

# The Leading Edge

*Adaptive Business*

*Solutions, Inc.*

## Enhanced Payroll Tax Reporting



Are you concerned about producing complete, accurate tax reports in a timely and painless manner? Instead of manually typing unemployment, wage withholding, and new employee reports, you can now take advantage of Open Systems' new partnership with Aatrix Software. This partnership streamlines tax reporting processes and saves time by generating complete, comprehensive state and federal payroll tax reports from OSAS or TRAVERSE data.

**Here's how it works:** Aatrix's payroll tax reports automatically pull payroll data from OSAS or TRAVERSE history into a complete, interactive form. Color-coded areas highlight required fields or areas where information can be edited. After approving the forms, you can print the form to file it with your tax agency or take advantage of Aatrix's eFile service to file the information electronically. Because the reports are approved by more than 170 government agencies and are constantly updated to reflect changes in tax regulations, you can be confident that your filings are accurate. This product is available on a subscription basis through the ABS/Open Systems partnership.

Open Systems  
Celebrates it's  
30th  
anniversary in  
2005 !

### Digital Dashboard: Traverse and OSAS

Now included with Traverse System Manager, Digital Dashboard gives an executive snapshot of key business indicators. One can personalize Digital Dashboard using over 35 pre-defined business metrics. Each user can choose which objects to view and whether to show data graphically, in text mode, or both. User settings also include the ability to set an automatic refresh interval to ensure timely, accurate information. Dashboard objects can show individual company or consolidated data in multi-company environments. OSAS users will recognize this feature as the Executive Information System Dashboard Display available from the OSAS 6.1x and later Resource Manager menu.

### 2005 W2

According to our latest information, the 2005 W2 format has not changed. Box 12, though, which contains coded amounts, does have some additional options. For further information, look at the "What's New" section of the W2 instructions at:

<http://www.irs.gov/pub/irs-pdf/iw2w3.pdf>

An informational copy of the W2 Form is at:

<http://www.irs.gov/pub/irs-pdf/fw2.pdf>

**OSAS**<sup>™</sup>  
OPEN SYSTEMS® Accounting Software

Microsoft Certified  
Solution Provider

**TRAVERSE**®

## Traverse CRM

A marketing department needs to provide strong leads to the sales group; this may involve a number of activities designed to initiate a relationship with prospects, including advertising, telemarketing, direct mail, special events and more. TRAVERSE Customer Relationship Management (CRM) gives you seamless control of your marketing programs and lets you do an online analysis of their effectiveness. A real-time integration to other TRAVERSE applications provides access to ERP data such as open invoices, sales history, etc. You can maintain unlimited contact names, methods (phone, email, fax, etc.) and user-defined fields. You'll be able to define campaign types such as Print, Direct Mail, Radio, etc. and maintain your campaign dates, costs and responses. Receive, categorize and refer opportunities, and analyze your campaigns by optionally assigning values and campaign references.

## OSAS End Of Year for Inventory-Related Modules

Inventory is one of the systems that has interfaces from a number of other modules. Because of this, clients often wonder what is the appropriate time to run periodic processing in Inventory. The short answer to this question is, "Whenever one of the related systems enters its new year, it is time for all systems to roll to a new year." Most often, this includes Accounts Payable and Purchasing, Sales Order and Accounts Receivable, and Inventory. If you are going to begin purchasing in a new calendar year, or selling in a new calendar year, than all three systems should have periodic processing (end of year) run at that time to initiate the new reporting year. Note that most of the above will permit processing in the "prior year" through run-time operator selections. Just remember that in order to have the correct beginning balances and YTD transaction history in Inventory, it is critical that Inventory EOY be run before receiving or selling anything in the new year.

## Use of FAVORITES menus

Do you have a number of processes that you run frequently? Could those appear on a single menu and save you time over navigating the Open Systems Menu System? If so, then setting up a "Favorites" menu is for you!

**OSAS:** First, go to Resource Manager, Workstation Configuration, Defaults and bring up the defaults for the Terminal ID for which you want to create a Favorites menu. Make sure that the Favorites option is set to "Active". On the workstation, navigate to a process that you want added to Favorites. When the menu selection is highlighted (scroll up or down to it, but don't execute it), depress <F10>. The selection will be added to the Favorites menu. The <F2> key will toggle between the Favorites menu and the complete OSAS menu system. To remove an item from the Favorites menu, simply bring up Favorites, and <F10> on that selection.

**TRAVERSE:** Navigate the menu system until you find a process displayed in the right-most column that you want to add to Favorites. Right click on the menu selection and choose "Add to Favorites". To use the Favorites menu, select it in the left-most column. The word "Favorites" will appear in the center menu column, and the processes that have been added to the Favorites menu will appear in the right-most column. To remove a process from the Favorites menu, click on "Favorites" in the drop-down menus at the top of the Traverse menu system. Select "Open Favorites". Select the item you wish to remove, and click the DELETE button. You may also select an item and use the EDIT button to change the Favorites menu text.

## Traverse Active Financials Drilldown

Traverse 10.2 contains a financial statement feature called "active financials". Active financials permit drill-down to source transaction data from a financial statement that has been displayed to the video screen.