



## What's New

Happy New Year! This is a time to reflect on the successes in 2023 and the goals/plans for 2024. We continue to look for opportunities to Streamline, Standardize, and make our systems Bullet Proof as we serve our clients.

Our security offering includes some standard safeguards as well as some new tools that address new threats. In recent newsletters, we shared our new M365 security tool to address the non-stop attacks.

It's official! Our IL company has merged into our AZ company. Same family ownership, amazing teams, focus, serving your computer-related needs through education and great support!

- Catherine Wendt

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**January 2024**



## Business Computer Safety 101

In November, I sat in a meeting of business owners who had gathered to spend a full day focused on their business and running it well. The pre-arranged discussion materials were focused on IT safety, security, and in my world, 'IT 101' requirements for anyone running a business in our technology age. Wow! I was blown away by what I heard and some of the responses to the materials.

I feel like I've written on this topic to the point where many of our clients might say 'Again?' to running this article, but I think I might be off-base. You are focused on running your business, so perhaps I haven't been as 'in your face' as I think, so here we go!

Business Computer Safety 101 – Let's review a few basics, then layer on the important topics for you and your IT support team, whether that's internal, with us, or with an outside IT team.

**MFA, Multi-Factor Authentication:** This basically means, just because you have a password, you have to prove

it's really you! Authenticate yourself in at least two ways, so if the password is hacked, we can still confirm if it's really you or not. We've written various articles on this, we have a short flyer with info, insurance companies have 'forced' you to do this in order to write a Cyber security policy, and so on. We recommend a 'strong' password, which basically means at least 8 characters made up of upper case, lower case, numbers, and a special character. Yes, you already hate this, I get it! The problem is, you use something like a pet's name, an anniversary date, your company's street address, or something similar. Well unfortunately all that's available on LinkedIn and Facebook, so with the sophisticated tools hackers have available, or an inexpensive purchase from the Dark Web, they have your password! So having a second form of authentication GREATLY reduces the risk of being hacked. Requesting a two-digit code that comes directly to your cell phone means you can prove it's you who entered the password in the

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first place. And, it shows you where the request was made, so make sure it's the right continent!

The next topic in our meeting was **Cyber Security insurance**. I was blown away by how many companies did *not* have this insurance coverage. Small businesses are THE number one target for hackers. You have cash on hand to cover payroll, share passwords (Ugh!), lack MFA enforcement, have older equipment that is often not patched, and often lack security protocol. And you think you're 'too small' to be a target, but it's a numbers game. If their success rate is 20%, the more businesses they target, the more money they can make!

We have a very smart, very thoughtful client with excellent systems in place who was tricked into over \$750,000 of fraudulent vendor payments. Hackers also use **Social Engineering**, preying on your wonderful, good, sincere team, tricking them! It's sinful to say the least! I've said it before; I can't get past your receptionist and I'm an existing vendor! When it comes to email, the very same person on your team is not as suspicious and takes the bait. I would add that this client had Cyber

Insurance so all the experts they needed were at their disposal.

Let's talk about **computers**, next. At a minimum, you need a business-class anti-virus/EDR (Endpoint Detection & Response) solution in place with continuous updates. Next, an automated patch management solution that automatically installs Microsoft-specific security updates, other MS updates, and even third-party patches. When vulnerabilities are found, these vendors provide patches to keep things current and safe. As a Managed Solution Provider (MSP), we review the patches each week and any that are security-specific or stable are approved and pushed out, automatically, to all computers we manage. In addition to keeping computers patched and safe, this greatly cuts down on the time to do maintenance!

Anyone with M365 should have additional **backups** in place. These cloud backups cover the email as well as documents in SharePoint and OneDrive. For specific software programs installed on the computer, there are additional backups solutions available.

