

Sage MAS 90 Special Edition  
for QuickBooks Users  
Conversion Guide

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## **Introduction**

### **The Sage Software Ideal**

At Sage Software, our mission is to help you manage and grow your business more efficiently, productively, and profitably. The key to our success has always been providing exceptional business management and accounting software solutions that help ensure your success.

Whether or not your company survives in this competitive market, more often than not comes down to business management. Successful business management relies on having the right tools, which, in turn, provide the insight to make the right decisions.

We make it our business to keep pace with the technology revolution. That's why our product lines are continually evolving to ensure that you are always one step ahead of the rest. Our software solutions provide a higher level of functionality and integration to equip you with the accounting and business management capabilities needed to compete in today's volatile business environment. After all, it's about thriving—not just surviving.

We leverage the power of new technologies, and streamline and package them into powerful, user-friendly formats. The Sage MAS 90 and 200 ERP product lines are continuously updated to equip you with the power of the latest technologies and newest features. Our software enhancement releases include straightforward upgrade paths so you can take advantage of important new capabilities with minimal disruption and expense.

We look forward to providing you with seamless, cost-effective upgrade paths and highly evolved business management solutions, such as Sage MAS 90 Special Edition for QuickBooks Users, which include the newest technologies and operating platforms of tomorrow.

## Welcome

Whether you have already purchased Sage MAS 90 Special Edition for QuickBooks Users or are considering upgrading, this guide provides a thorough explanation of the conversion process. We hope you choose to become part of the Sage Software family and enjoy the benefits of our high-quality software and support services.

## Upgrade to the Next Level of Success

As your company grows, it places increased demands on your accounting system and your accounting personnel. How your company handles its growth can make the difference between success and failure. The following questions will help you determine if your company can benefit from an upgrade to Sage MAS 90 Special Edition for QuickBooks Users.

- Are you limited by your current system's level of functionality? Do you require more detailed purchase histories or multiple warehouses?
- Does your software package still meet your needs or are you using several different software packages in addition to QuickBooks?
- Can you quickly get answers to those "what-if" business questions that keep you awake at night?
- Do you use additional reporting tools for your financials?
- Do you worry about compliance with Sarbanes-Oxley?
- Can your software support remote users? Do you have branch offices, traveling employees, and telecommuters?
- Do you have more users than your current software can handle? Can your software handle increased demand?
- Would you like system customization capabilities, including user-defined fields and changing tab sequences?
- Do you need advanced, integrated e-commerce capabilities, such as business-to-business and business-to-consumer Web-based transactions, or online customer access to purchase history or order status?

- Do you need integration with industry-specific solutions such as job shop, service/warranty, or apparel?
- Do you require greater transaction volume?

If you answered "yes" to any of these questions, your company can benefit from an upgrade to Sage MAS 90 Special Edition for QuickBooks Users. At Sage Software, we've made it our primary concern to help our customers, like you, keep up with their own growth and stay ahead of the competition. With Sage MAS 90 Special Edition for QuickBooks Users, we have made it easy for you to move to the next level of business management and accounting software solutions. We hope this guide helps you overcome any concerns that you may have about upgrading your software. Rest assured—you can count on Sage Software to be there when you need support now and as your business continues to grow in the future.

## Addressing Your Conversion Concerns

Many companies recognize the need to upgrade their accounting software package, yet hesitate to do so because of various conversion concerns. Sage Software understands these concerns and has designed Sage MAS 90 Special Edition for QuickBooks Users to ensure a smooth transition. The following are some common concerns that Sage Software has successfully addressed.

### **Will I have to reenter all my data?**

You have all your data in QuickBooks and you don't want to take the time to rekey the information. Most companies want to convert their files, such as customers, vendors, inventory items, open items, and beginning balances. Sage Software has developed a data migration tool, for use exclusively by our business partners, that converts QuickBooks data quickly and accurately to Sage MAS 90 Special Edition for QuickBooks Users. For more details regarding the Data Migrator and QuickBooks to Sage MAS 90 conversion process, see Conversion Expectations on page 53. Keep in mind that you can retain your QuickBooks software to review past transaction details, although research has shown that companies usually do not need to view historical data within 30-45 days of converting to Sage MAS 90 Special Edition for QuickBooks Users.

### **Is the cost of the software expensive?**

When you outgrow a retail package such as QuickBooks, the next step usually requires a more significant financial investment. Sage Software has several options to make this transition easier on your company's budget. When you upgrade to Sage MAS 90 Special Edition for QuickBooks Users, you can exercise the option of purchasing the easy-to-order bundles for a single-user or dual-user system at a discount of up to 40% off standard pricing. Or, if you need a 5-plus-user system, there are other cost-saving options featuring special pricing for QuickBooks customers. Contact your Sage Software business partner for pricing information.

### **Will learning the new software be challenging?**

Not so in this case! Although you are migrating to a more robust software package, moving up to Sage MAS 90 Special Edition for QuickBooks Users couldn't be easier. The user-friendly tutorials, easy-to-navigate screens, online Help, training centers throughout the United States, and dedicated network of Sage Software business partners ensure that you'll be trained and ready to operate in no time. To ensure a successful migration, we encourage you to work closely with your Conversion Specialist to allow for adequate time for training.

### **I still have concerns about changing software.**

Changing software is a major business decision. We assure you that upgrading to Sage MAS 90 Special Edition for QuickBooks Users will be easier than you may think. The software is a modular business management solution, which means that you have the option to purchase only the modules you need now and add more as your business expands.

As you read through this conversion guide, you'll see that Sage Software has addressed every likely conversion concern and you'll begin to understand why the Sage MAS 90 product line is the number one selling mid-range accounting and business management solution on the market today. Sage MAS 90 Special Edition for QuickBooks Users is easy to learn and user-friendly, and features comprehensive solutions, in-depth functionality, and versatility.

## What Other Conversion Customers Are Saying

The quotes that follow are from businesses like yours that simply outgrew the features and flexibility of their accounting software package. They all have made the transition to Sage MAS 90. Success stories related to your specific business can be found on the Sage MAS Web site ([www.sagemas.com](http://www.sagemas.com)).

*"In six months, the new [Sage] MAS 90 system has never crashed. Data was transferred electronically, without a hitch. The new system worked so well, in fact, that Gotham ran its old and new systems in parallel for only two weeks. The first month-end numbers came out identical. It's amazing when you look at what you get for your dollar now in the computer world. And I've got a much more powerful system, that's easier to work with, faster, and much more versatile. Now I'm confident I can grow the business to 10 times our present volume, add product lines, even expand to new locations, all with our existing [Sage] MAS 90 capabilities."*

Danny Schwartzstein, President of Gotham Sales Company

*"I didn't realize that an entire conversion process could ever be this easy. If I had known it was so fast, I would probably have allowed myself more time up front getting the final numbers prepared before the transfer."*

Rodney Aguiar, Controller for DuPar & Angel Manufactured Housing

*"It was the smoothest conversion I've ever been through. It was a first-class installation. Thanks to [Sage] Software and the expertise of our well-qualified reseller, we now have an application that has the power to handle our growth. We're all very happy with [Sage] MAS 90."*

Brian Whitney, Controller for Statile and Todd

*"Invoicing now takes just 15 percent of the time it used to. We've cut the time needed to find an item in inventory by 95 percent. Already the system is saving us at least \$10,000 a year, which is a lot to us. We expect to see much bigger savings in the next quarter due to improvements in inventory accuracy."*

Claire Hailey, Vice President of Operations for Data Cable Corporation

## **Benefits of Joining the Sage Software Family**

At Sage, we specialize in business management software for small and medium-sized businesses. You can count on us to build powerful, reliable products that are thoughtfully adapted to changing technologies and business needs. Our software products are recommended, sold, and supported by more than 6,000 business partners who provide services such as installation, product support, and systems integration.

When you purchase a software product from Sage Software, you will receive highly evolved business applications with reliable performance today and smooth, cost-effective upgrade paths to the new technologies and operating systems of tomorrow. By choosing Sage MAS 90 Special Edition for QuickBooks Users, you receive the following benefits.

### **Applications Backed by the Largest, Most Qualified Channel in the Industry**

Our business partners and CPAs can provide installation, data migration software support, and system integration services. They focus on delivering the solution that is tailored to your needs.

### **Support with ClientCare**

To help maximize your Sage MAS 90 Special Edition for QuickBooks Users investment, Sage Software provides a range of software maintenance and phone support programs that offer automatic software updates and award-winning support.

## Education and Training

To ensure that you receive the maximum value from your software, Sage Software offers the following:

*Conversion Specialists*—These specialists not only have expert knowledge of Sage MAS 90 Special Edition for QuickBooks Users, but also have QuickBooks knowledge. These specialists ensure that you have a successful conversion to Sage MAS 90 Special Edition for QuickBooks Users.

*Authorized Training Centers (ATCs)*—With ATCs located across the country, including our corporate training facility located in Irvine, California, certified training centers are available at a location near you.

*Anytime Learning*—These recorded online classes provide you with the same expertise as a live class, anytime that is convenient for you. For more information, refer to the Sage Software University Web site at: [www.sagesoftwareuniversity.com](http://www.sagesoftwareuniversity.com)

*Certified Trainers*—Sage Software certifies trainers at Sage Software business partners' offices, enabling trainers to provide you with onsite instruction.

*Certified Support Centers*—These centers are staffed and operated by Sage Software business partners that have taken phone support to the next level. They have completed intense training and evaluations to obtain this status.

*Certified Support Specialists*—These specialists must meet specific support and product knowledge requirements through an intensive series of courses and evaluations. This process ensures that your Sage Software business partners' support staff has the training necessary to answer your questions.



## Price Value

This chapter covers the general differences between QuickBooks and Sage MAS 90 Special Edition for QuickBooks Users. Specific feature and workflow comparisons are discussed in Chapter 3. The objective of this chapter is to help you better understand what we call "Price Value"—in other words, it will explain the valuable benefits you can capitalize on when you upgrade your software to Sage MAS 90 Special Edition for QuickBooks Users. These benefits go beyond the expanded features and functionality to focus on entire business management solutions. Sage MAS 90 Special Edition for QuickBooks Users is more than just a product that handles the daily bookkeeping of your business—it gives you the insights you need to run your business more productively and more profitably!

## Generally Accepted Accounting Principles (GAAP)

What are Generally Accepted Accounting Principles (GAAP)? GAAP is a widely accepted set of rules, conventions, standards, and procedures for reporting financial information that are established by the Financial Accounting Standards Board (FASB). Sage MAS 90 Special Edition for QuickBooks Users adheres closely to these important industry guidelines.

For example:

- In Sage MAS 90 Special Edition for QuickBooks Users, a user cannot change or delete posted transactions without an audit trail. With an audit trail of changes to posted transactions, you will maintain a clean general ledger that will make your accountant and the IRS much happier!
- QuickBooks allows you to use either cash-basis or accrual-basis accounting methods. Cash-basis accounting does not follow GAAP. Sage MAS 90 Special Edition for QuickBooks Users uses accrual-basis accounting, which closely follows GAAP.

