

The Sage Peachtree Insider | February 2011

An Inside Look at Sage Peachtree and Your Business



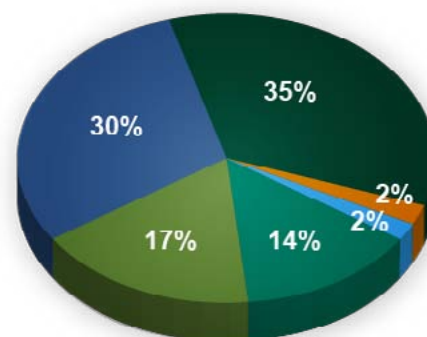
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Previous Poll Results

What social media tools does your business use?

- 35%** Social media? Who has time?
- 30%** Facebook
- 17%** I'd use these if I just knew how
- 14%** LinkedIn
- 2%** Twitter
- 2%** Blogs



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Feature Article: Love Your Customers

Make the Warm Fuzzy Feeling Last Throughout the Year

Almost everyone loves Valentine's Day. Heart-filled ads and displays bring a smile to your face. This includes small businesses, many of which use the season to deliver a message of warmth to their customers.

Showing customers you care is not a once-a-year event. Here are a few simple ideas to show customers you value them – this month and throughout the year.

1. **Improve Your Customer Service:** By building your company's customer service, you develop a reputation for caring. It's true that a happy customer refers others. And, as Tali Yaholom reports in her Inc. Magazine article "[How to Improve Your Company's Customer Service](#)," in a tough economy, good service may be the key to survival.
2. **Share your knowledge:** Give away helpful, practical and easy-to-use advice in your newsletter, on your website, in your business. The key to success for this tip? Make this be more about information and not about sales.
3. **Reward your customers:** Rewards can be small; you don't need to make large investments. Simply look for meaningful ways to say thank you. It could be as easy as hosting a customer appreciation event on a regular basis.
4. **Pay it back. Get involved locally:** You become more than a business name or a storefront when you are involved in community affairs. You put a face on your business. And, most people prefer to do business with someone they know.

There are thousands of more ideas. [Swiftpage](#), a leading provider of email marketing services, has a wealth of articles that offer more tips on improving your communication programs. Increased communication, the right communication, is a simple way to express appreciation on a regular basis. (Tip: Be watching for more information on an easy email marketing tool that works with your customer base in Sage Peachtree.)

After you put away the chocolates and flowers from the Valentine holiday, will you remember to practice customer appreciation the rest of the year? Everyone wants to feel valued and respected – especially when they are making choices with their wallets.

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Sage Peachtree Tweet of the Month

The most popular [@PeachtreebySage](#) Twitter post of the past month:

Funny weekend read: "The Accountant's (bad) JokeBook:" <http://bit.ly/g9Cpoh> Thanks [@CPA_Trendlines](#)



PeachtreeBySage

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Social Media for Your Business: Be Part of the Conversation

Facebook for Your Business

By Kim Dixon, Sage Peachtree Product Team

With over 500 million users (I'm one of them), Facebook could be the third largest country in the world. Originally created for college students, today approximately 60 percent of users are 35 years or older. This means there's a great chance your business' audience is on Facebook and you can reach them.

A lot of small businesses think that Facebook isn't going to help them, it's not for their type of business, they don't have the time, or some other reason that keeps them from getting started. Truth is if you don't want to build relationships with your customers or generate new sales leads, then Facebook's not for you. My guess is you want those things.

Managing a Facebook Fan Page takes time and commitment. Once you have a goal – driving traffic to your website, building your email list, building brand awareness, enhancing customer service, etc. – you can develop your plan.

If you haven't created a Facebook page, there are 3 things you have to do first:

1. Register your page [here](#).
2. Invite friends and customers to "Like" the page. (This will allow them to get your updates.)
3. Secure a [unique page](#) username [here](#). You have to have 25 "Likes" before you can secure a page username.

