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Sage PFW ERP

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### ***Back in Business***

In this article, the senior vice president and general manager of Sage PFW ERP reflects upon the changes in our economy over the last year and how those changes will influence our business in the near future.

### ***Tips and Tricks for a Smooth Year-End Process***

As the calendar year comes to a close, you may be getting ready to perform your year-end processes. The Sage PFW Knowledgebase has several articles that can help to make your year-end close as smooth as possible.

### ***Preparing for 1099 MISC Forms***

What do you need to know to prepare for running 1099s? This article includes valuable information as well as links to additional resources.

### ***Use Test Data to Try Out New Sage PFW Software Features***

You might be surprised to learn that the features you would put on a wish list already exist in your software. Creating a sample company and testing features is a great way to get to know what's available should the need arise.

### ***Get More from your Sage PFW System***

Did you know Sage PFW provides powerful tools that help increase efficiency? Learn more about Premier Budgeting and Advanced Allocations.

### ***Save the Date: Sage Online Educational Symposium***

The Sage Online Educational Symposium is coming soon! Learn more about this unique virtual conference and how easy it will be to attend.

### ***Sage Contacts***

We want to hear from you! If you have any questions, concerns, or comments regarding Sage PFW, please let us know. Your feedback is valuable to us.

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## Back in Business



### Dear Valued Sage PFW ERP Customer:

What a difference a year makes. With the economy taking us on a wild ride over the past 12+ months, it's been difficult to predict where markets will end up, but I'm glad to see things have settled down and the worst appears to be behind us. That's not to say we are in the same place we were before. In fact, we are in a very, very different place, and we have different behaviors and expectations with regards to our buying habits. As we approach the end of the year, I'd like to share with you some changes I've observed and how I believe they will influence the way we all look at the world around us.

### The value of simplicity

In an increasingly complex world, it has become important to be able to find simplicity. In the past, for example, when I was thirsty and stopped into a convenience store for a drink, it was overwhelming to look at row after row of beverages to choose from, and I'd often leave without making a purchase. In recent articles I've been reading, many retailers are reacting to similar situations by narrowing their offerings to a few, top-quality items rather than a plethora of random offerings. We should all keep this in mind when determining what we want to provide to our own customers.

### Cost-conscious environmentalism

When economic times were better, it was easy to be green, even if it cost more. But in today's world, we aren't as likely to spend a great deal more in order to be more environmentally friendly. Rather, it's the opposite. We are attempting to spend less and at the same time trying to help the planet. For instance, many won't spend an additional \$10,000 to buy a hybrid automobile but will turn down the thermostat and turn off unused lights. This is having an effect in two ways: We are personally reducing our energy consumption, and we are forcing manufacturers to find less expensive ways of bringing green products to market. This in turn means we as businesses need to be acutely aware of the latter.

### Utilizing business intelligence

Within our own companies, we are finding it's more important than ever to have a handle on our business to ensure we are spending at appropriate levels (not too little and certainly not too much), that our revenue is flowing as predicted, and that sales forecasts can be developed more frequently. All of this requires a constant stream of accurate data. In order to get this

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data, we need software and systems that not only deliver a large number of reports, but also allow us to customize and manipulate this information to ensure it is tailored to our unique needs. It's important to not just have the information, but to actually use it.

It's amazing the way the recent downturn, then upswing, in the economy has changed the way we behave, both personally and in business. During the boom time, a lot of behaviors that had always been "nice to haves" became "need to haves," while the downturn is making us more responsible both to ourselves and the environment. In order for us to thrive in this new world and provide our own customers with products and services that have evolved to meet everyone's new expectations, we must recognize that we and those around us have changed. What will be really interesting to see is which of these behaviors become permanent fixtures in the years ahead, and which will fall to the wayside.

Sage is proud to play a part in your company's success, and we hope by working together, we can all look forward to a simpler, greener, and more prosperous 2010.

Regards,

A handwritten signature in black ink that reads "Sam". The letters are cursive and fluid.