At the next level, we provide security

tools that monitor activity on the computers, as well as the M365 accounts, and enforced MFA. M365 is a HUGE target! If a bad actor can get in one of the company's M365 accounts, it can hijack the account, create rules, even allow email to go out looking like it was from you, but it isn't. Other advanced tools include the award-winning Sentinel One, DNS filtering, use of InTune to roll out solutions and services, and of course, our Dark Web monitoring. There's more, but this gives you an idea of the types of tools in use and their importance. As your partner, we take our responsibilities seriously so you can focus on running a great company! -CMW

*"You don't rise to the level of your goals, you fall to the level of your systems."*

— James Clear

*Is Everyone on the Boat?* by Fred Johnson & Paul Metler

We were so blessed to find Dr. Fred through some wonderful contacts. After a 'feisty' first interview, Dr. Fred and Chris began a one-on-one coaching relationship. In early 2023, we began a 15-month journey with seven of our team members on a Leadership Training program with Dr. Fred.

Taking the Initiative One Leadership concepts, this book follows the story of a special boat trip to a very special destination. As the story unfolds, we have an exciting vision by Sam. The journey continues as more passengers board along the way.



For a successful journey to reach the destination, Sam, the visionary, needs some other skills. He encounters Primary Leaders,

**Book Nook**

Thoughtful Leaders, Bandwagoneers, and even a Naysayer. The book explores the different roles as they relate to the journey, mixed in with some business applications and nice summaries of what each group brings to the journey, what drives them forward, and how they are engaged with the bigger vision.

The book is clear that these are generalizations, and sometimes people contribute in more than one category. As we think through how our team members contribute and where they are on their growth journey, it was interesting to think through the combination of our Leadership training, our overall team members, and how these 'puzzle-pieces' come together. Strongly suggest bringing this back to your leadership team and considering who on your team falls into these categories. Definitely Recommended! - CMW





## Important Updates

- Are you traveling out of the country? Let us know so we can open up access while you're there, then lock it back down when you return.
- 'Perpetual Microsoft' licenses are the old ones you bought years ago. Microsoft is dropping support for these. Use your M365 licenses and upgrade your local computer if needed. We're here to help!

## Microsoft Licenses—Annual

Back in February 2023, Microsoft made some significant changes in its licensing. We held a webinar for all of our clients to talk through the changes and their impact. We also sent each of you a list of the licenses you had at that time for you to review.

You might recall that Microsoft was announcing a price increase, as well as a change in their subscription model. Licenses would have an annual renewal (paid monthly), or you could keep them monthly but with a 20% premium! Many of you opted for the annual renewal at the Basic, Standard, or Premium levels.

Well, we're coming up on the one year mark! This February, a LOT of you have Microsoft licenses that are renewing. This is a good time to review what you have, how many might be 'parked' and if any are candidates to not renew.

It's our plan to get you the list of your licenses so you can review them. In the meantime, you can reach out to Liz and let her know if you'd like the list now, otherwise watch for our update. — CMW

## Backups—A Sad Story

Backups are SO important. For some of our clients, we handle all their IT; others, we handle all their Sage 100 Contractor needs; and for others, we handle both the IT and Sage 100 Contractor.

We recently learned of a client who had a data compromise and they were hit with ransomware. Their IT team used a quality backup solution, but unfortunately, one of the data drives was not backed up as expected, and it was their S100C data. So heartbreaking!

As upsetting as this was, it is a reminder on the importance of having good backups, AND testing data recovery from time-to-time. For critical software such as estimating, accounting, project management, whether on your computers or in a cloud solution, we recommend running a test recovery, maybe on a bi-annual basis, or at least annually. This is usually an additional charge by the IT team, but in this business environment, it would be money well spent! - CMW

## Scan Documents with your Cell Phone

There's an option to use your cell phone and the OneDrive app to scan documents directly to SharePoint Libraries. The idea is to use the OneDrive App on your phone and select the camera. Scroll through the scan types at the bottom of the screen (whiteboard, document, business card, etc.) and click on the camera icon to capture the image. You may need to give OneDrive permission to access the camera. We're intrigued so we'll do some testing.

