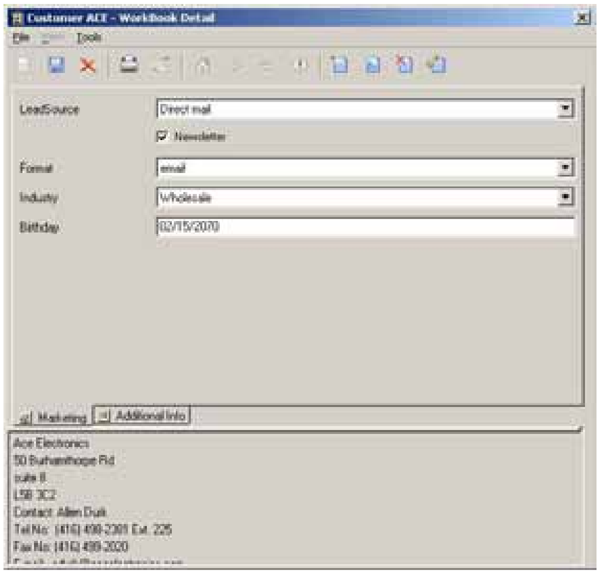
Sage BusinessVision Accounting: CustomPack

Your company is unique—it has its own specialized needs and requirements for a business management and accounting system. Sage BusinessVision CustomPack can satisfy those needs by transforming your Sage BusinessVision Accounting Small Business, Standard, or Client-Server edition into a unique solution designed specifically for your business. Sage BusinessVision CustomPack is an exceptional addition to Sage BusinessVision that combines customization features with other mission-critical business benefits, including customer-specific pricing, easy mail-merge capabilities, document tracking, and the unique real-time information service, SuperTicker. Unlike modifications created in other business systems, custom changes using Sage BusinessVision CustomPack are not "source code" changes—you can upgrade your software whenever an update is offered, without compromising your custom features or requiring additional modifications or investment! Sage BusinessVision CustomPack has five major features that advance your Sage BusinessVision system:

WorkBook

WorkBook is an easy way to add customized fields to your system to meet your specialized needs. For example, you may need to record certain information about your customers, such as alternate addresses, years in business, membership dates, and special contracts. Or you may need inventory descriptions in other languages, alternate part numbers, or vendor specifications for inventory items. You may even want to create work orders associated with your regular orders, or track and retain special information about jobs, bills of material, or employees.

WorkBook allows you to add new fields throughout your Sage BusinessVision system to cater to specific business requirements. Fields can be added to different sections throughout the system, including: Customer Details, Supplier Details, Accounts Receivable, Accounts Payable, Inventory, Order Entry, Point-of-Sale, Purchase Order, Bill of Materials, Employee Details (Payroll), Job Cost, and User Details. A WorkBook can also be created for General Ledger Accounts, Product Codes, Order Line Items, and Territory Codes.



Add your own custom fields throughout your Sage BusinessVision system to cater to your specific business requirements.

Each WorkBook can hold up to 50 fields, spread across up to five screens. Fields can contain text, dates, numbers, percentages, or foreign currency values, or they can be configured as drop-down lists or checkboxes. Fields can even have unique validation rules. A numeric field can be configured to require the entry of a date within a fiscal period or year.

WorkBook provides you with the information you need to better manage your business. The data in the WorkBook fields can be added to more than 190 existing reports in your Sage BusinessVision system, and entirely new reports can be created to reflect the new information contained within the WorkBook. And because all of the fields you add to WorkBook are indexed, "searching" on any of these fields is simple, getting you the information you need quickly.

With the unique and powerful WorkBook, it's never been easier to customize your Sage BusinessVision system to suit your special requirements.

Customer Specific Pricing

Customer Specific Pricing provides you with the ability to establish unique pricing and quantity breaks for specific inventory items sold to certain customers. Designed for companies that offer special or contract pricing to their clients, customer-specific prices can be copied from one customer to another, and start/end dates for those prices can be easily established, ensuring the right price is charged at the right time.

