

# Business Technology Consulting





ACCOUNTING • AUDIT • TAX • TECHNOLOGY | 1947 - 2017

Waukesha, WI based CPA Firm

Waukesha & Appleton, WI and Atlanta, GA

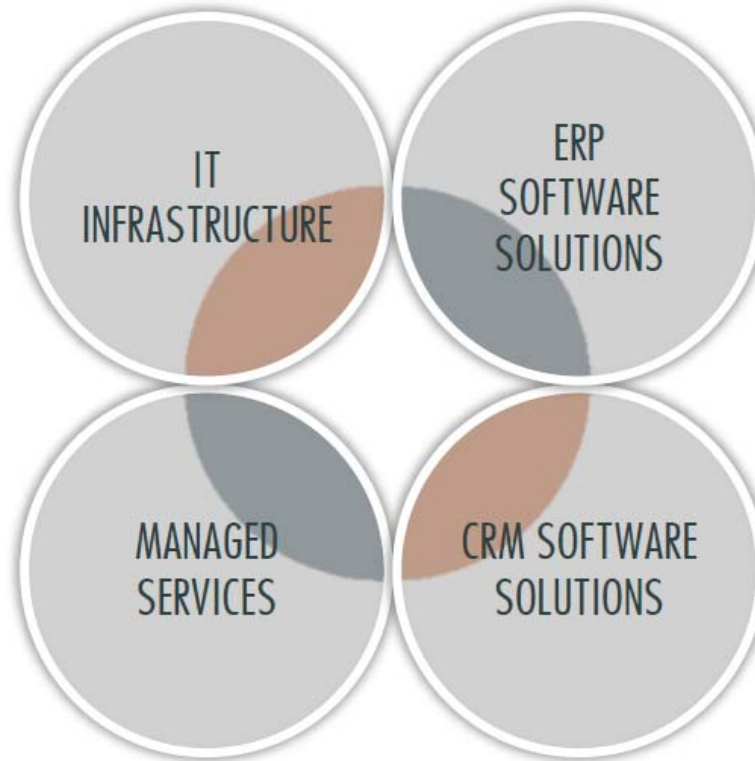
Over 70 years in business and over 50 employees

Tax, Audit, M&A, Technology Services

<https://www.chortek.com/about-us-business-advisory-firm/>



servers and virtualization  
security and remote access  
mobile workforce solutions  
back-up and failover systems



implementation/training/support  
dashboards, alerting, reporting  
system selection/requirements  
Sage, JobOps

call center technical support  
patch management  
back-up administration  
3<sup>rd</sup> party software support

implementation/training/support  
Integrated marketing campaigns  
ERP integration  
Sage CRM

# Firm Overview | Technology



System Selection and Requirements Definition  
Software Implementation, Training & Support  
Custom Programming/Reporting (MS Access/MS  
SQL/MS Excel, Crystal Reports)  
Project Management

<https://www.chortek.com/information-technology-consulting/>

Software Services



Managed Network Services

Remote Access Solutions

Network Design Services

Cyber Security

Backup and Disaster Recovery



Networking/Infrastructure



# Sage 50

(formerly Peachtree/Quantum)

# Sage 100

(formerly Sage MAS 90/200)

# Sage BusinessWorks

[https://www.chortek.com/information-technology-consulting/sage\\_business\\_management\\_systems/](https://www.chortek.com/information-technology-consulting/sage_business_management_systems/)

# Sage CRM

# JobOps/ Sage 100c Manufacturing

The Sage logo consists of the word "sage" in a lowercase, green, sans-serif font.

Authorized Partner

# Sage Products

The CHORTEK logo features the word "CHORTEK" in a bold, uppercase, sans-serif font. The letter "O" is stylized with a circular graphic element. Below it, the text "CPAs | BUSINESS ADVISORS" is written in a smaller, uppercase, sans-serif font.

