Sage BusinessVision Accounting

2009 Release Guide:

Even More Ways to Improve Efficiency and Better Manage Your Business

sage

Sage BusinessVision 2009

Your Sage BusinessVision Accounting solution may already be doing a great job, but it could be doing even better. We're constantly developing new ways to improve Sage BusinessVision—all based on requests from customers just like you! Best of all, you can take advantage of the new features with minimal training. That's because the basic workflow in Version 2009 is virtually identical to what you're used to in recent versions. We kept what you like and simply made it better.

We know you'll be amazed at the exciting possibilities presented to you by the new features available in Sage BusinessVision 2009. You may not have as much time as you'd like to learn how you can leverage these new enhancements to maximize productivity. Never fear, the Sage BusinessVision 2009 Release Guide is here, focusing exclusively on the new 2009 features and getting you quickly up to speed with what's new.

As you peruse this resource guide, you may be wondering how you can get your hands on all of the dynamic new features packed into this version. Great news! Clients who are current on Software Assurance automatically receive access to software upgrades and maintenance updates every time one is released, along with many other features, such as award-winning support, which help keep your system running smoothly. Your Software Assurance plan offers you access to a Web-based technical resource, available 24/7, providing the same award-winning troubleshooting access to the support knowledge base used by Sage technical analysts. Priority Software Support is also available, providing unlimited phone, fax, and e-mail support direct with our technical analysts.

If your Sage BusinessVision ClientCare plan has lapsed, you don't have to miss out, simply contact us at 1-800-642-7693 today.

Accounts Receivable

Maintaining cash flow is vital to any business at any time, especially in an economic turndown, and keeping a close eye on your receivables is more important than ever. You'll notice an updated look and feel to the Accounts Receivable (AR) module in Sage BusinessVision. A convenient new tab view allows you to view more information from one screen. Along with information you've always had, there is some new information available for you in Sage BusinessVision 2009, as well.

Average days to pay–You can choose the number of months and invoices to include in this calculation, and the system automatically updates your customer records for you! Use this valuable information in conjunction with terms and discounts to offer incentives for customers to pay early or keep watch on customers that are paying late.

Customer contact information–No longer do you need to open up the Customer module in order to view contact names or telephone numbers when working in Accounts Receivable—all the information you need is right there.

Select/Deselect All–If you frequently work with many large numbers of customer invoices, you can choose to use the Select All function in order to flag all open invoices for a customer, then you can manually unflag the few that may not apply or continue with the payment information. This greatly improves your productivity when handling large amounts of invoices. Additionally, you can now link or apply more than 99 open invoices in one transaction.

Void a payment–With a new ability to void an Accounts Receivable payment, you can remove a payment that was made in error to a wrong account or had other issues, allowing you to back out associated ledger postings quickly and easily.

Applying payments–Giving your customers the choice to make payments in multiple formats helps to improve your cash flow, and this is now even easier with the ability to take cash and credit card payments in Accounts Receivable. If you take payments currently by credit card, you also have the ability to integrate Sage BusinessVision directly with your merchant account through the credit card processing feature.

Print payment receipt–Customers who make payments or deposits into their AR accounts can now receive a receipt of their payments for their records.

Status field–No need to wonder why a customer has a warning flag in Accounts Receivable. A new status field lets you know if customers have overdue items or are over their credit limits and lets you deal with the issues quickly.