## Retail Limitations vs. Value Added Reseller Consulting

Because Sage MAS 90 Special Edition for QuickBooks Users includes global setup options, as well as separate setup option menus for each module, the software is easily customized to meet each customer's specific needs. A trained consultant (your local Sage Software business partner) performs a needs analysis, custom implementation, and provides training and on-going support to make sure that your software is ideally configured for your unique business requirements. The value to you is a better-configured system and the benefit of local support from someone who understands your business and has implemented and trained you on your new software package.

Retail products are adequate when your business is small and has low volumes. At this stage, manual processes and the duplicative, redundant work that results from data stored in multiple places (such as the accounting software, Excel spreadsheets, or a Web database) have a minimum negative impact on profitability and productivity. But, as transaction volumes increase, streamlined integrated processes become essential for your business to remain competitive in today's ever-changing economy.

QuickBooks' basic accounting functionality—general ledger, accounts receivables, and payables—is not nearly as robust as Sage MAS 90 Special Edition for QuickBooks Users. When your business requirements exceed the basic functionality of QuickBooks and you require more advanced functionality such as distribution, manufacturing, and job costing, you'll find that Sage MAS 90 Special Edition for QuickBooks Users is a better fit.

QuickBooks is sold as a package—you can't choose the core applications you want to integrate or purchase. With Sage MAS 90 Special Edition for QuickBooks Users, you can purchase only the modules that you need. With so many choices, it helps to have an expert in the field to assist you in selecting the right modules for your business. Our business partners have the expertise with Sage MAS 90 Special Edition for QuickBooks Users to help ensure a successful implementation. Conversion Specialists are also available to help you with the data transfer to Sage MAS 90 Special Edition for QuickBooks Users. These specialists have extensive knowledge of both QuickBooks and Sage MAS 90 Special Edition for QuickBooks Users.

## Integration

As your business grows beyond basic accounting functionality, integration with industry standard applications becomes essential to your business management solution. Sage MAS 90 Special Edition for QuickBooks Users integrates with the industry leaders to help you get the most out of your accounting data.

**Crystal Reports**—comes standard with the Sage MAS 90 Special Edition for QuickBooks Users Library Master module. A graphical report writer, Crystal Reports offers presentation-quality output for your accounting data. Within any of the reports you can change the fonts, text colors, borders, and shading, as well as embed pictures, logos, or diagrams. You can access templates or create your own custom report using the Business Insights Reporter. After creating a custom report, you can save it in the Custom Reports menu of each module for quick access.

All bundled reports, including transaction reports, listings, and forms, leverage Crystal Reports for report design and output. Sage MAS 90 customers can use the Crystal Designer for simplified report customization and creation. This means that all standard Sage MAS 90 reports are readily customizable. You can also benefit from the multiple report output options supported through the Crystal Viewer, including Microsoft Word, Excel, and Adobe PDF.



### NOTE

FRx Desktop is an optional purchase with Sage MAS 90 Small Business Edition.

**FRx Desktop Single-User**—comes with the General Ledger module. With FRx Desktop, you can create sophisticated financial reports. Row and column formats are defined separately for maximum flexibility. Using the FRx Desktop drag-and-drop feature, you can restructure your cost centers or carve out new account segments using a special clever tool. Reports can be printed, exported to an Excel spreadsheet, or distributed to non-accounting system users and viewed in the Drill Down Viewer.

**Microsoft Office Link**—Easily generate business letters using Microsoft Word, and print directly from Sage MAS 90 Office. Use Word to make temporary changes to the Sage MAS 90 Office Templates, or use Word to create your own business letters. For example, in Customer Maintenance, you can automatically create a welcome letter, a credit limit advisory letter, or a dunning letter. Also, in Vendor Maintenance, you can create a letter requesting a price quotation.

## Customization

Sage MAS 90 Special Edition for QuickBooks Users provides virtually unlimited user-defined fields and capabilities. Customization capabilities in QuickBooks have limits, such as not being able to customize statements and only allowing up to 15 fields to be added per list (Customer, Job List, Vendor List, or the Employee List). For more information on feature comparisons, see Feature and Workflow Comparison on page 23.

For example:

- Your order entry process flows in a different way than Sage MAS 90 Special Edition for QuickBooks Users. This is no problem; change the tab sequence to fit the way you do business, or move a field to a position on the window that meets your needs.
- You would like to change a field to make it stand out more. All you need to do is change the color of the field.
- You would like to add an image to an inventory item or perhaps add an employee's picture to their payroll file. You can attach a bitmap image easily to just about any form in Sage MAS 90 Special Edition for QuickBooks Users.
- You don't want to use a field in the Customer Maintenance window. You can easily hide the field to suit your business needs.

## Enhanced User Interface

The enhanced user interface enables greater control for heads-down data entry users, while providing a more streamlined entry process for all users. All of the following enhancements help customers streamline their data entry processes with a minimal learning curve.

- New controls for flexible line entry
- Customizable column widths
- Sort and hide fields
- Undo unsaved changes
- Resizable windows (as required)
- Drag-and-drop interface
- Modern look and feel
- Ability to scroll through all data entry lines
- Dual-grid interface for line item entry
- Hyperlinks for quick access to related information, such as salesperson information from Customer Maintenance

These are just a few examples of the power and versatility of Sage MAS 90 Special Edition for QuickBooks Users.

## Flexibility to Add Modules as You Grow

Sage MAS 90 Special Edition for QuickBooks Users offers a broad range of modules designed to meet the needs of virtually any business. Integrate as many modules as are necessary for your company and reap the benefits of a system that is far more powerful than the sum of its components. As your business continues to grow, you can have the confidence of knowing there are additional Sage MAS 90 Special Edition for QuickBooks Users modules that can provide you with the finest solution for your expanding needs.

### Core Accounting

Based on the elements that compose the heart of any accounting system, the core accounting solution consists of the following modules, which help provide a seamlessly integrated accounting foundation for your business.

- Accounts Payable\*
- Accounts Receivable\*
- Bank Reconciliation\*
- Fixed Assets
- General Ledger\*
- Electronic Reporting
- Payroll
- Sage Payroll Services

\* Module is included in the Sage MAS 90 ERP Small Business Edition single- or dual-user product. All other modules are available for purchase separately.

## Distribution

Designed to enable seamless integration of accounting, customer service, and inventory tracking data into a rock-solid system.

- Inventory Management\*
- Sales Order\*
- Purchase Order\*
- Bar Code
- StarShip
- Return Merchandise Authorization (RMA)

\* Module is included in the Sage MAS 90 Small Business Edition single- or dual-user product. All other modules are available for purchase separately.

## Manufacturing

The manufacturing solution allows you to create multi-level bills, and track materials and labor costs from the shop floor to completion. Finished goods are posted to inventory or sales orders for seamless integration with the distribution system.

- Work Order
- Material Requirements Planning
- Bill of Materials

## Resource and Project Management

Integrating the core accounting solution with the construction modules allows you to track and manage job estimates, costs, and profitability.

- Job Cost
- TimeCard
- TimeSheet
- Sage Abra Human Resources

## Business Intelligence and Customization

Designed to provide instant visibility across your business, our business intelligence tools combine to create an all-encompassing information management solution. Our customizable report generation, inquiry, analysis, and integration applications work seamlessly with your Sage MAS 90 or 200 systems. Increase your productivity, improve business financial reporting, and enhance functionality with comprehensive Business Intelligence.

- **Business Alerts**—Use your e-mail system to notify yourself whenever something significant happens in Sage MAS 90 or 200. Automatically communicate shipment information to customers, keep staff informed of specific events, and track important business functions.
- **Business Insights Explorer**—Gain instant visibility across your business and turn data into actionable knowledge using Business Insights Explorer. Increase your efficiency with easy personalization for your role, view your data from a data-centric perspective, access related entries, and launch a familiar Sage MAS 90 or 200 task.
- **Business Insights Reporter**—Need a quick report to indicate how close you are to meeting your sales goals? Business Insights Reporter can provide the business financial reporting that you need.
- **Business Insights Dashboard**—Included with any new Sage MAS 90 or 200 system, Business Insights Dashboard is the ideal solution for busy managers, executives, and business owners who need quick access to key business financial reporting information in an easy-to-read format.

- Crystal Reports (included at no charge)
- Custom Office (included at no charge in five-plus-user systems)
- F9
- FRx Desktop
- Visual Integrator

## Customer Relationship Management

- ACT! by Sage
- SageCRM
- SalesLogix

## Business Management Applications

The integration of business management applications with Sage MAS 90 Special Edition for QuickBooks Users creates an unbeatable combination. Completing your business management solution with the following modules helps you maintain your competitive edge.

**Credit Card Processing**—The Credit Card Processing module is powered by PCCharge Payment Server, an open architecture system designed to integrate electronic credit card processing to existing accounting systems like Sage MAS 90 Special Edition for QuickBooks Users. Whether you are a small wholesaler, a mid-sized distributor, or a large Internet provider of e-commerce and virtual shopping services, this robust engine is the ideal solution for you. Credit Card Processing allows you to obtain authorizations and accept credit card payments seamlessly through the Accounts Receivable and Sales Order modules, as well as the e-Business Manager module. All transaction information, such as authorization codes, is captured and stored in the appropriate application database for historical and reconciliation purposes.

**e-Business Manager**—The e-Business Manager module provides an affordable, out-of-the-box solution for e-commerce that integrates your Sage MAS 90 Special Edition for QuickBooks Users software with the World Wide Web. The e-Business Manager module is designed so that additional functionality can be added later by plugging in "applets" that fit your specific requirements. Applets currently available include:

- .order      Enables your customers to place orders online
- .inquiry    Provides your customers access to their online account status
- .store      Allows new, anonymous customers to browse your products and services, place orders online, and pay by credit card

**ACT! by Sage**—As a service-oriented company, your most valuable asset is your customers. New sales are hard to come by, so taking care of existing customers and servicing their needs is vital to your success. A seamless integration between ACT! by Sage contact management software and your Sage MAS 90 Special Edition for QuickBooks Users system can be a significant benefit to your customer service and sales performance.

By leveraging the strengths of two industry leaders, your company can improve information sharing and gain efficiencies. For instance, a salesperson using ACT! by Sage can issue sales orders, perform customer inquiries, or view detailed orders and invoices from Sage MAS 90 Special Edition for QuickBooks Users without leaving their ACT! by Sage desktop. In effect, the two products allow you to connect the two halves of your business—your front office, which includes your sales force, and the heart of your business, your accounting system.

Bi-directional data transfer is available throughout and can be utilized to maximize efficiency within numerous aspects of your company. It's a complete front office to back office solution that can boost your company to the next level of profitability.