Sam Hunter  
Senior Vice President and General Manager



### Tips and Tricks for a Smooth Year-End Process

For companies running on a calendar year, it's time to go through the year-end procedures. Here are some tips that will help your year-end processing go as smoothly as possible. Just visit [www.sagesoftwareonline.com](http://www.sagesoftwareonline.com) and log on to access the Knowledgebase and search on the following concept IDs:

1. **Create a Trial Balance in FRx:** You can save yourself a lot of time and effort by using the simple FRx Trial Balance Report. Be sure to close prior periods for maximum effectiveness. (Concept ID = 440468)
2. **Reconcile the submodules prior to distribution:** It is strongly recommended to reconcile your submodules prior to distributing them to the General Ledger. This will enable you to catch issues before they go to General Ledger. Additional resources to help you reconcile can be found for Accounts Receivable (Concept ID = 400659) and Accounts Payable (Concept ID = 400647).
3. **Make sure any prior year transactions have been posted:** This helps ensure a zero error year-end edit list. (Concept ID = 400643)
4. **When generating future period dates, be sure to go from the first day of the period to the last day of the period:** If you are generating period dates for a calendar year (for instance, Jan 1 – Dec 31), be sure to put 01/01/xxxx in the begin date and 12/31/xxxx in the end. (Concept ID = 400805)

Make sure you do a back-up prior to using any utilities, and if you have any further questions consult your partner or Customer Support.

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### Preparing for 1099 MISC forms

It may not be January yet, but the need to generate 1099s is just around the corner. So what do you need to know to prepare for running 1099s? Sage PFW provides program updates for any federal changes to the 1099 requirements in the most current release (v5.7) and one version back (v5.6). If you are not on either of these versions, it's time to evaluate upgrading to the most current version. Sage PFW provides the 1099 MISC program updates at the end of the year. These updates are posted on the [Sage PFW Support page](#), from which you can also access the articles referenced below.

There are three formats for preparing the 1099 MISC Form: Use YTD 1099 Amt from Vendor Activity file, Scan Current/History Payment Transactions, and Scan Line Item History File for 1099 Information. The Adjust 1099 MISC form option can also be used to add, modify, or delete any 1099 MISC forms that were created during the Preparation process. See the article "How to create a 1099 for a specific vendor" (Resolution ID 426971). Before you select to Print in Final mode or Reset All YTD 1099 amounts, make sure you have performed a backup of your company data. For the specific steps to process 1099 MISC forms, see the article "How to process 1099 MISC forms" (Resolution ID 430722).

For additional year-end process preparation, join our Webcast, "Sage PFW—2009 1099 and Year-End Processing":

December 16, 2009  
9:00 a.m. - 10:00 a.m. PT  
12:00 p.m. - 1:00 p.m. ET

January 13, 2010  
9:00 a.m. - 10:00 a.m. PT  
12:00 p.m. - 1:00 p.m. ET

[Register now](#)

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## Use Test Data to Try Out New Sage PFW Software Features

Are you making full use of the sample company data that ships with Sage PFW ERP software? Better yet, have you made a copy of your own company data for practice and play? The new version, Sage PFW 2010, is due to be released this spring, so now is a great time to try out some of the features introduced in version 5.7 in a demo or your test company. As a Chinese proverb says "Tell me, and I'll forget; show me, and I may remember; involve me, and I'll understand." The best way to learn it is to do it.

Many customers would be surprised to learn that the features they would put on a wish list already exist in the software. It's a good idea to set aside some time to go over the documentation that comes with each new version and actually try out each new feature, even if you don't plan to use all of them right away. You never know when you may have a need for a new feature, and if you've already tried it out, you're more likely to remember it when you most need it.

Even if you're not able to block off a large amount of time to test new features, you can easily choose one or two new things to try out at your convenience until you've exhausted the list. If there are multiple people who can do this on your team, then split up the list and have each person teach the rest of the team one new feature and offer an example of how your company could use it. The pressure of having to present what you've learned to others is usually a good motivator.

Have you wondered how those inventory transactions affect the General Ledger or how the Bank Book works? In your practice company, run some test transactions, see what accounts are updated or not, so you understand the product even better. Do the same with the new features—try them out to see what happens. It's practice data, so try to break it! Do things you may not normally do with your own data just to see what the outcome is.

There are, of course, other ways to learn beyond testing. Visit the [Sage PFW customer community](#) to see how other customers like you are using the features and how they like them. Take a course at [Sage University](#) or use the expansive knowledge of your Sage Business Partner. And remember, the new, enhanced ClientCare plan lets you take advantage of numerous online learning opportunities at no additional charge. The most satisfied and most efficient customers are those who know the most about the software and can use its hundreds of features to serve their company best.

