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Important Releases: AccountMate 10.2 for LAN & 2020 Payroll Tax Update for Coronavirus Tax Relief!

Across the country and the world restrictions for COVID-19 shelter-in-place are not uniform. At AccountMate Software Corporation, we offer the option for our employees to work from the office or remain at their homes working remotely. This has worked for us. What is clear is that companies are doing their best to adjust to the changes as they present themselves.

I am pleased to say that our recent decision to provide **online classroom training** has been a very viable option for those people that joined us for the AccountMate core product training classes that began last week. One quote from an attendee seems to sum it up, when they wrote *"the flexibility to avoid travelling and still get the benefit to learn about AccountMate functionality was HUGE for me! The information provided during these sessions will definitely help me to be more productive as I continue to use AccountMate to get my work done."*

Another COVID-29 related announcement is our release of an **AccountMate 2020 Payroll Tax Update: Coronavirus Tax Relief Enhancement**. We are providing features to record and track COVID-19 related earnings and tax credit claims. Take a minute to read below if this information is relevant for your business.

Another important milestone this month is that we have released **AccountMate 10.2 for LAN**. This build is the latest update to our long-standing entry level product. See below for more information.

Stay safe and stay healthy,

David Dierke
President & CEO

AccountMate 10.2 for LAN Has Released!

Be sure to check out our [WHAT'S NEW](#) that lists the highlighted features and benefits in AccountMate 10.2 for LAN.

For a quick bulleted feature list here are a few of the enhancements that are included:

- New Customer Address Maintenance Function Facilitates Set up and Maintenance of Customer Address Records
- Search Process for Special Items to be Shipped or Invoiced
- Ability to assign an Inactive Status to a Bank Account

- Bank Account Listings report for the active bank accounts, only for the inactive bank accounts, or for all bank accounts regardless of status
- Email Invoice feature allows File Attachments to the Email
- Option to Suppress Message on Inclusion of Labor/Machine Setup/Teardown Time in Work Order Explosion
- Import AP Invoice allows Post Date to Differ from Invoice Date
- Import Sales Order Supports Special Items
- Show AP Invoice Amount and Balance in AP Automatic Apply Payment
- Show Unit Price in Approve Sales Quote
- New and Enhanced Reports in the Inventory Control module
- Reports Enhanced to Facilitate Receivable Collection and Shipment Preparation

See the webinar scheduled below to learn even more about what features are releasing in AccountMate 10.2 for LAN.

July Webinar: AccountMate 10.2 for LAN



We have scheduled an upcoming AccountMate 10.2 for LAN product webinar. Here is a chance to learn about the new features and benefits introduced in this latest build update.

Sign you and your staff up for this 1-1/2 hour webinar using the link below:

[AccountMate 10.2 for LAN New Features \(Users\)](#)
July 9, 2020 (Thursday) 10:00-11:30am PDT

2 Weeks Left: Extended LAN to SQL/Express Upgrade Promotion

Two weeks remaining for AccountMate LAN Registered Users to be **eligible for FREE Module upgrades when upgrading to the AccountMate 11 for SQL/Express product platform:**

- **LAN Registered Users on Lifecycle Maintenance** – All Product Modules FREE*
- **LAN Registered Users on Standard Maintenance** – All Compiled Modules FREE*
- **LAN Registered Users without current Maintenance** – 5 Compiled Modules FREE*

* The System Manager Module does not qualify for free module upgrade promotion.

Talk with your AccountMate Solution Provider if an upgrade is appropriate for your business. This **promotion end June 30, 2020.**

AccountMate 2020 Payroll Tax Update: Coronavirus Tax Relief Enhancement

The government is offering tax help for taxpayers, businesses, tax-exempt organizations, and others – including health plans – affected by coronavirus (COVID-19). The Families First Coronavirus Response Act (FFCRA) and the Coronavirus Aid, Relief and Economic Security (CARES) Act provide a variety of tax credits and grants to employers in response to the COVID-19 pandemic.

IMPORTANT! Consult your Tax Accountant on the applicability and implementation of the Coronavirus Tax Relief programs to your specific business.

Based on the FFCRA and CARES Act provisions, AccountMate will provide the following features to record and track COVID-19 related earnings and tax credit claims through the [Coronavirus Tax Relief Enhancement](#) package:

- An option to assign **FFCRA Type** to applicable earning code to track paid leave wages related to COVID-19
- A new report called **Federal Tax Credits Report** that provides information on applicable paid wages, health plan, employee retention, and other credit
- A new function called **Federal Tax Credits Claim** that allows users to record claimed credits under FFCRA, employee retention under CARES Act, and other tax credits

- A **Recalculate Employer FICA** utility that allows users to recalculate employer FICA for checks issued beginning April 1, 2020. Based on FFCRA, the eligible employer is not subject to the employer portion of Social Security tax (FICA) imposed on qualified paid leave wages.
- A comprehensive **User Guide** that provides step-by-step instruction on how to install the enhancement package and the recommended setup and implementation.

