

Volume 6

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Headline News

Important Reminder! Best Software support for BusinessWorks version 12 will cease effective September 30, 2003. After five years of reliable performance, version 12 is stepping down to make room for BusinessWorks Gold. If you have an existing ClientCare support plan, it will be transferred to the new product for its duration. Renewals of version 12 support plans will not be accepted after March 31, 2003. Now is the time to upgrade to

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Client Server Version!

See page 4
for more info!

Custom Office

A Module Worth Its Weight in Gold

Would you let an opportunity to boost productivity, streamline operations, and maximize data analysis options pass you by? If you are not taking advantage of the productivity tools offered by Custom Office, you are missing a powerhouse of potential. Custom Office allows you to integrate Business Works Gold with Microsoft Office products such as Excel and Word. Custom Office consists of three separate components: Targeted Mail Merge, Attachment Manager, and Custom Worksheets; each geared to increase your productivity by saving you time and increasing your efficiency. Let's take a closer look at each feature.

Mail Merge

Using the Targeted Mail Merge feature of Custom Office you can quickly merge BusinessWorks Gold data into a Microsoft Word document, and then send the resulting document to multiple recipients simultaneously, either by print or by Email. Your recipients can include Customers, Vendors, or Employees.

How Can I Use It?

There are many ways to use the Mail Merge feature; here are just a few ideas:

- ★ Send an Email to employees announcing the annual holiday schedule.
- ★ Create a post card to mail to your vendors informing them of your company's new address.

- ★ Create a welcome letter for new customer.

What Is Involved In Creating A Mail Merge?

Creating a new Mail Merge is easy. First create the document in Word that you want to send; for example the New Customer Welcome letter. Now you are ready to start the user friendly BusinessWorks Wizard to guide you through the entire process:

- 1 Using the Wizard, give your Mail Merge Job a name, and pick Customers, Employees, or Vendors as the source of your data.
- 2 Select your Word document from the list displayed. You can edit your Word document here and insert data elements such as Name, Address, Credit Limit, etc. from BusinessWorks Gold. You can even create a new Word document here by copying from

an existing Job.

- 3 Choose how you would like the recipients in your mailing list sorted. Your list of sort options is vast, consisting of most of the fields in the Customer, Vendor, or Employee files.

- 4 If you want to filter the data, you can use: =, >, <, <>, </=, >/=, or Between as filter tools. In our

example, you would only want to select customers whose Customer Since date is Between the date range you specify. Here too, virtually all of the related data fields may be used as filters.

- 5 Your new Job is now created. Simply click on the Merge button to send your Job to Word, or the Email button to generate Emails. Your new saved

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Custom Office is the perfect tool to help you organize your client, vendor, or employee information.



(916) 624-7243
(916) 624-7244 fax

Email: jay@bestasc.com

Web: www.bestasc.com

Custom Office: A Module Worth Its Weight in Gold — Continued

Job may be used again, as is, or edited to suit a new purpose.

A related function is Instant Correspondence. Instant Correspondence is used when you want to create a mail merge document or email for a single customer, vendor or employee. Look for the Instant Correspondence icon on the tool bar of the Maintain Customers, Vendors, and Employee screens. Clicking on this icon will launch the Mail Merge function, for the selected record only (e.g. customer, employee or vendor).

Your correspondence can be printed and distributed manually, or sent automatically via Email. Email is an effective and cost efficient way to reach your audience and you will lower your postage costs. You also avoid misdirected mail and can be assured your message is delivered right to your contact's desktop.

Creating a Email, or Email blast, to your customers, vendors, or employees is a snap. Simply select your Job, and click on the Send Email button. The list of potential recipients is displayed, along with their Email address. If there is no Email address on file, or if you need to change an address, you can edit the field *on the fly*. You can decide to send your correspondence as an



Select from a list of your customers, vendors, or employees to send an Email blast

attachment or in plain text. A Send Test button is available which allows you to enter your own Email address to receive a copy of the Email for final review before you send it off.

Attachment Manager

Attachment Manager is the third component of Custom Office, and one of the best ways to avoid the paper chase in your office. The Attachment Manager function of Custom Office enables you to associate OLE (Object Linking and Embedding) objects with General Ledger Accounts, Cus-

tomers, Vendors, Employees, Jobs, and Items.

