

**Volume 3
Issue 4
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What's Inside

Page Two

Sage MIP Version 9
CONTINUED

Page Three

Benefits Of Integrated Payroll
Headline News CONTINUED

Page Four

In The Spotlight:
Sage Fundraising 50
Version 8 Enhancements

Headline News

Sage Summit, the annual Sage Software customer conference, is scheduled for November 3-6. The conference enables you to connect with other users, experts, and executive leaders—all under one roof. Finally, an event where your entire team can discover better, faster, and smarter ways of working. Each day is packed with sessions and activities including instructional training, tips and tricks, hands-

Continued on Page 3

**Sage
Fundraising 50
Version 8**

See page 4
for more info!

Sage MIP Fund Accounting Version 9 Coming This Fall

Version 9 of Sage MIP Fund Accounting is coming your way this fall. Version 9 focuses on features and functionality to help solve your organization's business problems, improve efficiency, and enhance usability. New payroll tax filing options are designed to smooth your year-end processing.

Tax Forms And eFiling

Perhaps one of the biggest headaches associated with running payroll in-house is the need to produce and file federal and state payroll tax forms in formats acceptable to the various government entities. With Version 9, new signature-ready forms that can be printed on plain paper are available for dozens of government entities. You also have the option to avoid printing altogether and e-File your forms directly from the Sage MIP Fund Accounting Payroll module.

The new **Tax Forms and eFiling** capability is provided by Aatrix® and is fully integrated. The forms are automatically filled out with information from your payroll system. On-screen editing of the actual report makes it easy to make any needed changes or additions before filing. Over 250

forms are supported to handle your federal and state tax reporting needs.

Once you have produced and verified the forms you need, you have several choices in printing and filing tax forms and their associated payments:

▶ **e-File Tax Forms**

Create and verify your federal and state tax forms, then simply e-File them—no printing, folding, or mailing required. A basic filing fee per form will apply, plus any expedited or per-employee charges.

▶ **Print And Mail Forms**

Create your tax forms and print them to either plain laser paper or the preprinted forms created by the government. Mail the forms to the appropriate taxing agencies.

▶ **e-File W-2 Forms**

Calculate and verify your W-2 tax information, then simply allow Aatrix to handle the rest. Aatrix will produce and mail your employ-

ees their W-2s and also make them securely available to employees for electronic download. Aatrix will file the state and federal copies for you, including the W-3. A standard basic filing fee per employee will be applied. All federal copies will



Eliminate the hassles of preparing year-end payroll tax forms with new Tax Forms and eFiling.

Continued on Page 2

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Sage MIP Fund Accounting Version 9 CONTINUED

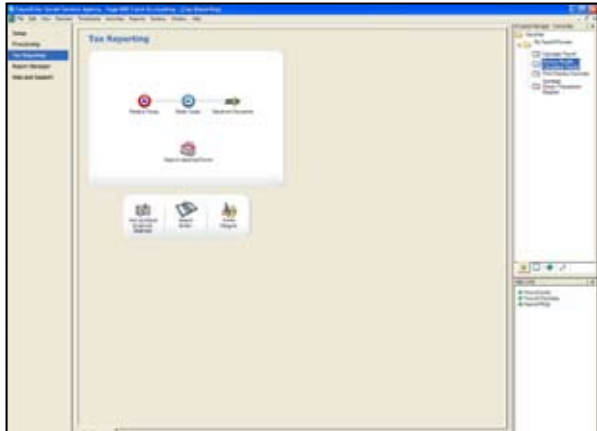
be e-Filed at no cost, while all state copies will have the basic filing fee per form plus any expedited, per employee, or minimum charges.

► Print And Distribute W-2 Forms

Create and verify your W-2 tax forms, then choose to print and distribute your employee copies in-house using government-compliant forms or plain perforated laser paper. You will then have the choice of printing the W-2 and W-3 federal and state copies to blank paper or e-Filing them with only the state e-File charge being applied.

► Other New Options

The new service provided by Aatrix also allows you to create an e-Filing online account where you will be able to check the status of your submitted files, make federal and state Electronic Tax Payments for a particular file, pay your filing fees, and maintain your account information.



With Version 9, you have the option to e-File your forms directly from the Sage MIP Fund Accounting Payroll module.

Recurring And Reversing Entry Manager

With Version 9, great new time-saving tools are available for managing your journal entries. Do you have journal entries that are the same every month? Now, instead of retyping those entries every month, you can set up recurring journal entries. Recurring entry uses existing forms so it's easy to use. Multiple transaction types are available, and you can edit or update the stored

entries at any time. A Process Manager allows you to generate your recurring entries quickly and easily, and alerts will warn you when recurring journals need to be run.

Also new with Version 9 is the ability to automatically reverse entries in a future period. Do you have accruals that need to be reversed at a future date? Now you won't have to remember to do it. Multiple processing options make it easy to set up and manage reversing journal entries.