Entering new invoices–When entering in new transactions, you will find more options available to you on one screen. You can apply payment terms for each transaction, enter taxes on the same screen, and even use a memo field for future reference in the General Ledger.
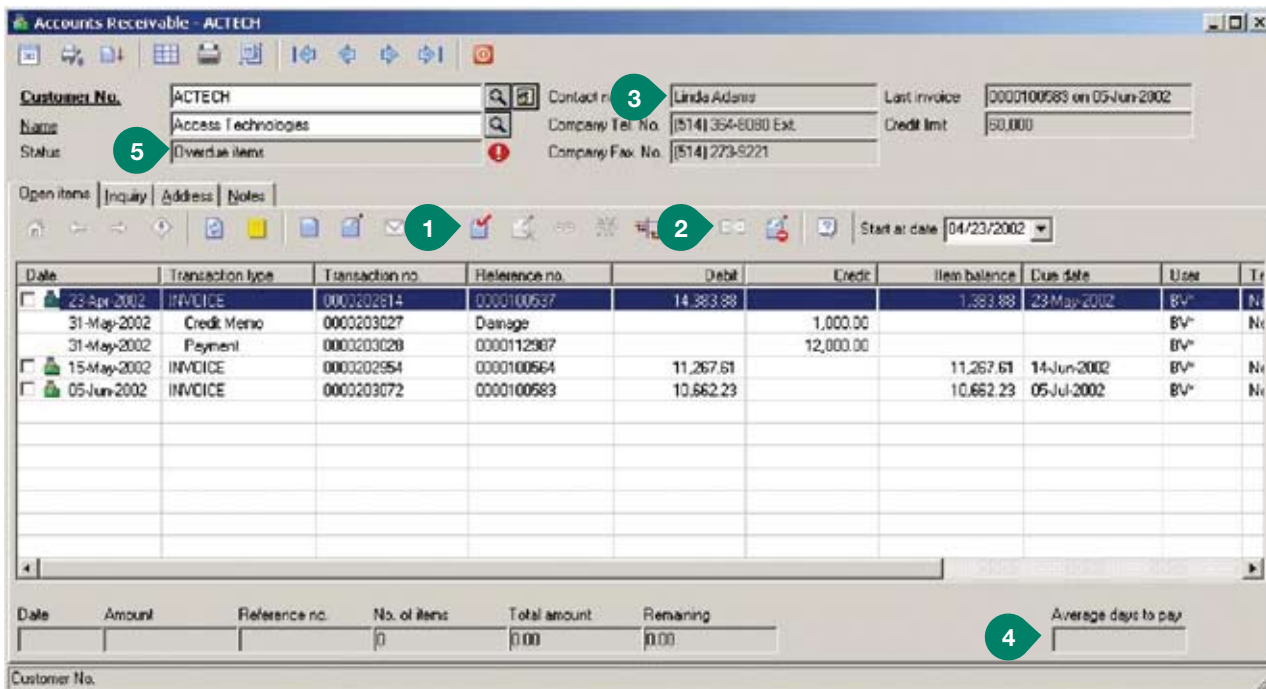
Importing/Exporting

There are many different ways you do business, and in order to help support you and assist with integration to outside software and some manual record keeping, Sage BusinessVision is improving the way you can import information into your accounting system. An easy-to-use wizard helps guide you through the process of importing from either a CSV or Microsoft® Excel® file format.

You can export the following data from Sage BusinessVision:

- Customer
- Customer Ship-to addresses*
- Customer Specific Pricing*
- Accounts Receivable
- Vendor
- Vendor specific pricing*
- Accounts Payable
- Chart of Accounts
- General Ledger (GL)
- General ledger segments
- GL allocation accounts
- Inventory
- Inventory receipts
- Bill of Materials
- Serial numbers
- Product codes
- Territory codes
- GL sub-groups
- Sales orders
- Sales history
- Purchase orders
- Purchase history
- Notes
- Employees
- Timecards
- Job cost

Data you can import into Sage BusinessVision:

- Accounts Payable transactions*
- Accounts Receivable transactions*
- Chart of Accounts
- Customers
- Customer Ship-to*
- Customer Specific Pricing*
- General Ledger transactions
- Inventory
- Unit of Measure/Pricing
- Vendors
- Vendor remit-to
- Vendor specific pricing*

*New additions in Sage BusinessVision 2009

Sage BusinessVision Accounting ●

Accounts Payable

Managing your payments is just as important as receivables. Taking advantage of supplier discounts and avoiding penalties is a high priority, and Sage BusinessVision helps you to manage your payments. The first thing you will notice in Sage BusinessVision 2009 is an updated look and feel, which makes it easier to get to the information to you need most from one location.

