



Sage BusinessWorks v7 Enhancement Summary

Get more of what you need to succeed with the new and improved Sage BusinessWorks V7!

Keeping your business successful takes plenty of time and hard work. And, the tools you use to get there are an integral part of reaching your goals. That's why we've packed Sage BusinessWorks V7 with so many significant improvements geared towards streamlining your business management processes and saving you money. For example, seamless integration with Sage Payroll Services, Enhanced Payroll Tax Reporting, and the separation of Medicare and OASDI are designed to help you increase productivity while reducing the headaches of filing tax reports. Security settings and parts are now easier to set up. And a new copy part feature will make setting up new parts even faster. So, whether it's time to renew your ClientCare plan or you are an active ClientCare subscriber waiting to receive your upgrade soon, V7 simply has more of the features and functionality your business needs to succeed.

As a benefit of maintaining your support agreement, ClientCare subscribers will receive Sage BusinessWorks V7 at no additional charge. If your plan has lapsed, you can renew your ClientCare agreement by contacting your Sage BusinessWorks business partner or Sage Software. To learn more about how Sage BusinessWorks V7 will benefit your business, please contact your local Sage BusinessWorks business partner, or call us directly, toll free at 800-447-3415 or e-mail us at: BusinessWorksSales@sage.com.

Enhanced Payroll Tax Reporting

You can now print over 180 federal and state payroll tax forms on plain paper including 941, 940, 4-up W-2s, W-3, state tax reports and much more. These signature ready forms minimize the need for preprinted forms, streamline the tax filing process, and will greatly reduce the amount of time you will need to produce your return and payment coupons.¹

Enhanced 1099 Reporting

Enhanced 1099 reporting lets you save money by producing signature ready 1099 Misc. forms directly to plain paper.¹

eFiling

You now have the option to eFile your payroll tax forms and payments as well as your 1099s. Plus, W-2 and 1099 processing services are now available to print, stuff and mail your vendor/employee copies of your W-2s and 1099s, eFile the state and federal copies, and provide a plain paper copy for your records. ²

Seamless Integration With Sage Payroll Services

Sage Payroll Services³ is the only full-service outsourced payroll solution designed to integrate seamlessly with your Sage BusinessWorks software so you don't have to spend hours manually entering your payroll information into your General Ledger and Cash Management modules. You can even upload the following existing employee data from the Sage BusinessWorks Payroll module to assist you during the setup process: Employee ID, First Name, Middle Name, Last Name, Address 1, Address 2, City, State, Zip, Home Phone, Social Security Number, Employee Status, Hire Date, Termination Date, and Pay type: Hourly, Salaried & Commission.

Sage Payroll Service isn't just the easiest solution, it can be the least expensive. And our Penalty-Free Guarantee⁴ means that your tax filings and deposits will be accurate and on-time, or we'll pay any penalty.

Services can include:

- Compliance with tax rule changes.
- Tax Filings and Reporting.
- New Hire Reporting.
- Payroll checks printed and delivered or sent to your desktop for on-site printing

Separated Medicare and OASDI

Now, in V7, FICA has been split into OASDI and Medicare allowing your employees to be exempt from one but not the other. Deductions and other pays can also be taxed separately, giving you more flexibility.

NOW AVAILABLE Employee Totals Verification Report

A new Employee Totals Verification report is now available. Designed to help you identify when your employee check detail does not match your employee totals, this helpful report makes it easier to spot when an employee's totals have been adjusted in "setup mode."

Social Security Number Protection

Offering you added protection against identity fraud, V7 not only gives you the freedom to either include or exclude social security numbers on payroll check stubs, but also gives you the option to include only the last four digits of social security numbers.

Additionally, social security numbers are also no longer displayed in lookup windows minimizing the opportunity for unauthorized individuals to access private information.

Include W-2 Reporting File Submitter Information

The W-2 Reporting file now gives you the ability to include the submitter's information. This improvement is especially important when the employer and the submitter are different (i.e. a Bookkeeper or CPA is filing on behalf of a client).