The new recurring and reversing entry manager is a comprehensive processing tool that can streamline workflow and eliminate hours of manual data entry every month. Customization capabilities give you the flexibility to set up entries according to the specialized needs of your organization.

Payroll Enhancements

Along with the tax forms enhancements described above, Version 9 improves Payroll flexibility by adding new benefit and deduction calculation methods and the ability to change Employee IDs.

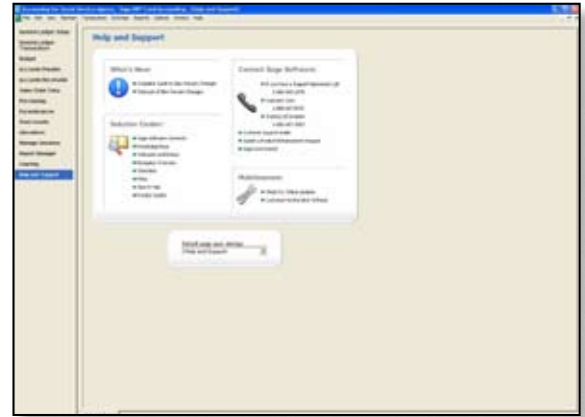
Enhanced Fixed Assets

Enhancements to Fixed Assets in Version 9 add new capabilities, new user-defined fields, and reporting options. You'll save time with the availability of Quick Asset Entry for EXP type accounts. Zero book value assets can now be tracked so you can record fully

depreciated assets. A new Fixed Asset Ledger Report provides for straightforward reconciliation of Fixed Assets data with General Ledger transactions.

Updated Navigation

Sage MIP Fund Accounting is completely updated with a modern look and feel and improved navigation. Module workflow diagrams and toolbar icons are more intuitive and



The updated user interface makes navigation easier and more intuitive.

easier to use. This helps you work more quickly and efficiently, and facilitates a quicker learning cycle for new users.

Purchase Order Usability

The Purchase Order module receives enhancements to improve flexibility. Receiving is now optional; you can set the option in Administration or at the time the Purchase Order is created. Totals are now included on receipt entry and the Select ENC/PO options have been improved.

Accounts Receivable Enhancements

With Version 9, the Accounts Receivable module has an increased number of fields in Forms Designer for Billing. This allows you expanded options in designing invoice forms.

User-Defined Fields

User-defined fields are a great tool to customize Sage MIP Fund Accounting to your organization's unique needs. Now with Version 9, there are twice as many user-defined fields available at the transaction level, which increases your ability to track information unique to your company.

Give us a call with your questions, or to schedule your upgrade to Sage MIP Fund Accounting Version 9. ☆

Benefits Of An Integrated Payroll

How do you generate payroll in your organization? Is the process smooth and efficient, or labor-intensive and error-prone? If you'd like to see improvements, now is a good time to re-evaluate your needs. You'll have time to research options, select a solution, run parallel with your old system for a few payroll runs, and be ready to begin processing in the new system at the start of the new tax year. New tax filing options for the Sage MIP Fund Accounting Payroll Module, plus the tight integration with other modules, make this solution better than ever. Let's take a closer look.

Complete Payroll Solution

The Payroll module contains everything your non-profit organization needs to track employee service efforts, produce payroll, and generate the reports needed for government compliance. Fully distributed accounting entries flow to the General Ledger, and you can track checks cleared in Bank Reconciliation.

Comprehensive Employee Records

You can maintain detailed profiles of your employees. The system tracks pay rate, demographics, and emergency contacts. Required forms such as I-9 and W-4 can be attached to each record. You can even include review dates and performance notes, and attach performance evaluations, making the module a mini human resources system. Employees can be grouped by pay cycle or department.

Flexible Accounting Codes

For maximum power and control, you can create an unlimited number of nonprofit payroll codes for earnings and deductions. Design the payroll codes you need to meet the needs of your organization, from worker's compensation to health care benefits and leave accrual.

Fast Payroll Entry

Timesheet templates are your key to fast payroll processing. Set up a template with the appropriate payroll codes for each employee. When it's time to generate checks, your nonprofit payroll can be processed directly from the template information. Once timesheets have been generated from the templates, you can review

entries and make modifications as needed for the current payroll run.

Allocate Labor Costs To Programs

Perhaps one of the biggest benefits of using the Payroll Module with your Sage MIP Fund Accounting software is the ability to automatically allocate the hours each employee works to programs. Earnings can be distributed by percentages, dollar amounts, or units. Even fringe benefits and taxes can be allocated to programs and/or departments. The actual cost of employee efforts is accurately tracked and automatically distributed to the General Ledger.

Direct Deposit Option

Direct Deposit is a separate module that integrates with Payroll and General Ledger. It allows you to give your employees the convenience of having their pay electronically deposited. Direct deposits and regular checks can be processed together in the same processing step, and your employees can choose to deposit pay into multiple bank accounts. An override option allows you to print checks for special circumstances, such as bonus checks.

