

5 Tips to Earning More Money With Sage BusinessWorks

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Over 20 years of
Accounting Software Consulting
Experience.



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How can I get more out of BusinessWorks?

As a business owner or accounting manager using BusinessWorks, this is likely one of your questions. You run your business with BusinessWorks, and you know you can use the software more efficiently.

You may have had BusinessWorks for years, and have not been taking advantage of all the great features available to save time. And you know that saving your staff time equals earning your business more money.

This tip guide offers just of the few ways you can take advantage of BusinessWorks to earn your business more money. Our team of experts helps hundreds of BusinessWorks users get the most out of their accounting systems on a daily basis, and we can help you, too.

Since 1983, I've been helping businesses untangle accounting software. After over 1000 accounting software installation projects, I decided to focus exclusively on one product, BusinessWorks. And I've surrounded myself with experts who are as fanatic about BusinessWorks as I am.

We hope this tip guide can help you get more out of BusinessWorks right away. And if you have some additional tip ideas, please feel free to share them with us. Our mission is to help BusinessWorks customers maximize their return on their BusinessWorks investment.

We appreciate your taking the time to review our tips. Thanks for the opportunity to be of service. Please feel free to visit our website to learn more about how we help BusinessWorks customers, or give us a call, toll free at 877 700-9082.

I wish you the best in getting the most out of your BusinessWorks software.

Jay Panuska
BusinessWorks Fanatic

TIP 1 – Save time by reducing mouse clicks.

Did you know you can save time by keeping your hands on the keyboard instead of moving your hand to a mouse? Every time you take your hand off the keyboard to grab your mouse, it takes time. For a data entry person, this can save a great amount of time!

KEYSTROKE TIME SAVER

Underlined Characters = ie ALT-P (for Part?... lookup). Save time by not having to take your hands off the keyboard to use your mouse.

The screenshot shows a window titled "Maintain Sales Orders / Line Items - ETC". The interface includes a form for entering order details and a table of line items. Underlined characters in the labels indicate keyboard shortcuts for various functions.

Order	Ship	Cancel	Unit price	U/M	Discount	Acct	Warehouse	Accept	Clear
2	0	0	378.95	each	0.00	2	STORE 1		

Order	Ship	Type/Part #	Description	U/M	Price	Amount	Edit	Insert	Delete	Long desc...
2	0	1004	26 inch racing bicycle	each	378.95	757.90				
3	0	1005	24 inch racing bicycle	each	390.95	1172.85				

Subtotal 1930.75

Buttons: OK, Cancel, How Do I...