If you are relatively new to Facebook for your business, you need to first focus on getting "fans" or "Likes" to build your audience. Once you have a following and understand what they like, you can add more bells and whistles like customized landing pages, events, and other special tabs.

Here are ways to increase your fan base.

1. Add your Facebook URL and Facebook logo to all of your correspondence – email signature, website (add Facebook logo and "Like" button with [Facebook Social Plugins](#)), business cards, letterhead, products, etc.
2. Send out emails to customers telling them about your page and offering an incentive to "Like". For example, before March 31 and get 10% off your next purchase."
3. "Tag" companies or customers you work with. This will show up on your page and theirs! Example, "Just had a great meeting with Jane Doe to discuss plans for her new kitchen. It's going to be beautiful! Check back for before and after pictures! Thanks John Smith for the referral!" To tag Jane Doe and John Smith, simply put "@" without the quotes before their name (e.g., @Jane Doe).
4. "Tag" photos or invite your customers to post photos while using your product or service.
5. Post links, articles, or videos that your customers will find useful or interesting – especially those that inspire them to comment or share on their page.

The bottom-line is that it's a time commitment, but it will reap rewards. And remember, if you set it up, get the fans, and then don't update your page or don't respond to comments, it can actually hurt your reputation. Decide you are going to do it and stay with it. Slow and steady wins the race.

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Excel Tips & Tricks

Turning off AutoComplete

Does it annoy you when typing in data to a cell and Microsoft Excel starts prefilling for you? If so you are not alone. If you want to turn off this feature, called AutoComplete, follow the steps below.

Microsoft Excel 2003 Process:

1. On the **Tools** menu, click **Options**.
2. On the **Edit** tab, select or clear the **Enable AutoComplete** for cell values check box to turn automatic completion of cell entries on or off.

Microsoft Excel 2007 Process:

1. Click the **Office** button and then click **Excel Options**. Excel displays the Excel Options dialog box.
2. At the left side of the dialog box click **Advanced**.
3. Clear the check box named **Enable AutoComplete for cell values**.
4. Click on **OK**.

To turn **AutoComplete on**, reverse the above steps.

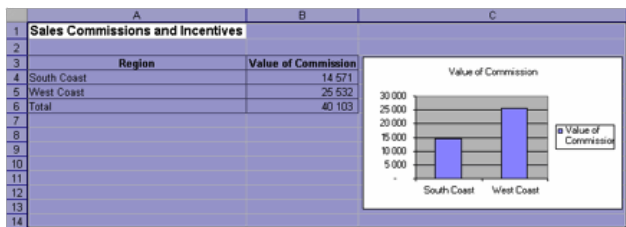
Comment on this tip

Paste Picture Link and creating worksheets that auto-update

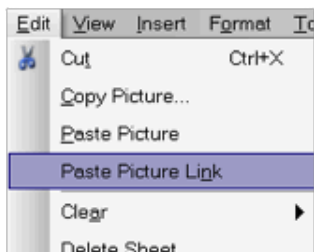
Ever struggle to build data across multiple worksheets and have the data auto-update across them when a change is made? This tool is helpful when needing to print multiple areas of a workbook onto one worksheet or creating a dashboard summarizing parts of the workbook.

Microsoft Excel 2003 process:

1. Select the desired **range** to be **copied**



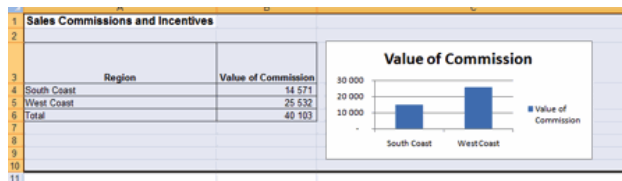
2. Right click the **selected** range, select **Copy**
3. Navigate to the **destination** worksheet
4. Hold down **Shift** on the keyboard
5. From the **Menu** bar, select **Edit, Paste Picture Link**



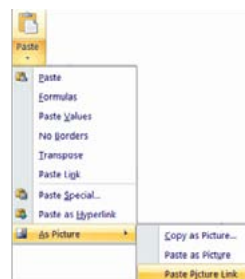
6. Your **object** (picture) will now be **pasted** and can be **resized** as desired

Microsoft Excel 2007 process:

1. Select the desired **range** to be **copied**



2. Right click the **selected** range, select **Copy**
3. Navigate to the **destination** worksheet
4. From the **Home** tab, in the **Clipboard** group, select the **down** arrow under **Paste**
5. Select **As Picture, Paste Picture Link**



6. Your **object** (picture) will now be **pasted** and can be **resized** as desired

Repeat the above **steps** for **additional** objects.