The system generates a NACHA-formatted direct deposit file and a convenient terminal interface allows you to transmit the file directly to your bank. You also have the ability to designate when funds are withdrawn from your account, making cash flow more predictable.

Timekeeping Import

For complete automation, you can integrate the Payroll Module with external timekeeping systems using the Sage MIP Fund Accounting Data Import/Export module. The module also can be used for exporting reports as needed to meet government or agency requirements.

Extensive Reporting Options

Your ability to account for costs by individual program is essential to your ability to obtain grant or other funding for the current year—and to justify future program expenditures. A nonprofit payroll report totals the labor hours and associated earnings across projects, grants, programs, or any other dimension you may

need in an easy-to read format you can present to auditors and agencies.

Tax worksheets, summary tax reports, and detailed tax accumulation histories provide all the information necessary for producing federal, state, and local tax reports. The system also produces both printed and electronic W-2s for year-end filing.

The Payroll module retains complete history for an unlimited number of years. You can easily research historical issues using the pre-configured reports provided or by creating your own custom reports.

New Tax Filing Options

Challenges with payroll tax compliance are significant these days. There are over 10,000 taxing agencies in the U.S. constantly changing regulations and penalties for late or missed payments are stiff. With the release of Sage MIP Fund Accounting version 9.0, new tax filing options are available to ease the process of producing and filing W-2s and federal and state tax forms. See page one of this newsletter for more details.

Please give us a call to discuss your payroll automation needs. ☆

Headline News CONTINUED

Continued from Page 1

on labs, as well as industry-focused workshops and guest speakers.

New this year for Sage Nonprofit Solutions customers is a book signing and presentation by Denis J. Prager of Strategic Consulting Services. His book, *Organizing Foundations for Maximum Impact: A Guide to Effective Philanthropy*, encourages organizations to think about challenges such as governance, leadership, management, organizational structure and function, organizational integration, program development, and collaboration.

To register visit: www.sagesummit.com. ☆



In The Spotlight Sage Fundraising 50 Version 8 Enhancements



Sage Fundraising 50 Version 8 is scheduled to be available this fall. As we noted in a previous newsletter, the new version adds the ability to transfer gift and donor information received on the Web right into Sage Fundraising 50. It also includes usability, reporting, and security enhancements. Let's take a closer look.

Seamless Web Integration

Sage Payment Solutions Donate Now is a Web service that allows you to securely collect gifts over the Web. With the release of Sage Fundraising 50 Version 8, it is seamlessly integrated and has the potential to save you hours of time by reducing duplicate data entry.

You start by creating a donation form on your Web site using the Donate Now Form Options. You can elect to offer donors any of the following:

- ▶ Choose from a list of specific amounts for easier giving
- ▶ Make gifts anonymous
- ▶ Make recurring gifts
- ▶ Join your mailing list
- ▶ Honor and memorial gift tracking

Sage Payment Solutions tracks donors' credit card information for you and is PCI (payment card industry) compliant, assuring your donors' information is secure.

The gifts, pledge payments, and recurring gifts entered on your Web site transfer into Sage Fundraising 50. The Donate Now Processing Utility produces a report of the transactions that are transferred, which you can print or save as a PDF file for your records. Donate Now information also is available for queries and reports as a processing method. Collecting gifts online has never been easier or safer. If you are not yet accepting donations online, now is an excellent time to start.

Speed Data Entry With User Defaults

You can now set up default templates for five functional areas within your Sage Fundraising 50 software. You can set defaults for Data Entry and User Interface, Quick Gift, Import Wizard, Donate Now, and Online Gift Processing. The Defaults allow you to set values for fields on your data entry screen that you normally fill out the same way every time. Once you create a default template for yourself, you can share it with others in your organization.

Stronger Audit Trails

Reporting enhancements in Version 8 improve traceability and accountability. You now can optionally include the date, time, and page number on reports. New validation messages help ensure accountability, and *Last Saved By* information tracks who last made changes to a report. New report saving methods make it easier to save and recall custom versions of your reports.

Changes to standard and saved reports are only retained if the user clicks either the *Save* or *Save As* buttons. When clicking the *Save* button,

changes to all tabs are saved for both standard and saved reports. Clicking the *Save As* button will create a new saved report using the values from all the tabs. These changes are made available to all users. Perhaps you print a summary report all month long, but then a detail report at the end of the month. Now you can save both versions, making printing the report you need quick and easy.

New Security And System Options

With Version 8, a new Global Security option has been added. This feature lets you choose which users in your organization are able to globally add cards or globally edit.

To improve the usability of the NCOA (national change of address) feature, a new NCOA flag has been added to Country Code maintenance. This allows you to choose which records will be included in the NCOA process based on the country code. When you upgrade to version 8, the system will automatically check this new flag for all country codes with an abbreviation of USA.

With Version 8, Sage Fundraising 50 makes collecting and managing donations easier than ever. Please call to learn more or with any questions you may have about Sage Fundraising 50, Version 8. ☆

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