

**Volume 6
Issue 5
Sept 2006**

What's Inside

Page Two

The New ACT! Link

CONTINUED

Page Three

Credit Card Processing

Page Four

In The Spotlight:
Sage Compliance Services

Headline News

The August 2006 issue of *CPA Technology Advisor* magazine gave Sage Payroll Services a perfect 5-star review, calling it “truly a turnkey payroll service that delivers online services accessible on an in-house basis—the best of both worlds.” If you’d like to learn more about this outsourced payroll solution that integrates with Sage MAS 90, give us a call.

**Sage
Compliance
Services**

See page 4
for more info!

**The New ACT! Link
Bringing Two Favorites Together**

The new Sage MAS 90 and MAS 200 ACT! Link creates a bi-directional integration from ACT! by Sage to Sage MAS 90 and MAS 200 ERP. This link gives ACT! by Sage users real-time access to Sage MAS 90 customer-related data. A salesperson can issue a sales order or view critical customer information such as invoice history, purchase history, sales order history, return orders, and payment information directly from within ACT! by Sage. The ACT! Link brings customer accounting and inventory data into ACT! and sends opportunity data to Sage MAS 90 to become quotes and orders. It all happens in this powerful new interface; let’s take a closer look.

Benefits Of Integration

An integrated front and back office system can lead to greater overall efficiency and improved customer service. The ACT! Link delivers a single shared view of customers, allowing your sales, support, service, and marketing teams to service your customers without burdening the accounting department.

The improved data sharing and data integrity provided by the ACT! Link reduces your

company’s overall operational costs by minimizing rekeying and the time spent hunting for answers in two separate systems.

If you are already using ACT! by Sage for your front-office employees, they can continue to work in familiar software, with the added benefit of having access to critical back office data.

If you are using a stand-alone contact management software, consider the benefits of an integrated solution. In addition to giving your salespeople the information they need, your back-office employees benefit by knowing that orders are posted accurately into

the Sage MAS 90 Sales Order module—without rekeying.

New Tabs In ACT!

The new ACT! Link automatically adds several tabs to ACT! by Sage. Each tab holds Sage MAS 90 accounting data, and displays a data grid that can be personalized and resized to suit your specific needs. You can sort the rows, and remove and reorder fields and columns. The personalization you make is specific to you, so when you access the tab again, your changes are remembered.



New tabs in ACT! by Sage give users access to the Sage MAS 90 data they need to serve customers better.

Compliments of:



Continued on Page 2

The New ACT! Link CONTINUED

There's even an option to drill down into the details of the associated Sage MAS 90 data. Here's a list of the tabs added with ACT! Link:

- ▶ **Accounting Links Tab** displays all the Sage MAS 90 customer links configured for the selected ACT! by Sage company.
- ▶ **Accounting Data Tab** displays standard customer accounting information such as name, address, credit limit, and aging balances.
- ▶ **Invoice History Tab** displays sales invoice history records with line item details and lot/serial number information.
- ▶ **Sales Orders Tab** displays current sales orders and sales quotes for the selected Company (Sage MAS 90 customer).
- ▶ **Open Invoices Tab** displays current open invoices in the Sage MAS 90 Customer record.
- ▶ **Payments Tab** displays current Sage MAS 90 customer payment history information, such as date payment received and amount.
- ▶ **Return Orders Tab** displays current open return orders for the selected Company.
- ▶ **Item Sales Tab** displays current Item sales history for the selected Company.
- ▶ **Last Purchase History Tab** displays the last purchased information for the items this company bought.
- ▶ **Job Information Tab** displays current job cost information for any open jobs for the selected Company.
- ▶ **Work Orders Tab** displays all open work orders.

If one of the standard tabs does not include the information you need, you can add additional tabs to hold data specific to your company's operations.

Launch Sage MAS 90 Tasks

A Sage MAS 90 Tasks menu provides users with proper security access to many Sage MAS 90 tasks right from within ACT! by Sage to save time and keystrokes. Users may directly access the **Customer Maintenance**, **Sales Order Entry**, **Sales Quote Entry**, and **Inventory Inquiry** tasks.

The **Customer Maintenance** task displays customer information and allows you to group, sort, and filter data for use within ACT! by Sage. For example, make a group of all customers for which you are the sales representative.

The **Sales Order Entry** task launches a new sales order already populated with the customer information corresponding to the active Company record in ACT! by Sage—if the customer is not on file in Sage MAS 90, it's quick and easy to create a new Sage MAS 90 Customer.

The **Sales Quote Entry** task launches a new quote with the customer number corresponding to the active Company record in ACT! by Sage already filled in.

The **Inventory Inquiry** task makes it easy for you to look up detailed item information before creating an order, or to better respond to a customer's questions.

There's no waiting for the data to be updated—the ACT! Link works immediately to update both systems.

