

# Sage BusinessWorks Accounting

Sage BusinessWorks 2010 Release Guide



sage



## The fresh look of Sage BusinessWorks 2010 is the first sign of the remarkable changes that have taken place in your Sage BusinessWorks Accounting software.

Your Sage BusinessWorks Accounting software has undergone an extraordinary facelift over the past year, resulting in a product that is easier to use than ever before. Sage BusinessWorks 2010 is a culmination of months of development and collaboration not just with the Sage development team but also with customers like you. Through extensive usability testing, we reached out to Sage BusinessWorks customers to ensure the new look and feel of Sage BusinessWorks 2010 is not just pretty, but also highly functional and intuitive. As you navigate through the new launcher, you will be able to take advantage of all the new features with minimal training because the basic workflow is virtually identical to what you are used to.

As you read through this Enhancement Guide, we hope you will be amazed at the sheer number of exciting new enhancements available in Sage BusinessWorks 2010. You may be wondering how you can get access to all of these new features that are packed into this version. Great news! Customers on a current ClientCare plan at the time of shipping will be sent the software upgrade CD automatically! It's just one of the many benefits of being a ClientCare member. Did you know a ClientCare plan already provides 24/7 access to download maintenance updates as they become available? In addition, a ClientCare plan offers you the following valuable resources:

- For Gold plan subscribers—unlimited access to Tech Thursday and Business-Building Courses. For Silver and Bronze plan subscribers—use your points for Tech Thursday and Business-Building Courses (1 point per Webcast). Visit Sage University for course listings.
- Gold and Silver plan subscribers have access to up to two Private Tutor sessions, which are customized to fit the needs of your business (two sessions included with the Gold plan, 3 points each for Silver plan).
- Enhanced Tax Reporting, which automatically produces more than 250 tax forms, including state and federal unemployment forms, W-2s, W-3s, 1099s, and many more using your Sage BusinessWorks data.
- Access to a collection of short recorded tutorials covering everyday tasks in Sage BusinessWorks.
- Access to a wealth of technical and product knowledge accessible over phone, fax, e-mail, or the Web. Gold plan subscribers have unlimited access to these resources; Silver and Bronze plan subscribers may use their points (1 point per case).

If you don't have a ClientCare plan or yours has lapsed, you don't have to miss out on the exciting new features in Sage BusinessWorks 2010 or the world-class support provided by the Sage Technical Support analysts. Simply contact your Sage Business Partner, give us a call at **800-447-5700**, option 2, or send an e-mail to: **BusinessWorksSales@sage.com** today.