ACT! by Sage helps companies:

- Centralize critical contact and customer information and stay organized
- Manage and grow business relationships through top-notch communications
- Prioritize day to day activities to stay on top of appointments and tasks
- Forecast and track sales opportunities for an improved bottom line
- Access and report on information quickly for a complete view of customer interactions
- Stay productive by taking critical information on the go
- Provide a seamless user experience to front office employees as they access critical back office customer data to better manage their customer relationships
- Improve customer service by providing immediate access to critical customer data
- Build long-term customer loyalty by empowering front office personnel with the information they need to better manage their customer relationships
- Increase productivity with real-time data sharing between front and back office systems
- Reduce overall operational costs by improving data integrity and eliminating costly back office order processing errors

**SageCRM**—An award-winning wireless and browser-enabled system, SageCRM provides enterprise-wide access to your vital customer, partner, and prospect information. This feature-rich CRM solution is complete with comprehensive sales force automation and marketing campaign features.

Seamlessly convert SageCRM prospects to Sage MAS 90 or 200 customers. Provide real-time quotes and convert quotes to orders. This increases your forecasting accuracy and productivity, and strengthens your customer relationships. Use Business Insights Explorer to gain true visibility across your business and produce up-to-date sales results.

For example, with the real-time availability of pricing, you can easily generate an accurate proposal with no hidden charges. Send the quote by e-mail directly from SageCRM and set follow-up reminders. When you close the sale, your prospect automatically becomes a Sage MAS 90 or 200 customer. The order ships and your new customer is happy.

With a full suite of integrated applications—including Sales, Marketing, Customer Service, Mobile Solutions, Accounting, Distribution, and Manufacturing—you get the tools you need to find new customers, close sales faster, access transaction history, and accounting data to build lasting, more profitable relationships across all channels.

Regardless of how, when, or where customers, partners, and prospects choose to interact with your organization, SageCRM offers a comprehensive, easy-to-use solution to successfully manage relationships.

SageCRM allows you to:

- View complete customer information—orders, payments, account history, marketing campaigns, customer care, communications and attachments
- Effectively convert prospects to customers
- Quickly analyze, forecast, and report on key sales data
- Synchronize your sales, marketing, and customer care activities
- Deploy quickly using training and coaching quick tips, videos, and wizards
- Build long-lasting customer loyalty and generate repeat sales
- Assign, schedule, track, and measure performance of marketing campaigns

**SalesLogix**—Taking care of customers and servicing their needs is vital to every company's success. And the more you know about your customers, the better. That's why it makes sense to invest in the industry's leading customer relationship management solution: SalesLogix. As a member of the Sage Software family of products, SalesLogix integrates with Sage MAS 90 Special Edition for QuickBooks Users. With both systems sharing data, you can streamline workflow between your front office and back office.

Integrating SalesLogix with your back-office software gives your employees greater customer insight by enabling them to:

- Quickly identify cross-sell and up-sell opportunities
- Easily access payment history information
- Identify additional purchasing power - or lack of
- Identify availability of products for sales
- Quickly assist customers with order status
- Generate more accurate quotes and proposals

**Sage Abra HR**—Human resources (HR) represents the life and energy of any organization. Accurately administrating a company's work force is vital to its success and growth. The Sage Abra HR module allows companies to manage information based on their unique HR structure and needs. Data is entered just once and is shared with the entire HR system—leaving time to address strategic business issues that support recruiting and maintain a competitive work force.

Sage Abra HR provides many benefits, but the most impressive feature is providing a means to quickly access key data with minimal effort. HR personnel are just keystrokes away from viewing data like emergency information or performance reviews due for any employee. The ability to promptly analyze critical company data is also within reach, including salaries, turnover ratios, and performance issues.

## **Add Users as You Need Them**

Sage MAS 90 Special Edition for QuickBooks Users allows you to start with just a single accounting user. When you're ready to increase to 5, 10, or 15+ user licenses, simply contact your Sage Software Conversion Specialist or business partner. Your original investment is protected; basically, you just pay for the users you add.

It's seamless. As soon as you add your new serial number and unlocking key, your new user account is ready. Concurrent user licenses are sold with Sage MAS 90 Special Edition for QuickBooks Users. This means that if you have 25 employees or possible accounting users and only 10 are using Sage MAS 90 Special Edition for QuickBooks Users at one time, you will need a 10-user license. If an eleventh user tries to access Sage MAS 90 Special Edition for QuickBooks Users, additional licenses will need to be purchased.

## **Feature and Workflow Comparison**

The top two frequently asked questions for QuickBooks customers moving to Sage MAS 90 Special Edition for QuickBooks Users are:

- 1 What features will I have in Sage MAS 90 Special Edition for QuickBooks Users that I don't have in QuickBooks?
- 2 How will my day-to-day processes change?

This chapter will help answer these questions. The following comparison is between QuickBooks and Sage MAS 90 Special Edition for QuickBooks Users. Currently, Data Migrator can migrate data from QuickBooks Premier version 2007. For the most current information on Data Migrator, check with your business partner, or refer to [www.sagemas.com](http://www.sagemas.com). Whatever version of QuickBooks you have, your Conversion Specialist can discuss the options to convert your data so it will be ready for migration.

While a checklist of features may provide a high level comparison of QuickBooks and Sage MAS 90 Special Edition for QuickBooks Users, it does not go into the depth of how the features can be utilized in the application.

This comparison highlights significant feature differences and is by no means a complete list.

## Feature Comparisons

### Available Modules

Available Modules (Modules may require separate purchase)	QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
General Ledger	•	•
Accounts Receivable	•	•
Accounts Payable	•	•
Bank Reconciliation	•	•
Payroll	•	•
Inventory	•	•
Sales Order	•	•
Purchase Order	•	•
Business Insights Explorer		•
Business Insights Reporter		•
Business Insights Dashboard		•
TimeSheet		•
SageCRM		•
Return Merchandise Authorization (RMA)		•
Bar Code		•
Bill of Materials		•
Work Order		•
Material Requirements Planning		•
Job Cost	•	•

<b>Available Modules</b> (Modules may require separate purchase)	<b>QuickBooks</b>	<b>Sage MAS 90 Special Edition for QuickBooks Users</b>
TimeCard		•
Visual Integrator		•
Electronic Reporting		•
E-Commerce		•
Business Alerts		•
Credit Card Processing	•	•
Fixed Assets		•
F9		•
FRx		•
Crystal Reports		•
Time and Billing	• Third Party	• Third Party
Contact Management	• (Customer Manager, ACT! by Sage)	• (ACT! by Sage, SalesLogix, SageCRM)
Customer Relationship Management		• (SalesLogix, SageCRM)
Shipping Interface	• Third Party	• (StarShip)

## System Options

System Options	QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
Cash or accrual basis accounting	Both	Accrual only
Post transactions by...	Real-time	Batch
Search on reports printed to screen		•
Create custom reports	•	•
Add user-defined fields	Limited	Custom Office
Change order of fields on screen		Custom Office
Change tab stops		Custom Office
Automatic field entry population	•	•
Multiple lookup options (such as filters and custom)		•
System has setup wizards	•	•
Supports GST and PST tax computations		•
On-site training		Available through local Sage Software business partner
Drill-down capabilities		Extensive
Security	Menu groups	Robust role-based security system allows Task level/Control level with multiple roles per user at different levels by company

<b>System Options</b>	<b>QuickBooks</b>	<b>Sage MAS 90 Special Edition for QuickBooks Users</b>
Screen preferences and customizations by user	Not available	Extensive
Form and report customizations by user and/or company	Not available	Extensive
Stack or collate forms	Not available	Available for all graphic forms printing
Print forms to multiple printers in a single print job	Not available	Available for all graphic forms printing
Launch program functions from outside the system	Not available	Launch selected programs from outside Sage MAS 90 and use Windows Scheduler to schedule them

## Accounts Receivable

<b>Accounts Receivable</b>	<b>QuickBooks</b>	<b>Sage MAS 90 Special Edition for QuickBooks Users</b>
A/R customer number size		7 plus 2 for division
A/R supports divisions		•
Report and post to G/L by division		•
Number of address lines	2	3

<b>Accounts Receivable</b>	<b>QuickBooks</b>	<b>Sage MAS 90 Special Edition for QuickBooks Users</b>
Multiple contacts per customer	2	Unlimited
Invoice number size	11	7
Track customer's URL address		•
Track customer's e-mail address	•	•
Customer can be marked as a prospect		• (Temp customer)
Number of ship-to addresses	1	Virtually unlimited
Number of customer price levels	20	36
Enter multiple invoice batches		•
Tracks customer's average days to pay		•
User-defined aging periods	Limited	•
Balance forward capability		•
Sales history through Customer Maintenance	•	•
Can enter credit memo	•	•
Can partial pay invoices	•	•
Can select range of customers to print invoices	•	•
Auto memo display during data entry		•
Automatic credit limit checking during data entry		•
Multiple credit cards per customer		•
PST and GST tax support		•

## Accounts Payable

Accounts Payable	QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
A/P vendor number size		7 plus 2 for division
A/P supports divisions		•
Report and post to G/L by division		•
Number of address lines	3	3
Multiple contacts per vendor	2	Unlimited
Track vendor URL address		•
Maximum invoice number size	10	10
Track vendor e-mail address	•	•
Print checks using MICR		•
Generate 1099s on electronic media		• (Separate module)
Enter multiple-invoice batches		•
Merge two accounts together		•
Shows cash balances when selecting invoices		
Apply A/R invoices to vendor balances		•
Flag for a separate check per invoice		•
One-time vendor payment	•	•
Vendor purchase history report	•	•
Put individual invoices on hold		•
Use tax and landed cost		•

<b>Accounts Payable</b>	<b>QuickBooks</b>	<b>Sage MAS 90 Special Edition for QuickBooks Users</b>
Payment by credit card	•	•
PST and GST tax support		•

### General Ledger

<b>General Ledger</b>	<b>QuickBooks</b>	<b>Sage MAS 90 Special Edition for QuickBooks Users</b>
G/L account number masking	7	Up to 32
G/L account segments	Not available	Up to 10
Mark G/L accounts as inactive	•	•
Budgets	One per account	Unlimited
View G/L data graphically	Limited	•
G/L supports allocation entries		•
Choose industry-specific chart of accounts		•
Show current period this year vs. last year	•	•
Show quarter-to-quarter comparisons	•	•
Post to G/L by department/segment		•
Number of years of historical data		99
Fiscal years open	Unlimited	Unlimited
Rollup codes allow multi-account summary reporting	Subaccount nesting	Up to 4 separate rollup codes for each account

General Ledger	QuickBooks	<b>Sage MAS 90 Special Edition for QuickBooks Users</b>
G/L account status	Active and Inactive	Active, Inactive, and Deleted. Start and end dates.
Allocation	Not available	Percent, Quantity, and Basis methods; Period, Quarter, Annual, and Manual cycle
Data export in the General Ledger module	Limited IIF	Export to ASCII, CSV, Excel, XML, DIF, PDF, and Word from the General Ledger module; see the Customizer module for DDE features; see the Visual Integrator module for expanded data and file types