Comment on this tip

Employer's Corner: Motivating Employees

Brought to you by Sage Employer Resources

Whether you manage a single employee or a large staff, successfully motivating your employees can boost productivity and help achieve your business goals. Ultimately, you want to create an environment that allows employees to satisfy expectations, do their best, and feel valued.

While employees are clearly motivated by tangible rewards such as salary, providing other meaningful opportunities for growth, such as mentoring or the freedom to work independently can likewise motivate your employees to succeed.

How to Motivate Your Employees

Keep in mind that your employees are likely to have different needs and aspirations – what motivates one employee may not motivate another.

Different motivational drivers include:

- Financial incentives / opportunities for promotion
- Job titles that represent status or authority
- Training and professional development
- Flexible work arrangements that accommodate employee needs

Strategies for Successful Motivation

Consider the following strategies to encourage your employees to contribute their best:

- When tasks are more challenging, employees may feel more accomplished and satisfied.
- Consider lateral moves as an alternative where promotion is not feasible. Many times, people like to perform different tasks to expand their areas of expertise.
- Ask employees about what is important to them.
- Recognize efforts by personally thanking employees, or publicly highlight achievements at meetings or on the company intranet.
- Create opportunities for social interaction, such as a company sports team.

Creating a work environment that includes a range of motivators can show that the company appreciates all of its employees, and may contribute to improved performance, as well as increased retention and enthusiasm for your company.

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Become a Fan!

The Sage Peachtree [Facebook Fan Page](#) has business news, special offers, tips and occasional contests. "Like" us and become a fan today!



Retirement Readiness: Save Your Employees 28%

Brought to you by Retirement Services for Sage Customers

Give your employees a token of your affection by preserving almost a third of their retirement savings.

The Department of Labor recognized that many employers and their employees were not aware that they might be sacrificing close to a third of their retirement savings to plan expenses that are not reasonable or, in some cases, necessary.

The first challenge small employers have is knowing where to look to add up all of the fees. You have to look at your investments, administration, recordkeeping, trustee, advisory, trading, custodial fees...the list goes on and on. Many small business retirement plans have annual recurring fees of 3%.

Show Your Employees How Much You Love Them: Save Them 28% at Retirement

The upcoming fee disclosure regulations will ease this a little bit, but not entirely.

Do you know what you're paying in annual fees? If the answer is no, you're not alone. Locating and deciphering these fees is difficult, to say the least. Call your provider and ask for a clear cut explanation of your fees. Better yet, get it in writing.

Once you know what you're paying for, ask yourself some questions:

Is the expense justified for the service you're receiving? Do you have a process for evaluating this?

If a participant came to you today and asked you to justify the amount of fees they see coming from their account in the last quarter, could you do it to their satisfaction? If not, you'll need to get there in the next year. That day is coming faster than you think.

Could lower cost more efficient investments like [Exchange Traded Funds \(ETFs\)](#), replace your existing investments and reduce your fees?

But one of the most important questions to ask is this: Who's responsible for your investment performance? Has your financial advisor provided you with a written document outlining their fiduciary responsibilities?

Find [more information here](#) to help you save for your retirement.