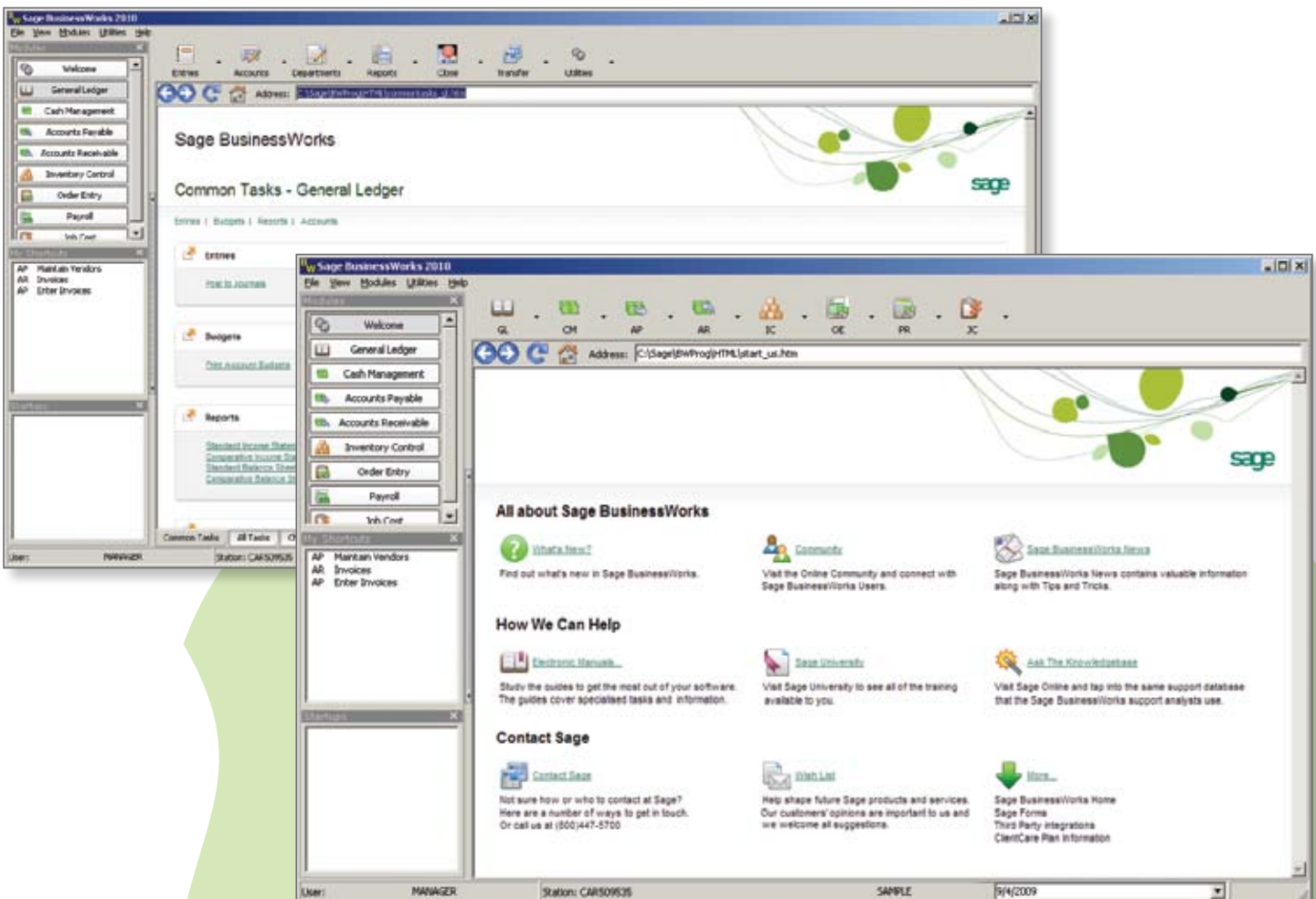
Access all of the modules from the button bar across the top as you always have, or select from the module list in the left navigation pane.

## Enhanced Usability

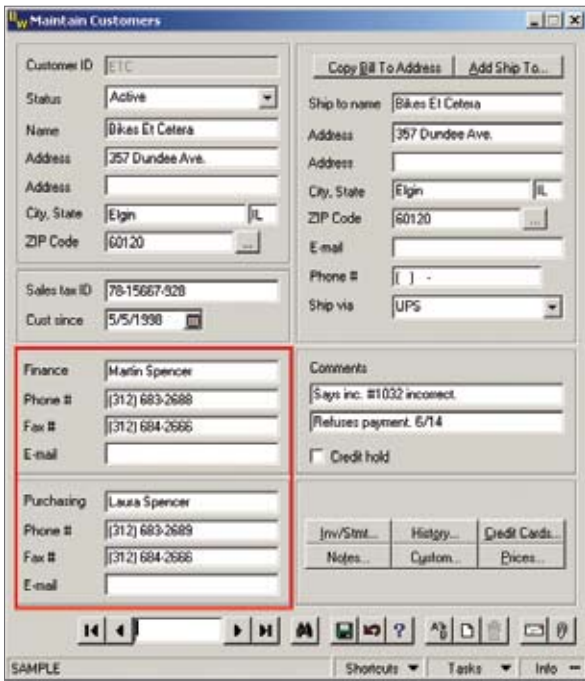
### Readily access your most used tasks

The Welcome page introduces the new look and feel of Sage BusinessWorks 2010 with a wealth of information available at a single click. Access all of the modules from the button bar across the top as you always have, or select from the module list in the left navigation pane. Selecting from the module list opens a whole new workspace that will simplify your work flow—choose

the Common Tasks tab for a hyperlinked list of tasks that are used most often, choose the All Tasks tab for a hyperlinked list of all tasks in that module, or choose the Checklists tab for a hyperlinked list of setup or period-end tasks. Further streamline your business processes by creating your own “My Shortcuts” list with the Sage BusinessWorks tasks you access the most. The Startups option will ensure you are ready to go by automatically launching selected tasks when Sage BusinessWorks is started.