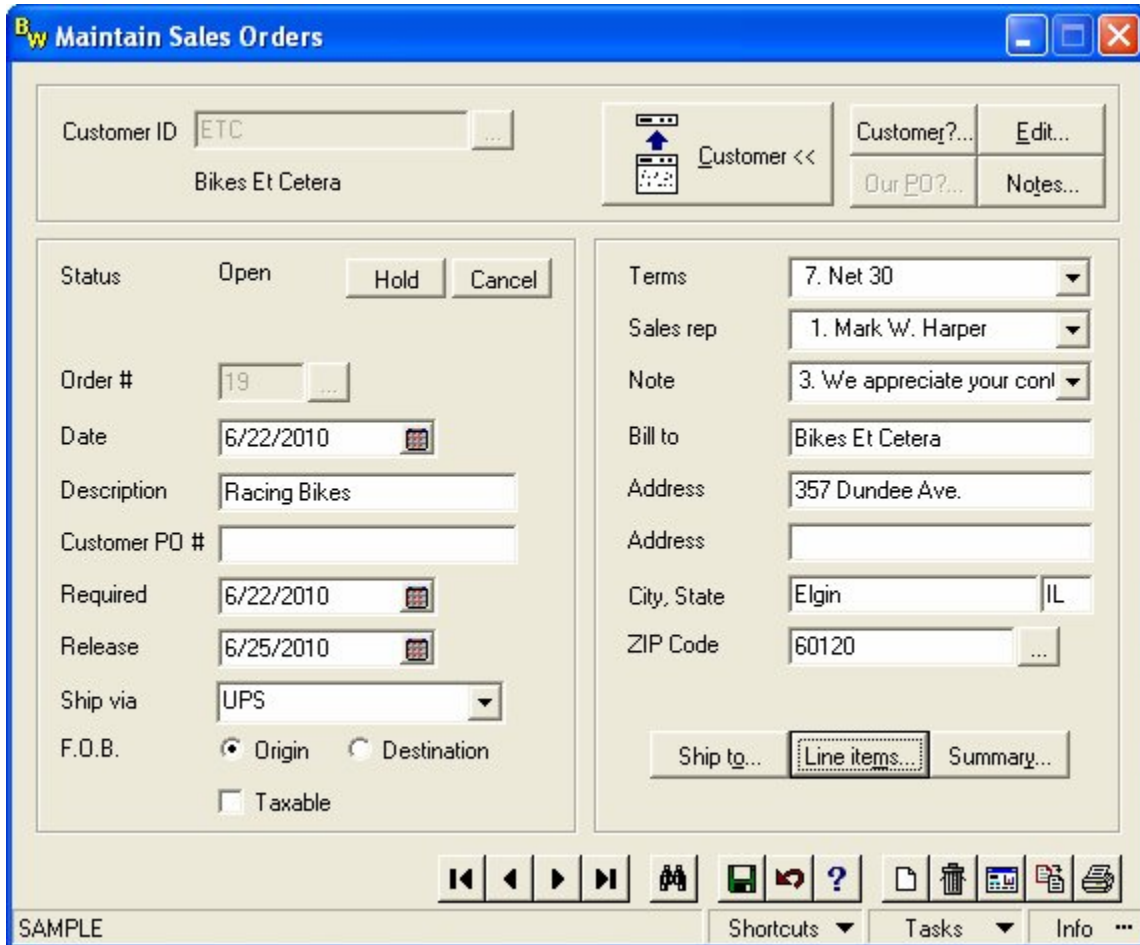
Did you ever wonder why some characters on the BusinessWorks screens have certain letters underlined?

Notice in the screen above, the underlined characters are keystroke equivalents, instead of using the mouse. You don't have to move your hand from the keyboard to grab the mouse to lookup Part information, or Part notes or Part historyu or Serial #s. Just use ALT-p (hold down the Alt key and simultaneously press p) or ALT-n (for Part notes) etc.

Notice that the commands on the bottom of the screen for OK (ALT-o) Cancel (ALT-c) and How Do I... also have keyboard equivalents.

You save time every chance you have to keep your hands on the keyboard as opposed to moving your hand to the mouse. This feature is subtle, but I've seen data entry personnel fly through order entry because they never have to take their hands off the keyboard. Every time they grab the mouse, a second is wasted. Over time, this adds up to thousands of seconds of time saved!!! Saved Time = Saved Money.

Keystroke Equivalents examples for buttons on the task screens ie - Ctrl+S = Save, Ctrl+O = Create Our PO



Just roll your mouse over the buttons on the bottom of the screen to view the tool tip. This will reveal the keyboard equivalent keystroke to use as opposed to grabbing the mouse and clicking the button.

Tip 2 – Are you using Cash Management fully?

You are entering in transactions like posting deposits and payroll expenses as journal entries in the General Ledger instead of Cash Management → Enter Bank transactions.

You didn't understand how Cash Management and General Ledger work together? You're not alone, as many clients have a lack of training on this module. In a nutshell, entering bank transactions from Cash management does two steps at once.

1. Updates the Cash Management for bank reconciliation purposes.
2. Posts a GL entry at the same time.

BusinessWorks maintains two files when entries are entered into Cash Management, the bank reconciliation and the general ledger. So if you enter all your entries into cash management, you will save time by enabling the bank reconciliation to be current, as well as the general ledger.

Account #	Description	Amount
0.000		0.00

Notice there are 5 types of bank transactions, and also a check box that defaults to checked called "Post to G/L".

Let's review the 5 transactions and what happens to the General Ledger for each.

Deposit – Debit the checking account, credit the GL account in Account #.

Credit – Same as a deposit.

Charge – Credit the checking account, debit the GL account in Account #.

Withdraw – Same as a charge.

Transfer – Debits one checking account and credits the other checking account.

