



SAGE BUSINESSWORKS

## *Version 6 Enhancement Guide*

### *A Completely New Way to Improve Efficiency, Increase Profits, and Better Manage Your Business — Sage BusinessWorks Version 6*

Sage BusinessWorks has been redesigned to give you the cutting edge and powerful technology your business needs to stay ahead of your competitors. As an existing BusinessWorks v12 customer, you'll receive over 6 years worth of improvements when you upgrade from v12 to Sage BusinessWorks v6. The best part is that the new product workflow is similar to your existing software so you get the maximum amount of new features — with minimal training. Don't miss out on all the valuable improvements that Sage BusinessWorks Version 6 has to offer, including the ability to support the latest operating systems and printers.

Give your competition something to talk about as Sage BusinessWorks boosts your growing business with greater productivity and more effective business management. Version 6 is what you've been waiting for, complete with the latest industry advancements that reduce costs and increase profitability for your business.

All it takes is one glance at the new operational capabilities and benefits in this summary to realize that Sage BusinessWorks V6 contains the essential tools to help your business reach the next level of success. For more information on Sage BusinessWorks V6 and how to achieve a higher level of productivity and profitability, please contact your local Sage BusinessWorks consultant, or call us directly, toll free at 800-854-3415. You can also visit our Web site at [www.sagebusinessworks.com](http://www.sagebusinessworks.com) or send us an e-mail at: [bwsales@sage.com](mailto:bwsales@sage.com).

## E-Business Features

With the ability to send forms via e-mail (i.e. statements, invoices, etc.), Sage BusinessWorks harnesses the power of the Internet to boost productivity and increase your company's bottom line.

### Enhanced Core Efficiency

Enhancements to General Ledger, Accounts Payable and Accounts Receivable will help you to optimize your core business processes for maximum efficiency and productivity.

### Improved Inventory Control and Order Entry

New features streamline inventory and sales operations.

### Powerful Payroll and Direct Deposit Capabilities

Expanded capabilities help you reduce expenses, save time and better manage your most important asset — your employees.

### New and Improved Reporting

New reports and enhancements to existing reports provide timely control of company data to improve your decision-making.

### Valuable Forms Customization

Forms customization can substantially increase the productivity of your accounting staff.

## E-Business Features

E-Business takes your company into high gear with high-tech capabilities including remote access, e-mail forms, and import/export of sales orders and quotes.

### E-Mail Forms

- Save postage and printing costs and expedite communications with e-mail forms.
- Collect on receivables more quickly by e-mailing your invoice directly to your customer's accounting department.
- Ensure timely delivery of key inventory items by e-mailing purchase orders to your vendors.

### Remote Access Via Terminal Services

- Stay on the pulse of your company by directly accessing your accounting software and critical business information — anytime and anywhere.
- Access and post information from remote locations.  
Please note Terminal Services is available only with the client server edition of Sage BusinessWorks.

### Import/Export Quotes and Sales Orders

- Easily transmit quotes and orders between two disconnected Sage BusinessWorks sites, such as a laptop user in the field and a main office.
- Shorten your sales cycle and improve your bottom line by having your remote sales people export orders and quotes from a remote system, and then e-mail the export file to the main office for importing.
- Import Orders from your Web storefront.

Please note that importing orders from an outside source may require the knowledge of a programming expert. Consult your Sage BusinessWorks business partner for more information.

## Enhanced Core Efficiency

Enhancements to the efficiency at the core of your business operations.

- **IMPROVED! Fine-Tuned Search Features** — Conduct faster, more advanced searches with the new Search, Lookup and Find capabilities, saving you valuable time and keystrokes.
- **IMPROVED! Advanced Power Search** — Customize your lookups to meet the unique needs of each employee. Using the Advanced Power Search, you can select the field to search on, hide and rearrange columns, and change the sort order of a column. You can also designate your custom lookup as the default lookup, bypassing the standard Quick Search.
- **Export Lookup Information** — Transfer information from any Sage BusinessWorks lookup into Microsoft Excel, enabling you to create reports quickly, including Customer call lists, Active parts lists, Active vendor lists, and more.
- Deactivate customers, vendors, parts, and General Ledger (GL) accounts. Minimize data entry errors and keep lookups clutter free by hiding inactive records when performing search lookups. You can also streamline report information to exclude inactive records with the Report Filter feature in Sage BusinessWorks .

*“The transition to Sage BusinessWorks went smoothly as everyone was familiar with the way Version 12 worked. Plus the new features like e-mailing statements were very well received.”*

*Laurie Vigil*  
Director of Financial Services  
Advanced Retail Management Systems, Inc.

*“I love Sage BusinessWorks because it is a very user-friendly program that permits me to accomplish more work in less time. Add the wonderful customer service, and I’m on cloud nine.”*

*Kimberly Bannister*  
Director  
Truck Mixer Supply & Mfg., Inc.