Take note of the IMPORTANT information below about this enhancement:

- You only need to install the enhancement package if you need to track FFCRA-related paid leave and earnings and CARES Act-related Employee Retention Credit.
- The enhancement package is version/build-specific.
- The enhancement package must be installed together with the PR Tax Subscription Program (Version # 2020.07 or later).
- The tax update includes table structure changes and Remote Views update to PREARN and PRTERN_DESC. This means that if you have modifications or patches affecting these files, do not install the PR Tax Update without contacting [AccountMate Support](#).
- You can install the PR Tax Subscription program without installing the enhancement package if you do not need the FFCRA and CARES-Act-related features. Installing the PR Tax Subscription program using the Check for Payroll Subscription Updates from the Utilities menu (without installing the enhancement package) will not cause any issues unless you have modification or patches that affect the aforementioned table structure changes and remote views update.

If you need this enhancement or have questions, please contact your AccountMate Solution Provider.

2020 Payroll Tax Changes

The 2020 Payroll Tax information and changes (by State and Federal) has become available. As we learn about any Federal and/or State tax changes, you will find them noted on our [website](#).

Friday June 19th (Soon!) Coffee-Chat with APS Payments, V2 Cloud & AccountMate



Grab your coffee and sign up to [join us on June 19th](#) for a virtual coffee break with casual conversations and stories around how companies can innovate, overcome, and thrive in a time of economic uncertainty.

This AccountMate specific coffee break is meant to be an open community forum for customers and partners, and we want to see and hear you! Share the challenges you've been facing, how your company is adapting to accommodate social distancing and any tips you have about working from home.

Join Joe Geusic from [APS Payments](#) as he co-hosts with [V2 Cloud](#) and [AccountMate](#) to guide the conversation with stories of their own. We encourage you to join with audio and video on.

Vertical Solution: AvidXchange



More than ever before, there are more companies with employees working remotely. One of our Vertical Solution Partners, [AvidXchange](#), provides a way for AP and Payment Automation. You have the option to batch and print invoices without having to require any employees to go to a physical office.

AvidXchange provides links to valuable content so you can investigate more about why their type of specific offering is especially relevant now – and ongoing – by adding benefits to clients like you:

- [e-book: Identifying Gaps in Preparedness: How to Bolster Your Business Continuity Plan. - AccountMate](#)

Webinar: RDI Link for Hubspot



AccountMate Registered Users can now enjoy the immense power of HubSpot CRM, integrated with AccountMate SQL! One of the highest-rated CRMs in the world, HubSpot provides: Full-featured management of companies, contacts, prospects, actions, notes, reminders, appointments, integrated email, quotes, sales, inventory analysis, pipeline management, analysis/reporting and more. Internet-based/runs-anywhere, low-cost subscription pricing, world-class support. RDI-Link provides deep bi-directional integration so that HubSpot performs as a "module" of your AccountMate system. Register today by clicking the link below.

[RDI-Link for HubSpot CRM \(Users\)](#)

June 24, 2020 (Wed) 10:00am-11am PDT

Technical Note: Understanding the Company Access Lock Feature

Some AccountMate processes including period-end closing, adding or editing custom fields, and product updates installation require exclusive access to the company database. The Company Access Lock feature is a handy tool that addresses the need to prevent users from accessing or logging into a company. [Article # 1294: Understanding the Company Access Lock Feature](#) is a Technical Note that discusses the repercussions of activating the Company Access Lock feature. It also explains how to activate, use, and deactivate the feature.

Feature Focus Tips (Activity Detail)

Version: AM11.2 for SQL and Express

Modules: AR, RA, SO

TIP: Starting in AccountMate 11.2 for SQL and Express, a **Show Same Customer Records Only** checkbox is added next to the **Activity ► Activity Detail ► Transaction #** field of Customer Maintenance and any customer related Transaction function that has an Activity tab. Marking the checkbox will display only the transaction records for the selected Customer #. In previous AccountMate versions, all transactions from different customers are shown when searching for a transaction from the **Activity Detail** window.

Version: AM11 for SQL and Express

AM10 for SQL and Express

AM9 for SQL and Express

Modules: AR, RA, SO

TIP: The customer transaction records that will be displayed when searching for a transaction from the **Activity ► Activity Detail** window will be based on the **Transaction Type** of the selected **Activity Type**. If the Transaction Type is AR Invoice, RMA, or Sales Order/Quote, only AR invoices, RMA transactions, or sales orders/quotes will be shown, respectively.

