



SAGE 100 FUND ACCOUNTING NEWSLETTER

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Auto-Close of Encumbrances

A New Feature Introduced in Version 11.3

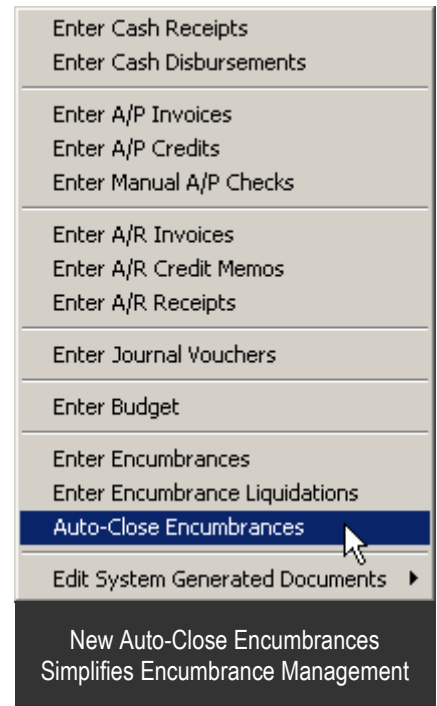
If you haven't had an opportunity to install Sage 100 Fund Accounting Version 11.3 released in April, you probably haven't seen the fantastic new "Auto-Close of Encumbrances" feature that reduces keystrokes and simplifies encumbrance management. Here's what you're missing.

The Problem with Encumbrances

At the end of the year, there are typically a number of outstanding encumbrances that will never be used ... just a normal part of nonprofit business operations. During year end processing, ALL encumbrances are usually cleared out, only to re-enter data on encumbrances that are still open. So you delete everything, then re-enter the encumbrances that should have carried over. That can mean a lot of unnecessary administrative work and extra keystrokes. And that's where the new **Auto-Close Encumbrances** comes into play.

Introducing Auto-Close Encumbrances

With the new Auto-Close Encumbrances feature, you can easily generate a list of outstanding encumbrances and simply select the ones to close. You can also select the encumbrances you want to magically reappear (or carry over) in the new year. Just a few mouse clicks and you're all done ... no more extra time, effort, or keystrokes.



Other Stuff You May Have Missed

If you're running an older version of "Sage MIP Fund Accounting," you might be missing out on some of the great new features that were added with Sage 100 Fund Accounting Version 11 back in November 2011. Here's a quick look at what's been added:

- **Core Accounting Updates** - improvements in General Ledger, Accounts Payable, and Accounts Receivable along with some new standard reports.
- **Grant Administration Module Free** - once a separate purchase, this module is now free.
- **A Brand New Look** - the Navigator look and workflow has been updated ([See it in action here](#))

Want more info? Download the [What's New Guide](#) for a summary of key enhancements to Sage 100 Fund Accounting Version 11.

Reminder
 Sage MIP is now Sage 100 Fund Accounting!

[More Details Here](#)



[Contact us](#) if you'd like to learn more about Auto-Close Encumbrances or to discuss an upgrade of your Sage 100 Fund Accounting system.

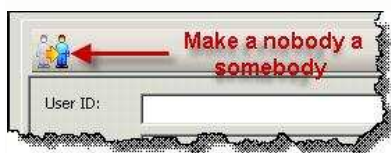
Fund Accounting Tips & Tricks

How To Add New Users to the System

One of the first things you need to do when hiring a new employee is to get him or her set up in the system. So here are a few simple options for getting new users set up in Sage 100 Fund Accounting.

Rename an Existing User

The easiest option is to simply rename an existing user in **Admin > Security > Maintain Users**.



An icon at the top of the screen allows you to start with an existing user, change the ID & password, and you're done!

Copy Security Settings

If you decide to set up a completely new user, there's still a simple way to assign the same level of permissions and security settings as a former employee.

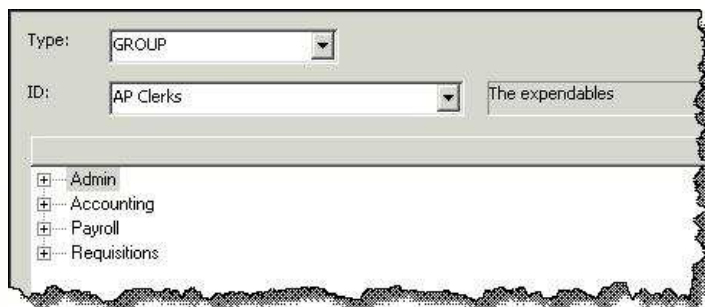
Go to **Admin > Security > Set Up Organization Menus** and select the **"Copy Security"** button at the top of the screen.



This allows you to copy security settings from an existing user and apply them to the new user.

Managing Groups of Users

If you're a larger nonprofit organization, setting up user **Groups** might be the way to go. Groups allow you to define a role and assign security permissions to a group of users (like AP Clerks for instance). Once set up, you simply add or remove users from the group. In addition, you can assign a user to multiple groups. A Manager, for instance, might be assigned to both the Accounting and AP groups.



Groups can be created under **Admin > Security > Maintain Groups**. Once you've created a group(s), you can go to **Admin > Security > Set Up Organization Menus** to assign appropriate security permissions.



Need Help? Contact us and we'd be happy to walk you through the process or provide training.

SNUG West 2012

Registration is now open for **SNUG WEST 3** - our annual conference for Sage users. This year, SNUG will be hosted September 26-28 at the Red Lion Inn in downtown Seattle, WA. This year's conference will feature training and discussions sessions for all facets of Fund Accounting, Fundraising, Grant Management, HR and EWS. Register, plan your trip, and view sessions at:

www.SNUGWest.com

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