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Headline News

Version 6 Announced

Best Software has announced that BusinessWorks® Gold Version 6 will be available for general release in late fall 2005. While details have not yet been released, we do know that this version will include a link to the ACT!® 2005 contact management solution. We will provide in-depth information as it becomes available. If you are interested in participating in the early controlled release of this version, contact us for further information.

KnowledgeSync

See page 4
for more info!

BusinessWorks Gold Version 5 Gems

BusinessWorks® Gold Version 5 introduced a wealth of new features, most of which we reviewed in an earlier version of *info for BusinessWorks. Three of those features warrant more attention, and in this article we'll give you more details on these useful features and enhancements.

If you are looking for an easier way to organize records, search for data, or more flexibility in setting up item pricing, BusinessWorks Gold, Version 5, has your solution.

Gone But Not Forgotten

Version 5 incorporated the single most requested enhancement to BusinessWorks—the ability to exclude inactive records from searches and reports. Now General Ledger Accounts, Customers, Vendors, and Inventory Parts can be designated as *Inactive*.

This addition offers a simple and convenient way to streamline searches and reports to provide you with only the most relevant data.

The Answers You Seek

Version 5 introduced **Advanced Power Search** with features that make it fast and easy to identify a single record or list of records within your BusinessWorks Gold database. Now you can create **Saved Views** of your data. Rather than entering the same search criteria each time

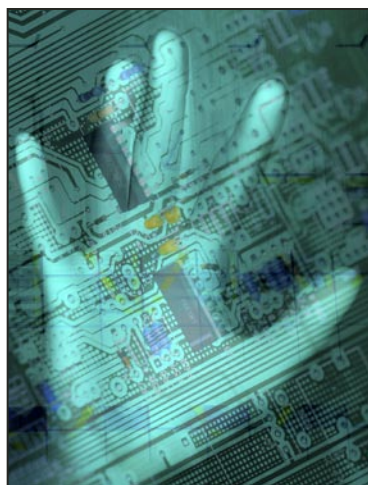
you need the data, you can save an unlimited number of views and reuse them at any time. For example, find all the customers in San Francisco, or all the customers on *Credit Hold*. You can even search for what isn't there—identify all your Vendors with a blank Federal ID number, for example, or Customers without an email address. Click on a column heading to sort by that value, stretch or shrink a column, or even hide a column of data entirely.

Version 5 added the ability to designate records as *Inactive*, and the new Advanced Power Search and the BusinessWorks report filters now can optionally exclude Inactive records.

When you save a view, you are saving the search criteria, not the data, so that

each time you select that view, the most current data matching your search criteria is selected. Since the searches you create are user-specific, feel free to create as many views of the data as you wish.

The Advanced Power Search also adds more columns of data to the views, such as Balance and Status for Vendor records; Sales Rep and Status for Customer records; and On Hand Quantity and Status for Item records. Addition-



Let BusinessWorks put the information you need at your fingertips.

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Version 5 Gems Continued

al search criteria also were added making it easier to fine-tune your search so that it will return only the data you seek.

Once you locate records using Advanced Power Search, you can export your list to Microsoft Excel with a click of your mouse. This improvement offers big benefits. Use it to export call lists, mailing lists, parts lists, or job statuses—any list where some action is required. Once your Excel list is created, use it as a work list, filling in additional data as you find it, checking off completed tasks, or performing additional calculations. Once your list is in the form of a spreadsheet, you'll have the ability to email that list to those who need it, such as sending a list of delinquent accounts to your sales manager for action.

Chances are, you'll find the Advanced Pow-

er Search so valuable you'll want to use it every time, in place of the standard Quick Search. With Version 5, you have the option of auto-loading Advanced Power Search whenever the look-up key is pressed.