Select/Deselect All–If you frequently work with many large numbers of vendor invoices, you can choose to use the Select All function in order to flag all open invoices for a vendor, then you may manually unflag the few that may not apply or continue with the payment information. This greatly improves your productivity when handling large amounts of invoices. Additionally, you can now link or apply more than 99 open invoices in one transaction.

Entering new invoices–When entering in new transactions, you will find more options available to you on one screen. You can apply payments terms for each transaction, enter taxes on the same screen, and even use a memo field for future reference in the General Ledger.

Status field–No need to wonder why a vendor has a warning flag in Accounts Payable. A new status field lets you know if you have overdue items or are over your credit limit and lets you deal with the issue quickly.
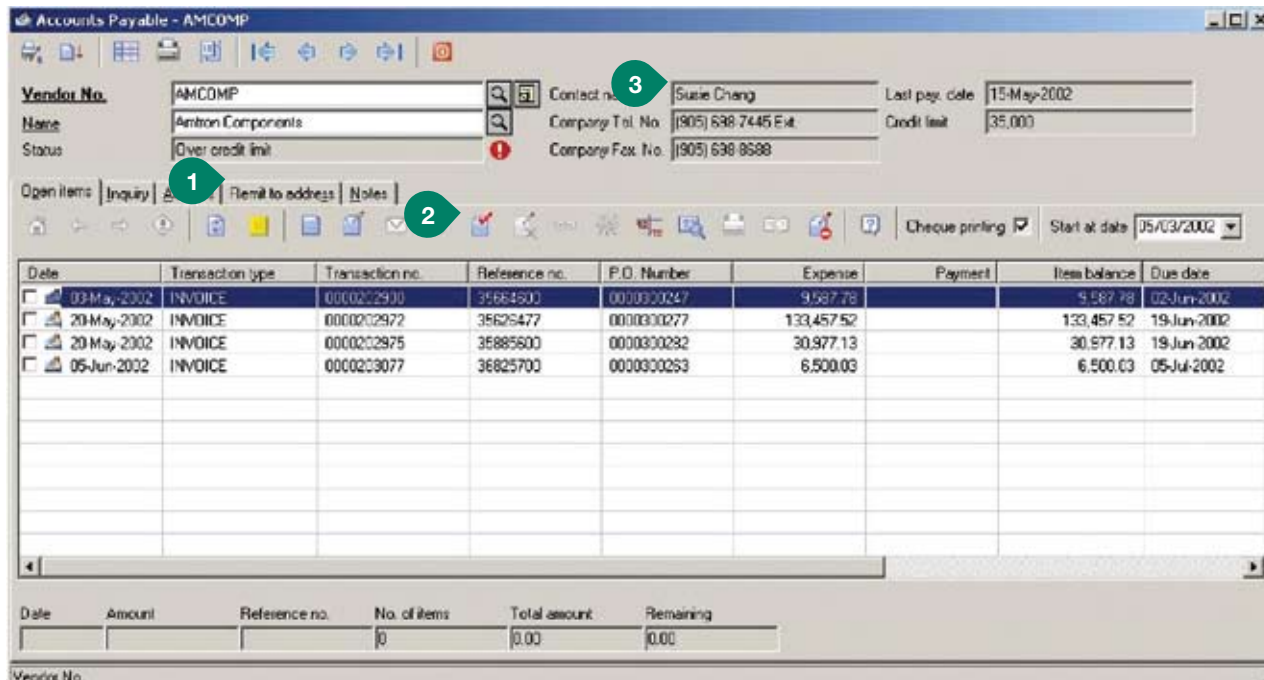
1-Remit-to
2-Select All Funtion
3-Contact Information

Vendor contact information–No longer do you need to open up the Vendor module in order to view contact names or telephone numbers when working in Accounts Payable, as all the information you need is right there.

Remit-to Address–If you have vendors that require payments to go to a clearing house or another location, you may now set up a separate remit-to address, which can then be used when processing cheques.

Voiding cheques–From time to time it may be necessary for you to void a cheque to a date other than the original payment date. With Sage BusinessVision 2009 you can now turn on the ability to choose which date to use for these transactions.