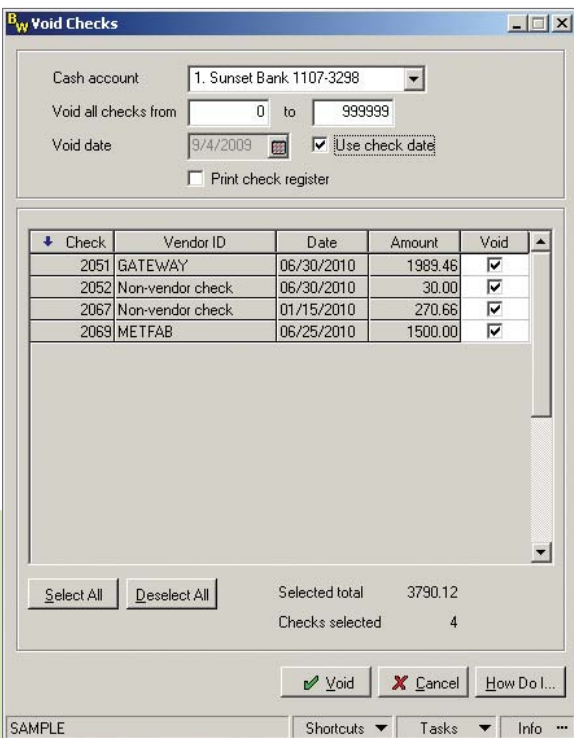
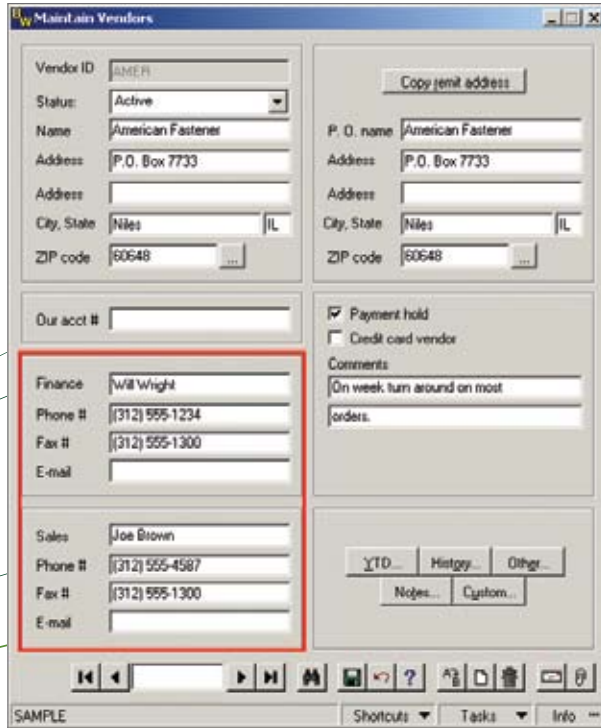






## Stop toggling to see company contacts

Sage BusinessWorks 2010 simplifies maintenance of finance and purchasing contacts in Maintain Customers by displaying both contacts on the main screen. Both may be viewed and edited without having to toggle between the two contact records. The same simplification was carried through to Maintain Vendors where the finance and sales contacts are displayed on the main screen.



## Reduce worry when voiding checks

Take the risk out of voiding a range of checks with the new, simplified Void Checks by Range interface. The new interface significantly reduces the chance of voiding the wrong range of checks by displaying a list of the checks selected to be voided. Checks may be deselected by removing the check mark from the Void box. The count and the total amount of checks selected to be voided dynamically updates as checks are selected and deselected.

## Make sales order changes whenever it's convenient

Save time and inconvenience by simply adding, deleting, or editing lines on sales orders that have been partially invoiced.

## Forget about running out of invoice numbers

The Accounts Receivable (A/R) and Order Entry (O/E) invoice number fields have been expanded to 9 characters, significantly expanding the range of available invoice numbers.

## Save time with a single invoice for credit card charges

Easily enter a single invoice for credit card charges or other invoices now that the General Ledger (G/L) distribution accounts have been expanded to 999 unique accounts on Accounts Payable invoices.



## Simplified Business Processes

### Get orders out faster

Two new fields—phone number and e-mail address—have been added to the Ship To form to facilitate processing of Drop Shipments. The fields are available to be added to sales order and invoice forms as well as the purchase order forms.

