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STAR-INFO

NEWSLETTER for Sage BusinessWorks

Sage BusinessWorks 2011

Scheduled Fall Release Is Designed To Help Speed Your Daily Work Tasks

Sage BusinessWorks Accounting 2011 is scheduled to come your way this fall. This release adds 64-bit compatibility and is full of time-saving features designed to make your daily tasks simpler and faster.

Payroll Improvements

Payroll is an important and time-consuming task for small businesses. This release includes several new features in Payroll designed to speed your payroll processes, and serve employees better.

Many employees like the option of depositing a portion of their pay into their savings account and the balance into checking. With the Expanded Direct Deposit distribution in Sage BusinessWorks 2011, you will be able to automatically distribute direct deposit payments to multiple bank accounts per employee. The Direct Deposit process also has been streamlined to make it faster and easier to use. By upgrading to Sage BusinessWorks 2011, you can reduce payroll processing time while simultaneously improving employee satisfaction.

A new State Tax Report filter allows you to print the State Tax Report for employees with Year-To-Date data only. This allows you to save time printing, save money on paper, and be a little greener.

Do you find that you need to go to your calculator to figure your total tax liability for OASDI, Medicare, and SUI taxes? With this release, new subtotals on the Payroll Tax Deposits screens provide you with this information at a glance.

The last four digits of the Social Security Number (SSN) now are stored in the database in the PR Employee table, providing you with a means of searching for employees based on the SSN while still protecting sensitive employee information. You also can add the last four digits to Custom Reports, Custom Exports, Crystal Reports®, and customized reports.

Enhanced Navigation And Display

With Sage BusinessWorks 2011, a

(continued on page 2)

Sage BusinessWorks 2011

(continued from cover)

new Docking Manager allows you to un-dock various viewing panes and dynamically resize Bank Reconciliation screens.

You can un-dock the Shortcuts, StartUps, and Module list. On the View menu, you can simply uncheck the Viewer and move the panes anywhere you like on your desktop to match your work processes.

Reconciling your cash accounts is easier with Sage BusinessWorks 2011. You will be able to work more efficiently with the ability to see more transactions at the same time. Dynamic Screen Sizing of both the Bank Reconciliation and Bank Deposits screens allow them to grow automatically based on the number of transactions to display and your monitor settings. The screens now will display higher up on your monitor so you no longer need to reposition them when you open them.

Purchase Order Enhancements

A new Quick Find field on the Maintain Purchase Orders and Purchase Order Inquiry screens make it easier and faster to locate the desired purchase order.

Working Efficiently With Customer Accounts

The Post Receipts interface is redesigned to save you time posting payments to customer accounts. You will be able to select the invoices to pay from a single screen populated with a list of all the customer invoices that are available to pay.

A new Optional Past Due Notification setting gives you more control of your company order process.

- When you want the sales team to know when a customer is past due, but not stop them from entering orders, you can set the option to Warn – a message will appear notifying the representative that the customer has one or more invoices past due. After reviewing the message, the representative can continue with the order if they choose.
- Setting the option to Restrict Orders will prevent orders being entered for customers who are past due. A message will display that the customer has one or more invoices past due and will require the manager password in order to continue.
- If you prefer not to use this feature at all, set it to Ignore and no message will display.

A new Print Pick Ticket button on the Maintain Sales Orders screen allows you to print Pick Tickets directly from Sales Orders. This enhancement improves productivity for your sales and order entry teams as they will no longer need to navigate to the Print Pick Ticket task to launch this feature. The Picking Ticket setup screen will come up automatically, populated with the order information.

An Email button has been added to the Print Recurring Invoices screen. Now you can take advantage of the electronic forms manager in Sage BusinessWorks to e-mail recurring invoices to save time, postage, and paper.

User Reports Manager Enhancements

In Sage BusinessWorks 2011, you can select a report to use as a template and create a new blank report with the New button on the User Reports Manager. You will be presented with a blank design screen with all the tables and links pre-populated based on the report you selected. Sage also has created an Import/Export New Reports feature so you can easily add new reports.