Opportunities To Orders

Converting opportunities to orders is quick and easy with the ACT! Link. Starting from a contact record within ACT! by Sage you'll select the Opportunities to Orders option, find the opportunity you're looking for, and click OK. Immediately and automatically, the order is created in Sage MAS 90. This works great for quick orders. For the more complex orders, you can simply launch the Sales Order Entry task to take advantage of the full power of Sage MAS 90 Sales Order. Either way, the ACT! Link will update the contact record in ACT! by Sage, ensuring you're always up to date.

Overall Flexibility

To facilitate its initial setup, the ACT! Link adds new menus within ACT! by Sage that allow you to: establish links to fields in Sage MAS 90, adjust for customizations, control when data is refreshed, and establish default settings for new companies.

A comprehensive field linking process enables you to specify precisely which fields in ACT! by Sage will be linked to which fields in

Sage MAS 90. For example, you will link the ACT! by Sage Company field to the Sage MAS 90 Customer field; and you can link the ACT! by Sage Opportunity field to a user defined field (UDF) in Sage MAS 90 Sales Order.

Linking fields is simple—you just click on the field you want to change and select a new field from the drop-down field list. Any user defined fields (UDFs) you have set up in either ACT! by Sage or Sage MAS 90 are available in the drop-down list.

These linkages are defined by Company Code, allowing you to have different configurations for each of your Sage MAS 90 companies, if needed.

If you are using ACT! for Workgroups, your users can log on at different workstations and have their own ACT! Link configuration follow them since the personalized and customized settings you establish are stored in the ACT! by Sage user record.

You can customize the ACT! Link by user type—a different configuration for sales versus customer service, for example.

Since there may not be a simple one-to-one association between a company in ACT! by Sage and a customer in Sage MAS 90, the ACT! Link allows you to associate a single company in ACT! by Sage with multiple customers in Sage MAS 90.

How To Get It

The new ACT! Link is expected to be available in early autumn. Those of you who already own the existing ACT! Link and have a current Maintenance Plan will receive the upgrade at no charge.

If you're currently running ACT! by Sage and are interested in the ACT! Link, or if you're looking for a new contact management solution and wonder if ACT! by Sage can work for you, please give us a call for details and pricing. ☆

Credit Card Processing

Americans bought over \$2 trillion worth of goods and services with major credit cards in 2005. The Sage MAS 90 ERP **Credit Card Processing** module automates credit card verification and gives you better control, tighter security, and a clear audit trail. As more and more of your customers seek to use credit cards as a payment method, the Credit Card Processing module can ensure your company can handle them efficiently.

How Does It Work?

The Credit Card Processing module integrates **PCCharge Pro Payment Server** by GO Software with Sage MAS 90, allowing you to accept credit card payments through Sales Order Processing, Accounts Receivable, and the e-Business Manager applets, .store and .order. With the Credit Card Processing module, you can approve and submit credit card transactions directly from within Sage MAS 90. All transactional information, such as authorization codes, is captured and stored within Sage MAS 90 for historical lookup and settlement purposes.

You can choose between a modem connection or if your credit card processing network supports it, the Internet. Authorizations and payment requests initiated within Sage MAS 90 are sent through the PCCharge Pro Payment Server, an intermediary between Sage MAS 90 and your credit card processing network. Approved transaction information is passed from the processor to PCCharge Pro, and then automatically into your Sage MAS 90 software.

Sales Order Processing

The Credit Card Processing module handles both full payments and partial or deposit payments within Order Entry and Invoice Entry in a straightforward, intuitive fashion.

For example, a customer wishing to make a deposit for a large order using their credit card, and charge the balance upon shipment, can be accommodated—after choosing a payment type of *Credit Card* and entering the credit card information, you will enter the deposit amount and select the *Deposit* check box. When you select the *Authorize Now* button, the Credit Card Processing module treats the deposit as a sale amount, seeking approval for the deposit

amount. If you have selected the *Pay Balance by Credit Card* option, the balance of the order is automatically charged to the credit card when you create and update the invoice.

For the typical sale where you charge the credit card upon shipment, do not enter a deposit amount or check the Deposit box. Just select the *Authorize Now* button and the Credit Card Processing module pre-authorizes the total invoice amount. The transfer of funds does not occur until the invoice is posted during the Sales Journal Update. For both deposits and



The Credit Card Processing module allows you to accept credit cards in Sales Order Processing, Accounts Receivable, and e-Business Manager.

payments, you'll receive notice that the Credit Card Processing module is seeking authorization. When authorization is received, the data automatically fills the Sage MAS 90 fields for Authorization Number, Date, Time, and Transaction Number.

Accounts Receivable Cash Receipts

From within Accounts Receivable Cash Receipts Entry, after creating a new deposit entry, you will select *Credit Card* as the Deposit Type. After entering your customer, enter a credit card number or select one of the on file card numbers for this customer. Once you enter the credit card information, select an invoice and distribute the deposit as usual. Next, select *Accept* to begin the credit card authorization process.

e-Business Manager

Using the Credit Card Processing module, customers can use credit cards as payment for the

orders they place in the .store and .order applets of e-Business Manager. Your customers will not receive an authorization code or decline message, just a thank you for their order. If the credit card is rejected for any reason, the order will go into the **Shopping Cart Accept and Reject Entry**, allowing you to contact the customer for another means of payment.