IMPROVED “Ship-to-Address”

A number of significant improvements have been made to the "Ship To Address" feature.

- Data entry and address maintenance is more intuitive with easy, on the fly access to the Order Entry “Maintain Ship-To-Address” in “Maintain Customers.”
- Ship-to-Address lookup now uses a standard show control and includes Quick Search and Power Search capabilities, making it much easier to locate an address. Better still, you can now locate the ship-to-address using the following criteria: ship-to name, address line 1, address line 2, city, state, and zip code.
- The primary ship to address is now accessible when performing lookups and creating custom reports.
- Quotes, orders, or invoices can be easily located based on the ship-to-address in the quote, order, and invoice inquiry options.
- Ship-to-addresses can be imported and exported through standard import/export as well as through BW Access.
- Easily create custom reports, spreadsheets and Crystal[®] Reports that include the ship-to-address information.

Select Purchase Order Line Item Sequence

Version 6 included the ability to create Purchase Orders from a Sales Order. Version 7 has been further enhanced to provide more flexibility in determining the order in which items appear on the Purchase Order. You now have the choice to sort items on the Purchase Orders based on the sequence used on the Sales Order, the part number, or part descriptions.

Display Open Sales Order Line Items Only

If you need to create custom reports to meet your business' unique needs, the new "OE Orders Line Items" data view gives you even greater flexibility. That's because it allows you to create custom reports that include only the open Sales Order line items. Plus, you can also create filters that include only open Sales Order line items by selecting <OESQStatus> StatusDesc equal <=> to “Open”.

Enhanced Drop Ship Capabilities

Drop ship purchase orders now give you the ability to select a customer or vendor's ship-to address. After selecting the vendor or customer ID, simply select a saved ship-to address, edit an existing ship-to address, create a one time address, or copy the address from a source document. If a source document (i.e. sales order or invoice) is chosen, the address from the source document is then copied into the Purchase Order.⁵

Accurately Update Committed Quantity

Canceling a Sales Order now properly updates the part's committed quantity.

NEW IC Part View Prices

Custom Reports and Exports now include a new data source that incorporates all part maintenance information as well as pricing tables. This means you'll save time when importing new pricing matrices, or when creating custom reports that take advantage of part price information.

Easily Copy Parts

Easily copy parts to a new part making the set up of like items faster and easier, with the following fields:

- Part Description (all lines)
- Product Line
- Unit of Measure
- Ship Weight
- Primary Warehouse
- Bin Location
- Comments
- Inventory Item
- Taxable
- Discount
- Back Orders OK
- Fractional Quantity
- Fractional Cost/Price
- UPS Shippable
- Track Serial Numbers
- Category Information
- Sales Promotion (Promo)
- Pricing Method
- Pricing Matrix
- Vendors
- Components
- Warehouses

Easily Import Job Cost Transactions

Charges, bills, cash postings, credit memos and debit memos can all be imported using the standard Job Cost import giving you improved flexibility and making it easier to recognize expenses and billings for a job.

Automatically Post GL Entries to Job Cost

Optionally post General Ledger journal entries to a job minimizing double entry and improving productivity.

IMPROVED Job Cost Reporting

Report Sorting in Job Cost has been improved.

- The Pre-billing Worksheet sorts in priority order.
- The Job Transaction Report sorts in date order.
- The Cash Posting Report sorts in date order when no phase detail is provided.

NEW Job Cost Checklist

Setting up the Job Cost module is faster and easier with an Initial Setup Job Cost Checklist.

IMPROVED Comparative Balance Sheet

The Comparative Balance Sheet no longer displays zeros in place of data when you run it for a period greater than 24 months back.

Include Open Balances on Accounts Receivable and Order Entry Forms

You can now include your customer's open balance on quotes, orders, and invoices. This is helpful if you don't want to incur the additional expense of sending out statements, or if you just want an extra reminder for faster collections.

