TAKE ACCOUNTING TO THE NEXT LEVEL

Connected
Accounting & ERP

CONNECT *YOUR DATA* ▪ CONNECT *YOUR STAFF*
GET CONNECTED!

CONNECTED ACCOUNTING
FOR MAC & PC

Accounting and ERP Software
for Small Businesses

Brought to you by:

ACCOUN|TEK

solutions inc.

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Introduction

We have all seen the commercials - Mac and PC getting along like never before. This booklet highlights a great product called Connected Accounting and ERP, designed for your small business. Connected works on both Mac and PC and can manage your accounting, inventory, and track your jobs.

What is Connected?

Connected is a small to mid range accounting program for growing small businesses. The Core Accounting and Enterprise editions are both cross platform which means they can be shared concurrently by both Mac and PC users at the same time.

Connected Core Accounting offers powerful accounting features to manage your small business for one low price. Departmental and profit center reporting, customizable forms, customer invoicing, receipt tracking, purchasing, cheque issue, and easy import/export data transfer.

Connected Core Accounting starts from $399

Connected Enterprise offers a powerful set of tools to manage all aspects of your growing small business in a multi-user environment. Connected Enterprise offers robust multi-location inventory control, order entry, purchasing, distribution lot/serial control, and manufacturing. Track your project estimates, hours, costs, expense reports, and billing with our comprehensive Job Costing additions.

Connected Enterprise starts from $899

How this Booklet is Organized

This booklet is divided into five parts to help you get to know the Connected product and available services.

Part I: FAQ's
This part of the booklet answers those initial questions that you may have about Connected. This is a quick bathroom reader style overview to get you familiar with our product.

Part II: Getting Started with Connected
Find out more about how getting started with Connected is made easier by some of our value added services.

Part III: Connected Partners and/or Apple Consultants
This section shows our commitment to IT Professionals. You don't need to be an accountant to contribute value to a Connected installation. Read this section to see how.

Part IV: How do I "Get Connected"?
Learn how to download a free trial and purchase Connected.

Part V: Connected System Requirements
Learn the current Connected system requirements and network configurations.

Part 1: FAQ's

The following is a list of some of the most frequently asked questions on the Connected software.

Q: Does Connected support both Mac and PC users at the same time?
A: Connected is a true cross-platform solution. Mac and PC users can work on a single data file at the same time. Either a Mac or PC server can be used to host the data file.

Q: How long has Connected been in development?
A: Connected will be celebrating it's 20th anniversary in 2011.

Q: Is Connected scalable?
A: Connected will easily accommodate your business needs as your organization grows. Connected installs range from single user to sites with over thirty-five concurrent users.

Q: Can I limit a user's ability to view and/or modify specific areas of the program?
A: Connected lets you specify different levels of access for each user. For example, limit your customer service staff to a few screens and select reports. Any window, report, or function that a user does not have access to, will disappear - they won't even know it exists making screens and menus secure and easier to use.

Q: Is Connected auditable?
A: Connected is a completely auditable system. You can have total piece of mind that your books are accurate and cannot be altered. Transactions are posted in Connected ensuring that entries are locked once they are posted. Each entry that affects the general ledger will also include user information on who added, who last edited, and who posted it.

Q: Can I transfer information from my existing accounting program into Connected?
A: Connected has many import functions to allow the easy transfer of your data from entry level programs. If you are not comfortable with exporting/importing your data, one of our conversion specialists can do it for you.

Q: Is there training and/or consultation available for my staff?
A: Accountek provides online training and consultation using WebEx conferencing technology. By removing the travel time and costs, Accountek can provide effective, low cost solutions to any site in North America.

Q: Is Connected customizable?
A: Connected has many options to customize. Customize your printed forms and save unlimited templates of each form type (quote, order, invoice, packing slip). Customize up to 25 fast key combinations for any report, screen, or posting function using the unique Connected "My Places" feature. Customize up to ten user definable fields on customers, vendors, jobs, and inventory items. Customize eleven custom sales fields that are available and transfer from quote to order to invoice.

Q: Can custom programming changes be made?
A: If programming changes are required, programming services are available. Each company is unique. Programming changes can make a big difference in specific organizations by saving valuable time and increasing productivity.

Q: Does Connected integrate with Microsoft Office?
A: Connected supports integration with both the Mac and PC versions of MS Office. All reports and some screens can be exported directly to Excel so that your information can be received in more detail. A complete list of compatible third part applications, system, and network requirements can be found in the System Requirements chapter of this book.

Q: Can I e-mail invoices and order confirmations to my customers?
A: Connected gives you the ability to automatically generate and e-mail PDF files of forms directly from the data entry screens. You can e-mail forms or screens to customer contacts, vendor contacts, and internal company contacts.

Q: How much customer order and invoice history can I keep?
A: Connected allows can keep as much of the detailed customer sales history that your company requires. Purging data is optional.

Q: Can I have custom pricing of my items for specific customers?
A: Connected supports multiple pricing and discount structures. The custom price table allows specific items to have custom prices and/or percentage discounts. A price table code can be assigned for one or many customers. Connected also supports a global pricing matrix for volume discounts with up to 7 quantity break levels.

Q: Is there a Canadian version?
A: Canadian businesses have enjoyed Connected for many years. The program supports full Canadian standards, proper GST, HST and QST accounting, and spells "cheque" correctly where applicable.

Part II: Getting Started with Connected

Our staff is committed to your business's success and we offer a wide range of services to help your installation and/or conversion go as smooth as possible. A successful installation can be the most important part of your new accounting system. Ensuring that you are prepared and that Connected is configured for your specific business is very important.