Item Pricing Reaches New Levels

Price Levels provide an effective way to offer unique pricing to different classes of customers, varying the price between retail and wholesale, for example. Best Software, responding to customer requests, increased the number of Price Levels. Version 5 gives you the ability to define up to 25 price levels for each Inventory Item. Further, you can specify each level as active or inactive. Using this feature, you can set up your pricing tables well in advance, keeping them inactive until the effective date. Go ahead and enter the new price increases now, flipping the

flag to active and the old price level to inactive on the day the new prices go into effect. Rather than price levels A, B, and C, you can title your price levels to give them meaning. Call one level *Retail*, another *Wholesale*, another *Spring Promo*—whatever suits your business needs. The **Inventory Price List Report** and the **Margin Analysis Report** now include options to select all price levels, a single price level, or only active price levels. The flexible pricing methods and quantity breaks you're already familiar with are still in place, but you now have more pricing levels to apply them to.

If you'd like more information on BusinessWorks Gold® Version 5, please give us a call. ☆

Still Running BusinessWorks Version 12?

If you haven't yet upgraded to BusinessWorks® Gold, you are missing out on a fabulous feature set. Here's just a taste of what you're missing by not upgrading to the latest version of BusinessWorks Gold.

Email Forms

You could realize significant savings in the form of postage, paper stock, envelopes, printer toner, and labor—all while getting your message directly to the desktop of the intended receiver—instantly!

Form Customization Perks

For busy organizations, the ability to customize forms is a vital step in increasing productivity and efficiency.

BusinessWorks Gold provides many new customization options including: support for advanced printer driver functions such as Draft Mode, Watermarks, and Multi-Tray capabilities; new calculated fields such as Sum, Minimum, Maximum, Average, and Count; and bar-coded fields to enhance productivity in your shipping department.

Productivity Boosters

BusinessWorks Gold allows you to hide inactive records from lookups, and adds a report filter feature to exclude inactive records from reports.

Now, voiding a bank transfer is accomplished with a single entry by voiding either the charge or the deposit. In this way, you no longer have to void the offsetting entry—BusinessWorks Gold automatically does it for you.

Historical General Ledger reporting gives you a valuable perspective on your business. In BusinessWorks Gold, you can enter General Ledger balances for up to nine years.

Import/Export Quotes And Sales Orders

Easily transfer quotes and orders between two BusinessWorks sites, such as a laptop user in the field and the main office. Remote sales people can export orders and quotes from BusinessWorks Gold and then email the export file to the main office for importing.

Improved Reporting

A new **Consolidated Cash Flow** report gives you the data you need to help forecast your com-

pany's cash. The **General Ledger Detailed Trial Balance** report setup includes two new flexible options: *Include Zero Activity Accounts* and/or *Include Zero Balance Accounts*.

Several improvements have been made to the Inventory Control module reports to support multiple warehouses and report generation for the non-primary warehouse.

A new **Inventory Purchase Order Reconciliation Report** lets you identify billing issues or data entry errors quickly and easily by comparing Accounts Payable Invoices to corresponding Purchase Order Receipts.

Use the new **Accounts Receivable Invoice Detail Report** to view complete Accounts Receivable invoice line item history. The report is even flexible enough to ask you whether you want to include complete line item detail or limit the report's detail to three 40-character lines.

This is just a sampling of the power of BusinessWorks Gold. Why run an obsolete and unsupported system? Call us for upgrade information. ☆

Protecting Your Company From Fraud

Fraud costs businesses billions of dollars each year. Fraud can be perpetrated either by external sources, such as Web hackers or customers using stolen credit cards, or by your own employees. What can your business do to protect itself? BusinessWorks can be your ally in the fight against fraud. In this article we'll highlight two of the most prevalent types of business fraud, check fraud and credit card fraud, and point out ways you can protect your business using a combination of technology and common sense.

Here are some steps you can take to minimize the risk of falling victim to check and credit card fraud.

Check Fraud

One of the most common crimes against businesses and financial institutions is check fraud. Advances in computer technology make it increasingly easy for criminals to fraudulently manipulate your checks. Check fraud can range from forgery, where an employee issues a check without the proper authorization, to counterfeiting, where a check is altered or wholly fabricated.