Easily Record EFT Payments

Accounts Payable payments and Payroll Tax Deposits made by an electronic funds transfer (EFT) and the corresponding confirmation number can now be recorded after the fact in Sage BusinessWorks without wasting a check number or using the "cash" payment type.

Import Vendor Invoices

Vendor Invoices can now be imported without requiring a default General Ledger account number in "Maintain Vendors."

IMPROVED Check Register

The Accounts Payable Check Register will now identify when the current vendor name does not match the vendor name at the time the check was issued. All checks that were issued using a different vendor name will have an asterisk next to the vendor name to help safeguard your business from embezzlement.

IMPROVED 1099 Reporting

Voiding a credit card payment or check now updates the 1099 YTD payments.

Enhanced StarShip Integration

In V7, your customer's purchasing contact e-mail address is now automatically sent to the StarShip freight manifest system. This time-saving feature automates the process of e-mailing your customers when their order has shipped, providing them with the tracking number so your sales people can focus on selling instead of responding to inquiries regarding the status of orders.

Power Search Improvements

Lookup functionality has been enhanced allowing you to search by many new fields. You can even export the lookup information to Excel directly from the lookup window, making it easy to create custom reports.

Parts Lookup

- On Order Qty
- Committed Qty
- Back Ordered Qty
- Product Line

Purchase Order Lookup

- Ship to address

Customer Lookup

- On Hold
- Credit Limit
- Discount %
- Custom Fields

Vendor Lookup

- Account #
- On Hold (The data will display as T or F)
- Custom Fields

Employee Lookup

- Custom Fields

Quote Lookup Button Makes Finding Quotes a Snap

Don't know the customer ID used for a quote? No problem. Now, in V7, you can easily locate a quote using just the quote number.

Vendor Invoice Inquiry Improvement

You can now lookup a vendor record by searching on an invoice number. This feature is most beneficial when the invoice number is known, but you're unsure of the vendor ID.

New Check 21 Compliant Templates

Version 7 now includes three new check templates that are Check 21 compliant. Check 21 is the "Check Clearing for the 21st Century Act", which was enacted by the U.S. Congress in 2003 and went into effect October 28, 2004. Check 21 allows banks to send electronic images of your checks instead of the actual paper check allowing checks to clear in hours instead of days. For more information on Check 21 visit our Web site at www.sagesoftware.com/products/check21.htm

Save Time With Copy Security Settings

Now, setting up user security is fast and easy with the new "Copy Security" option. Your security settings can be copied between users within the same company or even from users across different companies.

Upgrade to Latest Version of Pervasive

Now, Sage BusinessWorks proactively installs the very latest version of Pervasive v9.1, ensuring your underlying database is current and takes advantage of the latest software improvements.

UPDATED Sample and Demo Data

The Sample and Demo datasets have been updated to use the year 2010. Plus, the Sample dataset has also been enhanced to showcase many of the newest features that have been implemented within the last few Sage BusinessWorks releases.

UPDATED Zip Codes

The zip code list in V7 has been updated, and as a result, the "auto-insert city state" feature will now insert the most up to date information when a zip code is selected.

¹ Twenty percent of all tax forms change on a quarterly basis. Your ClientCare plan must remain active in order to be eligible to download the required updates that ensure that you are in compliance with the latest tax laws. If your plan becomes inactive or if you do not download the mandatory maintenance updates, the Enhanced Tax Reporting and Enhanced 1099 Reporting features will become inactive and will be placed in demo mode and forms produced cannot be filed until your ClientCare plan is renewed.

² Available from within Sage BusinessWorks, this service is provided by Aatrix eFile Service and additional fees apply.

³ Additional fees, Internet access and credit card required.

⁴ Sage Software will pay any tax penalties for inaccurate or late tax deposits and filings as long as the data provided is on time, complete and accurate, and your accounts are properly funded.

⁵ Addresses copied from a source document are used to aid in expediting data entry, and unlike the Sales Order to Purchase Order feature, a link is not established between the source document and the Purchase Order.