What Is OLE?

OLE is a Microsoft technology that allows Windows programs to share data. Embedding an Excel spreadsheet in a Word document is an example of OLE technology—the spreadsheet is an OLE object. An OLE object can be almost any type of file such as a Bitmap Image (e.g. .bmp, .jpg, .gif), an Adobe Acrobat file, a Word document, a sound or video clip, or an Excel graph or spreadsheet.

What Can It Do For Me?

You can capture the power of OLE within BusinessWorks Gold using the Attachment Manager function. Think of the practical uses for this technology. No more hunting for that missing contract or scrambling to find a copy of an invoice. Multiple OLE objects can be associated with a single record, so you're limited only by your imagination. Use Attachment Manager to better organize the wide variety of data associated with your company's daily business activities, saving time and increasing efficiency. Here are just a few examples of ways you can utilize Attachment Manager:

General Ledger Accounts:

- ★ Link an Excel spreadsheet containing your budget worksheet to an account. You'll always be able to refer back to the underlying detail that led to your budget amount.

Accounts Receivable Customers:

- ★ Embed a copy of a signed customer contract.
- ★ Record a sound byte giving the correct pronunciation of a difficult name.
- ★ Scan and retain the customer's credit application.
- ★ Attach a map to the customer's location.

Accounts Payable Vendors

- ★ Scan payables invoices and attach each of the image files to your vendor's file.
- ★ Attach a copy of each vendor's W-9 tax information form.

Payroll Employees

- ★ Embed a copy of the employee's resume, proof of citizenship, drivers' license, I-9 and/or W4 form.
- ★ Attach copies of awards, certificates or diplomas.
- ★ Link to the employee's last performance review documents.

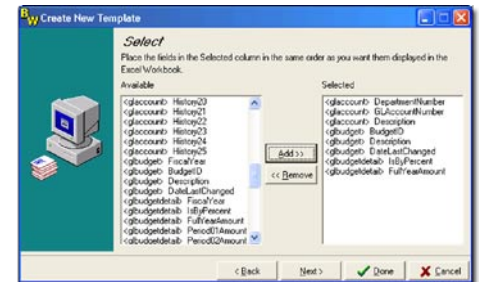
Job Cost Jobs

- ★ Link to blueprints, plans, schematics, and permits.

- ★ Attach the signed job contract or subcontractors' bids.

Inventory Items

- ★ Link to an item's Material Safety Data



Use the Wizard to select which information you wish to use.

Sheet.

- ★ Attach photos of the item.
- ★ Attach a copy of the item's warranty.
- ★ Include a document detailing the kit assembly process.

Embedded Versus Linked Objects

Your OLE attachments can be either embedded or linked. Which you choose will depend upon how you intend to use the attachment.

If you select a *linked* OLE object, the object's data remains stored in its original file, in its original location. It can be opened and edited using the originating program, or within BusinessWorks Gold, and any changes are saved to the original file. In contrast, if you select an *embedded* OLE object, you are creating a copy of the OLE object's data for use exclusively within BusinessWorks Gold. Any changes made to the original file are not reflected in BusinessWorks Gold, and likewise, changes made to the OLE object are not saved back to the original file.

If the object you are attaching is often updated outside of BusinessWorks Gold and you wish to always have the current file available, then select a *linked* object. An item's Material Safety Data Sheet might be an example of a linked attachment. It's updated frequently in another program, and you always want the most current copy available.

However, if you want to preserve the file as it was when originally attached, or if you want any edits reflected in BusinessWorks Gold only, then select an *embedded* object. Copies of contracts or an employee resume are examples of documents you would want to embed. An Embedded

file also offers greater security since it will be included in BusinessWorks backups, and BusinessWorks password security controls whether a user may move or access the file.

Custom Worksheets

Many individuals feel comfortable working in Excel and use it to create custom business management reports. With BusinessWorks Gold Custom Worksheets you can place accounting data into Excel, quickly, easily, and in the order you want it.

What Are Custom Worksheets?