Lock It Up

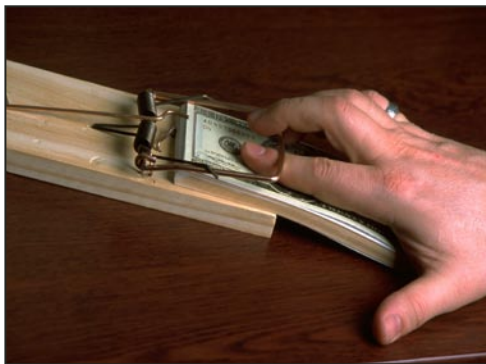
Keep preprinted check stock under lock and key, not lying next to the printer. Be certain you have setup BusinessWorks Task Level Security to give access to check printing only to authorized users. At least two third-party products are available to BusinessWorks users to allow you to print your own checks on blank check stock with MICR ink. While these products are convenient, be certain to take advantage of all security measures they offer to ensure that only authorized users have access to check printing or the optional scanned signature.

Positive Pay

Positive Pay is a service offered by many banks to their corporate customers. Positive Pay allows you to monitor and control the checks paid against your company's accounts to reduce fraud.

Using Positive Pay, you prepare a data file in the required format, containing details of the checks you have issued, including check number, amount, and date as well as other bank and account information. You transmit this data file to the bank. The bank compares checks received

for payment against your database of all issued checks. The bank identifies items that do not match the issue amount and check number, and these become exception items. Some banks offer additional services to identify checks that exceed certain dollar amounts and "stale" (dated) checks. The bank presents these exception items to you for consideration. You then have the opportunity to review the exceptions and decide whether or not the bank should release funds from your account for the check. This puts you in control and can significantly reduce check fraud. Using Crystal Reports you can produce a data file containing the data your bank needs, in the format they demand for their Positive Pay service.



Protect your company from theft and fraud by insuring you have adequate security measures in place.

Credit Card Fraud

An estimated \$1.8 billion was lost to credit card fraud in 2003. If your business sells its merchandise directly to consumers, either through mail order or your Web site, you already may have been a victim of credit card fraud.

You may think that if you get an authorization code from your verification service you're safe, but this is not necessarily true. Crooks now can create fictitious credit card numbers based on the algorithms used to produce authentic numbers. These fictitious credit card numbers pass through verification and will be given approval codes.

Individuals are not held liable for more than \$50 of fraudulent purchases made on their credit cards. Unfortunately, merchants are not provided the same protection as consumers

when it comes to credit card fraud. In fact, merchants are completely at risk. The issuing bank of a stolen credit card will charge the merchant back for any fraudulent purchases, plus a charge back fee. Unless your case of fraud involves tens of thousands of dollars, it's unlikely law enforcement agencies will get involved. Therefore, it's imperative for businesses to take precautions to protect themselves.

Verify And Validate Up Front

Take extra time to validate all credit card orders. Be extra cautious in the following situations.

Bill To Address—Verify that the customer's Bill To address is the same as the address on the credit card statement. If not, beware. Also be cautious of orders with a different Bill To and Ship To address, especially if they're in separate states.

Email Address—Be extra vigilant with orders coming from customers using free email services. There is a higher incidence of fraud from these services. Anyone can open up a free, anonymous email account with one of these services, even using the name of the person whose credit card number they have stolen.

Possession—Does your buyer actually have the card in hand? Ask for the name and phone number of the bank that issued the card. Ask for the three digit Credit Card Verification Value (CCV2) number—the number printed, not imprinted, on the back of each major credit card. This number is never transferred during card swipes and should only be known by the person holding the card in their hand.

Unusually Large Order—Be suspicious of orders much larger than a typical order. Take the extra steps to confirm your buyer's identity in these cases.