*Department of Labor, "[A Look at 401\(k\) Plan Fees](#)"

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Tip of the Month

Customize the Dunning Messages that Appear on Customer Statements

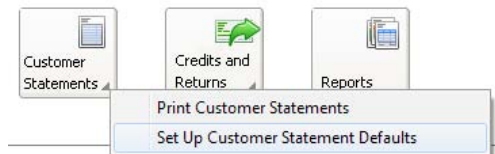
Sage Peachtree lets you print custom dunning messages on the bottom of your customer statements. These messages are used to inform your customers about their current account balance status and can vary depending on how far behind they are in their payments. For example, if their account is current, the message can be a simple "Thanks for your business!" If one or more invoices are overdue, the message can remind them to pay as soon as possible.

0 - 30	31 - 60	61 - 90	Over 90 days
29,696.06	2,383.94	0.00	0.00

Have you forgotten about us? Thanks for your attention You may have forgot.

You can customize these messages at any time using these simple steps:

1. In the **Customer and Sales Navigation** area, click the **Customer**



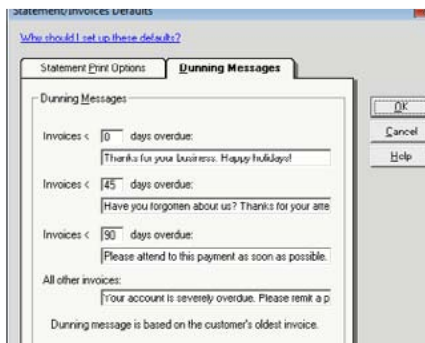
Statements icon and select **Set Up Customer Statement Defaults**.

2. On the **Statements/Defaults** window, click the **Dunning Messages** tab.
3. The **Dunning Messages** tab provides fields for up to four different dunning message levels; each based on the number of days the oldest invoice is overdue.

You can modify the days overdue levels and the message that each level triggers.

For example, you can change the default days overdue for each message level from **0, 30, and 60** days to **0, 45, and 90**. Note that it may be a good idea to keep the first level days set to zero. This way, statements for customers who are current will always print a standard "thank you" message.

Each dunning message can be changed to anything you like. As a tip, you can occasionally modify the message for the first level to inform your customers of new products, offer holiday well wishes, give notice to changes in business hours, and so on.



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FAQ

Q Rather than print aging reports regularly, how can I be notified when a customer's outstanding balance reaches a certain amount?

A You can set up Sage Peachtree to notify you when certain activities or events occur.

1. Select **Tasks > Action Items**. Click the **Alerts** button from the toolbar in the Action Items window.
2. Select a blank line in the list or click the **Row** button menu and click the **Add** button.
3. Select **Customer** in the **Apply To** column.
4. Select a range of customers.
5. Set **Type** to **Outstanding Invoice Balance** and set **Condition** to **>=**.
6. Fill in the balance amount that you want to trigger the alert.
7. To receive email notification for this alert, check the email check box and make sure you set up the **email** information at the bottom of the window.

Q Is there an invoice template that is suited for companies that provide services?

A Sage Peachtree provides a service invoice in addition to the standard invoice if you want to create an invoice without inventory items. You will want to use this type of invoice if you provide a service and don't ship products to your customers.

1. From the **Tasks** menu, select **Sales/Invoicing**.
2. Select the **Layout** toolbar button and choose the predefined **Service** template from the pull-down menu.

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Sage News: iOME Retirement Challenge

Sage North America Sponsors iOME Retirement Challenge

Sage North America came together with several large names in the retirement industry to sponsor the sophomore session of the iOME Retirement Challenge. Additional sponsors included, BlackRock, the American Society of Pension Professionals & Actuaries (ASPPA) and Life Tuner (an initiative of AARP).

The iOME (I-owe-me) Challenge was established in 2009 by PAI (Plan Administrators, Inc.). The competition encourages the 80 million members of the Millennial generation to help solve America's retirement problem. Student teams write an essay and produce a short video to illustrate what their lives could be like when they reach retirement.

Specifically, teams are asked to write an essay of 10,000 words or less, outlining three significant differences that will exist in our

Continued on next page >

Sage News: iOMe Retirement Challenge

economy forty years from now, provided the U.S. personal saving rate is sustained at 6% versus the lower prevailing savings rates of the last decade. Teams are also required to submit a short video that depicts American life forty years from now if we do not begin to save enough.

