MAIL MERGE

You'll have a simple method of creating marketing campaigns and contact correspondence.

ATTACHMENT MANAGER

Automatically create a paperless office by attaching objects, such as bitmaps, Word or Excel documents, and multimedia files, directly to any Sage BusinessWorks General Ledger chart of accounts, customer, vendor, part, job, or employee.

CUSTOM WORKSHEETS

This powerful, intuitive, Excel-based analysis tool allows you to create your own customized spreadsheets using Sage BusinessWorks data.

When integrated with Microsoft Office, the Sage BusinessWorks Custom Office module can significantly increase your company's productivity. The module offers mail merge, attachment management, and custom worksheet capabilities that put your Sage BusinessWorks information to work for you. This allows your employees to do their jobs more efficiently, which can lead to increased revenue.

Microsoft Office is the industry leader when it comes to business productivity tools. Sage BusinessWorks provides small businesses with an award-winning accounting solution. That's why it makes sense to integrate these two software solutions using the Custom Office module. You'll be able to take advantage of the extensive features within both products, and generate the spreadsheets, documents, e-mails and mailings that you need to produce to gain valuable business insights, increase productivity, and maximize your company's profitability.

Sage BusinessWorks
Custom Office

"I am thrilled with Sage BusinessWorks Custom Office. Combining the ease of use in Sage BusinessWorks with the powerful features in Microsoft Office is a very valuable tool."

Lorelei Walker, CPA

FEATURES

Mail Merge

The Mail Merge component of the Custom Office module enables effortless creation of mailings. You can quickly create and send personalized documents to your customers, vendors, and employees. This capability improves your communication with company contacts and provides you with a revenue-increasing marketing tool.

- Gives you the ability to create customized mailings targeted to groups of customers, vendors and employees using Microsoft Word.

- Allows you to create and edit documents and merge them with Sage BusinessWorks information using Word's advanced word processing features.

- Enables you to set up professional templates once and modify them as needed, saving you valuable time.

- Let's you send letters by e-mail or to a laser or ink jet printer.

- Enables you to easily insert or replace a paragraph based on user-defined criteria.

- Gives you the ability to utilize Microsoft Word's conditional paragraphs with either the Instant Correspondence or the Targeted Mail Merge function.

Attachment Manager

Another productivity tool offered by the Custom Office module is the Attachment Manager. By allowing you to attach multiple objects such as wave form audio (WAV) files, Word documents, Excel spreadsheets, and bitmaps to each Sage BusinessWorks record, you can create a paperless office.

- Creates a paperless office by attaching objects such as bitmaps, Microsoft Word or Excel documents, and multimedia files, directly to any Sage BusinessWorks General Ledger chart of accounts, customer, vendor, part, job, or employee.

- Supports both linking and embedding.

- Enables you to attach existing files or create new files to link or embed in a Sage BusinessWorks record.

- Reflects the changes you make to a linked file in the corresponding attachment.

- Tracks job permits and blueprints by attaching the scanned object to the jobs.

- Maintains customer correspondence by attaching delinquent account and welcome letters to each customer record.

- Records part returns by attaching documentation to each return on the part record.

- Tracks requests for vacation, leave of absence, maternity leave, and overtime approval by attaching completed and signed copies of the forms to the employee record.

Custom Worksheets

Finally, the Sage BusinessWorks Custom Office module allows you to create custom worksheets, using your Sage BusinessWorks data and the Microsoft Excel application. An intuitive, built-in wizard automatically extracts your accounting data and places it into Excel. Once in Excel, your options are virtually limitless. It's another powerful Sage BusinessWorks tool that can help you to improve your company's productivity.

- Creates customized worksheets in Excel using Sage BusinessWorks data.

- Compiles data from multiple modules into a single workbook within Excel, allowing multi-company consolidation reporting.

- Enables you to perform additional calculations, insert graphs or charts, that can help you with your future reporting.

"With the sophisticated mail merge feature of Custom Office, my clients can create and send new customer welcome letters as soon as they have been entered into accounts receivable. What used to take several steps can now be done in seconds."

Kenneth Saxe, Stambaugh-Ness, CPAs, p.c.

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