Version: AM11.2 for SQL and Express

Modules: AP, PO, RA

TIP: Starting in AccountMate 11.2 for SQL and Express, a **Show Same Vendor Records Only** checkbox is added next to the **Activity ► Activity Detail ► Transaction #** field of Vendor Maintenance and any vendor-related Transaction function that has an Activity tab. Marking the checkbox will display only the transaction records for the selected Vendor #. In previous AccountMate versions, all transactions from different vendors are shown when searching for a transaction from the Activity Detail window.

Version: AM11 for SQL and Express
AM10 for SQL and Express
AM9 for SQL and Express

Modules: AP, PO, RA

TIP: The vendor transaction records that will be displayed when searching for a transaction from the **Activity ► Activity Detail** window will be based on the **Transaction Type** of the selected **Activity Type**. If the Transaction Type is AP Invoice, RTV, or Purchase Order/Quote, only AP invoices, RTV transactions or purchase orders/quotes will be shown, respectively.

Tech Support Tips

Versions: AM11 for SQL and Express
AM10 for SQL, Express, and LAN
AM9 for SQL, Express, and LAN
AM8 for LAN

Modules: PR

Q: I have already set up FFCRA earning codes before installing the PR Tax Update Coronavirus Tax Relief enhancement. Will these earning codes still work after installing the feature?

A: It depends on whether a new earning code or an existing earning code is used.

- If a new earning code was created for each FFCRA Type, then amend the earning code and assign the appropriate FFCRA Type. You can do this only if the new earning code was assigned a Leave earning type and has no transactions before April 1, 2020.
- If a new earning code was created for all or two FFCRA Types, then evaluate whether an appropriate FFCRA Type can be assigned; otherwise, contact the Professional Services Group at psg@accountmate.com for assistance. Note that services are billable.
- If an existing earning code was used with payroll transactions before April 1, 2020, then you can no longer amend the earning code and assign an FFCRA Type. For data fixing, contact the Professional Services Group (PSG) at psg@accountmate.com. Note that their services are billable.

Versions: AM11 for SQL and Express
AM10 for SQL, Express, and LAN
AM9 for SQL, Express, and LAN
AM8 for LAN

Modules: AR

Q: What report should I generate in AR to verify the **Customer Deposits** GL Account ID balance?

A: Run the **Open Credit Report** and select **Payments Only** to get the information you need.

Featured VSPs



Aatrix Software, Inc. produces an integrated Electronic Filing (eFiling) and electronic payroll reporting service for employee Federal and State W-2s and 1099s. In addition to this integrated federal and state W-2 and



ACCU-DART is an inventory control solution, designed to integrate directly with AccountMate in real time. Using radio-frequency scanners, ACCU-DART allows the warehouse staff to instantly and easily update the accounting system,



AMmobile for AccountMate: Sales Tracker is designed for companies that have the desire to track their sales cycle from beginning to end easily, efficiently, digitally, and while on the go. AMmobile for AccountMate: Walk-Up Sales is designed

1099 eFiling service, Aatrix offers AccountMate payroll clients Federal and State payroll forms, more available services for increased payroll reports and a print and mailing out service for employees' W-2s directly or online.

[Learn More](#)

ensuring that all users throughout the organization have the most up-to-date information. ACCU-DART offers a range of options for radio-frequency scanners including Apple/iOS, Android, Windows Mobile, and Worth Data scanners.

[LearnMore](#)

for companies that process same-day sales transactions. This could be selling from a truck, from a will-call window, at a trade show, in a retail store, or while walking around a showroom floor with the customer.

[Learn More](#)



INFOtrac

INFOtrac Customer Relationship Management (CRM) manages and reports on every interaction entered for a prospect, client, supplier, contact, or branch office. It will even schedule the next appropriate interaction—enabling exceptional account management and customer service. With just a glance, you can view all the past interactions with each contact providing the ability to track activity, issues and interactions with all your clients. It will even manage your meetings, phone calls, e-mail and daily tasks.

[Learn More](#)



Nowsight™

Leading technology to take dashboards, analytics, business intelligence, and metrics to the next level. Nowsight™ stitches together all of your data sources to create a real-time, always-on, view of your company, that you can access 24/7/365. We help get the results you need to grow your business using powerful visualizations, prescriptive insights, and automated alerts. Nowsight™ gives you the information you need to increase revenue and profitability.

[Learn More](#)

TrueCommerce

EDI integration with your AccountMate business management solution provides the ability to seamlessly format your EDI Transactions to comply with your trading partners' requirements. This embedded integration is quick to implement and seamlessly supports a wide range of EDI documents. Delivered as a complete, managed services solution, TrueCommerce EDI for AccountMate offers robust functionality and unparalleled scalability.

[Learn More](#)

Quick Links

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