- Easily accomplish voiding bank transfers with a single entry, either by voiding the charge or the deposit, which will automatically void the offsetting entry. This eliminates the previously required step of making an adjusting journal entry.
- **NEW!** Voiding AP Credit Card Payments can now be accomplished easily in a single step that re-instates the original AP invoice, resets the payment term to "none" and if necessary adjusts the GL payables account.
- Easily transfer General Ledger entries to your CPA or export them to Microsoft Excel for further analysis.
- Utilize new, flexible print options for AR statements including a Minimum Balance threshold and e-mail statements.
- Provide more extensive AR invoice line item and journal entry descriptions utilizing expanded text fields with word wrap capabilities.
- Improve the accuracy and efficiency of AR and Order Entry with the new streamlined customer Refund Check feature.
- Reprint invoices from AR as needed.
- **NEW!** Inquiry Balance Drill Down (AP Inquiry and AR Inquiry) — the new drill down on open balance feature available in the Customer Inquiry and Vendor Inquiry will assist in identifying the invoices that make up the open invoice balance improving workflow and minimizing the need to produce lengthy reports.
- **NEW!** Cash Balance Inquiry can now be accessed directly from the Cash Management Accounts menu providing the ability to allow certain users to view the balance without giving access to the General Ledger module.

## Improved Inventory Control and Order Entry

New inventory and sales order features help ensure accurate order fulfillment and improve communication with customers and vendors.

- **NEW!** Create Purchase Orders from a Sales Order — Ensure you have inventory necessary to satisfy your customer's needs, improve productivity and increase order accuracy by automating the purchasing process. One or more Purchase Orders can optionally be created directly from the Sales Order option providing you with complete control to determine the parts, quantity and vendor to order from. You can even specify to order the item from someone other than the default vendor, indicate that the PO will drop ship to the customer and add additional parts, non-stock parts or comments to the purchase order. Locating the relationship between the purchase order and the sales order is a breeze with the various improvements made to the inquiry options, reports, custom reports, custom spreadsheets, custom exports and custom forms.
- **NEW!** Convert Sales Order to Invoice directly from the Sales Order option improves workflow and allows you to modify the sales order prior to invoicing.
- **NEW!** Maintain Purchase Orders now includes a drop ship flag that when selected allows better tracking of drop ship POs in the Purchase Order Inquiry, Purchase Order form and various inventory reports.

- **NEW!** Provide more extensive line item descriptions on purchase orders, quotes, orders and invoices with the new 1000 character description field. Available for parts, non-stock parts, visible comments, hidden comments, labor and miscellaneous charges, the new text block provides greater flexibility when describing transaction lines.
- Customize packing list and pick tickets to your unique specifications and send them to your customer or warehouse via e-mail as needed.
- Quickly and easily look up sales orders and invoices using the customer's purchase order number.
- **NEW!** Purchase Order part description line 2 and 3 are now accessible for editing in Maintain Purchase Order providing for greater flexibility when creating and printing POs.
- **NEW!** IC Transactions Receipt Register can now be produced based on range of vendors related to the receipts in addition to being produced based on the part's assigned vendor.
- **NEW!** IC Receipt Adjustment can now optionally update the Vendor's Last Cost.

## Improved Job Cost Capabilities

This flexible module empowers you with the financial insights you need to manage projects and improve your bottom line.

- Enhance database performance by deleting closed or obsolete jobs.
- Sort job code details by priority number within a phase.
- Reassign job codes that have been previously deleted from a phase and re-open a canceled phase.

## Powerful Payroll Capabilities

Expanded Payroll/HR capabilities help you better manage your resources.

- Store a combined total of 30 active deductions and other pays per employee.
- Utilize report functions that accommodate expanded deduction capabilities and two new preprinted check formats.
- Transform your payroll system into a mini-HR system by using custom fields for each employee. Track and report information such as birthdays, certifications, last raise, equipment issued, etc.
- Keep your employees informed with payroll check stubs that provide pay rate and other pertinent details.
- Direct deposit parameter is easier to use, uses the same terminology as your financial institution and supports direct deposit when used for multiple Sage BusinessWorks companies. Please note, the National Payment Corporation (NPC) interface is no longer available; however, NPC customers can use the new NACHA interface to transmit direct deposits to NPC.
- Retain payroll data and historical reports for up to five calendar years.



*Whether you plan to upgrade your operating system, replace your server or add new workstations to an existing network, Sage BusinessWorks provides the platform to help you grow.*

## New and Improved Reporting

Increase your ability to gain insight into your company's operations with reliable reporting.