When you enter all the transactions possible through Cash Management → enter bank transactions, you save time by getting 2 for the price of 1! One entry into Cash Management, and one entry into GL. The only transactions you can't enter into Cash Management instead of GL would be things like depreciation, and adjusting entries. But any other entries affecting checking accounts should be entered through Cash Management. Saved Time = Saved Money.

Tip 3 – Using Instant Checks in Cash Management

CM → Transactions → Instant checks

The screenshot shows the 'Instant Checks' window with the following details:

- Title Bar:** Bw Instant Checks
- Left Panel:**
 - To whom: Vendor (dropdown)
 - Vendor ID: [Field]
 - Name: [Field]
 - Address: [Field]
 - Address: [Field]
 - City, State: [Field]
 - ZIP code: [Field]
- Right Panel:**
 - Check #: 2071
 - Amount: [Field]
 - Date: 2/28/2007
 - Handwritten check
 - Post to G/L
 - Stub remarks... (button)
 - Cash balances?... (button)
- Main Table:**

Account #	Description	Amount
[Field]	[Field]	[Field]
- Bottom Buttons:** Post, Undo, How Do I...
- Status Bar:** SAMPLE, Shortcuts, Tasks, Info

Instant checks in Cash Management allow you to create a check with much fewer steps than the many steps required in AP. You'll save time by using instant checks when the vendor invoice history is unnecessary, and you just want to get a check out by selecting an expense account to apply the amount to. It takes much more time to enter in an AP invoice, then select the invoice for payment, then print the check. Just by using instant checks when appropriate, (which still records the payment to that vendor for 1099 tracking) you can save time. Many clients are surprised when I show them how easy instant checks are to use!

Tip 4 – Using the Find function to locate the Needle in the Haystack

Do you ever wish you could easily locate that one piece of information in BusinessWorks? Maybe it is an old invoice or an amount in the General ledger. Whatever you are looking for, you can find it quickly with the Find flashlight in the report viewer.

The screenshot shows the 'BikeWorks International Order Entry Invoice Detail Report' window. The report is titled 'All invoices' and displays a list of invoices. A 'By Find' dialog box is open, allowing the user to search for specific text within the report. The dialog box includes a 'Find what' field, 'Direction' options (Forward, Reverse), and 'Start at' options (Cursor, Beginning, Ending). The report shows three invoices: Invoice 7, Invoice 550, and Invoice 558, each with a table of items and their respective prices and amounts.

Inv. #	Customer ID	Name/Invoice Description	Invoice Information			
7	ETC	Bikes El Cetera Restocking	Inv date: 05/05/10	Rep: 1	Ord Date: 05/05/10	Order #: 11
*** Customer ID: ETC ***						
Item	Description	SA	Qty	Price	Amount	
1001	26 inch bicycle, boy's BB26-4403	2	2	140.95	281.90	
1002	26 inch bicycle, boy's BB26-4404			134.95	269.90	
1003	26 inch bicycle, boy's			90.95	90.95	
				Invoice subtotal	642.75	
				Freight charges	100.00	
				Invoice Total	742.75	
550	ETC	Bikes El Cetera	Inv date: 06/30/10	Rep: 1	Ord Date:	Order #:
Item	Description	SA	Qty	Price	Amount	
1001	26 inch bicycle, boy's	2	2	205.95	411.90	
1003	26 inch boys bicycle, custom metallic...	2	1	97.95	97.95	
				Invoice subtotal	509.85	
				Invoice Total	509.85	
558	ETC	Bikes El Cetera	Inv date: 06/30/10	Rep: 1	Ord Date:	Order #:
Item	Description	SA	Qty	Price	Amount	
1001	26 inch bicycle, boy's	2	10	207.95	2079.50	
	26 inch boys bicycle, custom metallic...	2	15.000	75.00	1125.00	
	LABOR Labor Costs	2				
	Comment(V) Labor for custom bikes	2				
	Misc. charge Prep for custom bike	2			750.00	

Just click on the picture of the flashlight to bring up the Find tool from any report preview. This tool will find an invoice number or any series of characters you want to locate in a heartbeat. Even if your report is thousands of pages long, Find is quick!