There are four key items when getting started with Connected:

Customize and Configure
During your review of Connected before purchase you will have identified the many ways to customize the program for your specific company needs. Configuring specific settings and customizing forms such as customer orders, packing slips, and invoices can be part of this process. Your Connected product specialist will have worked with your company to identify these needs during the decision making process.

In addition to configurable options, you may have also identified specific programming modifications with your Connected product specialist. These are changes to the program that are designed for your company. Changes can range from new report options, in screen changes, custom data transfer, or advanced form modification.

Data Transfer
Typing in all your existing data from your old accounting system is never ideal and generally not required. Data can be exported from your old system and imported into Connected via one of the many easy import options. Information such as your customers, customer

invoices, inventory items and stock levels, bill of materials, vendors, vendor open invoices, general ledger accounts, account balances, budgets, and bank reconciliation can all typically be moved from your existing system into Connected. Your time is valuable so if you can't find the time to do this, contact us to speak with a conversion specialist.

Training and/or Consultation
Properly trained staff and getting hands on help when you need it are always available with Connected. With the use of remote access and conferencing technology we can provide training services and hands on consultation. It doesn't matter where your business is located, our staff can help train and provide the unique services that will ensure a smooth transition to Connected.

Technical Support
It is our job to keep your business running. As a member of our customer support program you will always able to get help if you have a problem. Priority unlimited access to our telephone, fax, and email technical support as well as discounts on programming and training services are all included with your support plan. Helping you do a great job running your business is what our customer support plan is all about.

Part III: Connected Partners and/or Apple Consultants

Connected Partners and/or members of the Apple Consultants Network can be a valuable part of the Connected experience. By providing expert IT services these professionals can assist your company with getting the most value from Connected.

Teamed with the Connected Support Staff, Connected Partners and ACN's can be a valuable asset for the initial installation and periodic program maintenance by providing some of following services:

Data Migration
Assist with the migration of data from your old accounting system. Connected supports many import options and data can be moved from your old accounting system into Connected. Data migration can save substantial amounts of time when your system is being converted and allow your staff to focus on using and configuring Connected.

Link to External Database
Export or link Connected to external programs or databases. Connected can be queried by Excel or FileMaker using an ODBC connection which can help populate external databases or make data available for report writing in other applications.

User Privileges
Configure Connected user privileges. Like your computer, each Connected user should have a unique name and password with user privileges assigned to grant, limit, or block

access to specific parts of the program.

Remote Access
Assist with remote access solutions.   Often users will wish to access Connected from a remote location when travelling or from a home office. Using an IT professional to review and configure remote access solutions will help put an effective and secure solution in place.

Backup
Backup procedures and recovery plans are very important in the day to day operation with Connected. Knowing how your backup system works and testing to ensure that a backup can be retrieved will give you piece of mind in the event of a hardware failure.

Becoming a Connected Partner
Interested in becoming a Connected Partner? Visit our website and complete the partner registration form at www.accountek.com.

Part IV: How do I "Get Connected"?

Step 1: Download a free trial version
Downloading a free trial is easy. Simply visit our website at www.accountek.com and click the "Download Demo" button on the left side. Complete the information form and you will have access to the complete demo software for Mac and/or PC. There is no time limit expiry so take as long as you need. There is a max amount of entries that can be put into the demo - we can't give it away for free!

Step 2: Schedule a free online demonstration with a product specialist
After you have downloaded a free trial one of our product specialists will contact you. We want to schedule a time to review the product and your company needs using an online web conference. All business is unique and we want to make sure that you are confident and well informed when you decide if Connected is the right product for you.

Step 3: Purchase Connected Direct or from a Connected Partner
Well -- this is the easy part. Simply contact us or your Connected Partner to make purchasing arrangements. The product is always available to download so you can have it right away while you wait for your shipment.

Part V: Connected System Requirements

Mac OS Min System Requirements
190 MB of free hard disk space, 1 GB RAM, G4 or greater processor, OS 10.4 or greater. Screen resolution of 1280x900 or greater.

Windows System Requirements
150MB of free hard disk space, 512MB RAM, Pentium III or greater processor, Windows XP Professional, Vista Professional or Windows 7 Professional. Screen resolution of 1280x900 or greater.

Connected Server/Network Configurations

The following section outlines the required server/network configurations based on the platform/client operating system that is accessing the Connected data file.

Mac Clients with a Macintosh Server
2-3 Users: Dedicated Mac OS 10.4 to server data. All connections to server made via AFP.
4+ Users: Dedicated Mac OS 10.4 (or greater) or 10.4 Server (or greater) to serve data. Install and use the Connected ODB Admin server software.

Windows Clients with a Windows Server
2-5 Users: Dedicated Windows XP, Vista Professional or Windows 7 Professional computer to serve data.
6+ Users: Dedicated Windows 2003 or 2008 server.
Mac and Windows Clients with a Macintosh Server:
2+ Users: Dedicated Mac OS 10.4 (or greater) or 10.4 Server (or greater) to serve data. Install and use the Connected ODB Admin server software.
Mac and Windows Clients with a Windows Server:
2+ Users: Dedicated Windows 2003 or 2008 server with Macintosh Services installed

Compatible Third Party Applications

Mac Compatible Third Party Applications
E-mail: Microsoft Entourage (2004, or 2008), Microsoft Office 2011 or Apple Mail
Spreadsheet: Microsoft Excel (2004, 2008, 2011)
PDF Creation: Mac OS X 10.4 or greater

Windows Compatible Third Party Applications
E-mail: Microsoft Outlook XP, 2003, 2007 or 2010
Spreadsheet: Microsoft Excel XP, 2003, 2007 or 2010
PDF Creation: PDF995 software by Software 995. A free or registered version can be purchased from www.software995.com

Notes

- ACCOUNTING
- INVENTORY MANAGEMENT
- JOB COSTING

Software for growing small businesses