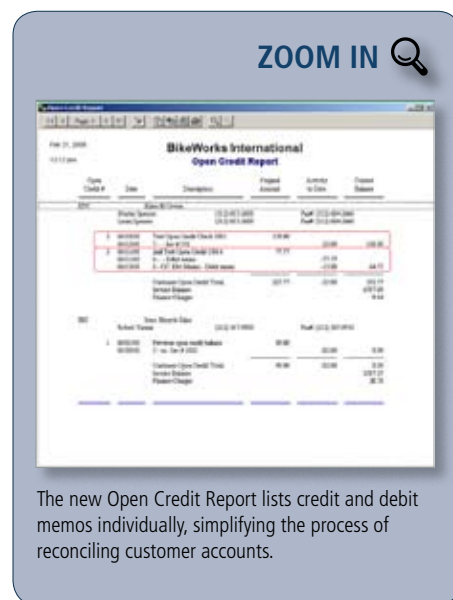
Enhanced Export Capabilities

When starting a separate line of business, you may prefer to create a separate company in Sage BusinessWorks to track sales and profit and loss information. However, chances are that a lot of the data, such as customers and vendors, will be the same. To easily copy this information from your existing company into your new company, Sage BusinessWorks Version 9 introduces a new menu selection to create an export file that exactly follows the required import file format. All of the major entities—Customers, Vendors, Parts, and Employees—easily can be imported into the new company.

Enhanced Vista Compatibility

The Help system in Sage BusinessWorks Version 9 is upgraded to utilize Microsoft

HTML Help to enhance Vista compatibility. In addition, Sage BusinessWorks now can take advantage of the Windows Aero Glass functionality. Aero Glass creates a translucent window, keeping the focus on your content and helping you to keep track of other windows on your desktop.



The new Open Credit Report lists credit and debit memos individually, simplifying the process of reconciling customer accounts.

Easy To Use

Because the basic workflow and user interface has not changed, you will find it easy to take advantage of all the new features in Sage BusinessWorks Version 9. Customers on a current Sage Software ClientCare plan will receive the software upgrade CD automatically this fall. Please give us a call for more information about the upcoming release. ✨

Create Personalized Communications With Mail Merge

For most companies, the primary tools for communicating with customers and suppliers are Microsoft Word and Outlook. However, the information that you need to communicate to them is most likely in your Sage BusinessWorks Accounting software database. The Custom Office module is your key to combining the capabilities of all these applications to: increase productivity, standardize documents for a professional look, enhance customer service, improve cash flow, and increase revenue.

In this article, we'll suggest some ways to use the Mail Merge capabilities of Custom Office to achieve these benefits, as well as provide step-by-step instructions for using the Mail Merge function.

Creative Ways To Use Mail Merge

Here are a few ways we can think of to use mail merge to improve service, improve cash flow, and increase revenue while working more productively. No doubt you can think of many more.

- » Announce availability of a new product to all customers
- » Send a *Did You Forget?* e-mail to all customers with past due invoices
- » Send a rewards promotion, offering free shipping to all customers who purchase within a specific time frame
- » Notify customers of an impending price increase and suggest they order now
- » Introduce your new purchasing manager to all your vendors
- » Send a request for quote to selected vendors

Mail Merge Step-by-Step

The following instructions can be used to send printed letters or e-mails to a list of selected customers or vendors.

1. In Sage BusinessWorks, select *Utilities/Targeted Mail Merge*.
2. Click the *New* button.
3. Enter a name for this Targeted Mail Merge job, and click the *Next* button.
4. In the *Data Source* drop-down box, select the type of records to use. Click *Next*.
5. In the *Selected Document* drop-down box, select the appropriate basic template (for example *Basic Vendor Template.doc*) or click *Copy To a New Name*. Click the *Edit* button and edit as needed. This is where you can create customized e-mail or letterhead formats to standardize the appearance of all your communications. We recommend saving the template under a new name and thereby preserving the original template for later use or reference.
6. All available mail merge fields are included. Delete any unnecessary fields, such as <ID> or <FinanceContact> and click *Save*.
7. Choose sort and filter options as required.
8. Choose either *Mail Merge* to print the documents or *Email* to send an e-mail.
Note: The template documents are located in the *BWData* folder.