Finalists were judged by a Blue Ribbon Panel that met in Miami, Florida on January 15, 2011 to determine the winners. The grand prize winning team hails from Texas Tech University and will be awarded \$10,000 and an expense-paid trip to Washington D.C. to present their entry to members of Congress. Also awarded were first runner up and honorable mention to teams from University of Nevada-Reno and LaGrange College respectively. Visit iOMe Challenge to learn more and view the winning video.

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Heads Up: Regulatory Issues We're Watching

New Process for Treasury Tax and Loan Payments

Welcome to busy season! As your fiscal year gets kicked into high gear, there are new payroll regulatory changes and developments that should be top of mind. In the previous edition of this newsletter, we previewed several items of note, one update being to the Treasury Tax and Loan (TT&L) payment methodology.

Did you know that the IRS no longer allows businesses to submit tax and loan coupon payments at their financial institution? That's correct. In an effort to bolster security, as of January 1, 2011 organizations making these types of payments will have to seek alternative methods. There are two options for customers.

1. You can sign up for a free service – the Electronic Federal Treasury Payment Service – provided by the U.S. Treasury whereby Federal TT&L payments can be made via the web (www.eftps.gov) or phone (1-800-555-4477). However, this service does have a lengthy enrollment process that can take a minimum of 21 days.
2. Alternatively, you can use one of the [Sage Peachtree Payroll Solutions](#). With Sage Peachtree Select Payroll the payroll information is carried into your federal and state forms in Sage Peachtree. With a few clicks your information is electronically sent to the tax agencies.

Sage Peachtree Managed Payroll powered by CompuPay includes full tax filing, payment and compliance for all federal, state and local taxes and is guaranteed to be penalty free.

Either way, accuracy and timeliness is assured, so you can concentrate on running your business and not your payroll.

This TT&L payment method adjustment is just one of the ever-changing federal and state requirements, compliance issues, year-end reporting deadlines, and complex payroll tax calculations that must be monitored this, and every year.

Next month's topic? Recent updates to the HIRE Act. Stay tuned here or contact us directly with any immediate concerns.

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Business News: Stormy Weather Strikes the Sage Peachtree Campus

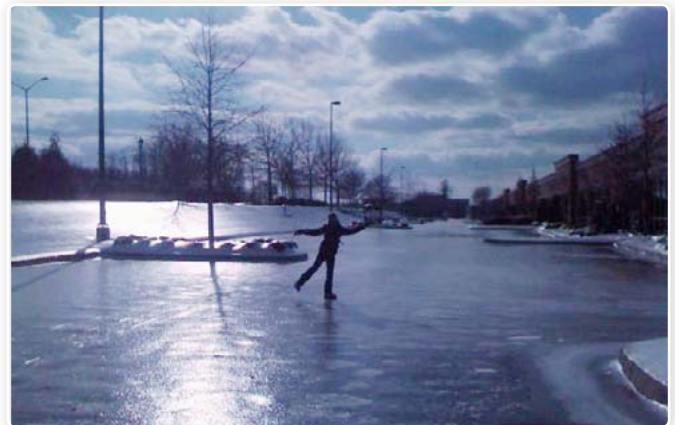
For the people who support Sage Peachtree Accounting, the time between mid-December and the end of January is always hectic. This is our "peak season," when we typically get 15% - 20% of our total annual calls. But this January, some significant weather made this peak season anything but typical.

It started off pretty well. We took in nearly 20,000 calls in the first week and expected to see that many or more come in the second week. Mother Nature threw us for a loop, though, as a severe snow storm, followed by daily temperatures at or below freezing, shut down the Sage offices near Atlanta for almost the whole week!

We still wanted to be there to help so, with a skeleton crew of employees working from home, we set up new "snowmageddon" procedures. If you called us during that week, we asked you to send us an email with your contact information. We also pointed you to numerous online resources so you could find answers before we got back in touch. During that week, we received nearly 10,000 calls and were able to help many of you through our revised procedures.