Audit Reporting

Two reports in Accounts Receivable help to reconcile your transactions. Additional reports also are available from within the PCCharge Pro software. A convenient link within Sage MAS 90 lets you access the PCCharge Pro server and print transaction data directly from the source.

Security And Fraud Prevention

Credit card fraud costs businesses millions of dollars each year. Security is obviously a critical concern for your customers as well, and the Credit Card Processing module addresses security in several strategic ways. Multiple password layers increase the security of customer card numbers and information by reducing the possibility of unauthorized access into the database. Credit card numbers are stored in an encrypted format within the Sage MAS 90 database. e-Business Manager uses SSL (Secure Socket Layers) to communicate securely with the Internet client. Further, you can elect to print only the last four digits of the credit card number on internal documents. Two effective methods of fraud prevention, Address Verification Service (AVS) and Card Verification Value 2 (CVV2), are both used by PCCharge Pro.

New Corporate Card Support

With Version 4.1, the integration between Sage MAS 90 and Sage MAS 200 and PC Charge Pro Payment Server has been enhanced to include support for corporate credits cards. You now have the ability to pass an additional tax amount along with a unique employee identifier as part of the transaction.

Give us a call for complete details.





In The Spotlight: Sage Compliance Services



Employers often report that ensuring compliance with the host of changing government tax filing regulations is a constant source of worry. Fees for missed deadlines and non compliance are steep. **Sage Compliance Services** can help eliminate that worry by ensuring your tax filings are accurate and on time. Let's learn more.

About Sage Compliance Services

Sage Compliance Services is a complete outsourced tax filing service from Sage Software. Sage Compliance Services supports Federal Payroll Withholding Tax, Social Security, Medicare, FUTA, state and local income tax, state unemployment insurance, state disability insurance, and IRS Forms 940, 941, 943, 944, and 945. The service also can print and mail your employees' W-2 forms and file via magnetic media. You simply upload an electronic file containing your tax data to Sage Compliance Services following each payroll cycle.

Save Money

Most service bureaus impound your payroll tax liabilities during each pay cycle. It's a great deal for the bureaus, since they collect interest on your money until the taxes are due. Sage Compliance Services does not impound your tax liabilities. Instead, your payment is electronically routed directly from your bank account to the taxing authority just before or on the tax due date. You keep the money, and earn interest on that money, until it's due.

Convenient

After running payroll in Sage MAS 90 ERP Payroll, you will create your tax liability file from a window within Sage MAS 90 and then upload the file to Sage Compliance Services. Your work is done.

Sage Compliance Service offers tremendous convenience and peace of mind to busy organizations like yours. Tax filing experts will analyze your payroll tax data, determine when your taxes are due, coordinate payment, and provide you with status reports documenting the actions taken on your behalf. Your tax data is reviewed by tax professionals and any discrepancies are immediately called to your attention.

Comprehensive Reporting

While using Sage Compliance Services can help eliminate worries and stress, it doesn't do it by keeping you in the dark. You'll have the opportunity to verify your tax payments before they are made. Hard copies of every tax return are provided to you for your files. Your state taxes are delivered to you via a signature-ready return or on your original blank return form. You'll receive same-day confirmation of tax information received by the service.

Several reports are available to ensure you have the information you want, when you want it. For example, you'll receive a copy of your company's **Master File Information** at the time of your account setup or after any changes are made. A **Summary of Wages and Tax Totals** helps you verify the information used is accurate. You can confirm pay-



ESC Software

1620 W. Fountainhead Parkway
Suite 509
Tempe, AZ 85282

(480) 784-1622
(866) 248-3241 toll free
(480) 784-1623 fax

Email:
info@escsoftware.com

Web Site:
www.escsoftware.com

C
O
N
T
A
C
T

More
Info

Click here for more
information on products
and services featured

ments made on your behalf by Sage Compliance Services with the **Payment Summary** report, which includes tax due date and amount due, name of taxing agency, tax type, date, and amount paid.

W-2 Printing Service

For many companies, printing and delivering W-2 forms is a time-consuming and tedious chore. Why not let Sage Compliance Services take on this burden for you?

High quality, laser printing technology means your tax forms are easy-to-read and meet all government requirements. You won't need to worry about last minute form changes with Sage Compliance Services; your W-2 forms will be ready and mailed on time. Elect to have the W-2's mailed directly to each employee, or have the set delivered to your offices for distribution.

If you are required to file electronically, Sage Compliance Services will create the electronic submittal of your company's W-2 forms. Should you have any questions, your assigned tax professional will work with you to ensure W-2's are accurate and on time.

Call us for more details and pricing for this service.