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### Get More from your Sage PFW System

It is more important than ever to define strategic goals for your organization and to measure your progress towards these goals. Your Sage PFW system provides powerful tools that help increase efficiency so you can focus more time on strategic projects and generating profit. Using Premier Budgeting and Advanced Allocations with Sage PFW gives you the integrated tools needed to develop budgets that support your strategic plans and goals.

Premier Budgeting provides the tools your organization needs to efficiently develop budgets that support your strategic goals. Premier Budgeting allows all stakeholders in your organization to access budget sheets and input values specific to their areas, and then quickly and easily integrate these individual budget plans into your organization's master budget. This process not only increases the efficiency of the budgeting process, it increases the accuracy as individual stakeholders enter their own budget values. Premier Budgeting also includes the tools you need to analyze your progress against specific goals as well as the tools needed to integrate these budget numbers back into Sage PFW, where you can get insight into your organization's overall financial position.

Advanced Allocations provides the tools to increase efficiency even more, by automating recurring general ledger entries. Advanced Allocations uses formulas you define for these recurring general ledger entries to submit the entries to your general ledger automatically when you need them. No need to calculate complicated sales commission payments any longer; you define the formulas once, and Advanced Allocations enters the appropriate general ledger entries into Sage PFW at the specified intervals.

We welcome you to contact us and see how these powerful tools can further increase your organization's efficiency as well as help you better define and realize your organization's strategic goals. If you are interested in more information, please [contact your Sage PFW Sales team](#).

Kindest regards,

Mark Janecek  
Product Manager—Sage Active Planner

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### ***Save the Date: Sage Online Educational Symposium***

Mark your calendar now to attend the Sage Online Educational Symposium March 18, 2010. During this unique virtual conference, you'll have the opportunity to learn from others, discuss business topics, and further educate yourself about your Sage PFW solution. And it's all available from the comfort and convenience of your own desk—no travel required! Be on the lookout for an e-mail invitation and additional information coming in January!

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We want to hear from you! If you have any questions, concerns, or comments regarding Sage PFW ERP, please let us know. Your feedback is valuable to us.

#### Sales

888-473-5135

[Info Request Form](#)

#### Customer Care

800-854-3415 (Ext. 4156)

#### Support

800-333-5242

[sagepfwsupport@sage.com](mailto:sagepfwsupport@sage.com)

#### Customer Community and other Social Networking Pages

Valuable resources are available for all Sage PFW software customers. This customer community is designed to enable you to engage and interact with Sage PFW professionals and other users through a variety of different communication forums and tools. Register at [Community.SagePFW.com](http://Community.SagePFW.com) today!

Also, visit us on [Facebook](#) and [LinkedIn!](#)

#### Learning Services

Get the most out of Sage PFW through a variety of training options. Whether you prefer classroom training, online classes, or one-on-one training, click on the link below to point you in the right direction to get the help you need in the format you prefer.

[Visit Sage University](#)

877-920-9600 (Option 2)

#### Product Updates

Download files containing patches, the latest service releases, and other updates for your Sage PFW software through [Sage Online](#). You can also access this site through your Sage PFW software by selecting Help > Sage PFW on the web > Select Support > Customer Login > Sage PFW under the Mid-Market section. Just log on to the Web site using your user name and password; if you don't have your user name and password, use the "register now" option > Select Support > Sage PFW and scroll to the section for downloads.

#### Mail

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**Web site**

[www.SagePFW.com](http://www.SagePFW.com)

**Feedback**

Receiving feedback from customers who actually use the product on a day-in, day-out basis can help us identify features that can make your tasks easier. If you have an idea or suggestion for something that you would like to see on our Web site or within Sage PFW, please e-mail us at:

[SagePFWEnhancements@sage.com](mailto:SagePFWEnhancements@sage.com)

**Customer Loyalty**

We hope that you find the Sage PFW Source Newsletter both helpful and informative, as your business success is important to us. With this said, we want to make the Sage PFW Source the best resource for you. Please feel free to provide us with your feedback, information ideas, or anything else you would like so that we can keep providing you with outstanding products, services, and information to help your business succeed. Your success and satisfaction are our top priorities. Please contact us at [customer.loyalty@sage.com](mailto:customer.loyalty@sage.com) anytime we can help you receive the extraordinary service you deserve from either Sage or your Sage Business Partner.