In the meantime, Larry found an app called Tiny Scanner (he says it's a few dollars a year). He scans documents, music, anything he needs, then he can choose OneDrive, name it, and save to a folder. In this app, it adjusts the image to the full page, so it's been great for music! - CMW



## Shiny New Gadget Of The Month:



### Shokz OpenRun Headphones

Start the year with an enhanced audio experience, the Shokz OpenRun Headphones – an ideal choice for those who value both innovation and practicality. Priced at \$129.95, these headphones redefine the way we enjoy music, and they come with an added bonus – they're waterproof.

Available in two different sizes, Shokz OpenRun ensures a personalized and comfortable fit for every user. With eight (8) hours of battery life and easy commands such as play, skip, pause, and back-a-track, you can enjoy music, calls, audiobooks, and podcasts all day long.

The standout feature of the headphones is its waterproof design, elevating the headphones to a new level of versatility. Whether it's a run in the rain or a high-intensity workout, these headphones are built to withstand the elements, providing a reliable audio experience no matter the conditions.

The open-ear design not only delivers a premium audio experience but also prioritizes safety during outdoor activities. Stay immersed in your favorite tunes while remaining fully aware of your surroundings. Shokz OpenRun is not just headphones; it's a lifestyle upgrade, combining style, functionality, and durability.

Learn more at <https://shokz.com/>



# CONSTRUCTION CORNER



## S100C Version 25.2.162+

Beginning with version 25.2.162 (there's another update after that, and we're expecting the Tax Table upgrades soon), there are new features, but there are some unexpected issues, too.

A reminder that version 25.2.x requires Server 2016 Operating System or newer (cannot install on a server running 2012 R2). And it is NOT compatible with SQL 2022; you have to stay on 2019 for SQL Express.

That's the tech info, now here's the rest. One of the new features is custom Pay Types. I'm sure Sage has added these because of the user requests they've received, but we've recommended using the Absence field for special tracking such as Bereavement time, and similar. There are reports for this tracking, too.

The Custom Pay types they added are creating some unexpected issues with Liberty Reports and with some Power BI reports. It has to do with the way they handled the new tables ('0' versus 'null' choices), but in the end, it's causing issues.

If you use Liberty Reports, you might want to hold off on the latest upgrades until Sage or Liberty Reports comes up with a resolution. You'll have a little 'wiggle' room when rolling out the 2024 Federal tax tables, at least a few weeks. We'll keep you posted if we learn anything new on this one. — CMW

**LOTS of changes in various states. Things to look for include new rules for vacation and sick time; new requirements for retirement plan offerings; update rates for Paid Family Leave, Disability, and State Unemployment; and more!**

## S100C Changes – Audit Errors

We've run into some unexpected audit errors and they are related to a new feature in the 1-8 screen. I'll bet you haven't been in that screen since you went 'live' with the software! Among other things, the 1-8 screen is where you can activate the alert when the posting period doesn't match the date, for instance.

*'Sage introduced an option to change the posting period or the checking account [for payroll]...'*

There's a new check box that automatically changes the posting period to match the date in the record – not our favorite! One of the great features of S100C is that you can control the posting period regardless of the date! If you have a January 1st VISA statement, you can enter it to December which is where all the costs were anyway; and many other important controls.

This new feature is also causing some audit errors. We recommend you uncheck the box in the 1-8 screen that automatically sets the posting period from the transaction date and take back control of your posting periods! Any questions, let us know. — CMW

## Payroll Records – Wrong Posting Period, Wrong Checking Account

Once in a while we'll get a call about a payroll that has been posted to the wrong checking account, or to the wrong posting period.

Back in the 'old days,' this meant you had to void and re-create the entries for wrong posting period. For wrong checking account, you could make some journal adjustments instead, but it was painful!

Several versions ago Sage introduced an option to change the posting period or the checking account without these headaches. You need Exclusive Access, then from the 5-2-2 screen, choose the option to make the changes. Select the records that need to be fixed and follow the prompts. Review the selection, then let it run!