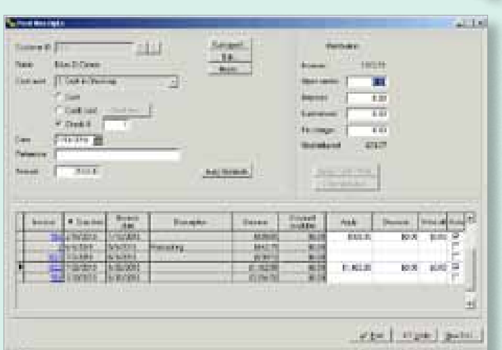
Technology And Security

Sage BusinessWorks 2011 is compatible with 64-bit Operating Systems. Now you can take advantage of the improved processing speed and larger memory allocation available with the new 64-bit operating systems.

An option has been added that allows you to grant a new user complete access to all companies or no access to any companies. The option will save time and reduce the likelihood of a security breach when setting up new users in Sage BusinessWorks.

Sage BusinessWorks is filled with time-saving features designed to help you run your business more efficiently. Please give us a call with your questions or for assistance with your upgrade.

ZOOM IN



The New Post Receipts Entry screen makes it easy to allocate payments to the correct invoices.

Using Custom Forms Designer—Report Sections

With the Sage BusinessWorks Custom Forms Designer, tailoring your invoices and checks to your company's specific look is easier than you may imagine. This article is the first of a series that will provide tips for working with the Sage BusinessWorks Custom Forms Designer. In this tip we provide an overview of the various form sections.

Getting Started

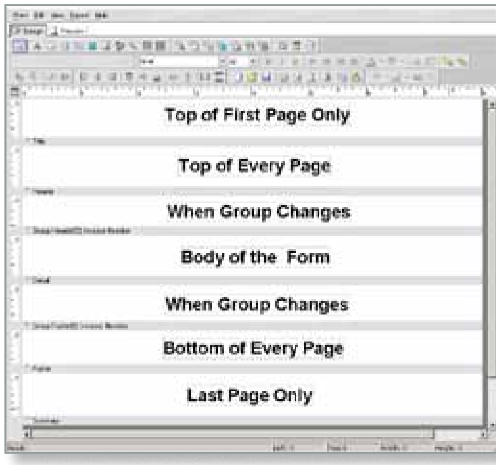
We recommend that you start with one of the existing form designs included with your Sage BusinessWorks Accounting software. Then use the Form Save As command to save it under a new name before you start editing. This gives you a good starting point for creating your form.

Information on forms is organized into sections in horizontal bands. Each section has its own particular properties that suit its use. The sections are: Headers, Footers, Group, Detail, and Summary. We will discuss each section in turn.

Headers And Footers

Fields in the Header section appear at the top of the page. There are actually different types of headers—Title Header, Page Headers, and Group Headers. A Title Header will print at the top of the first page only, typically used for the company name, logo, or report title. A Page Header will print at the top of every page, and is typically used for column headings. A Group Header will print each time the Group By field changes. For example, if you grouped your report by invoice number a new Group Header would appear for each invoice number.

Fields in the Footer section appear at the bottom of each page. Typical Footer section fields are page numbers or footnotes.



Information for forms and reports in Custom Forms Designer is arranged in sections or bands of information.

Group

This section is the meat of your form. The Group section allows you to break your document into several bands by category. When you add a Group, a Group Header and a Group Footer band are automatically created that allow you to define and further customize the information. A typical group might be all the line items for a single invoice or all invoices for a single customer. Groups also allow you to enter fields such as subtotals. For example, you can create a Group that will group invoices by customer number and creates subtotals of all the invoice amounts for each customer. Groups are added from the Report Menu option. You can select the Start New Page check box to have it start a new page when the Group By information changes. You can choose the Reprint Group Headings On Subsequent Pages option; this is useful if you have an invoice that covers multiple pages so that the group heading will print on each page.

You can add other useful information to a group footer, such as a field to count the total number of items shipped on the invoice or to total the line item dollar amounts to print an invoice subtotal. The group footer will print after the last detail line in that group.