General Ledger	QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
Data import in the General Ledger module	Limited IIF	Import from ASCII, CSV, Excel, and XML; see the Customizer module for DDE features; see the Visual Integrator module for expanded data and file types
Numeric masks	99 million within entry programs	999 million within entry programs, 9 billion on the account level, and 99 billion for reports

## Inventory

Inventory	QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
Inventory part number size		15
Alias item numbers supported		•
Product class or category	•	•
Costing methods supported	Average only	Average, Standard, LIFO, FIFO, Serial
System tracks multiple warehouses		•
Print inventory labels with bar codes		•

Inventory	QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
System supports customer level pricing		•
System allows for change of inventory valuation method after transactions have been processed		•
System allows for physical count		•
System allows two or more inventory items to be merged		•
Alternate items available		•
In the item files, the system shows average cost	•	•
Attach image to item file		•
Bar code receipt labels		•
Warranty tracking		•
Inventory tracking		Lot and Serial

## Sales Order

Sales Order	QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
Enter recurring orders		•
Enter master orders		•
Track promised ship date by line item		•
System can recommend alternate item number if selected item is out of stock		•
Enter alias item numbers		Virtually unlimited
Enter line item discounts		•
Split sales commission		Up to 5
Sell items in a different unit of measure than they are stocked		•
System shows customer's purchase history when entering sales order line items		•
Automatically calculate freight using a rate table		•
Check credit when entering an order		•
System supports drop-ship items		•
Create backorders		•
System generates daily sales report recaps		•
Bar Code Sales Order and Picking Sheet printing		•

Sales Order	QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
Automatically populates sales tax for each sale	•	•
Provides automatic sales tax jurisdiction search and updates, and real-time address verification through sales tax services		• (Additional purchase)

## Purchase Order

Purchase Order	QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
Autogenerate orders based on reorder points		•
Generate purchase orders based on a sales order		•
Allocate freight expenses to inventory line items		•
Track job cost number by line item		•
With the inventory item received, system prints back order fill report listing sales orders that can now be filled		•
Required dates may be entered by line item for each purchase order		•
Generates an expected delivery report		•
Overdue purchase order report		•
Repeating purchase orders	•	•
Review purchase orders by vendor	•	•

## Payroll

Payroll	QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
Accept hours from Time and Billing module		Third Party
Payroll register by department		•
Supports bonus pay	•	•
Supports salaried with overtime employees	•	•
Supports multiple pay rates per single pay period	•	•
Supports daily payroll	•	•
Distributes salaried employees time	•	•
Supports direct deposit	•	Extended Solution or Sage Payroll Services
Abra Link		•
Multi-state payroll		•
Tax table updates		•
Full-service online payroll services		•
Payroll tax compliance process with penalty-free guarantee		•

## Customizer

Customizer	QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
Add user-defined fields		Extensive
Specify default values in data entry		Extensive
Add buttons to launch specific tasks		Extensive, includes DDE link to third-party products (for example, MS Office)
Customizations specific to user and/or company		Extensive
Hide data entry fields and control buttons		Extensive

## Bar Code

Bar Code	QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
Import scanned Inventory transactions		•
Import scanned Sales Order transactions		•
Import scanned Purchase Order transactions		•
Import scanned Bill of Materials transactions		•
Print Bar Code lot/serial labels		•
Print Bar Code inventory receipt labels		•

<b>Bar Code</b>	<b>QuickBooks</b>	<b>Sage MAS 90 Special Edition for QuickBooks Users</b>
Print Bar Code P/O receipt labels		•
Print Bar Code P/O receiver		•
Print Bar Code sales order		•
Print Bar Code S/O picking sheet		•
Print Bar Code B/M picking sheet		•

### **Job Cost**

<b>Job Cost</b>	<b>QuickBooks</b>	<b>Sage MAS 90 Special Edition for QuickBooks Users</b>
Supports phases within jobs		•
Supports cost types within job/phase		•
Supports A/R and A/P retention		•
Cost to complete report		•
Report profit by job		•
Remaining to be billed		•
Burden computations per estimated direct labor rate per hour		•
Percentage completion billing		•

## Visual Integrator

Visual Integrator	QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
Import files	IIF	All data files
Import file types supported	IIF	ASCII, Delimited (CSV), DIF, Direct (PVX), Indexed (PVX), dBASE III Plus, Lotus WKS (Release 1A), Lotus WK4 (Release 4), Excel XLS (Version 4), ODBC Data Source
Export files	Limited to a predefined list of data files	All data files
Export file types supported	IIF (text format)	Delimited, ASCII, ODBC Data Source

After comparing the features between QuickBooks and Sage MAS 90 Special Edition for QuickBooks Users, you should see that some of the basic accounting functionality is similar; however, even though both QuickBooks and Sage MAS 90 Special Edition for QuickBooks Users have the same features, the way the feature is executed may be different. Sage MAS 90 Special Edition for QuickBooks Users is intuitive and easy to use. When you move into more advanced features of distribution and job costing, you will see more of the power of Sage MAS 90 Special Edition for QuickBooks Users, which makes it the logical next step for your business. For more recent additions, refer to [www.sagemas.com](http://www.sagemas.com).

## Workflow Differences

An important question you may be asking is: how will your daily processes be different in Sage MAS 90 Special Edition for QuickBooks Users as compared to how you were working in QuickBooks? Good question! We have identified several daily processes and described the differences below.

### Real-Time and Batch Processing

QuickBooks allows only real-time posting. Sage MAS 90 Special Edition for QuickBooks Users allows you to do batch processing and batch posting. Batch processing is available in Invoice Data Entry and Cash Receipts Entry, as well as in other processes. One of the reasons Sage MAS 90 Special Edition for QuickBooks Users is so well respected in the CPA community is because of its batch posting and batch processing methods.

The following are benefits of batch processing.

- You have more control over your accounting data.
- You can verify the entries prior to posting the transactions.
- You can minimize any data entry errors before posting. (This reduces data entry time of creating credit memos and then re-creating the transaction correctly for incorrectly posted transactions.)
- You can allow the data entry staff to post their own batches or you can set up a supervisor with exclusive rights to post the batch.

*Example:*

One clerk is entering invoices for the eastern division of the company while another is simultaneously entering invoices for the western division. Each clerk can print and verify batch totals independently of one another before posting.

Process	QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
Real-time posting	•	
Batch posting		•
Batch processing by user		•

## Cash Basis vs. Accrual Accounting

QuickBooks allows users to choose between accrual- and cash-basis accounting. Sage MAS 90 Special Edition for QuickBooks Users uses accrual-basis accounting. Why? Because cash-basis accounting does not follow the Generally Accepted Accounting Principles (GAAP) discussed in Chapter 2.

### The difference between cash-basis and accrual-basis accounting

#### *Cash-Basis Accounting*

- Records business transactions when cash is received or paid.
- Revenues are recognized when cash is received.
- Expenses are recognized when cash is paid.

#### *Accrual-Basis Accounting*

- Revenues are recognized when earned. Revenues are earned when the company sells products or provides services to customers.
- Expenses are recognized when incurred. Expenses are incurred when the company uses internal or external resources or services to conduct its daily operations.

Cash-basis accounting provides an easy way to record transactions; however, it fails to take into account that some transactions impact more than one accounting period. Because of this, cash-basis accounting is not GAAP compliant. Cash-basis financial statements may understate revenue, overstate taxes, understate assets, understate liabilities, and cause users to make decisions based on incomplete information.

## **Audit Trail**

QuickBooks allows users to turn on Audit Trail. When Audit Trail is selected it maintains a log with the following information.

- Date
- Time
- User ID
- Action
- Window name (such as payments or sales/invoicing)
- Transaction #
- Transaction Type

With Sage MAS 90 Special Edition for QuickBooks Users, every change, edit, or deletion of a transaction is recorded by an audit trail. Hard-copy reports must be printed during the closing process.

## **Adding Customers and Vendors**

There is more information located on the Sage MAS 90 Special Edition for QuickBooks Users Customer Maintenance window compared to the Maintain Customer/Prospects window in QuickBooks. Additional fields include: multiple credit card information, extensive historical information, and easy drill down to Invoice and Sales Order tabs. All your customer information is only a click away!

With Sage MAS 90 Special Edition for QuickBooks Users, learning is easy. For example, as in QuickBooks, after becoming familiar with the Customer Maintenance windows, you will notice that the Vendor Maintenance window is similar, thus decreasing your learning curve.

### Sage MAS 90 Special Edition for QuickBooks Users Customer Maintenance Window

Customer Maintenance (ABC) 5/31/2010

Customer No. 01-ABF Copy From... Renumber... Contacts...

Name American Business Futures

1. Main 2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions 8. S/Ds

Address 2131 N. 14th Street Suite 100 Accounting Department  
 ZIP Code 53205-1204  
 City Milwaukee State WI  
 Country USA United States of America  
 Residential Addr   
 Salesperson 0100 Jim Kentley  
 Telephone (414) 655-4787 Ext 219  
 Fax

Terms Code 01 Net 30 Days  
 Primary Contact ARTIE JOHN Artie Johnson  
 Ship Code UPS BLUE  
 Primary Ship To 2 American Business Futur

Tax Schedule WI MILMIL Milwaukee Exemptions...

Credit Hold   
 Credit Limit 120,000.00

E-mail Address artie@abf.com E-mail Statements   
 URL Address www.abf.com

Accept Cancel Delete ?

### Working in More Than One Company

In QuickBooks, you work with one company at a time. With Sage MAS 90 Special Edition for QuickBooks Users, you have the flexibility of opening multiple companies simultaneously. For example, you are entering invoices in ABC company and you receive a phone call about an invoice in XYZ company. What do you do? Simply open XYZ company, retrieve the information for the customer and go back to entering invoice data for ABC company without losing the information or keeping the customer waiting.

## Memorized Transactions vs. "Copy From"

<b>QuickBooks' Memorized Transactions</b>	<b>Sage MAS 90 Special Edition for QuickBooks Users "Copy From" feature</b>
<p>In QuickBooks, you can enter and save common transactions for later use.</p> <p>You can set up and use memorized transactions for the following:</p> <ul style="list-style-type: none"> <li>• Bills from vendors</li> <li>• Checks</li> <li>• Estimates</li> <li>• Invoices</li> <li>• Cash Sales Receipts</li> <li>• Sales orders</li> </ul>	<p>In Sage MAS 90 Special Edition for QuickBooks Users, you can use the Copy From feature to enter a sales order or quote. This feature can save time during Sales Order Entry. Simply click the Next Number (#) button for the next sales order number and click the Copy From button. A Lookup window appears from which you can simply select:</p> <ul style="list-style-type: none"> <li>• Existing sales orders</li> <li>• Invoice history</li> </ul> <p>You can also look up:</p> <ul style="list-style-type: none"> <li>• Standard orders</li> <li>• Master orders</li> <li>• Repeating orders</li> <li>• Price quotes</li> <li>• Backorders</li> </ul> <p>After you have the information in the Sales Order module, you can edit any information required. Additionally, the ability to recalculate prices allows you to ensure all lines contain current pricing.</p>

## Data Entry

In Sage MAS 90 Special Edition for QuickBooks Users, data entry is handled a bit differently than in QuickBooks. Let's take a look at the Sales Order Entry window in Sage MAS 90 Special Edition for QuickBooks Users.