This is a great timesaver. If you'd like some help, happy to get on a call and assist, just be sure you can get Exclusive Access. - CMW

## Progress Billing Corrections

We're getting more and more of these calls. The AR invoice has been voided but the Progress Bill is still in place. Turns out the person has voided the 3-2 record instead of the source record in 3-7. This 'disconnects' the link between the two records causing havoc in your job billing and ability to change a previously posted progress bill.

It's important to follow the rules – in Sage, it is usually best to go to the source record (there are a few exceptions, but not in Progress Billing) to void the original Progress Bill, make corrections, and re-post when there are changes in the schedule of values billing or in the retention.

Also, there are some great secondary retention options for contracts where after a specific amount of billing, the retention is reduced. More in our November 2023 newsletter.

Any questions or if you need a refresher, let us know! - CMW



# M365 Education Station

## Visio—A Brief Overview

Visio is Microsoft’s tool for visual collaboration. In other words, it’s for making diagrams, flowcharts, office plans, and other organizational charts.

## How Does Visio Work?



It’s a drag-and-drop drawing tool. Once it’s open, follow these 4 steps to make a visual masterpiece!

1. Select and open a template (or start from scratch!)
2. Select shapes from the left panel
3. Arrange and connect shapes
4. Add text to shapes and/or connectors

## Web vs. Desktop



VS.



### Web App:

- Opens from M365 online portal
- Included with M365 subscription
- Simplified version of the app
- Automatic updates

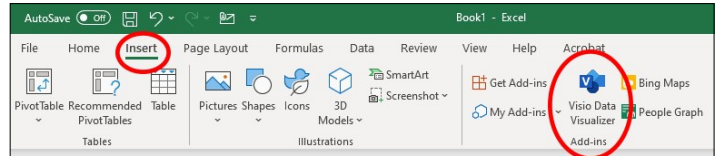
### Desktop:

- Opens from a desktop app
- An add-on cost
- More shapes and templates than web
- Updates need to be installed

## Visio in Excel



Visio is also an add-on in Excel! Diagrams, flowcharts, and other visuals can be created in Excel without opening the Visio app. If you’re using M365 and Office is up-to-date, no additional steps are needed to give it a try. The picture (below) shows where to find it.



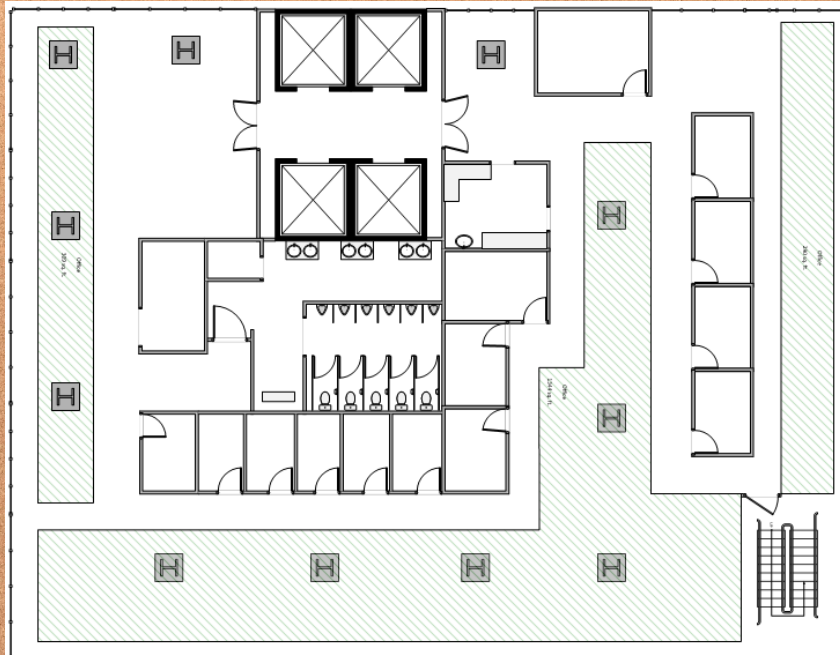
## What Can I Make?