You can view information such as existing specific prices established for a particular customer, look at the last 20 prices for an item charge to a customer, and see the highest, lowest, and average prices charged. With customer-specific pricing, your customers will always get the right price!

Mail Merge

You can easily create personalized promotional letters, newsletters, thank-you notes, and correspondence. Mail Merge saves you time and money by automating the arduous task of keeping your name in front of your customers, staying on top of your Accounts Receivable, and enhancing communications with key vendors and employees.

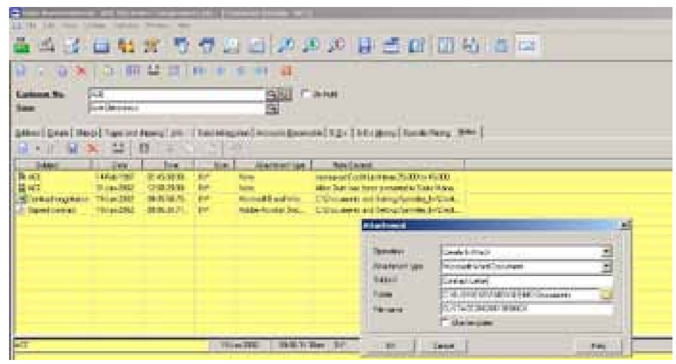
The Mail Merge function automatically passes information from your Sage BusinessVision system to either a Microsoft Word document or to e-mail. Filters enable you to select customers based on territory and customer codes, employees based on payroll department and employee number, and suppliers based on supplier code. Additional predefined filters simplify the Mail Merge process even further. For example, you can select only those customers with a current balance exceeding their credit limit, or those that have purchased a particular item during a certain time period. You can even use your custom WorkBook fields as selection criteria when creating merged documents.

Document Linking

It has never been easier to manage your correspondence and document flow than with the Document Linking feature in Sage BusinessVision CustomPack. It allows an unlimited number of files to be linked to an item within your Sage BusinessVision system. Together, Sage BusinessVision and Sage BusinessVision CustomPack make it easy to keep track of warranty information, assembly and installation instructions, specification sheets, client correspondence, voice messages, custom reports, spreadsheets, graphics, Web sites, and virtually any other business document.

Documents can be linked throughout Sage BusinessVision including: Customer Details, Supplier Details, Accounts Receivable, Accounts Payable, Inventory, Bill of Materials, Payroll, Order Entry, Sales Analysis, Purchase Order, Purchase Analysis, and Job Cost. Documents can also be linked to specific General Ledger Transactions, Product Codes, and Territory Codes.

You can easily view any linked document and create new documents directly within the “Document Browse” window, making it easier for you and your employees to share information. You can also access pre-defined templates created with the Mail Merge function—allowing you to efficiently manage all your documents.



Now you can easily and effectively manage your correspondence and document flow by linking documents throughout Sage BusinessVision.

SuperTicker

SuperTicker allows you to keep your finger on the pulse of your business, day and night. Designed to provide access to your critical business information through a continuous scrolling marquee window, SuperTicker displays text messages of your real-time information. Now you can find out exactly how well your business is doing—any time, anywhere. SuperTicker can be set up to update you constantly with the latest sales figures, the exact value of your inventory, your bank balance, or your accounts receivable, without your ever having to print a report.

Each Sage BusinessVision user can establish the contents of their own SuperTicker, depending on their needs. The SuperTicker can be customized to specify how fast it scrolls, its color, font, and content. It can even be configured to display only when a predetermined condition is satisfied, such as when the stock quantity of an inventory item drops below a certain level. You can also set up a SuperTicker to e-mail its contents when a certain condition or time of day is met. These e-mailed messages can be sent to personal wireless devices, such as cell phones, and other hand-held devices—allowing you to keep tabs on your business no matter where you are!

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