**Maintain Ship To Addresses**

Customer ID: ETC  
Bikes Et Cetera

Address #: 1  
Description: Primary ship to address  
Ship to name: Bikes Et Cetera  
Address: 357 Dundee Ave.  
City, State: Elgin IL  
ZIP Code: 60120  
**E-mail: siobhan.finders@sage.com**  
**Phone #: (800) 447-5700**

Ship via: UPS

Sales tax 1, 2, 3: [ ] [ ] [ ]

### Store employee and customer information without worry

Sage BusinessWorks 2010 now encrypts sensitive information inside the database to better protect your employees and customers. All credit card numbers and social security numbers are encrypted in the database to assist you in complying with the PA-DSS requirements (Payment Card Industry). To further protect credit card numbers and social security numbers, Sage BusinessWorks 2010 adds a new security setting that allows you to decide if a user may view and edit the credit card number and if a user may print the credit card number or print splats and the last four numbers. The same settings are available in Payroll for protection of the social security number. A user may be given View/Edit and/or Print capabilities.

**Maintain User Security**

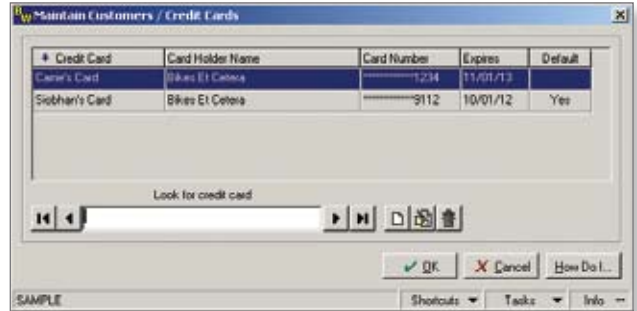
User ID: SIOBHAN  
Company ID: SAMPLE

- System Wide (Review of System Wide options is recommended)
  - Change Startup Options
  - Reports and Report Printing
  - Transaction Drill Down(s)
  - Form Printing Engine
  - Attachment Manager
  - Business Graphics Viewer
  - Electronic Forms Manager
  - Create Purchase Order From Sales Order
  - Data Access
    - Social Security Number
      - View / Edit on Screens
      - Print on Reports
    - Credit Card Number
      - View / Edit on Screens

Buttons: Clear All, Select All, Copy From, Expand All, Collapse All, OK, Cancel, Help

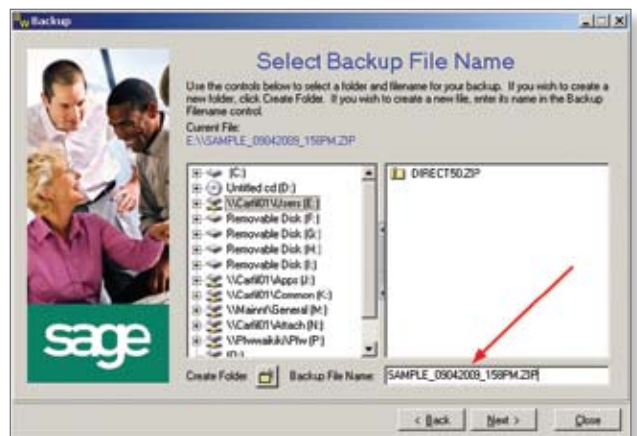
## Go green with reduced paperwork and manual record-keeping

Throw away your manual records for saving customers' credit card information with the enhanced credit card maintenance capabilities. You can save an unlimited number of credit cards for each customer within the protection of the Sage BusinessWorks 2010 database.



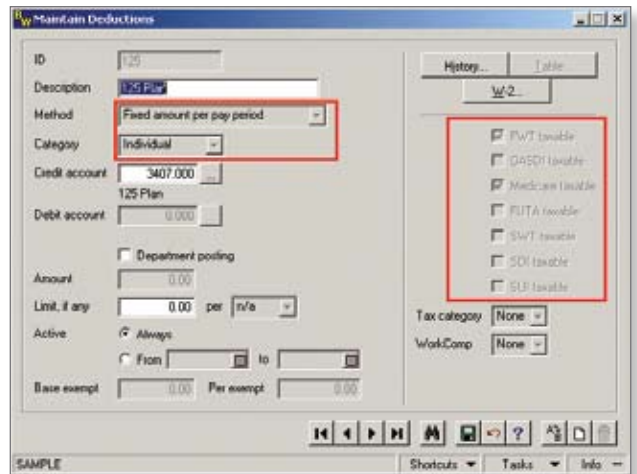
## Eliminate the chance of overwriting backup data

Quickly back up your company data files without worrying about overwriting an existing backup as the backup utility appends a date/time stamp to the default backup file name.



## Report payroll figures with confidence to the government

Accuracy of payroll figures is vital when reporting to state and federal governments. Changes to method, category, or taxable status are no longer allowed within Deductions and Other Pays that have transactions against them, ensuring greater accuracy at year end.