Think of Custom Worksheets as a custom report generator with an output to Excel. Custom Worksheets are available in: Accounts Payable, Accounts Receivable, Cash Management, Inventory Control, Job Cost, Order Entry, and Payroll. In designing a Custom Worksheet, you are creating a template that specifies the data you wish to capture, in what order you'd like it, and where it should go. You can copy from an existing template and make necessary changes, or create a new one.

How Do I Create A Custom Worksheet?

Custom Worksheets employs a friendly wizard to help you through the surprisingly simple process:

- 1 Choose the Custom Worksheets option within the reports menu section of a module.
- 2 Name your Template.
- 3 Select the source of your data (e.g. GL Accounts).
- 4 Select the individual data elements from that data file (e.g. Account Number, Description, Beginning Balance, etc.).
- 5 Pick up to three sort criteria and where you'd like subtotals.
- 6 Designate your data filters (e.g. Between, <, =, etc.).
- 7 Decide whether you wish to create a new Excel Workbook, or to use an existing workbook and worksheet you specify.
- 8 Click on the Execute button and your information is now in an Excel worksheet.

Treasure Chest Of Functionality

With its communication, organization, and data manipulation tools, Custom Office has the power to make your company more efficient. If you don't yet own the Custom Office module, or simply have not taken the time to explore its potential, please give us call for a demonstration. ☆

Using the Shortcut and Startups features of BusinessWorks Gold can save you time and streamline the navigation required when performing your required tasks. If you haven't tried them, you'll be surprised how easy they are to set up and how convenient they are to use.

Startups

Do you routinely perform the same three or four tasks in BusinessWorks, firing them up as soon as you log in to BusinessWorks Gold in the morning? Do you train temporary personnel to perform data entry, or make sales calls? If so, you can save time and simplify training by adding these often used tasks to the Startups Menu.

Tasks included on your Startups Menu are automatically launched every time you log in to BusinessWorks Gold. Since they are specific to your user ID, each person can create and maintain their own list of Startups. In the case of your temporary personnel, there's no need to learn the BusinessWorks Menu and where to find a particular task. Startup tasks are also specific to the company ID you cre-



Learning about Shortcuts & Startups will save you time and make your job easier

ated them in. Therefore, if you often work between companies posting journal entries, you can have the Post to Journals task from each company open automatically upon log in.

If you happen to close one of your Startup tasks, you can easily re-open it from the Startups Group on the Launcher's Resource Bar (the vertical bar on the left side of the Launcher).

Shortcuts

Shortcuts are a fast and efficient way of moving between the BusinessWorks Gold tasks that you use in the course of your job. Because you can access Shortcuts from anywhere in BusinessWorks Gold, you can quickly change tasks without navigating through the Launcher's menu system. Jump from Order Entry to Customer Maintenance, to Cash Management and back again, all without leaving the current task. Like Startups, the Shortcuts Menu is specific to user ID, making your Shortcuts your own. Unlike Startups, Shortcuts span company IDs. The Shortcuts you set up in one company will be available in all companies and selecting one will take you to that task in the current company.

You can immediately access your Shortcuts using one of three techniques:

- ★ Clicking on the Shortcut button at the bottom of the window for the currently active task.
- ★ Selecting from the Shortcuts Group on the Launcher's Resource Bar.
- ★ Selecting from the Shortcuts Menu on the top of the Launcher window.

Adding a task to the Startups and Shortcuts Menu

Adding a task to the Shortcut or Startup list is simple. While running the task, simply click on the Shortcut button in the task's Status Bar, along the bottom of the task window. Select Add to Startups or Add to Shortcuts and immediately this task is added to your Startups or Shortcuts Menu. *It's that easy.* ☆

Headline News Continued

BusinessWorks Gold if you have not already done so. Take advantage of the many new features including remote access capabilities, user defined fields, increased field lengths, and the ability to Email forms.

