

# Business Software Consulting



sage Partner

**CHORTEK**  
CPAs | BUSINESS ADVISORS



Waukesha, WI based CPA Firm

Waukesha & Appleton, WI and Atlanta, GA

Over 70 years in business and over 50 employees

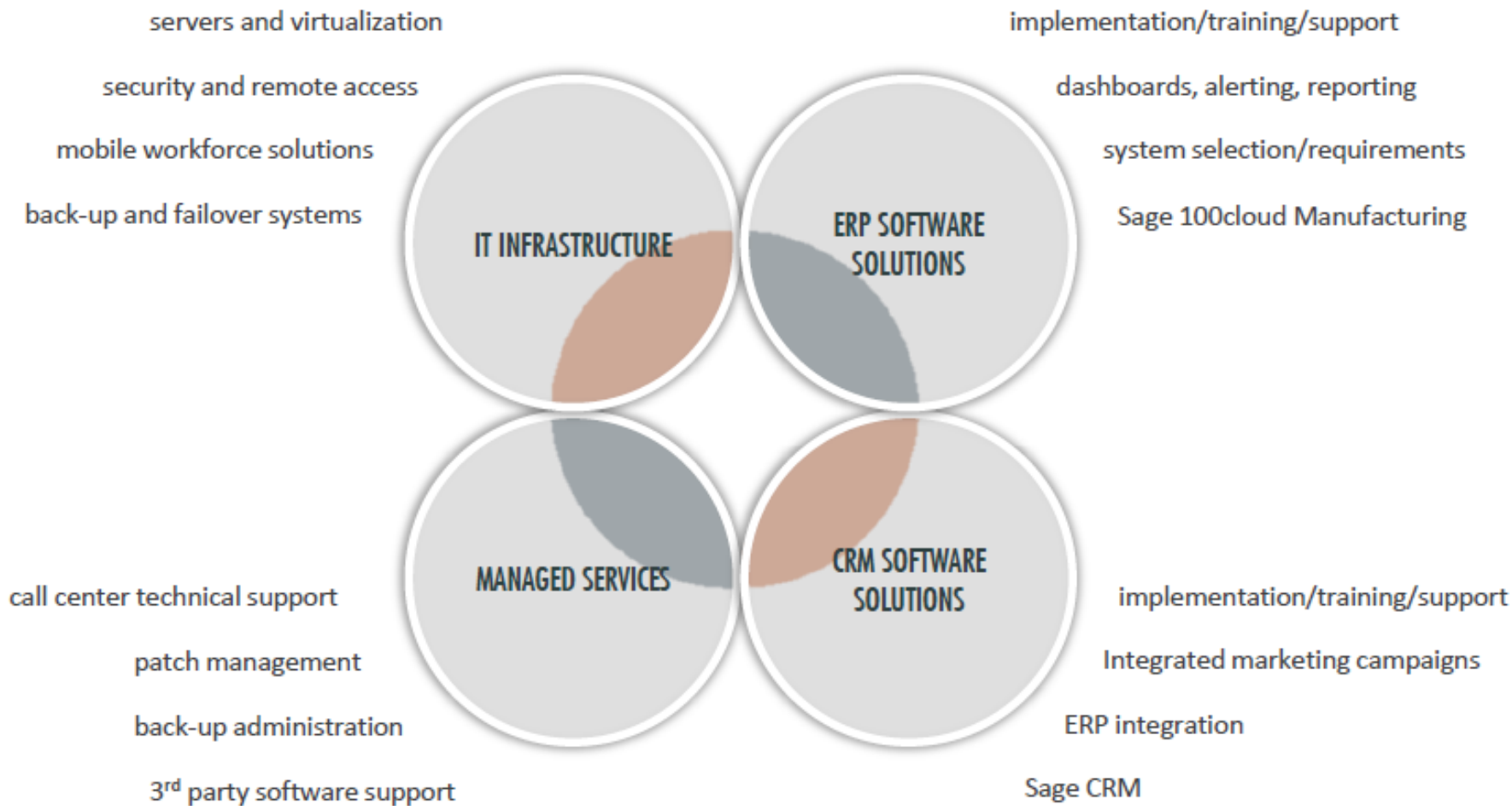
Assurance & Accounting, Tax Services,

Business Software Consulting

& Managed IT Services

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





# 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/business-software-consulting/>

Software Services



Managed Network Services

Remote Access Solutions

Network Design Services

Cyber Security

Backup and Disaster Recovery



Networking/Infrastructure



**Sage 50cloud**  
(formerly Peachtree/Quantum)

**Sage 100cloud**  
(formerly Sage MAS 90/200)

**Sage BusinessWorks**

<https://www.chortek.com/business-software-consulting/sage-products/>

**Sage CRM**

**Sage 100cloud  
Manufacturing**

**sage Partner**

**Sage Products**

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

The logo consists of a green rounded rectangular border with a pointed right side. Inside the border, the word "sage" is written in a lowercase, sans-serif font, and the word "Partner" is written in a bold, uppercase, sans-serif font, both in a bright green color.

**sage Partner**

Sage Services

**CHORTEK**  
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Steve Krueger, Principal



Mark Booth, Director – Consulting Services  
ATLANTA, GA



Gail Warren, Sr. Consultant  
ATLANTA, GA

BSC Team







Sue Wolf, CPA, Sr. Consultant



Debby Hanson, Sr. Consultant



Debra Scheider, Team Administrator

BTC Team



- Dedicated Account Manager
- Annual Sage / Business Review Meeting
- Dedicated Help Desk phone number and email
- Annual User Group Meetings
- Management of your Sage Business Care 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 User Group
- Newsletters – bimonthly
  - (Jan, March, May, July, Sept, November)
  - <https://www.chortek.com/business-software-consulting/bsc-resources/sage-software-technology-newsletter/>

Chortek Support



- Sage 100cloud for Distribution Companies
  - <https://www.chortek.com/wp-content/uploads/2019/10/Sage-100cloud-for-the-Distribution-Industry.pdf>
- Sage 100cloud for Manufacturing Companies
  - <https://www.chortek.com/wp-content/uploads/2019/10/Sage-100cloud-for-the-Manufacturing-Industry.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



- 100cloud Manufacturing (formerly JobOps)
  - 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 Customer Portal  
<https://customers.sagenorthamerica.com>
- Sage City  
<https://sagecity.na.sage.com>
- Sage Summit  
<https://www.sage.com/en-us/company/events/sage-summit/>
- Business Technology – Sage Software Newsletter  
<https://www.chortek.com/business-software-consulting/bsc-resources/sage-software-technology-newsletter/>
- Sage Document Library  
<https://www.chortek.com/business-software-consulting/bsc-resources/sage-software-document-library/>



- 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, WI – Corporate Headquarters

Appleton, WI – Business Software Consulting

Atlanta, GA – Business Software Consulting