What data needs to be visualized? Here’s a list to jumpstart your imagination!

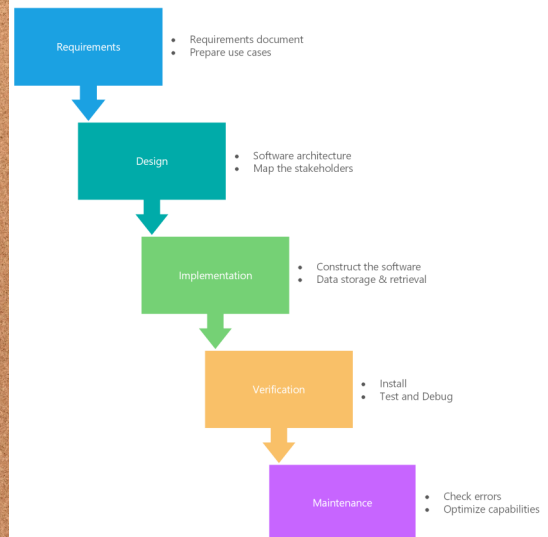
- Flowcharts
- Organizational charts
- Floor plans
- Network diagrams
- Outline a process and its steps, like sales
- Schedules
- Gantt chart

## Visio Idea Board



### SDLC WATERFALL PROCESS

WATERFALL MODEL OF SOFTWARE DEVELOPMENT LIFE CYCLE





## How Did They Do It? Sterling Commercial Roofing

In a recent interview, Kevin Froeter, president of Sterling Commercial Roofing, shared key insights into the company's journey, challenges, and success-driving philosophy.

With roots tracing back through three generations in the roofing business, his commitment to excellence spans many years. His belief that the only company surpassing Sterling today will be Sterling tomorrow underscores the company's dedication.

Upon acquiring Sterling Commercial Roofing in 2008, he prioritized employees and customers, recognizing that their well-being would naturally lead to financial success. This approach, centered on customer satisfaction and employee focus, has been pivotal in the company's achievements.

Reflecting on challenges, he highlighted supply chain issues in the past year. To overcome material delays, the company took decisive actions, including a 300% inventory increase and strategic material sourcing. This adaptive strategy showcased resilience and unwavering commitment to customer satisfaction.

Sharing a compelling story from a project at Rock Island Arsenal, he emphasized the company's rare commitment to rectifying mistakes. Despite an error, they dismantled

and replaced the roof at no cost to the owner, solidifying their position as the preferred roofing contractor for Rock Island Arsenal.

When discussing Syscon resources, he praised the Sage 100 Contractor system for its positive impact on the organization. While initially challenging, once mastered, it provided invaluable information. He commended Syscon for their support in setup and problem-solving.

In conclusion, he reiterated the company's commitment to constant improvement. The mantra that the only company better than Sterling today will be Sterling tomorrow encapsulates the company's ethos. Their pledge to strive for excellence ensures they remain a leader in the industry, navigating a dynamic business environment with a focus on customer satisfaction, employee well-being, and continuous improvement.



**Kevin Froeter,**  
President

### Fast Facts

**Location:** Sterling, IL  
**Specialty:** Roofing  
**Founded:** 1986  
**Professional Affiliations:** CRCA and CRCA Health and Safety Committee

**Read more at [www.syscon-inc.com/how-did-they-do-it](http://www.syscon-inc.com/how-did-they-do-it)**

**Are you interested in having your story featured? Let's talk!**

## Upcoming Events

**Event:** Field Time Made Simple and Sage 100 Contractor, webinar

**Date:** Thursday, January 25

**Time:** 1 p.m. CST

**Register:** [www.syscon-inc.com/events](http://www.syscon-inc.com/events)

*Did you know?*

**This year is a leap year!**

## Proud Members



## Proud Partners



**We love this stuff!**  
 We are committed to helping businesses use technology to run their organization successfully and profitably.

This monthly publication provided courtesy of Catherine Wendt, President of Syscon Inc.