It's also easy to use. Just preview a report, like an Order Entry Invoice Detail Report for "All Invoices" as an example. Then click on the flashlight at the top of the report, and enter in the information you want to find. Like "1125.00" for an amount or "1008" for an invoice number. Then click the Find button (or press Alt-F to execute –see keystroke tip 1) and PRESTO, the find will wizz through the report looking for just that string of characters. And it is fast!



Pay attention to the radio buttons... Do you want find to go forward or backward, and do you want find to start at the current cursor location, or the beginning or ending of the report? If you are looking through the entire year's trial balance, and you want to find both sides of an GL entry, then Start at the beginning to find one side of the entry, and then start at the Cursor location to find the next side of the entry.

This feature works like magic... And you can really impress your boss when you find that needle in a haystack!

Tip 5 – Keeping Your BusinessWorks up to date with a support plan saves you time and money

When you invested in BusinessWorks accounting software, you made a significant decision. You selected a powerful and convenient accounting solution that expands as your business grows.

Maintaining your support plan saves you money by:

- Keeping your BusinessWorks current with all the latest features.
- Avoiding the dreaded “Reactivation Fees”.
- Providing 24/7 online support options for quick answers to your questions.
- Options for phone support, and technicians connecting to your system remotely.

More on these main points later, but first...

Did you realize that the software you run your business with cost millions of dollars to produce? Think about having a staff of 5 to 10 programmers on your payroll for the last 10 years (BW is 20+ years old, so we'll ignore the first 10.) A programmer costs 50k to 80k per year to employ with benefits.

So let's look at the math. 5 programmers times 60k per year times 10 years = 6 million dollars. So your BusinessWorks software costs at least that, and you can keep it current for \$599.00 per year! Does that sound like a bargain to you? Does that make you feel better about your investment in BusinessWorks? I use BusinessWorks and I sure appreciate running my business with a useful program for an affordable cost! Plus, for only a few hundred bucks a year, (about \$50 per month) I get all the upgrades that include timesaving features, just like you. Sure is better than having to have a team of programmers on staff maintaining my accounting software, right?

You and I get these advantages because BusinessWorks can spread the development cost over tens of thousands of users, all paying an annual fee of \$599 for a subscription plan, or \$899 for a Silver plan (which provides 10 call cases) or \$1199 for a Gold plan (which offers UNLIMITED call cases – truly one of the best bargains of all accounting software support plans!)

So how does a support plan save you money?

Keeping your software current includes an annual upgrade which adds features that make the software better. For example, one feature that was added in v7 was the ability to use enhanced tax reporting and e-filing. Now all those payroll forms you had to fill out by hand can be filled out online and printed and/or e-filed, resulting in saving time. SAVING TIME = SAVING MONEY.

What about the “Dreaded Reactivation Fee”? This is a little understood, and never fully explained “GOTCH YA” a big software company can impose. Your plan has an annual expiration date, for example March 15. If you renew your plan prior to, or up to March 15, no problem. You pay only the plan fee, like \$599. But if you are 1 day late to 6 months late, then you must pay the \$599 plus a \$75 reactivation

fee. For a Silver or Gold plan, the reactivation fee is \$150. (This is explained legally in the Lapsed Policy verbiage provided by Sage included at the end of this tip.)

Why do they charge a reactivation fee? Because you still get the feature improvements made when your plan lapsed, and now you are charged for them. If your plan lapses from 6 months to 18 months, the reactivation fee increases to \$674 for a subscription plan, and \$749 for a Silver or Gold plan. In Sage's words, the reactivation fee "is based on the plan that expired and entitles customer to all missed updates and upgrades. This price is added to the cost of the plan the customer wishes to purchase."

After 18 months, the reactivation fee is \$1273 for a subscription plan (plus the \$599 for the plan for a total of \$1872) and \$1348 for a Silver or Gold plan (plus the \$899 or \$1199 cost of the plan). This covers all the upgrades and features BusinessWorks added over the past 18+ months, since your plan lapsed.

A better strategy is to budget annually \$599 to keep your software current. If you run into a big problem, you can upgrade your subscription plan to a silver plan for \$300. With a silver plan, BusinessWorks technicians can actually connect to your system (provided you have an internet connection) and can fix most any issue. The worst-case scenario is that your data has become so bad, that BusinessWorks technicians will ask you to electronically send them a backup of your data and they can untangle it using their special tools.