Visit the Sage BusinessVision Online Community!

An open forum lets you post questions, discuss ideas, and share information about your Sage BusinessVision experiences.
Visit http://community.sagesoftware.com

Find

This powerful feature that allows you to perform data queries was introduced in a previous version. However, we have made it even more easily accessible by adding it to the main module toolbar. If you have not already made use of this feature, spend a few minutes discovering all the things you can do with it. The ability to run a search on customers, vendors, inventory, and transactions is more powerful when you can set criteria by which to find only certain records. Once you have the list of records from Find, you can export them directly to Excel.

4-New "Find" Icon

If you've ever had difficulty finding a particular Accounts Receivable or Accounts Payable transaction then you'll want to take a look the new search capability for AR and AP transactions. A search on the reference number will allow you input a complete or partial invoice number and let Sage BusinessVision do the searching for you!

5-New "Browse"
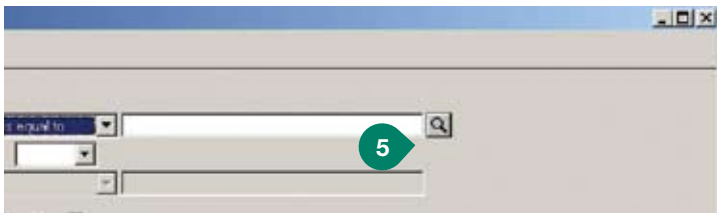
Getting to the data you want in Find is now easier with a browse option that is available for key fields.

Customer and Vendors

You can now define labels for the three contacts provided in the Customer and Vendor modules. If you want to use contact 1 for the president/CEO and contact 2 for the buyer or payables person then you can easily set this up in the System Manager. A previous field that was defined as cell/fax made it difficult to distinguish whether you were calling a phone or fax machine, so this has also been relabeled as "other." For your employees who have access to add new customers but may not have the right remove customers from an "on hold" status, this has been added as a new user security option that will allow them each to function independently.

You will also notice a new icon that appears where addresses are stored in Sage BusinessVision. This allows you to pull up an online map to a customer or vendor location quickly usinf one of three popular Web mapping tools. Getting directions for that customer visit should never be a problem again.
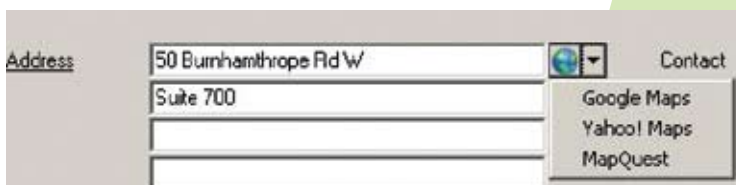
Order Entry

With so much time spent in the Order Entry module and so much of your business depending on the transactions made here, you will appreciate the many improved processes in this area.

Print and/or e-mail quote and order confirmations–Many businesses utilize e-mail more these days, and the ability to e-mail documents to customers saves time and money. Sage BusinessVision 2009 adds the ability to e-mail both quotes and order confirmations.

Copy order to quote–A new option to copy an existing order to a quote allows you to create a new order quickly for a customer from one currently in your system without rekeying any data.

Show invoice date–In several areas including Order Entry, Customers, and Inventory, you can now view the sales order date as well as invoice date when looking at historical records.

Bypass unit of measure field–If you are not using the new unit of measure option in Inventory, you can choose to bypass this field. When entering in new orders with a simple setup in user details, you can enter your orders as you always have.

Print packing slip–Now you can print your packing slips from the main print menu in Order Entry, once you have set up the option to do so in user details.

Reports

Sage BusinessVision 2009 gives you more reports to help analyze your business and keep an eye on your most important metrics. There are over 300 reports that now come with every installation of Sage BusinessVision. A new option for those companies that print multiple copies of forms and use the supplementary forms options will be pleased with the ability to set a print destination for each form now. This allows you to print on separate paper stock or to different locations within your company.