CHORTEK  
CPAs | BUSINESS ADVISORS

ACCOUNTING & AUDIT | TAX PLANNING & STRATEGIES | TECHNOLOGY CONSULTING | BUSINESS ADVISORS, MERGERS & ACQUISITIONS

- Implementation
- Training
- Personalization
- Report writing
- Upgrades
- Help Desk (phone and email)



## Sage Services





Steve Krueger, Principal



Mark Booth, Sr. Consultant,  
ATLANTA, GA



Gail Warren, Sr. Consultant  
ATLANTA, GA

BTC Team







Sue Wolf, CPA, Sr. Consultant



Debby Hanson, Sr. Consultant



Debra Scheider, Team Administrator

**BTC Team**



- Dedicated Account Manager
- Annual Sage / Business Review Meetings
- Dedicated Help Desk phone number and email
- Annual User Group Meetings
- Management of your Sage BusinessCare plan and related integrations

## Client Benefits



- Support Desk
  - “Tickets” your request, distributes to consultants
  - 877-526-8226
  - [support@chortek.com](mailto:support@chortek.com)
- Chortek Users Group (Appleton, Waukesha)
- Newsletters – bi-monthly
  - (Jan, March, May, July, Sept, November)
  - [www.chortek.com/resources/sage-software-technology-newsletter](http://www.chortek.com/resources/sage-software-technology-newsletter)

# Chortek Support



- Sage 100 for Distribution Companies
  - <https://www.chortek.com/wp-content/uploads/2019/02/Sage-100cloud-for-the-Distribution-Industry-2.19.19.pdf>
- Sage 100 for Manufacturing Companies
  - <https://www.chortek.com/wp-content/uploads/2019/02/Sage-100-for-the-Manufacturing-Industry-2.19.19.pdf>

Industry Expertise



- CRM
  - [www.sagecrm.com](http://www.sagecrm.com)
- Sales Tax, Exemption Certificates
  - [www.avalara.com](http://www.avalara.com)
  - [www.avataxrates.com](http://www.avataxrates.com)
- Sage Alerts and Workflow
  - [www.sageknowledgesync.com](http://www.sageknowledgesync.com)
- Warehouse Management/Bar Code
  - [www.scanforce.com](http://www.scanforce.com)
  - [www.scanco.com](http://www.scanco.com)

# Sage Integrations



- Sage Inventory Advisor
  - <https://www.sage.com/us/sage-inventory-advisor>
- Shipping - Starship
  - <http://www.vtechnologies.com/integrated-shipping-software>
- Sage Intelligence
  - <https://www.sageintelligence.com>
- Credit Card Processing
  - APS | [www.apsmerchants.com](http://www.apsmerchants.com)
  - Paya | <https://paya.com/merchants/>

# Sage Integrations



- 100c Manufacturing
  - JobOps – Make/Install/Ship
  - [www.jobops.com](http://www.jobops.com)
- EDI
  - Kissinger [www.kissingersolutions.com](http://www.kissingersolutions.com)
  - TrueCommerce [www.truecommerce.com](http://www.truecommerce.com)
- Website integration
  - WebServices from Sage
  - [www.websitepipeline.com](http://www.websitepipeline.com)
  - [www.kissingersolutions.com](http://www.kissingersolutions.com)

# Sage Integrations



- Sage Customer Portal

<https://customers.sagenorthamerica.com>

- Sage City

<https://sagecity.na.sage.com>

- Sage Sessions

[https://get.sage.com/NPS\\_18Q2\\_C4L\\_NAM\\_EVRE\\_NPS\\_SageSessions/](https://get.sage.com/NPS_18Q2_C4L_NAM_EVRE_NPS_SageSessions/)

- Chortek Technology Newsletter

<https://www.chortek.com/resources/sage-software-technology-newsletter/>

- Sage Document Library

<https://www.chortek.com/sage-software-document-library/>

## Resources





- ITA – Information Technology Alliance

<https://www.italliance.com>

- 90Minds

<https://www.90minds.com>

- RSM Alliance

<https://www.chortek.com/about-us-business-advisory-firm/member-rsm-us-alliance/>

# Associations



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Waukesha – Corporate Headquarters

Appleton – Technology Consulting

Atlanta, GA – Technology Consulting

