Rogers & Company Technology Consultants

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SAGE NONPROFIT SOLUTIONS NEWSLETTER

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ONLINE PRODUCT GUIDES AND USER MANUALS

Help Is Just a Click Away

You've probably noticed that you no longer get software discs, hard copy user guides, or printed manuals shipped with your Sage 100 Fund Accounting software. After all, we live in a digital world. But you still have access to help, how-to's, and troubleshooting resources at your fingertips because the information is now built into the system; giving you a reliable resource that's available 24 x 7. Let's take a look at some online guidance and help documents that are just a click away.

There's a Guide for That

Because they are no longer handed out as printed documents, a lot of people don't realize that there are **Product Guides** available for the software. To access these guides while in Accounting, Payroll, or Administration, head over to **Menu Toolbar > Help > Product Guides**. You will then be transported to a browser-like page that has a complete list of product guides, each of which break down the features and functions of every Sage Fund Accounting module.

Whether you are a Fund Accounting newbie or expert, you'll find helpful step-by-step answers to everything from setup and entries, to reports and reconciliation. Consider these Modular Guides as your one-stop shop for all things Sage Fund Accounting.

A Built-in "Easy Button"

In Sage Fund Accounting, just about every screen offers a **Help Button**. This built-in resource should be the first place you go whenever you have a question while working in the software. The Help Button is context-sensitive which means that only information relevant to the screen you're currently working on will be displayed. So if you launch help from the invoice screen, only information about invoice processing will be displayed. Resources in the help system include definitions and explanations for each field, a guide to what each icon and button means, tips to prevent errors, and hyperlinks to additional online resources when needed.

All the Knowledge You Need … Online

If you're on a current Business Care plan, the **Online Knowledgebase** offers a huge library of articles and support resources that are available at no additional cost. The knowledgebase is packed with FAQ's, How-to's, support documents, troubleshooting guides, and other product information. Just go to at customers.sagenorthamerica.com to gain access to all of these resources and more.

Everything you need to know about Sage Fund Accounting is just a click away - so don't let these valuable resources go underutilized!

NEED MORE INFO OR HELP?

Contact us and we'd be happy to answer any questions you have about Sage 100 Fund Accounting or connect you with resources to assist with support or an upgrade.

Automating Reports with the Scheduler Module

If you're struggling to find time to run all the forms and reports you need without disrupting your busy day, then the Sage 100 Fund Accounting **Scheduler Module** may be the answer. Scheduler works behind the scenes, automatically pulling data and running reports based on the parameters you pre-define. Here's how it works.

Just Set It and Forget It

Long after the office closes for the day, the Scheduler Module continues to work, creating reports and automatically sending them to the people that you specify. That way, you can automate tasks that would normally take up valuable staff time and potentially tie up servers and computer resources. Setting things up is as simple as 1-2-3.

1. Launch the Scheduler and enter an **ID** and **description** for the scheduled task.
2. Choose an **output option** (Email, PDF, Printer, Excel) and determine who will receive the reports.
3. **Schedule** the frequency, period of time, and time of day.

Each time it runs, the Scheduler grabs the most up-to-date reporting information from Sage Fund Accounting. Plus, Scheduler can even be run for a single report or a bundle/batch.

Report Options and Distribution

During setup, you can specify who receives the reports and in what format. Which means you can pre-schedule Board reports and have PDF copies automatically distributed by email to Board members before the meeting. Or maybe schedule an updated Aging Report and have it available to your AR staff first thing Monday morning. Plus, you get email confirmation when scheduled tasks are complete so you have peace of mind knowing everyone has the information they need, when they need it.

Not JUST for Reports

The Scheduler module isn't JUST for reports. In fact, you can set up a Scheduler task for **recurring transactions** (like monthly lease payments, for instance) and have Sage Fund Accounting automatically post those transactions for you. The Scheduler can also handle **allocation calculations**, with the ability to schedule automatic allocation processing over night.

Contact us if you'd like to save time creating reports and processing recurring transactions using the Scheduler module - just set it and forget it!

Google for nonprofits

Did you know that Google offers a special program and collection of technological tools just for nonprofits? The **Google for Nonprofits** program offers access to **free or highly discounted products** and services that can help you find new donors and volunteers, work more efficiently, and get supporters to take action. Programs include:

Google Grants - the nonprofit edition of AdWords … Google's online advertising tool to help you reach more donors, volunteers and constituents while they're online.

Google Apps for Nonprofits - free productivity tools that reduce your IT costs.

YouTube for Nonprofits - with customized channels and convenient "Donate Now" buttons right next to your video.

Go online to learn more or to apply for the program at:

www.Google.com/nonprofits

"HELPING NON PROFITS MAKE MORE OF A DIFFERENCE"

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