- **NEW! Improved GL Reporting Sort Options** — Create reports the way you want to see them. The Account Detail Report, Journal Detail Report and Detailed Trial Balance now have a "Sort by" option that provides up to three sort options per report, the ability to sort in either ascending or descending order.
- **Consolidated Cash Flow Report** — forecast and better manage your company's cash. Available in both a detailed and summary format, you can analyze your cash needs and easily determine if a shortage or surplus exists. You'll also receive an early warning alert when expenditures exceed projected receivables.
- **Accounts Receivable Line Item Report** — view complete AR invoice line item detail with this new report. You can even indicate whether you want to see complete line item detail or produce a more concise report by limiting descriptions to three 40-character lines per part.
- **Multi-warehouse reporting** — several reports in the Inventory Control module have been improved to support multiple warehouses and report generation from non-primary warehouses. These include:
  - The Transaction Detail Report, Receipt Adjustments Register and Transfers Register for a specific warehouse now include transaction detail for the specified warehouse only.
  - The Transaction Detail Report has been enhanced to reflect transfers.
  - Pick Tickets now include the correct warehouse.
  - The On Hand Detail Report for a specific warehouse reflects correct quantity values for that warehouse.
- **Warehouse Stock Report** — Easily determine the total value of stock in your warehouse(s).
- **Detailed Trial Balance Report** — filter inactive GL accounts with greater report setup flexibility and two report settings: Include Zero Activity Accounts and/or Include Zero Balance Accounts.
- Reports and inquiry options have been improved to sort based on the Purchase Order, Quote, Order, or Invoice Number.

## Valuable Forms Customization

For accounting departments, the ability to customize forms is vital. Sage BusinessWorks provides increased data access and customization options, including the ability to:

- Batch-load or import custom forms from a floppy disk or CD.
- Make use of the new features in the Maintain Forms option, which consist of:
  - Add fields to custom forms, including AP Our Acct #, AP Fed ID #, AR/OE Invoice Due Date, and AR/OE Discount Date.
  - Adding calculated fields to your custom forms, such as sum, minimum, maximum, average and count.

- **NEW!** More fields are available to print on forms including: Text Block Word Wrap, Drop Ship, Sales Order Number for the PO, Ship Weight, PO Description, Line item discount total, Original line item price, part Base Price, YTD Deductions and YTD Other Pays.
- Enhancing productivity in your shipping department with the ability to display or print fields in a bar code format.
- Inserting Inventory Control product categories on Order Entry and Inventory Control forms.
- Customizing pick tickets to include on-hand and short quantities, and whether the customer is on hold.
- Support advanced printer driver functions, such as draft mode, watermarks and multi-tray capabilities.

## **NEW! ACT! Link Module**

Improve productivity and maximize your relationships with your customers and vendors with the new ACT! Link module. The Sage BusinessWorks ACT! Link integrates the Sage BusinessWorks Accounts Payable, Accounts Receivable, Order Entry and Inventory Control, and Purchasing modules with ACT! 2005 and ACT! 2006 to create a completely integrated front office and back office solution. Vendor and customer information can be synchronized with ACT! contact information, accounting transactions such as quotes or purchase orders can be launched on-the-fly through ACT! and a record of when an accounting transaction was posted (i.e. payment received) can optionally update the ACT! History. To learn more or to purchase the ACT! Link module please contact your Sage BusinessWorks Business Partner.

## **Capitalize on System Wide Improvements**

### **NEW! Sage Software Information Center**

All Sage BusinessWorks users can now access the latest Sage Software news and announcements, tips and tricks, product alerts, and training and support information with the new Sage Information Center accessible from the Main Resource Bar in the Sage BusinessWorks launcher. The Information Center will help all Sage BusinessWorks users stay informed and get the most out of their Sage BusinessWorks software.

### **Supports the Latest Operating Systems**

Sage BusinessWorks supports the latest operating systems including Microsoft Windows 2000 and Windows XP. Whether you plan to upgrade your operating system, replace your server or add new workstations to an existing network, Sage BusinessWorks provides the platform to help you grow. For a complete list of Sage BusinessWorks system requirements and supported operating system configurations, please visit the Sage BusinessWorks Web site at: [www.sagesoftware.com/businessworks/product/sys\\_req.asp](http://www.sagesoftware.com/businessworks/product/sys_req.asp)

### **Web-Enabled Launcher**

The built-in Web browser lets you quickly check the status of a shipment with your vendor, conduct transactions through the Internet, search for information on the Web and more.

## **Links to Sage BusinessWorks Web Sites**

Quickly gain access to important Sage Software Web sites designed to help you maintain and get the most out of Sage BusinessWorks, such as Download Updates, Online Support, System Requirements, Free Web Seminars, and more.

## **New Database**

Sage BusinessWorks full 32-bit program incorporates an open database. This new architecture supports your growth and empowers you to take advantage of tools like Microsoft Access or Crystal Report Writer.

## **Data Conversion**

Built-in data conversion makes it easy for you to take advantage of this new and powerful upgrade without losing important historical data.