We'd like to thank all of you that contacted us during that time – for your patience, understanding, and kind words. We'd also like to thank our dedicated employees – for their innovation and agility as they improvised offices in their homes. Thank you all for your continued support of Sage Peachtree Accounting!

If you have a "snowmageddon" story you'd like to share, we'd love to hear from you!

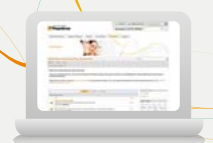


The Sage Peachtree campus parking lot during January's Snowmageddon

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Join the Sage Peachtree Community!

Get answers and advice from the thousands of members of the Sage Peachtree Online Community. Join in the discussion at <http://community.peachtree.com>



Productivity Tip: Stay Productive During Stormy Weather

Love Your Customers by Staying Productive During Winter Storms

It's winter – and you know what that means for your commute. When a storm hits, you could end up stuck in bumper-to-bumper traffic or stranded.

This was all too real for our employees and customers during a recent snowstorm that hit the Sage Peachtree campus (see Business News article in this issue). Icy conditions seriously impacted our customer service group. They had to work from home and rely on email and live chat instead of their busy phones – not an ideal situation during busy season! We kept customers informed via [Facebook](#) and [GM Connie Certusi's blog](#).

How about you? You can't let your work or your customers suffer just because the weather isn't cooperating. We have two solutions that will keep you productive no matter what the forecast says.

Sage Peachtree Remote Access gives you the freedom and flexibility to work where, when and how you want with instant access to your office Mac® or PC from any Internet connection. After the automatic two-minute setup, you can use it to securely work from your home, a satellite office, the airport – anywhere. With [Sage Peachtree Remote Access](#), you can keep off the road and stay productive. [Try it free for 30 days](#).

Sage Peachtree Online Meeting allows you to hold your meetings online when that storm is preventing you or other participants from attending in person. Office shut down? Feeling sick? Cancelled flight? No matter what the problem, you can meet instantly – right from your desk. Setup takes just minutes, and with one click everybody can view and discuss whatever you want to present, demonstrate or collaborate on. [Learn more](#), or start your [free 30-day trial today](#).

Try both of these solutions free for 30 days and see if they are right for you and your business.

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Top Online Community Discussions

The most viewed discussions at the Sage Peachtree Online Community over the past month:

- [Sage Peachtree Accounting 2011 Start-up Problem](#)
- [Sage Credit Card Statements Downloadable](#)
- [Printer Settings on Workstations](#)
- [Upgrade from Complete Accounting 2005](#)
- [How to Set out Round Figure](#)

Customer Spotlight

Davidson Chocolate – Sweet on Sage

Davidson Chocolate Co. proudly opened their second Charlotte, N.C., area store in September 2010. Between October and December, the two Davidson Chocolate stores processed around 1,700 pounds of raw chocolate. And this Valentine's Day? [Davidson Chocolate Co.](#) expects to go through another 1,500 pounds of chocolate – more than double last year's amount!



Since opening their first store in 2008, John and Sue Elliott have depended on Sage's software and services – specifically, Sage Peachtree and Sage Payment Solutions – to help them manage their small, but rapidly growing, business.

Sue Elliott, who acts as CFO for the company, says they chose Sage as their payment processor because of their positive Sage Peachtree experience. She appreciates the great support Sage provides.

"When we were having issues getting the credit card terminal at the new store to work properly, the Sage Payment Solutions support team gave us immediate help."

She adds,

"When credit processor salespeople contact us, they try to point to security issues we might be at risk for. The sales pitch turns off really fast when I tell them that we use Sage Payment Solutions and I have complete faith that we're fully compliant and protected. It's an interesting sight to see!"

Davidson Chocolate Co. is looking at integrating its payment processes with Sage Peachtree to assist with both standing corporate orders and those from parents of students at local Davidson College who have gifts delivered for their children – but only if business slows a bit.

Elliott concludes,

"I've received a great customer experience from all the people at Sage. Without the company's technology helping us run our business, we'd be sunk."

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