## Sage MAS 90 Special Edition for QuickBooks Users Sales Order Entry Header Tab

Order Number: 0000115  
 Order Date: 5/18/2010  
 Order Type: Standard Order  
 Customer No.: 01-ABF  
 Ship Date: 5/31/2010  
 Status: New  
 Whse: 001  
 Sales Tax Schedule: W1 MILMIL  
 Ship To Addr: 1  
 Terms Code: 01  
 Ship Via: UPS BLUE  
 Confirm To: Artie Johnson  
 E-mail: artie@abf.com  
 Salesperson: 0100  
 Split Comm.: Yes

## Sage MAS 90 Special Edition for QuickBooks Users Sales Order Entry Lines Tab

	Item Code	Ordered	Back Ordered	Unit Price	Extension
1	D1400	4.00	.00	1,700.000	6,800.00
2	D1700	2.00	.00	900.000	1,800.00
3		.00	.00	.000	.00

Total Amount: 8,600.00

From your QuickBooks data entry experience, you will notice there is more information stored in Sage MAS 90 Special Edition for QuickBooks Users. Most of the information is automatically populated when a customer is selected; this saves time during the data entry process. Sage MAS 90 Special Edition for QuickBooks Users is set up in a tabular format, moving you seamlessly through the system and guiding you through the data entry process.

## Navigation

Navigation in QuickBooks and Sage MAS 90 Special Edition for QuickBooks Users differs; however, in both you have several options available to you. The chart below describes the differences you can expect when moving to Sage MAS 90 Special Edition for QuickBooks Users.

QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
<b>Navigation Bar</b> —Lets you access tasks across the top of the window.	<b>Toolbar</b> —You can use the toolbar to access common functions, such as changing the date, company, or user. Each user can individualize their workstation by choosing frequently used menu items or external applications and dropping them on their Customizable Toolbar.
<b>Quick Add</b> —Allows you to add the current window to the Navigational bar.	<b>Task Menu</b> —You can select private or public task menus that can be customized for your employees' specific tasks. You can even add external programs, such as Word or Excel.
	<b>Drop-Down Menu Bar</b> —Select a module and then select a task within that module.

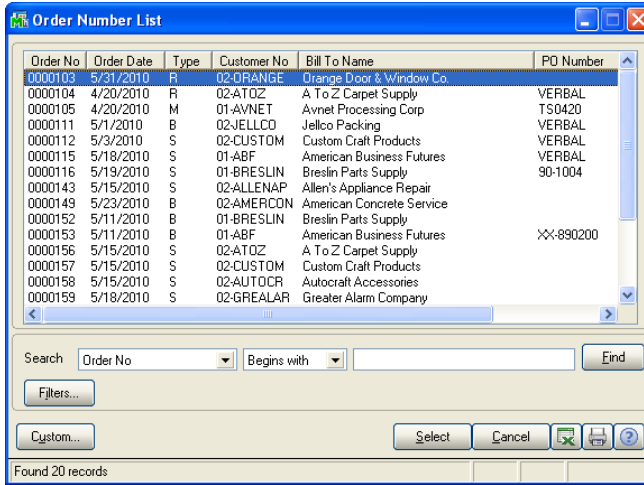
QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
	<p><b>Detail View</b>—The detail view is similar to working with folders in Windows Explorer; simply click a folder and select a task within the folder.</p>
	<p><b>Status Bar</b>—Displays information for items or fields selected, as well as the current accounting date, company, and user ID.</p>

For more information about navigating through Sage MAS 90 Special Edition for QuickBooks Users, see the tutorials located on the Tutorials page of the Sage MAS 90 Special Edition for QuickBooks Users Desktop.

## Viewing and Editing Open Sales Orders and Quotes

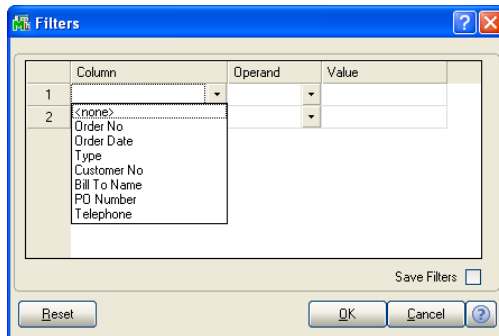
In Sage MAS 90 Special Edition for QuickBooks Users, you can easily look up and edit existing sales orders or quotes. Using the Advanced Lookup Engine, you can search by order/quote number, customer number, order date, or purchase order number, to name just a few of the search criteria. After you select the appropriate sales orders you can edit any of the fields or line items to ensure the customer receives the proper order. And, if you want to see more information on the customer, you can click the drill-down button in the lookup window to display the Customer Inquiry window for the selected customer.

## Sage MAS 90 Special Edition for QuickBooks Users Lookup

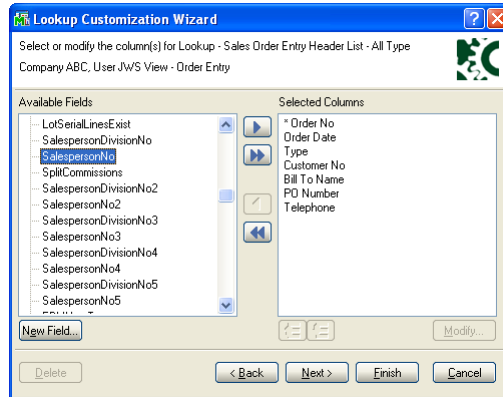


## Sage MAS 90 Special Edition for QuickBooks Users Advanced Lookup Engine

Filters can be added to your basic search, further refining the search criteria.



Custom searches can also be created, adding additional power and flexibility. In the following example, the salesperson is being added to the lookup, which will allow the user to sort on orders by a specific salesperson. In addition to adding an existing field, a new field can be created and calculations can be added, making for easy ad hoc reporting.



## Inventory Costing

QuickBooks only offers the Average Cost method for valuing your inventory.

Sage MAS 90 Special Edition for QuickBooks Users supports the following six methods of inventory costing: Standard Cost, Average Cost, FIFO, LIFO, Lot Number, and Serial Number methods. These valuation methods determine the current value of the on-hand inventory, allocate the cost of goods sold, and determine gross profits as items are sold from inventory.

Each item can be assigned a different valuation method, or all items can be valued using the same method. Selecting the appropriate valuation method ensures that the financial and inventory reports provide the most accurate picture of the profitability of your sales. Consult with your accountant to determine which valuation method (or combination of valuation methods) suits your needs.

## Functionality That's the Right Fit

QuickBooks provides just the right level of functionality for small companies. Growth-oriented companies with expanding needs find the more robust, flexible functionality of Sage MAS 90 Special Edition for QuickBooks Users a better fit.

The following section briefly outlines some of the differences between the two software systems.

### Alerts vs. Business Alerts

QuickBooks includes Alerts, which is the same concept that the Business Alerts module embodies; however, Business Alerts takes the concept several steps further. You can set up alerts to be sent by e-mail directly to your customers, vendors, or employees so everyone stays "in the know." The following chart describes the differences in more detail.

QuickBooks	Sage MAS 90 Special Edition for QuickBooks Users
<p><u>Features</u></p> <ul style="list-style-type: none"> <li>• To do notes</li> <li>• Alerts</li> </ul>	<p><u>Features</u></p> <ul style="list-style-type: none"> <li>• Various reports including the option to create custom alerts</li> <li>• Task list or contact management</li> <li>• E-mail alerts sent automatically</li> </ul>
<p><u>Differences</u></p> <ul style="list-style-type: none"> <li>• Must have QuickBooks running to view the Alerts.</li> <li>• Access is only through the Company Center</li> </ul>	<p><u>Differences</u></p> <ul style="list-style-type: none"> <li>• Sage MAS 90 Special Edition for QuickBooks Users does not need to be running for alerts to be generated.</li> <li>• Automatic e-mails are generated to employees, customers, or vendors.</li> <li>• Standard alerts are included with the Business Alerts module.</li> <li>• Virtually unlimited number of alerts can be easily added.</li> </ul>

## QuickBooks Welcome Window vs. Sage MAS 90 Special Edition for QuickBooks Users Business Insights Dashboard

Both solutions are designed to put key information at your fingertips. One is a basic system designed to support the needs of smaller businesses and the other is a more sophisticated tool with expanding capabilities to meet the demands of growing companies. The following is a brief outline of the functionality of both solutions.

### QuickBooks Welcome window is divided into three major areas:

**Company Setup**—Displays what to do next and gives access to support.

**What's New**—Displays centers and reports. Find products and services and other new features.

**Find What You Need**—Displays information about moving around in QuickBooks and gives access to a sample company file.

### Sage MAS 90 Special Edition for QuickBooks Users Business Insights Dashboard main features:

**Customizable Welcome Page**—A wizard makes it easy to customize your individual Welcome page and select the reports you want to view.

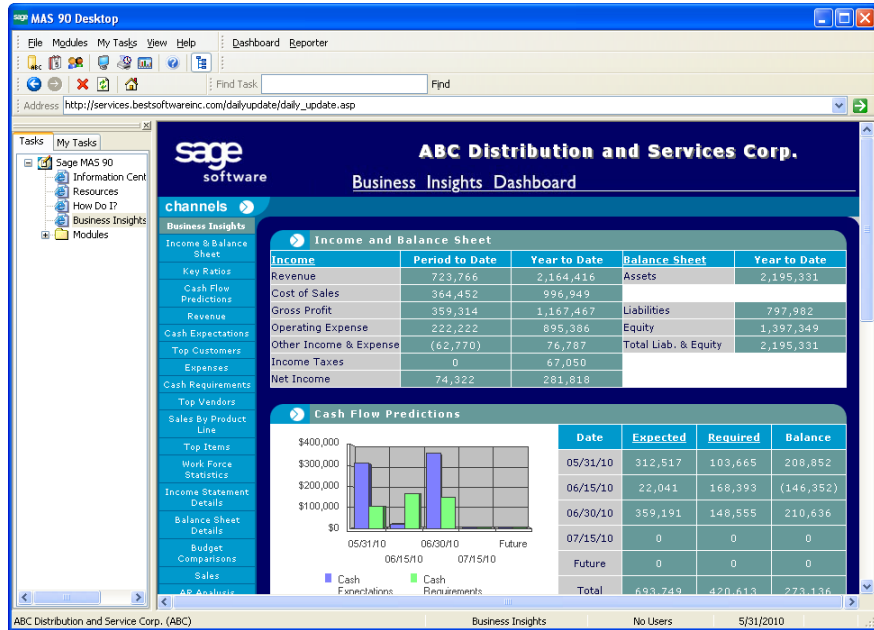
**Easy Access to Information**—Create a shortcut from your desktop or use Outlook to access reports from your desktop without having to launch Sage MAS 90 Special Edition for QuickBooks Users.