Some of the new reports in Sage BusinessVision 2009 include:

- GL Transaction Journal by date
- Top customer reports
- Ship-to labels
- Top inventory report
- Top vendor report

Did you know? With a Priority Software Support plan you can get expert help with your reports from one of our qualified technicians.

For more information call your Sage support specialist at 800-215-5395.

To order cheques and forms exclusively for Sage BusinessVision, please call 888-893-7423.

Keep in mind that with four different editions of Sage BusinessVision, you can make sure your software fits your business and allows for growth and expansion. The chart below may help you to see if you're currently using the edition that best fits your business.

Available editions include: Limited Edition, Small Business Edition, Standard Edition, and Client-Server Edition

	Limited	Small Business	Standard	Client-Server
Concurrent Users	1	3	1, 5, or 10	10-100
Available Modules				
SM, AR, AP, GL, IC, OE, PO	●	●	●	●
POS	●	●	●	●
Sales Analysis	●	●	●	●
Payroll	●	●	●	●
Bank Reconciliation	●	●	●	●
Purchase Analysis	●	●	●	●
Job Costing	●	●	●	●
BOM			●	●
Serialized IC	●	●	●	●
Budget and Forecasting			●	●
Customize Browses			●	●
Vendor item pricing	no quantity breaks	no quantity breaks	●	●
Crystal Reports®	●	●	●	●
Optional Products				
Multicurrency Manager		Optional	Optional	Optional
Custom Pack		Optional	Optional	●
e-BusinessVision	Optional	Optional	Optional	Optional

Recommended System Configuration

Microsoft Vista

Microsoft Windows® Vista® is now available from Microsoft and is being included on new computer purchases. Vista offers several improvements to security and desktop management. Vista's security improvements helps to minimize the likelihood of malware attacks; unfortunately it also prevents legitimate software applications from operating correctly since many applications require either full or administrator rights. We encourage you to double-check that all of your Sage, third-party, and other programs are fully compliant before upgrading.

Sage BusinessVision 2009 will run on Microsoft Vista Business and Ultimate. You must run Pervasive version 9.6 or higher to be compatible.

System Requirements

The recommended system configurations are as follows:

	Workstation	File Server
Operating System	Microsoft Windows	Microsoft Windows
	Microsoft Windows XP Professional w/ SP2	Microsoft Windows 2003 Server w/ SPI
	Microsoft Windows 2000 Professional w/ SP4	Microsoft Windows 2000 Server w/ SP4
	Microsoft Windows Vista	Microsoft Windows 2000 Advanced Server w/ SP4
Database	Pervasive SQL 10.12 Workgroup Engine	Pervasive SQL 10.12
Processor	2.8 GHz Pentium®	3.0 GHz Pentium
Memory	512 MB	Windows 2000 / 2003 Server - 1024 MB
Free Disk Space	500 MB for application files	500 MB for application files
Monitor	XGA with 256 or more colors (minimum 1024x768 resolution)	Not applicable for file servers
CD-ROM Drive	Required	Required
Printer	Non-host-based laser printer	Non-host-based laser printer

Compatibility with Integrated Solutions

Product	Version
Sage Pro Payroll (US)	7.3
ICVerify	4.0 Release 1 Build 8
Tender Retail	3.3.1.13
Crystal	10
Pervasive SQL	9.6 or higher
Sage FAS Fixed Asset Management 50	2007.1 or higher

How to Get Your Upgrade

This release will be available for download to customers who have a current ClientCare plan. All Business Partners and Developers will automatically be shipped the Master CDs. Go to http://support.accpac.com/myaccount or call 800-642-7693.

About Sage North America

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. At Sage, we live and breathe business every day. We are passionate about helping our customers achieve their ambitions. Our range of business software and services is continually evolving as we innovate to answer our customers' needs. Our solutions support accounting, operations, customer relationship management, human resources, time tracking, merchant services, and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries. Sage North America employs more than 5,000 people and supports nearly 2.9 million small and medium-size business customers. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 14,800 people and supports 5.7 million customers worldwide. For more information, please visit the Web site at www.sagenorthamerica.com or call 866-308-2378.

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