Detail

This band contains the individual detail lines that will print on the form. These include database fields such as invoice number, quantity ordered, and line item descriptions.

Summary

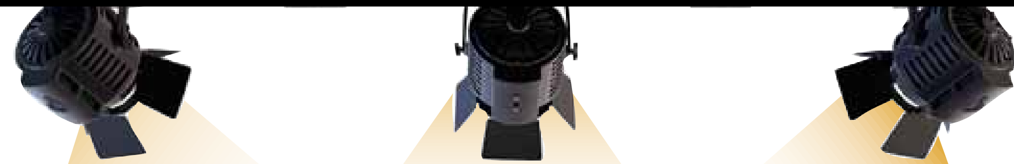
The summary section prints on the last page only and is typically used to summarize the report. On an invoice, you can use this section for a thank-you message to your customers.

Section Height

Each section of the form can be set to have either a static or dynamic height. Sections such as the Header or Footer always use the same amount of space each time, so they should be set as a fixed or static height. Setting a section to a static height causes it to stay the same size, no matter how much text is in the section—or even if there is no text in the section.

Setting a section to have a dynamic height allows the height to change according to the amount of content. The Detail section of a report is generally set to a dynamic height. If there is more detail than will fit in the available space, the software will print the footer information and then continue to the next page with the additional detail.

Understanding how form sections work is a big step in creating a custom form. We will learn more about working with Sage BusinessWorks Custom Forms Designer in the next newsletter. Please call us with your questions.



IN THE SPOTLIGHT:

F9: Your Excel-Based Reporting And Analysis Tool

Sage BusinessWorks Accounting includes built-in financial reporting, but if you like using Microsoft Excel or need financial reports more frequently than once a month, F9 might be the tool for you. Let's take a closer look at F9.

How F9 Works

When F9, an add-in to Excel, is installed, your familiar Excel interface will include a new F9 drop-down menu. A hot-link feature allows each cell in your spreadsheet to be automatically linked to any data item in your Sage BusinessWorks General Ledger. In this way, real-time financial information is instantly available within your spreadsheet.

Easy To Use

F9 is easy to use. A Report Wizard allows you to go from a blank spreadsheet to a fully formatted, hot-linked report in seconds. Built-in templates assist in the process. By following the graphical step-by-step procedure, you can point and click your way to a finished report, complete with F9 formulas.

Multi Company Reports

F9 allows you to access general ledger data from any number of Sage BusinessWorks companies simultaneously. You can use it as the tool to produce consolidated reports from multiple companies.

Anytime Reporting

Monthly financial reports are fine for audit and government reporting requirements. But if you need up-to-the-minute business data more often, particularly if you are in an industry where prices fluctuate frequently, F9 allows you to produce weekly or daily reports so you can stay on top of profitability.

Graphical Presentation Of Data

Because F9 is an Excel add-in, you can take advantage of all the graphics, font control, and other formatting features of Excel.

Drill-Down Capabilities

When looking at the data in your spreadsheet, unusual values may prompt you to want to check their origins. F9 includes complete drill-down capability to the source data.

Error Resolution

If your financial report is out of balance, it easily can be resolved with the Analyze feature in F9. With one click, the Analyze feature will scan your spreadsheet and help troubleshoot your report by identifying missing or duplicate accounts.

Account Inquiry

If you do not run Sage BusinessWorks on your desktop, you can use F9 for a quick account inquiry, such as a current bank balance. It is a simple matter to launch F9, select the accounts for which you want a balance, and click Get Balance. F9 offers highly flexible reporting capabilities, including multiple date ranges, lists of account segments, and report auditing, all while being dynamically linked to general ledger data. F9 helps ensure your numbers are current, consistent, and complete. Give us a call with your questions.

CONTACT INFORMATION

ESC Software
1620 W. Fountainhead Parkway
Suite 507
Tempe, AZ 85282
(480) 784-1622
(866) 248-3241 toll free
(480) 784-1623 fax
info@escsoftware.com
www.escsoftware.com

Authorized Partner

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