**Extensive Drill Down**—Drill down to more detailed HTML pages and selected reports and make inquiries into additional information.

**Automatic Data Refresh**—Data is automatically refreshed ensuring that you have the latest information without having to take the time to manually update the data.

**Restrict User Access**—Only users with access permissions can view Business Insights Dashboard from within their Welcome page. Users without access will not see the Business Insights Dashboard icon, and the option will be removed from the Detail view. This allows you, the business owner, to customize each employee's view.

## Customized Business Insights Dashboard Page



## **Conversion Expectations**

This chapter will help set your expectations of the conversion process. First we'll go over the qualifications of your Conversion Specialist. Then we'll briefly take you through many steps in the conversion process including data migration and the key to data integrity. We'll also provide a checklist for each section, which you can use when you're working with your Conversion Specialist. The chapter closes with a discussion of time frames. As you'll see, the data conversion process begins before the actual data conversion takes place.

### **Conversion Specialist Program**

Sage Software business partners must go through extensive training to obtain the status of a Conversion Specialist. They are considered experts with Sage MAS 90 Special Edition for QuickBooks Users and have knowledge of QuickBooks. Some of the Conversion Specialists are or were QuickBooks Professional Advisors that recognized the value of offering Sage MAS 90 Special Edition for QuickBooks Users to their QuickBooks customers. Others have had the opportunity to work with QuickBooks customers that were upgrading to Sage MAS 90 Special Edition for QuickBooks Users. All Conversion Specialists have combined experience in both QuickBooks and Sage MAS 90 Special Edition for QuickBooks Users.

### **Training Requirements**

Sage MAS 90 business partners are required to maintain specific training standards and pass assessment tests (with a minimum score of 80%) on the core accounting modules (General Ledger, Accounts Payable, Accounts Receivable, Bank Reconciliation, and Payroll).

The following courses are also required to obtain the status of a Conversion Specialist:

**Data File Structures**—This class covers how Sage MAS 90 Special Edition for QuickBooks Users information is stored and updated, how to use the ODBC files, understanding the data files and structure of the different data file types, and much more. This class is critical for data conversion. An assessment must be passed with a minimum score of 80% at the end of the class.

**Data Migrator**—This class is also designed to help Sage Software business partners master the conversion process. It teaches the strategies for evaluating QuickBooks data for a successful migration, as well as how to effectively and efficiently use the Data Migrator tool. An assessment must be passed with a minimum score of 80% at the end of the class.

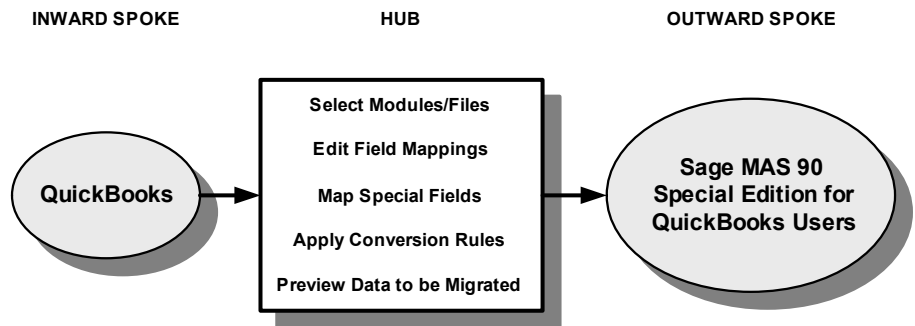
## Before You Begin the Conversion Process

This section gives you an inside look at the conversion process. We have included the checklists that are used by Conversion Specialists. It is our intention to give you as much information up front as possible, so you know what to expect during the conversion process. Each step of the conversion process is critical and carefully orchestrated to ensure a successful upgrade. By understanding and properly preparing for the process, you can experience a quick and error-free conversion. After reading this chapter, you will be able to answer the following questions.

- What is Data Migrator?
- What types of data can Data Migrator convert?
- Which versions of QuickBooks data will Data Migrator convert?
- What does the migration process entail? (Checklists are included for your reference and later used by your Conversion Specialist.)
- What is the integrity of the converted data?
- What is the time expectation for the conversion?

## What Is Data Migrator?

Data Migrator is a specially designed tool that enables Conversion Specialists to automatically migrate data from QuickBooks to Sage MAS 90 Special Edition for QuickBooks Users. Data Migrator is only sold to certified Sage Software business partners. This tool is designed in a modular format using a Hub and Spoke concept. For example, data from an input spoke (QuickBooks) is converted into a central hub (the Data Migrator) where additional editing and data manipulation can take place BEFORE it is entered into Sage MAS 90 Special Edition for QuickBooks Users. By utilizing the Hub, Sage Software business partners can detect any errors that could occur in the data prior to the import into Sage MAS 90 Special Edition for QuickBooks Users, resulting in the migrated data being even better than the original.



## What Data Can Data Migrator Convert?

The following information is converted when using the Data Migrator:

### General Ledger

- Chart of accounts
- Period summary balances
- Budgets (prior, current, and next year, if available)

### **Accounts Receivable**

- Customer information
- Customer contacts
- Open invoices and credits
- Sales representatives
- Terms codes

### **Accounts Payable**

- Vendor information
- Vendor contacts
- Terms codes
- 1099 statuses
- Open invoices and credits

### **Inventory**

- Product lines
- Inventory items
- Locations
- Quantities on hand
- Item cost and price information

If your company needs additional information converted (for example, Payroll or Job Cost), contact your Conversion Specialist. Sage Software offers additional tools to convert data not included in the Data Migrator. History files are not automatically migrated. If you would like to migrate your history files, consult with your Conversion Specialist.

## Which Versions of QuickBooks Data Will Data Migrator Convert?

For the most current information, check with your business partner, or refer to [www.sagemas.com](http://www.sagemas.com). Your Conversion Specialist can discuss the options to upgrade your data so it will be ready for migration.

It is **HIGHLY** recommended that you upgrade only with the expert assistance of your Conversion Specialist.

## What Does the Migration Process Entail?

As part of the Conversion Specialist program, your Conversion Specialist is thoroughly trained in all aspects of the migration process. The checklist below and the ones that follow can be used as guidelines for you and your Conversion Specialist to work together to help ensure a successful conversion. These checklists are for informational purposes only, to help you better understand the conversion process. They are by no means the only steps that need to be completed for a successful conversion. Under no circumstances should you attempt to convert your data on your own; it's not worth the risk to your data and the extra time and money that it could cost.

- 1\_\_\_ Decide which QuickBooks data to convert.
- 2\_\_\_ Prepare data for conversion.
- 3\_\_\_ Print QuickBooks reports to be used for import verification (see *Printing QuickBooks Reports Before Migration* on page 58).
- 4\_\_\_ Prepare Sage MAS 90 Special Edition for QuickBooks Users to receive the data.
- 5\_\_\_ Perform a test conversion.
- 6\_\_\_ Print reports from Sage MAS 90 Special Edition for QuickBooks Users for comparison with the reports from the existing QuickBooks system in step 3; verify that the data was properly converted (see *Printing QuickBooks Reports Before Migration* on page 58).

- 7\_\_\_ Have your Conversion Specialist begin training your staff using the test data.
- 8\_\_\_ Determine a date for final conversion.
- 9\_\_\_ Repeat steps 2 through 4; perform conversion to Sage MAS 90 Special Edition for QuickBooks Users, then repeat step 6.

### **Printing QuickBooks Reports Before Migration**

Use the following QuickBooks reports to plan your Sage MAS 90 Special Edition for QuickBooks Users setup. These reports should be printed before conversion and then saved for use after the conversion to review the data and to verify that the Data Migrator converted everything correctly.

<b>Print this QuickBooks report...</b>	<b>...to verify the following in Sage MAS 90 Special Edition for QuickBooks Users</b>
General Ledger: Chart of Accounts  Budgets, Profit & Loss and Budgets, Balance Sheet  Trial Balance  Financial Statements: Profit & Loss and Balance Sheet	Numbering scheme for your chart of accounts  Budget information  Period-to-date and year-to-date account balances  Income statement and balance sheet account balances
Accounts Receivable: Customer Contact List  A/R Aging Detail	Customer file information  Customer open invoice data

Print this QuickBooks report...	...to verify the following in Sage MAS 90 Special Edition for QuickBooks Users
Accounts Payable: Vendor Contact List  A/P Aging Detail  1099 Detail	Vendor file information  Vendor open invoice data  1099 data
Inventory: Inventory Listing  Inventory Valuation Detail	Inventory file information  Inventory value
Sales Reps: Customer/Vendor Profile Lists/Sales Reps	Salesperson data

## Data Migrator Checklists

Use the following checklists for the different stages of the data conversion process. You and your Conversion Specialist should complete these checklists together. Rely on the expertise of your Conversion Specialist for a smooth conversion.

These are guidelines only; your Conversion Specialist may have additional recommendations based on your company's specific business needs.

### ***QuickBooks Data Migration Checklist***

Use this checklist as a guide when preparing QuickBooks data for conversion.

- 1\_\_\_ Familiarize yourself with the inventory items, general ledger accounts, customer, and vendor numbers in the file layouts located on the Sage Software Online Web site.
- 2\_\_\_ Update journals and post all transactions for the accounting period.
- 3\_\_\_ Purge or merge excess data.
- 4\_\_\_ Verify that the current period is closed and all reports are printed.
- 5\_\_\_ Print the reports described in Printing QuickBooks Reports Before Migration on page 58 to verify that the information has properly migrated into the Sage MAS 90 Special Edition for QuickBooks Users system.
- 6\_\_\_ Print the Sales Tax Codes report for a complete list of the sales tax codes in QuickBooks.
- 7\_\_\_ Back up your QuickBooks data.
- 8\_\_\_ Exit the application.

### ***Sage MAS 90 Special Edition for QuickBooks Users Pre-Data Conversion Checklist***

Use the following checklists as a guide when preparing Sage MAS 90 Special Edition for QuickBooks Users to receive your data.

- 1\_\_\_ Create a company code for the company to migrate.
- 2\_\_\_ Create the sales tax schedules required in Sage MAS 90 Special Edition for QuickBooks Users.
- 3\_\_\_ Change the current company to the newly created company code.

#### **General Ledger**

- 1\_\_\_ Create the Sage MAS 90 Special Edition for QuickBooks Users General Ledger files for the company.
- 2\_\_\_ In the General Ledger Options window, enter a value of 03 or greater at the Years to Retain General Ledger History field.
- 3\_\_\_ Create fiscal years for your current fiscal year, 1 future fiscal year, and the 1 year prior.
- 4\_\_\_ In the General Ledger Options window, enter the value at the Current Fiscal Year field to match the oldest fiscal year you created in step 3.