The good news... I have never seen a BusinessWorks customer lose their data, as long as they backup their data with the built in BusinessWorks backup tool.

The last point to make on service plans is the great on-line knowledge base you can use as part of your support plan. BusinessWorks technicians document all the questions that are called in, and put the answers on the on-line knowledge base. So when I have a question, the first place I can look is at the on-line knowledge base with a key word search. Between the great built in BusinessWorks help, and the online knowledge base, 95% of my questions get answered.

I only have to call tech support on rare instances, which saves both my customers and I a lot of time.

Now let's look at the support options as BusinessWorks explains them, to help your business run more smoothly.

The basic plan is called a Subscription plan, and costs \$599 per year. That plan includes:

- Free upgrades to your current modules as they are released. These upgrades offer significant new functionality so you always have the most current version of Sage BusinessWorks.
- Maintenance releases from our development team. Take advantage of product updates, fixes and minor enhancements that help maintain the reliability and performance of your software. These service packs are available via download.
- Unlimited access to Sage Software Online, our award-winning online support service. Sage Software Online contains the very same knowledgebase that our internal software analysts use. The system provides 24-hour-a-day access to solutions for thousands of common and not-so-common technical questions. In addition, Sage Software Online helps prevent software difficulties before they happen by providing the latest product and technical bulletins, installation tips, troubleshooting hints and product release information.
- SageTalk discussion forums. These online discussion groups join customers with Sage support staff, as well as other Sage BusinessWorks users. You can get positive ideas and tips on how to make better use of your Sage software.
- Proactive e-mail notifications. Through our e-mail service, you'll receive technical bulletins, program updates and product fixes that will help maintain the reliability and efficiency of your software. Please make sure you register with your e-mail address.
- Access to SiteCreator. The Sage SiteCreator was built to help you publish a high-quality, profitable Web site quickly and without learning HTML language. We will also provide free hosting of your SiteCreator developed site.
- Procedure checklist and frequently asked questions for year-end processing will ensure a smooth year end process.
- Tax table updates. Make sure your tax tables and payroll calculations are always up to date (Payroll module only).

This plan does not include access to Sage's technical support staff via e-mail, phone or fax.

Silver Support Plan - \$899 per year or less than \$75 per month

The Silver Plan provides base-level phone support. We recommend the Silver Plan for existing customers who have some experience working with Sage BusinessWorks, who place moderate demands on their accounting system, and who desire backup when their consultant is unavailable. An active Subscription Plan is included with this phone support plan, in addition the Silver Plan provides you with:

- Expert telephone, e-mail and fax assistance for 10 cases per year.
- Toll-free telephone service with a guaranteed one-business-day response time.

Gold Support Plan - \$1199 per year or less than \$100 month FOR
UNLIMITED SUPPORT CALLS. This is a great value!!

By upgrading to the Gold Plan, you will be equipped with the premier support solution. In addition to having unlimited access to Sage Software Online and all the other Subscription Plan benefits, you'll enjoy friendly, personalized phone support from experts who understand Sage BusinessWorks inside and out. These experts have up-to-the minute, intimate knowledge of all the products and issues, so they can give you the security of knowing there's someone there to focus on your technical questions — while you focus on growing your business. We recommend the Gold Plan for customers who place heavy demands on their accounting systems. An active Subscription Plan is included with this phone support plan. In addition the Gold Plan provides you with:

- Expert telephone, e-mail and fax assistance for an unlimited number of cases.
- Exclusive priority toll-free telephone service with a guaranteed one-hour response time.
- 15% discount on Sage BusinessWorks training at Sage corporate headquarters and participating authorized training centers.

Lapsed Policies

Any plan that is not renewed before the expiration date is considered lapsed and is subject to lapsed plan pricing. If you wish to renew a lapsed plan, you must pay for the "expired" period plus a \$75.00 late fee for Subscription Plans and a \$150 late fee for Silver and Gold Plans, if renewed within 6 months of the expiration date of the previous plan. This allows you to pay for enhancements and improvements made to the software during the period in which you were not on a plan. After a plan has lapsed for 6 months or more, additional fees apply. The anniversary date will remain the same, and renewals are always charged in full-year increments.