Tandem Connections

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Accounting Packages; How To Know It's Time to Purchase and Which One is A Good Fit

Perhaps your CPA or CFO is making a recommendation that it is time for the company to change or upgrade its current software solution. Do you or your staff procrastinate getting monthly reports out? It could be that you dread how the present reporting tools function, perhaps there is too much data in your system that it is bogged down, or you depend on data from others in order to produce your reports. Technology changes and even though what has been in place for the last 10-15 years works well; it may actually be holding you back in terms of costs and more importantly, decision making. Many businesses have taken advantage of mobile phones, iPads, and data scanners. As a business owner you're probably receiving and replying to emails thru the use of some type of mobile device. The idea of being tied to a desk 40 hours a week because your business and accounting solution "lives" there is almost a thing of the past.

Tandem Technologies finds that most businesses never feel like there is a right time to purchase and migrate to a new business accounting and operations solution. While it might feel that way; with all the technological advances in today's computer industry, it's easier than you think. The most important thing is to change before you have to. Here are some important first steps Tandem Technologies recommends for a successful software implementation project:

- Evaluate business operations and know the problems you expect the new software to solve

- Create a task force or committee with staff from all departments

- Know what features and/or functionality the company cannot do without

- Put integration to current or third party solutions at the top of your list

- Evaluate systems that will allow for growth not only in users, but other solutions such as web integration, shipping, receiving, CRM, and human resources

- Evaluate the learning curve of the software and what training sessions include

- Locate a reseller that is actively listening to your committee, the software requirements and who the committee will feel comfortable working with

- Before you sign a contract, ask for references

It's Not Too Early To Include This In Your July 2015 Budget

sage
summit 2015
July 27–30, 2015 | New Orleans, LA

Circle the date, bring out your beads, and plan now for Sage Summit 2015 in New Orleans.

Next year's event promises breakthrough innovations, bolder ideas, and that one-of-a-kind Big Easy vibe. Plus with more visionary speakers than you can shake a beignet at, this is one get-together you don't want to miss.

Mark Your Calendars! – Tandem Technologies Monthly e-Sessions

January e-Sessions:

➢ **Sage 300 ERP - "Visual Process Flows"**
Date: Thursday, January 22, 2015
Time: 1:15 PM to 2:30 PM CST
The perfect session for Sage 300 ERP users to learn about and set up visual work flow to increase employee productivity. Karen Smart will go through features of the Visual Process Flows and demonstrate how to customize them.

➢ **ALERE -- New Release**
Date: Thursday, January 22, 2015
Time: 1:15 PM to 2:30 PM EST
Join ALERE expert, Dennis McVeigh, for a look at new features and functionality in ALERE Manufacturing V.9.7. See reports that include: Supplier Demand; Material Shortage; Lead Time Roll-Up and WIP GL Balances. See new features available in the Plan, Manager and BOM modules when working in ALERE Accounting. Get a sneak peek at what's to come in February 2015.

February e-Sessions:

➢ **Sage 300 ERP - "Sage 300 ERP Business Intelligence"**
Date: Thursday, February 26, 2015
Time: 1:15 PM to 2:30 PM CST

Join Bob Zuckerman for an introductory training on the Report Designer included with the Sage 300 ERP Business Intelligence module. Learn how to create your own customer GL reports within Excel.

➢ **ALERE Accounting - Comparing Versions 7.2 and 7.3**
Date: Thursday, February 26, 2015
Time: 1:15 PM to 2:30 PM EST
Join Dennis McVeigh for a comparison of the features currently available in ALERE Accounting V7.2 and the new release of ALERE Accounting V7.3

Enroll now at http://tiny.cc/e-session

Why Software Upgrades Are An Important Part of Protecting Your Business

Software upgrades are important enough that management should understand timing and project layout. Keeping your business software current and installing updates, service packs and or patches will ensure that the software is running at optimal performance, while reducing downtime and user questions. Running a company's critical business processes on unsupported software should be considered "risky" to management teams and boards of directors.

The business operations and accounting software your company uses delivers analytics and provides financial reports that assist owners and upper management in making informed decisions. Additionally, upgrades are released to improve functionality and usability of the solutions. Human Resource software updates include industry compliance and government regulations that are continually being passed, and there is normally a short amount of time to comply.