Confidentiality—You also have a responsibility to keep your customers' credit card numbers safe within your organization. Limit user access to customer data to those who have legitimate need for the data. Instruct users to keep credit card transaction slips off their desk tops and in a secure file.

Don't let your company fall victim to fraud. Take steps today to protect your business from both internal and external fraud. Call us to discuss additional security measures available. ☆



Spotlight On BusinessWorks KnowledgeSync



No one can keep track of everything. You have to sleep sometime, right? What will you miss, and what will it cost you? What if you had a tireless assistant on staff—one who constantly monitors corporate activities as they transpire, notifying you immediately of the events you care about, and who performs those vital, yet routine tasks effortlessly and without error? We all could use an assistant like this. The KnowledgeSync activity-monitoring application for your BusinessWorks® Gold software is that assistant. Let's learn more about it.

KnowledgeSync For BusinessWorks Gold

KnowledgeSync is an industry-standard solution published by Vineyardsoft Corporation. KnowledgeSync monitors your corporate databases and notifies you, your customers, your vendors, or your employees when important events take place. When you purchase KnowledgeSync for BusinessWorks Gold, a BusinessWorks EventPAK is included free of charge. The EventPAK includes over 40 pre-programmed Active Alerts that you can use as is, or modify to suit your needs. You also can create new alerts as necessary to fit your company's workflow. The alerts can be both time and date sensitive and can be configured to include pertinent BusinessWorks data, such as Name, Balance, Invoice Amount, and Date. KnowledgeSync helps you to be more proactive and efficient in your business ventures through alert triggering, the automation of repetitive tasks, and streamlined customer communication.

Alert Triggering

The concept behind alert triggering is simple: generate an automatic alert message whenever certain criteria are met. KnowledgeSync monitors the activity of your BusinessWorks database, and will automatically notify you, your staff, your business partners, and/or your customers when important events take place. KnowledgeSync is capable of sending alert messages via email, fax, page, cell phone, or web browser—automatically. It will alert you to significant events transpiring within your company's BusinessWorks database, effectively offering proactive communication to enable you and your staff to avoid missed deadlines and to capitalize on opportunities.

Data entry errors happen; won't you sleep better at night if you know you'll get an email if an Accounts Payable check over a specified amount is created? You'll want to know when an employee is using more vacation or sick time than they have earned. Automatically generate an email to the accounting department reminding them to take advantage of a discount before it expires; never miss a payables discount again!

Redundant Task Execution

KnowledgeSync shines at accomplishing routine or redundant tasks quickly and accurately. Many of the daily tasks you and your staff already perform are ideally suited to automation by KnowledgeSync. Use KnowledgeSync to acknowledge each customer order with a Thank You note or order confirmation—let your customer know that their order matters. Send an email to the salesperson when one of their customers exceeds their credit limit, or their past due balance exceeds a certain amount. This can help keep the company's cash flowing. And, let the purchasing manager know when an item is below its minimum stock



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level at a warehouse. Never run out of that best-selling item again!

Profiling And Loyalty Building

BusinessWorks stores a wealth of customer information, such as buying and payment patterns. Are you making maximum use of this data? Here are a few examples of ways KnowledgeSync can keep you informed automatically, and help keep your customers happy:

- ▶ Send an email to the salesperson when one of their customers has not ordered in more than 30 days.
- ▶ Automatically generate a Welcome note to each new customer.
- ▶ Follow up with a customer satisfaction survey 30 days after a sale.
- ▶ Receive a daily reminder of the customer quotes due to expire.
- ▶ Email notes of Congratulations and Thanks, respectively, to sales staff and customers when an order over \$5,000 is received.

KnowledgeSync Is Power

Use KnowledgeSync to give employees up-to-date information to make informed decisions. Improve customer service by providing personalized and timely attention. KnowledgeSync allows your business to respond to rapidly changing business conditions, 24 hours a day, seven days a week. It is like having a tireless, organized, proactive assistant on your staff. There's much more to KnowledgeSync than we have covered here. Call us for full details of product features, pricing, and order information.

