BizSight 365 Quick Start

WELCOME TO BIZSIGHT 365. WE HAVE PUT TOGETHER A FEW TIPS TO HELP YOU ACCELERATE YOUR BIZSIGHT 365 SOFTWARE IMPLEMENTATION.

All your business software is running on the Microsoft Azure Cloud. You will be accessing this using Internet Explorer from your device or PC. Other browsers like Microsoft Edge, Chrome, Fire Fox, and Safari are currently not supported. These will however, be supported in our next BizSight version anticipated later in Q4 2017.

When you launch the BizSight 365 URL (http://bizsight.biztechnologies.co) for the very first time a small plug-in is automatically downloaded and installed on your device. Please accept the defaults if you are asked to install the Silverlight plug-in.

During the signup process, you configured your company providing some basic company address and industry information. This information is all you need to get started!

VALIDATE YOUR CONFIGURATION, USERS, LOGO

This will allow you to establish or accept the default numbering scheme as well as the default accounts that will be used. It is recommended that all fields have values.

- Choose Settings from the Company homepage and navigate to the Transaction Numbers and System Accounts tabs. Make the necessary changes or accept the defaults. If accounts are missing make the best guess or use the account called 'ask your accountant'.
- The most common payment terms, and other codes that are typically used will already be available. These are available under the Company homepage and Support List selection. Make the necessary additions or changes to the desired codes. These can also be added later, during transaction entry.
- You can also add additional users and grant them rights through the Manage Users and Roles in the Company homepage. Each user in the system will require a valid license. When a new user is added, that user will receive an email notification with a link to access BizSight 365.
- If your Company Logo was not defined during the initial company creation process, you can add this under the Reports tab of Settings.
- If you are operating outside the United States, please select your home currency, Track VAT, and multi-currency in the Accounting tab of Settings. A new currency can be added in the Accounting homepage, Foreign Currency selection.

BizSight 365—Financial Accounting or Manufacturing Software for Small Business

- Validate Your Configuration
- Add Customers and Items
- Importing Data
    - From Microsoft Office Accounting
    - From QuickBooks
    - From an Excel Spreadsheet
    - Generate an Invoice
- Manufacturing
- Add Work Orders and Report Activity
- Additional Online Resources

ADDING CUSTOMERS AND ITEMS

Customers and Items can be added one at a time or imported in from a Excel spreadsheet. Customers migrating from Microsoft Office Accounting can accomplish all this in one step using the migration wizard.

♦ Navigate to the Customer homepage and add a customer from the menu. Add the necessary customer and address information for your customers.

♦ If sales tax or VAT needs to be collected, add this within the Accounting homepage under sales Tax groups or codes. Enter the appropriate sales tax percent and add this to the customer. If you have turned on VAT in Settings, the Sales Tax selections will now say VAT.

♦ Add items from the same menu. Add inventory, non-inventory or service items that you will be selling on an invoice or purchasing from your vendors.

IMPORTING DATA

To import accounts, customers, vendors, and items navigate to the Company home page and choose Import from Microsoft Office Accounting (MOA), Import from QuickBooks or Import from Excel.

♦ It is recommended that the industry selection was 'None' during company creation. This disallows an industry sample Chart of Accounts to be created before data import– as you will be importing these!

♦ Navigate to the Customer homepage and select Import from the appropriate source.

♦ To import from Microsoft Office Accounting (MOA), you will need to launch BizSight 365 from the machine running MOA. Follow the wizard. Additional instructions can be found online.

♦ To import from QuickBooks, you will need to first export your master data out of QuickBooks into their .IIF format. Follow the wizard. Additional instructions can be found online.

♦ To import from an Excel spreadsheet, data will first need to be in our recommended format. Sample formats are available online for accounts, customers, vendors, and items. Download these templates to your local machine and add the necessary data.

GENERATING AN INVOICE

You are now ready to generate and print or email an invoice. If these are done in the above mentioned sequence, you could be generating an invoice within a few minutes of installing the product.

♦ Navigate to the Customer homepage and select Invoice from the menu.

♦ Select the customer that was added. You can also enter a new one here and choose the quick add (just name) or add customer to add all the necessary details for the customer.

♦ Payment terms, shipping methods, and other fields can be selected or added during entry.

♦ Select or enter the products or services that you will be invoicing your customer.

♦ Choose the Preview icon on the invoice menu to preview the invoice. Choose Print icon from the invoice menu to print to a printer.

♦ To Email the Invoice through Outlook, choose the email icon. If the email address is defined in the customer record the outlook message with a .pdf attachment will be ready to be emailed out. You can further modify the text before it is sent. Additional email options are available in the Email tab of Settings.

MANUFACTURING

If you are using the manufacturing side, you will need to define your Bills of Materials (BOM) and at least one Operation at the item level before you can start creating Work Orders.

♦ To add a manufactured item, mark the 'Is Manufactured' field. This will turn on the Bill of Material, Operations, and Cost tabs within the item master.

♦ An additional Work-In Progress account will be required if the item is manufactured.

♦ Choose the component material that is required in the manufacture of your item. All component material should first be defined in the item master before they can be added as a component.

CREATING WORK ORDERS IN MANUFACTURING

Once the Bill of Material and Operations are defined against an item, you are ready to create work orders and process activity against them.

♦ Navigate to the Manufacturing homepage and select New Work Order. Select the item that you wish to manufacture, quantity, and date this is due.

♦ A Work Order can be printed with the necessary work instructions, material, and operation sequences.

♦ Material Issues and completions can be done in the Production Activity selection.

♦ If timesheet information needs to be recorded to capture labor, this can be done in the Employee Activity menu selection. The Employee Time application is also an alternative to capture labor like a time keeping system.

Here are some additional document and video links to accelerate you using BizSight 365:

♦ BizSight 365 Online Help

♦ Migrating from Microsoft Office Accounting 2009

♦ Migrating Master Data from QuickBooks

♦ Invoice Customers and Receive Payments

♦ Record Expenses and Pay Vendors

♦ Manage Purchase Orders and Receiving

♦ Manage Bill Of Materials and Operations