If you would like to send a letter or e-mail to a single customer or vendor, such as a welcome letter, notification of credit extended to customers, or request for credit to vendors, use the *Mail Merge* button on the *Maintain Customer or Vendors* screen.

Note: Because Custom Office is sold as a separate module, it must be registered in order to activate the Mail Merge feature. In addition, rights must be granted to each user for access to the Targeted Mail Merge option on the Reports menu via the Security Settings in the Utilities/Maintain Users function. Please give us a call if you need assistance with Mail Merge or template creation. ★

((Tips & Tricks))

Registering for Sage Software Online:

You must be listed as a contact for the company in order to register for Sage Software Online.

1. From a Web browser, access the Sage Software Web page (link below).
2. Click the *Support* tab.
3. Select *Customer Logon*.
4. Select *Sage BusinessWorks* and the Sage Software Online logon window appears.
5. Select *Register now*.
6. Read the instructions and enter the appropriate information. All the requested information is required. Access to Sage Software Online is not granted if any fields are blank or incorrect. Your login name must be unique in the Sage Software Online system. Avoid using common names that may already be used. The password is case sensitive and must be at least eight characters.
7. Select the *Continue* button.
8. Sage Software Online verifies and updates the request immediately. Once verified, Sage Software Online returns to the logon screen.

To register another contact for Sage Software Online:

Only contacts with Administrator rights in Sage Software Online may use this feature.

- » Log on to the Sage Software Online Web site and click on the *Profile Mgmt* tab.
- » Select *Contacts*: if the employee is already listed as a contact, click the name to make any changes. If the employee is not listed, select *Add New Contact* and enter the required information.

Link to Sage Software Web page:
<http://www.sagesoftware.com> ★



IN THE SPOTLIGHT: Self-Service Offerings From Sage Software

With your current Sage BusinessWorks ClientCare subscription plan, you have a variety of online services and training available to you directly from Sage Software. We are happy to assist you with your questions or support issues, but if you are the do-it-yourself type, or need the answer outside of regular business hours, Sage Software Online (SSO) is a useful resource. Let's review the options available to you.

Keep Your Sage Software Online Account Current

One of the most important reasons for logging on to SSO is to keep your account up to date. Keep your address current to ensure that you receive automatic shipments of software upgrades and tax table updates. To access the SSO services you must be set up as an authorized contact. See Tips and Tricks on page 3 of this newsletter for step-by-step set up instructions. Registering your e-mail address allows you to receive technical bulletins, program updates, and product fixes.

Access The Knowledgebase

Your subscription plan gives you access to the same knowledge base that Sage Software and Sage Authorized Business Partners use to resolve customer questions and issues. The Knowledgebase system provides 24-7 access to solutions for thousands of technical questions. You can find step-by-step instructions for various software procedures or tasks, as well as installation tips and troubleshooting hints.

Online Discussion Forums

On the SageTalk online discussion forums, you can interact with other Sage BusinessWorks customers as well as Sage Software support staff. You may find valuable ideas and tips on how to make better use of your software on SageTalk.

Online Training

A variety of online training options allow you to improve your skill with Sage BusinessWorks from the convenience of your office. Focused topics allow you to spend less time learning specific tasks.

Sage Software Webcasts offer scheduled online seminars on selected topics. One current Webcast covers the simplified tax reporting available using Print-N-Sign Forms and eFiling.

Sage Software also offers Computer Based Training (CBT)—training courses on a CD. CBT CDs allow you study at your convenience, come back to selected topics when you need to, and share them with other staff members. The CBTs cover general accounting knowledge for the non-accountant.

Sage Software Realtime Learning combines the interaction of a classroom with the convenience of the Internet. Courses are led by a Sage Software trainer and scheduled for a specific date and time. It is a virtual classroom; you can ask questions and interact with other participants. All you need is a computer with high-speed internet access and a telephone. A current offering is *Ins and Outs of Inventory Control—Reconciling and Reporting*.

As a Sage Authorized Partner we are here to assist you with your training and support needs. Combined with the additional services offered by Sage Software Online you have the ultimate in flexibility and convenience. Call us with your questions about SSO or to learn more about our training and support services. ★

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