### **Accounts Receivable**

- 1\_\_\_ Create the Sage MAS 90 Special Edition for QuickBooks Users Accounts Receivable files for the company.
- 2\_\_\_ In the Accounts Receivable Options window, enter the values at the Current Fiscal Year and Current Period fields to match the current accounting period in the source application.
- 3\_\_\_ On the Main tab, clear the General Ledger check box. (This is temporary for migration only.)
- 4\_\_\_ Click the Additional tab and, at the Open Item or Balance Forward field, select Mixed.
- 5\_\_\_ You can leave the general ledger account fields in Division Maintenance blank. After the import of general ledger accounts, access Division Maintenance and select the appropriate general ledger accounts.

### **Accounts Payable**

- 1\_\_\_ Create the Sage MAS 90 Special Edition for QuickBooks Users files for the company.
- 2\_\_\_ In the Accounts Payable Options window, select the 1099 Reporting check box; this check box must be selected to import 1099 payment history.
- 3\_\_\_ Enter the Current Fiscal Year, Current Period, and Default 1099 Calendar Year fields to match the current accounting period in the source application.
- 4\_\_\_ Clear the General Ledger check box. (This is temporary for migration only.)
- 5\_\_\_ You can leave the general ledger accounts fields in Division Maintenance blank. After the import of general ledger accounts, access Division Maintenance and select the appropriate general ledger accounts.

## Inventory

- 1\_\_\_ Create the Sage MAS 90 Special Edition for QuickBooks Users files for the company.
- 2\_\_\_ In the Inventory Management Options window, enter the values at the Current Inventory Period and Current Inventory Calendar/Fiscal Year fields to match the current accounting period in the source application.
- 3\_\_\_ If the source data includes warehouse codes other than 000, select the Require Multiple Warehouses check box on the Inventory Management Main tab.
- 4\_\_\_ Click the Additional tab, and clear the General Ledger check box. (This is temporary for migration only.)

## ***Sage MAS 90 Special Edition for QuickBooks Users Post-Data Conversion Checklist***

Use the following checklists as a guide when completing the Sage MAS 90 Special Edition for QuickBooks Users data conversion process.

### General Ledger

- 1\_\_\_ Verify the general ledger account numbers using the previously printed reports (see Printing QuickBooks Reports Before Migration on page 58).
- 2\_\_\_ Verify the general ledger budget information using the previously printed reports (see Printing QuickBooks Reports Before Migration on page 58).
- 3\_\_\_ Print the General Journal and verify the postings.
- 4\_\_\_ Update the General Journal.
- 5\_\_\_ If necessary, renumber general ledger account numbers to move them into the proper account breaks.
- 6\_\_\_ Perform year-end closing for each fiscal year up to the current fiscal year.

- 7\_\_\_ Perform period-end closing for each period up to the current period.
- 8\_\_\_ Print standard financials and compare the information with the previously printed reports.
- 9\_\_\_ Make changes in General Ledger Options, as necessary. Access all other options on the General Ledger Setup menu to add or maintain fiscal years.

### **Accounts Receivable**

If you converted Accounts Receivable data, complete the following steps:

- 1\_\_\_ Update the general ledger account numbers in Division Maintenance (even if the Accounts Receivable Divisions check box is cleared in the Accounts Receivable Options window).
- 2\_\_\_ Print and verify the Customer Listing.
- 3\_\_\_ Verify terms code information on the Terms Code Listing.
- 4\_\_\_ Print the Sales Journal and compare it with the previously printed Aged Receivables report.
- 5\_\_\_ Update the Sales Journal after verifying the information.
- 6\_\_\_ Print the Sage MAS 90 Aged Invoice Report and compare it with the previously printed Aged Receivables report.
- 7\_\_\_ In the Accounts Receivable Options window, select the General Ledger check box.
- 8\_\_\_ Make changes in Accounts Receivable Options, as necessary. Access all other options on the Accounts Receivable Setup menu to add or maintain the appropriate salespersons, bank codes, sales codes, and other necessary information.

## Accounts Payable

If you converted Accounts Payable data, complete the following steps:

- 1\_\_\_ Update the general ledger account numbers in Division Maintenance (even if the Accounts Payable Divisions check box is cleared in the Accounts Payable Options window).
- 2\_\_\_ Print and verify the Vendor Listing, including 1099 information.
- 3\_\_\_ Verify terms code information on the Terms Code Listing.
- 4\_\_\_ Print the Invoice Register and compare it with the previously printed Aged Payables report.
- 5\_\_\_ After verifying the information, update the Invoice Register.
- 6\_\_\_ Print the Sage MAS 90 Aged Invoice Report and compare it with the previously printed Aged Payables report.
- 7\_\_\_ In the Accounts Payable Options window, select the General Ledger check box.
- 8\_\_\_ Make changes in Accounts Payable Options, as necessary. Access all other options on the Accounts Payable Setup menu to add or maintain the appropriate terms codes, bank codes, and other necessary information.
- 9\_\_\_ In Vendor Maintenance, verify the 1099 vendor type, taxpayer ID number, 1099 box number, and 1099 form type.

## Inventory Management

If you converted Inventory Management data, complete the following steps:

- 1\_\_\_ Update the general ledger account numbers in Product Line Maintenance.
- 2\_\_\_ Verify product line information on the Product Line Listing.
- 3\_\_\_ Print the Inventory Item Listing and verify item information.

- 4\_\_\_ Print the Transaction Journal and compare it with the previously printed Inventory Valuation Report.
- 5\_\_\_ Update the Transaction Journal after verifying the information.
- 6\_\_\_ Print the Inventory Valuation Report and compare it with the previously printed Inventory Valuation Report.
- 7\_\_\_ In the Inventory Management Options window, select the General Ledger check box.

## **Data Integrity**

When you upgrade to Sage MAS 90 Special Edition for QuickBooks Users with the help of your Conversion Specialist, you can just about guarantee a smooth conversion. Your Conversion Specialist takes every precaution to preserve the integrity of your data. There are also steps that you can take to help ensure optimal conversion. First of all, make sure that all of your QuickBooks data is up to date. Now is the time to "clean house." Work with your Conversion Specialist to determine what data should be cleaned up and when. The time you invest up front on this project will pay off in dividends later and you will be happier with a fresh start. Keep in mind that you can look up the old information (if you ever need it) from the old QuickBooks database; the information will be there as long as you keep it.

The information that converts from QuickBooks to Sage MAS 90 Special Edition for QuickBooks Users is only as good as the data that is in QuickBooks. Your Conversion Specialist will do everything possible to detect any integrity issues using the Data Migrator, but if there is a data issue in your existing data, there is a good chance that it will be carried over into Sage MAS 90 Special Edition for QuickBooks Users.

## Time Expectations

Although there is no way to predict how long your conversion will take, we can provide general guidelines of what to expect. The timing depends on several factors:

- When do you want to start using Sage MAS 90 Special Edition for QuickBooks Users?
- Will you encourage your staff to view the excellent tutorials and to use the Help included in Sage MAS 90 Special Edition for QuickBooks Users?
- How do you want your new software to be configured?
- How much training will you and your staff have prior to the conversion?
- What version of QuickBooks are you on?
- How much data clean up will you need to do before and after the conversion?
- Which modules will you be using?
- How much QuickBooks data do you have?

After you've answered these questions, your Conversion Specialist can work out an estimated timetable for you.

## **Downtime**

Downtime is minimal during the conversion process. We define downtime as the time that you cannot access QuickBooks or Sage MAS 90 Special Edition for QuickBooks Users. When your Conversion Specialist performs a test migration, you can still work in your QuickBooks system. It is at this time that any problem areas are identified and corrected before the final conversion. Your Conversion Specialist will run several test conversions until he/she is comfortable that the final conversion will run flawlessly. The only real downtime occurs between the time your Conversion Specialist receives the final data and the time your Specialist converts the data to Sage MAS 90 Special Edition for QuickBooks Users. This process can be accomplished on the weekend, or if necessary, after work hours during the week. Your Conversion Specialist will work with you to provide the smoothest transition possible.

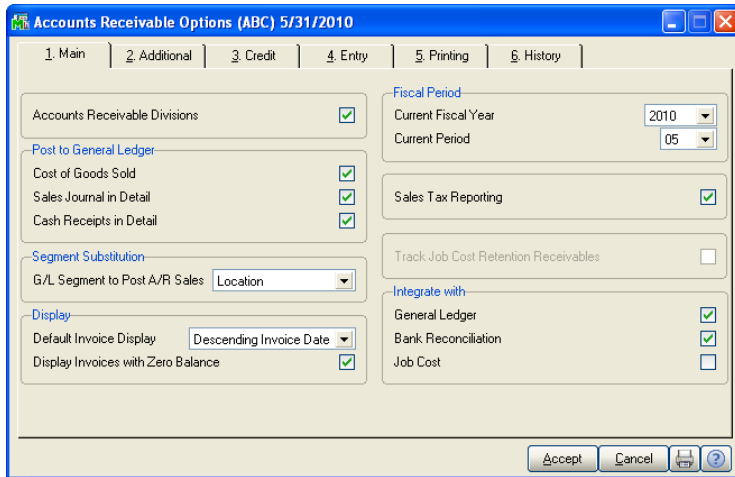
## ***How to Get the Most Out of Your Software***

By purchasing Sage MAS 90 Special Edition for QuickBooks Users, you have made substantial strides forward in acquiring the tools to make your business run more productively and more profitably. Now it is essential that you take full advantage of these tools and applications. This chapter covers the options you have to help you make the most of your new software. As you read on you'll discover some of the secrets to increasing staff productivity and your company's overall profitability.

### **Implementation**

Implementation is considered one of the most important steps in the conversion process as it lays the foundation for your future business operations. You may recall with QuickBooks that you had system-wide setup options such as cash- or accrual-basis accounting. The more sophisticated Sage MAS 90 Special Edition for QuickBooks Users has setup options in each module. The time to make critical decisions regarding how you would like to configure your software is **BEFORE** you begin the conversion. Discuss your options with your Conversion Specialist, who will make informed recommendations based on personal knowledge of your company, discussions he or she has had with you and your employees, and extensive familiarity with the software capabilities.

## Accounts Receivable Options



At Sage Software, we understand that every business is different. That's why we've designed Sage MAS 90 Special Edition for QuickBooks Users so you can customize the system to meet your company's unique needs. The window above illustrates how you can set up a module to accommodate your specific business criteria.

After viewing this information, you can see why the setup options are such a critical part of the implementation process. While a majority of the setup options can be changed at any time, some cannot. That's why it's so important to make sound decisions up front and thus avoid costly and time-consuming changes later.