Five Stars for BW Gold! In the November 2002 issue of *The CPA Software News*, Mary Girsch-Bock awarded BusinessWorks Gold Version 3.0 her highest rating of five stars. Bock was impressed with the ease of navigation, saying that BusinessWorks Gold 3.0 is "an excellent program with capabilities that keep expanding as newer technology becomes available." ☆

Spotlight on BusinessWorks Client Server Capabilities

Would it be beneficial to access your accounting database from home, your hotel room, or the airport? Do you have a mobile workforce? Do you have a second office or a separate warehouse that requires access to BusinessWorks Gold? Would you like to make use of those older workstations not powerful enough to run BusinessWorks Gold locally? Would your BusinessWorks Gold users benefit from faster performance? If you answered *yes* to any of these questions, then the *Client Server* version of BusinessWorks Gold is the solution for you.

What Does Client Server Mean?

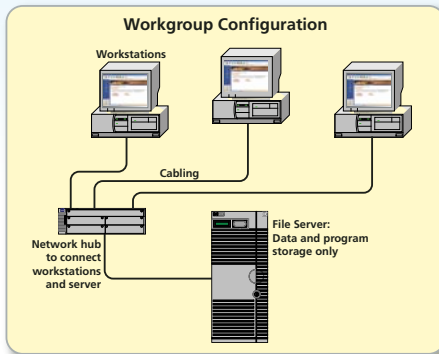
BusinessWorks Gold is available in both *Workgroup* and *Client Server* versions. In the *Workgroup* version, most of the processing is performed at workstation, using the local CPU and hard drive. When BusinessWorks needs new programs to run or requires data, your network must send this information to each workstation. This is an efficient method when the environment is local.

To tap into the benefits of remote access, the *Client Server* version is needed. *Client Server* computing shifts most of the processing from the workstation to the server. The workstation simply sends keystrokes and mouse movements to the server. The server actually runs the programs at the server, using its processor(s) and hard drive(s). Typically, only screen changes are passed back to the workstation from the server. This results in a faster method of operation that can be utilized by both local workstations and remote users.

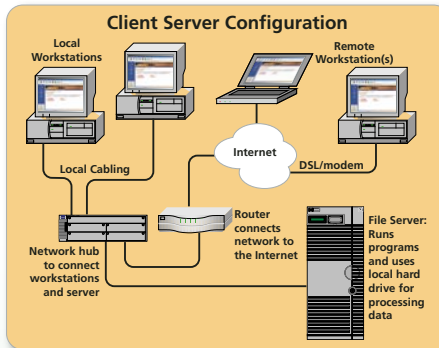
What Are The Benefits Of Client Server?

One benefit of this type of computing is that often older, less powerful workstations can be used, since the processing requirements on the workstation are reduced. Another benefit is that you and your employees can remotely access BusinessWorks Gold using a home or laptop computer with Internet access. Since minimal bandwidth is required to transfer the small amount of data, high speed data access lines are not required for these remote users.

For in-house users, speed and performance are optimized, since the server is typically the most powerful computer in use at your business, and only limited data is passed via your network connections.



Data and programs must constantly be sent to workstations for processing and data is returned back to server to be stored.



Server runs the BusinessWorks programs using data stored on its hard drive. Only screen information is sent to the workstations and keystrokes are returned.

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Best Accounting Software Consulting, Inc.

5325 Topaz Avenue
Rocklin, CA 95677

(916) 624-7243
(916) 624-7244 fax

Email: jay@bestasc.com

Web: www.bestasc.com

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What Do I Need?

BusinessWorks Gold Client Server

An affordable upgrade option is available to upgrade your standard BusinessWorks Gold to the *Client Server* version. There is software to install both on your server and on each workstation that will connect to BusinessWorks Gold.

Terminal Services

BusinessWorks Gold Client Server utilizes Microsoft's Terminal Services technology. Terminal Services is a built in part of the Windows 2000 Server, and the Small Business Server 2000 operating systems. Your server must be running one or the other of these operating systems.

Your Own Unique IP Address

You'll need a static IP (Internet Protocol) address. Talk you your Internet Service Provider about getting one if you don't already have it. The IP address is used to uniquely identify your particular network on the Internet and the particular server within that network. Remote stations need this address to access your server and the BusinessWorks data stored there.

If you'd like to learn more about the benefits of BusinessWorks Gold *Client Server*, please give us a call. ★