## Access your archived company more easily than ever

Save time when creating your archive company by selecting to copy the security during the copy company process. The resulting copy of your company will contain the exact security settings of your existing company.



## Keep IT happy with Pervasive v10 Compatibility

Pervasive v10 contains a number of performance-enhancing features. Most important is that it allows full support of Microsoft® Windows Server® 2008 with Sage BusinessWorks 2010.

## Improved Reporting

### An easier way to extract information so you can give everyone what they're asking for

A whole new reporting system implemented in Sage BusinessWorks 2010 gives each module at least two new reports for virtually unlimited customization capabilities. And in the future, the existing reports will be migrated over to the new reporting system, allowing them to be customized as well (for now no changes have been made to the existing reports, so there is no learning curve or change in your workflow).

#### The new reporting system gives you:

- Drill-down capabilities to the details of transactions
- Drill-down capabilities to the task screen
- Three levels of report customization:
  - \* Quick Reports for those who want to add/subtract/move fields or change the filter or sort options.
  - \* Comprehensive Reports for those who are more comfortable in the report design arena. Allows you to add/subtract/move fields, add calculations, add your own drill down or drill to fields, and more.
  - \* SQL Report Programming available with the Custom Office module. This option is available in the Comprehensive Reports option.
- Virtually unlimited calculation abilities
- Access to all company data fields
- Option of adding tables to existing reports with the Custom Office module
- Columnar Quick Reports so they export into Microsoft Excel® exactly as seen on screen
- Data pull capabilities from multiple modules through Custom Office module for better business decisions
- Protection by utilizing the existing Sage BusinessWorks security model

And to help you get up to speed quickly, Realtime Learning courses and other tools will be available.

**Note:** SQL Report Programming is beyond the scope of the Sage BusinessWorks ClientCare plans due to the advanced knowledge required.

### Easily keep up with customer payments

Stay on top of your customer payments more easily now that detail payment records have been added to Pre-Paid Accounts Receivable invoices. The added records are available in Custom Exports as well as in Crystal Reports® or when using ODBC queries to report on Sage BusinessWorks data.

### Keep IT happy with Pervasive v10 Compatibility

Pervasive v10 contains a number of performance-enhancing features. Most important is that it allows full support of Microsoft® Windows Server® 2008 with Sage BusinessWorks 2010.

### Break down allocations with more precision

More precise posting and reporting are at your fingertips with the 5 decimal place precision added to the AP Allocation Tables.

### Quickly show accurate sales figures

Maintain control of your true sales figures by posting returns to the original sales accounts without having to account for adjustments. The original functionality of the Invoice Returns and Part Return features is maintained by providing the option to post to Sales Returns as in the past or to the original sales account.

Part # / Type	p/a	Qty	Retain	Price	U/M	p/s	Amount
1003		2	0	205.95	each		0.00
1003		1	0	57.95	each		0.00
Misc chg ( 0.00)							0.00
Discount ( 0.00)							0.00
Freight ( 0.00)							0.00
Total returned:							0.00



## Ready for Sage BusinessWorks 2010?

If you're on a current ClientCare plan, you will be sent the software upgrade CD automatically as just one of the many benefits of being a ClientCare member. Not currently on a plan? We're here to help—simply contact your Sage BusinessWorks Partner, e-mail [BusinessWorksSales@sage.com](mailto:BusinessWorksSales@sage.com), or call the Sage BusinessWorks ClientCare department at **800-447-5700** and select option 2.

**Get Connected!** Visit the Sage BusinessWorks online community today to ask questions of and share product experiences, tips, tricks, and suggestions with colleagues as well as industry and product experts.

[Community.SageBusinessWorks.com](http://Community.SageBusinessWorks.com)

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Regional Headquarters

Orange County, California  
23161 Mill Creek Drive, Ste. 200  
Laguna Hills, California 92653  
Phone: (949) 583.9500  
Toll Free: (800) 425.9843  
Fax: (949) 583.0649

Atlanta, Georgia  
1100 Johnson Ferry Road, Ste. 450  
Atlanta, Georgia 30342  
Phone: (404) 841.6240  
Toll Free: (800) 455.1368  
Fax: (404) 841.6243

[www.blytheco.com](http://www.blytheco.com)

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2550 Warren Drive | Rocklin, CA 95677 | 800-447-5700 option 2 | fax 877-604-8928

[www.SageNorthAmerica.com](http://www.SageNorthAmerica.com) | [www.SageBusinessWorks.com](http://www.SageBusinessWorks.com)