## Training

Proper training is an essential component that will ensure your success with Sage MAS 90 Special Edition for QuickBooks Users. Our research shows that companies who invest in training are more satisfied with their software and better equipped to take advantage of the software's features to more efficiently run their companies. Sage Software offers several training options to meet our customer's range of needs. Whether you have a new employee that has little experience with an accounting software package, an employee that has had years of experience, or an employee in between; we have a training option for you. For more information and class descriptions, visit our Web site at: [www.sagesoftwareuniversity.com](http://www.sagesoftwareuniversity.com)

### Tutorials

The tutorials are invaluable resources located on the Tutorials page of Sage MAS 90 Special Edition for QuickBooks Users. The main tutorial introduces basic features and concepts of Sage MAS 90, such as navigating through the software, customizing your view of the software, entering data, printing reports, and accessing additional resources that offer help. This easy-to-follow tutorial can be used in conjunction with more formal training. It provides a solid foundation to begin your training process. You can also use this tutorial as a refresher course for employees or as a course for new employee orientation. We've also provided you with a Business Insights Explorer tutorial to make it easy for you to immediately begin using this tool, which will allow you to gain instant visibility across your business. Business Insights is an on-the-fly inquiry and analysis tool that improves your and your staff's decision making by helping identify opportunities, inefficiencies, challenges, and successes.

Also available for purchase is the TakeCharge! Accounting Tutorial. This inexpensive tutorial will help your employees who do not have accounting expertise or employees that just want to brush up on their accounting principles. Some of the topics include:

- Basic Financial Statement Formats
- The Accounting Equation
- Chart of Account Structures
- Adding Accounts to the Chart of Accounts
- Debits and Credits
- Using T Accounts
- Reviewing Balance Sheet Accounts
- Correcting Coding Errors
- Use of Trend Statements
- Period End Processing

### **Anytime Learning and Instructor-Led Training**

We are making training more convenient than ever through Web-based, instructor-led training courses that allow you to participate in an interactive instructional event from the convenience of your desktop computer using the Internet or to view pre-recorded sessions at your convenience, anytime day or night. For schedules and to sign up, refer to the following Web site: [www.sagesoftwareuniversity.com](http://www.sagesoftwareuniversity.com)

The following training types are available:

- **Classroom**—Instructor-led classroom training provides you with personal interaction in a professional atmosphere you will enjoy. Classroom training is delivered by Sage Certified Trainers at a Sage Software Campus or a Sage Authorized Training Campus nationwide and is ideal if you prefer a hands-on learning environment, interaction with other students, and a classroom atmosphere. Our classroom training provides you with certified curriculum, structured training, and knowledge you need to overcome real-world challenges.
- **Realtime Learning**—Realtime Learning is led by an instructor and is delivered online at a specific date and time. All you need is a computer, phone, and a high-speed Internet connection. Everything happens live, so you can ask questions and interact with other participants. Realtime Learning combines the interaction of a classroom with the convenience of staying right where you are! Realtime Learning includes live instruction, electronic or printed course materials, and hands-on activities.
- **Anytime Learning**—Anytime Learning offers a full range of recorded instructor-led sessions that are easy to use, always accessible, and ready when you are. All you need is a computer, speakers and a high-speed Internet connection. Anytime Learning sessions are ideal for review material, acquainting new hires with basic processing skills, and cross-training staff.
- **Self Study Guides**—Self-Study Guides are self-paced workbooks on a variety of topics and are another helpful training supplement for those who want to learn at a tempo that fits a demanding schedule, or refresh what they previously learned.

Anytime Learning and Web-based, instruction-led training sessions take only two hours and focus on a specific section or process in a module.

For example:

**Class Title**—Introduction to Common Accounts Receivable Processes.

**Class Description**—Complete with your own curriculum, your instructor will lead you step-by-step through each common Accounts Receivable process. Without ever leaving your office, you will learn how to perform Accounts Receivable processes such as invoicing and entering cash receipts. This Web-based, instructor-led course is designed to teach you how to utilize these processes and to obtain maximum use of your system. Ideal for new accounts receivable clerks or existing users who want to increase their knowledge of the Accounts Receivable module.

## **Authorized Training Centers (ATCs)**

Authorized Training Centers (ATCs) are Sage Software business partners who also specialize in training. They have met Sage Software's strict classroom requirements and have had the appropriate training to teach specific classes. The ATCs are able to purchase course curriculum and provide formal classroom sessions. There are over 29 ATCs located throughout the United States. Please visit our Web site at [www.sagesoftware.com](http://www.sagesoftware.com) for the locations, classes, and fee information.

## **Certified Trainers (CTs)**



### **NOTE**

Not all courses are available through Certified Trainers.

This program features Sage Software business partners who provide high-quality training services using Sage Software certified course materials. Certified Trainers are able to purchase the curriculum and offer training at their office or onsite at yours. Certified Trainers undergo the same training as the Authorized Training Center personnel.

## Business Partner Training

You can also choose to have your Sage Software business partner teach onsite or classroom training. If your business partner performed your implementation services, it's an advantage to have your business partner perform onsite or classroom training. This way your training will be closely tailored to your company's system. You can opt for more formal classroom sessions later that will provide you with great insights, tips, and tricks to get the most out of your software.

## Support

The final component to consider is support. We have several different plans to ensure that you can get the support your company needs—within your budget.

### Certified Support Specialists

The Sage Software Certified Support Specialist program is a unique program designed specifically for Sage Software business partners who are committed to achieving support excellence. It's designed to help business partners develop their staff's product and technical knowledge through a series of in-depth classes and comprehensive assessments.

Where the training courses for customers focus on the modules such as Accounts Receivables and Payables, Certified Support Specialists training focuses on the Data File Structures and Technical Support classes. Not only are they required to take and pass Sage Software classes, they are required to complete Microsoft technology courses as well.

### Certified Support Centers

Similar to the ATC program, the Certified Support Centers are Sage Software business partners who have trained to become experts in software support. They also have met the strict support center operation standards of Sage Software.

## Sage Software Support Plans

Sage Software also offers phone support to our customers. Sage Software support plans are annual support programs designed to cater to your most frequently requested service options.

### Subscription Plan



**NOTE**

This plan does not include access to the Sage Software technical support staff by e-mail, phone, and fax.

When you invest in Sage MAS 90 Special Edition for QuickBooks Users, you've selected a powerful and convenient accounting solution that expands with your business. Make sure you maximize your investment by renewing your annual Subscription Plan. (You automatically receive a one-year Subscription Plan with your new purchase of Sage MAS 90 Special Edition for QuickBooks Users.) The Subscription Plan provides the following benefits:

- Upgrades to current modules as they are released. These upgrades offer significant new functionality, so you will always have the most current version of your software.
- Maintenance releases from our development team. Take advantage of product updates, fixes, and minor enhancements that maintain the reliability and performance of your software.
- Unlimited access to Sage Software Online, our award-winning online support system.
  - Sage Software Online draws from the same knowledge database that our support analysts use. The system provides 24/7 access to thousands of common and not-so-common technical questions.
  - SageTalk Online Forums. You can receive valuable ideas and tips on how to make better use of your Sage Software.
- Technical & Troubleshooting Guides located on the Sage Software Online Web site. Regularly updated to coincide with major releases of your Sage Software, these guides are filled with valuable information you can use throughout the year.

- Tax Table Updates. Make sure your tax tables and payroll calculations are always up to date (Payroll module only).
- Discounts on compatible forms and checks.

### Silver Plan

**NOTE**

ClientCare Plans are renewable through either Sage Software or your Sage MAS 90 Special Edition for QuickBooks Users business partner. Other terms and conditions may apply. For details, refer to the Sage MAS Web site at: [www.sagemas.com](http://www.sagemas.com)

The Silver Plan provides base-level phone support. The Silver Plan is recommended for existing customers who have some experience working with Sage MAS 90 Special Edition for QuickBooks Users, place moderate demands on their accounting system, and desire backup support when their consultant is unavailable. An active Subscription Plan is required for purchasing this phone support plan. The Silver Plan provides you with:

- Expert telephone, e-mail, and fax assistance for an unlimited number of cases.
- Toll-free telephone service.\*
- Online access to your case history, allowing you to check the status of open cases and view a 13-month history of past cases, including analyst notes and resolutions.
- A 15% discount on Sage MAS 90 and 200-compatible checks and forms.

\*For phone support details, refer to the following Web site:  
[www.sagemas.com/support\\_services](http://www.sagemas.com/support_services)

## Gold Plan



### NOTE

ClientCare Plans are renewable through either Sage Software or your Sage MAS 90 Special Edition for QuickBooks Users business partner. Other terms and conditions may apply. For details, refer to the Sage MAS Web site at: [www.sagemas.com](http://www.sagemas.com)

By adding the Gold Plan to the Subscription Plan, you will be equipped with the premier support solution. In addition to having unlimited access to Sage Software Online and all the other Subscription Plan benefits, you'll enjoy friendly, personalized phone support from experts who understand Sage MAS 90 Special Edition for QuickBooks Users inside and out. These experts have up-to-the-minute, intimate knowledge of all the products and issues. They can give you the security of knowing there is someone there to focus on your technical questions, while you focus on growing your business. We recommend the Gold Plan for customers who place heavy demands on their accounting system. An active Subscription Plan is required to purchase this phone support plan. The Gold Plan provides you with:

- Expert telephone, e-mail, and fax assistance for an unlimited number of cases.
- Exclusive priority, toll-free telephone support service.\*
- Online access to your case history, allowing you to check the status of open cases and view a 13-month history of past cases, including analyst notes and resolutions.
- A 20% discount on Sage MAS 90 and 200-compatible checks and forms.
- A 15% discount on Sage MAS 90 and 200 training at the Sage Software corporate location (Irvine, California) or participating Authorized Training Centers.
- A 15% discount on additional Sage MAS 90 or 200 modules. This discount does not apply to third-party applications and cannot be combined with any other offer.

\*For phone support details, refer to the following Web site:  
[www.sagemas.com/support\\_services](http://www.sagemas.com/support_services)

The table below compares the different support options available to you with QuickBooks and the options and pricing available to you with Sage MAS 90 Special Edition for QuickBooks Users.

	QuickBooks Annual Support Plan	Sage MAS 90 Special Edition for QuickBooks Users Subscription Plan	Sage MAS 90 Special Edition for QuickBooks Users Silver Plan	Sage MAS 90 Special Edition for QuickBooks Users Gold Plan
Cost	\$299 per year	15% of software purchase (first year of subscription included with new purchase)	Subscription plus \$1500 per year*	Subscription plus \$2400 per year*
Upgrades (e.g. 4.1 to 4.2)	Additional Cost	Included	Included	Included
Maintenance Release (e.g. 4.0 to 4.05)	Download Only	Included	Included	Included
E-mail Support	Included	Not Available	Unlimited	Unlimited
Fax Support	Included	Not Available	Unlimited	Unlimited
Phone Support	Unlimited	Per case charges apply	Unlimited	Unlimited
Tax Table Updates	Additional Cost	Included	Included	Included
Online Knowledge-Base	Included	Included	Included	Included

\*Prices subject to change. Consult with your business partner, or refer to: [www.sagemas.com](http://www.sagemas.com)

## **Conclusion**

In summary, Sage Software has created a simple, accurate migration process for your company. It is our goal to have the right product for you as your company grows. This conversion guide is a tool to help answer questions during the migration process. Sage Software has made every attempt to identify areas of concern during a migration. We encourage you to work closely with your Sage Software business partner to put in place a migration plan that fits your company's individual business needs.



*Notes*



*Notes*



*Notes*



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