The decision regarding upgrade frequency should be considered as part of a strategic plan with your software consultant in order to maximize financial and resource planning of the business.

Sage 300 ERP ShortCut Keys

Key	Description
Page Up	Go to the first (top) record visible in a list.
Page Down	Go to the last (bottom) record visible in a list.
Ctrl/Page Up	Go to the first record in a Finder list.
Ctrl/Page Down	Go to the last record in a Finder list.
Ctrl/Tab	Move out of a grid or list to the first button or field following the grid or list.
Ctrl/Shift/Tab	Move out of a grid or list to the button or field directly above the grid or list.
Home	Go to the first entry in a list.
End	Go to the last entry in a list.
Tab or Enter; Shift+Tab or Shift+Enter	Go to the next column; or Go to the previous column.
Alt+C (or Alt+F4)	Close a form or dialog box.
Alt+E	Open the Set Criteria dialog box to specify records that will be displayed in the Finder.
Esc	Cancel/close a pop-up window (for example, the calendar, or a screen opened with the Zoom button).
Up Arrow / Down Arrow	Go up or down one line in a grid.

Payroll Tax Updates Are Now Available

The close of 2014 means payroll tax updates have been issued and need to be installed. While the payroll tax updates are provided thru your Software Maintenance Agreement or Software Business Care Plan; *the installation of the update needs to be done by a consultant.

*ATTENTION SAGE PRO CLIENTS: Tandem Technologies has access to payroll tax updates for your Payroll module. Contact us at: 866-392-6132 for pricing and scheduling.

Please contact your Tandem Technologies consultant if installation is included in your yearly support contract with us or if you need assistance.

Is Your Company Using Data or Intuition for Decision Making?

To get ahead of your competition in this economic market upturn it is vital to understand where your company has been and where you want it to go. Data reliance is the answer to business decision making. With tools like Sage Inventory Advisor, Sage Business Intelligence, Dataself, F9 and other data warehousing applications, you can cut down on marketing and sales failure. These tools will help you analyze and show differentiation. You will know where your company needs improvement and even how to get ahead of your competition.

The Economist recently surveyed several hundred international executives about their decision-making processes and reported on those results. If you would like a copy of this article please e-mail Linda Kiernan at linda@tandemtechnologiesllc.com

In this article, it eludes that 10% of executives made decisions based on a "feeling". The rest claimed they relied on data, analysis of that data and collaborative discussion with key individuals in their organization. Sounds interesting, but the article from The Economist uncovers that this statistic is not entirely accurate.

As a business woman who helps many companies move to the next level for their business I can attest to the fact that many businesses are still making "assumption" and "intuition" decisions to launch new products and do marketing. Last year I watched a company that had been in business for over 50 years launch a new website. Please note: The client didn't know we had multiple business software packages that could've managed their website and orders. This new website made itself available only to people who would take the time to sign up on their website, receive an acceptance e-mail, verify their information, and then watch a 15 minute video before they could order product from the website.

A few days before the website project launched, the customer asked me excitedly what I thought of their new website. My reply was simple, "Did you do any research on what your competition is doing?" The phone went silent and I lost a client due to their gut feeling to endeavor into a market they knew little about. I later found out they spent upwards of $275,000 on that website. Sad, but true stories like this abound even in today's advanced technological world. We can also utilize a very famous accounting firm to remind us that even the big companies fail. Just visit http://www.arthurandersen.com and you'll see that this shell is all that remains of a powerhouse among its rivals.

ALERE Tips & Tricks Corner

How to Create a Payable for Multiple Invoices

1. In the **Purchases Module**, select **Payables**
2. Click the **Add** button on the **Accounts Payable** header tab
3. Select **Multiple PO Invoice** on the **New Order** pop-up screen
4. Enter **Remit to** (double click to get drop down list)
5. Click the **Continue** button
6. Enter **Vendor Invoice** number
7. Click the **Accept** button
8. When **AP from PO** screen pops up, select PO's as appropriate
9. Add shipping charges as required
10. Click the **Continue** button
11. Review GL entries on **GL Journal Entry** pop-up screen
12. Click the **Post** button