## **Separate City and State Fields**

City and State are now in two separate, longer fields providing the flexibility you need for data export and synchronization with third-party applications.

## **Solid, User-Friendly Security**

Sage BusinessWorks new database structure provides more secure data protection features including the ability to assign different levels of task-specific security for each employee. Additionally, manager-level security rights are no longer required to access Custom Reports, Report Groups or Custom Office.

## **Start-Up Feature**

Save time by setting Sage BusinessWorks to automatically launch the functions you use most. Whether you enter invoices, post receipts or issue purchase orders, Sage BusinessWorks is ready when you are.

## **Shortcuts**

Streamline your workflow by creating personalized Shortcuts that put the options you use all the time at your fingertips.

## **Related Tasks**

Reduce the learning curve for new employees and help experienced employees navigate Sage BusinessWorks with the Related Tasks function.

## **Running Tasks**

A glance at this new Windows toolbar tells you which Sage BusinessWorks options are currently operating and lets you quickly switch among them.

## **Copy Company**

**NEW!** Minimize the time to create a clone of your company with the "Copy Company" feature which performs a backup and restore in a single step.

## **Built-In Backup and Restore**

Protecting your important financial information is easy with the new intuitive backup and restore options. A wizard interface simplifies the process and newly introduced safety measures including automatic prompts ensure that a reliable backup is

*“I must have looked at two dozen programs selling for \$10,000 to \$15,000 that didn’t have the look, appeal or ability of Sage BusinessWorks.”*

*John Wojchik  
President  
Wojchik Electric, Inc.*



completed every time. You can also backup on the fly when conducting a company close, closing the general ledger month, payroll quarter, payroll calendar year and AP calendar year. CD backup is supported as well, and now includes backup capabilities using Windows XP and Roxio Easy CD Creator.

### **Cash Management Module**

This new module is included at no additional charge. By consolidating bank reconciliation features into a single comprehensive module, Cash Management gives you more control and greater security.

### **Pop-Up Calendar**

Use this handy tool to display and select dates in any Sage BusinessWorks date field. For example, you can select the date you would like a particular invoice to become due.

### **Robust Online Help**

Save time and get answers quickly with the new context-sensitive “How Do I” help feature, which displays specific topics related to the task that is currently open. You no longer have to hunt through Help or leave your active Sage BusinessWorks option. For example, if you’re working on an invoice, you can simply click on the “How Do I” button to learn how to make an adjustment to the invoice.

### **Intuitive HTML Checklists**

NEW! HTML-based checklists are available for a variety of tasks including initial setup and various re-occurring processes. Checklists are particularly useful for training employees and providing reminders about the steps that need to be completed prior to performing routine operations such as the month-end close.

### **Expanded Field Lengths**

Sage BusinessWorks field lengths and chart of account limits have been significantly expanded to accommodate your company’s needs. See table at right for specific details on field length increases.

### **Tip Of The Day**

Drawn from the wealth of knowledge in our technical support database, the Tip of the Day is designed to provide you with important insights on how you can maximize the efficiency and functionality of Sage BusinessWorks .

**Learn how Sage BusinessWorks can benefit your business, contact your Sage BusinessWorks Consultant or Sage Software today!**

Field	Sage BusinessWorks v12 Field Length	Sage BusinessWorks Field Length
Address Lines (System Wide)	Lines 1 and 2 = 30	Lines 1 and 2 = 40
City (Separate from State)	30 (including State)	40 (excluding State)
State (Separate from City)	Included in City Field	2
Your Company ID	8	15
Your Company Name	30	40
GL Account Number Digits	4 (supports 8000 accounts)	8 (supports 99999999 accounts)
GL Department Number Digits	2 (supports 99 departments)	3 (supports 999 departments)
GL Account Number Description	30	40
GL Department Number Description	24	40
GL Journal ID	3	6
GL Journal Description	22	40
GL Journal Entry Description	3 lines at 24 each	250
GL Special Journals	4	Virtually Unlimited
AP Vendor Name	24	40
AP Contact Name	24	40
AP Invoice Number	12	20
AP Invoice Reference	12	20
AP Recurring Invoice Number	8	20
AP Recurring Invoice Reference	12	20
AR Customer Name	24	40
AR Contact Name	24	40
AR Customer Invoice PO Number	12	20
AR Invoice Description	40	1,000 characters
PR Employee Name	1 field, 24 characters	4 fields, 54 characters
PR Department Number	99	999
OE Customer PO Numbers on Orders and Invoices	12	15
OE Ship to Name	24	40
IC Part ID	12	20
IC Part Description	3 fields, 84 characters	4 fields, 1084 characters
IC Purchase Order Number	8	15
IC Purchase Order Ship to Name	24	40
Job Cost Contact	24	40
Job Code ID	12	20



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