

October 2023

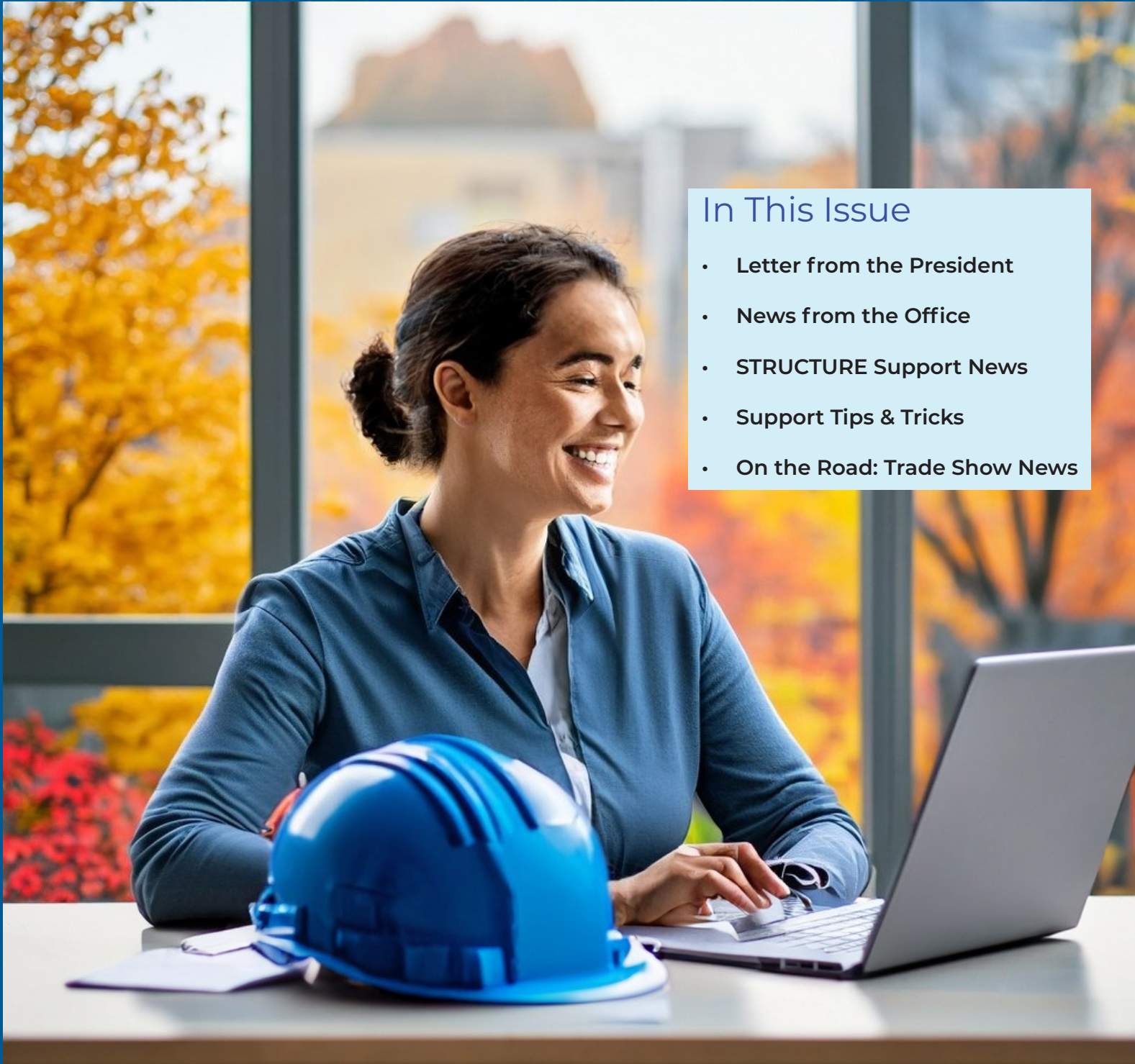


Under Construction

Quarterly Newsletter for STRUCTURE Blue Users

In This Issue

- Letter from the President
- News from the Office
- STRUCTURE Support News
- Support Tips & Tricks
- On the Road: Trade Show News



Letter from the President

Do you want to save money and be more efficient?

Then consider moving to StructureCloud

At the risk of repeating myself, PLEASE consider moving to StructureCloud.

More than 25% of all STRUCTURE users are currently running on StructureCloud!

What are the benefits and what are the costs?

The primary benefit to moving your accounting and project management software on to the cloud is that you are able to eliminate any server that is hosting your STRUCTURE software.

You also need not worry about constant costly server replacement and upgrades.

In addition to removing the server from the equation, you are also able to get rid of all associated IT administration costs for maintaining that server.

Another HUGE reason to move to StructureCloud is that since C/F Data sets up and maintains the infrastructure, we are able to eliminate any 98 errors or 3000 errors that you may have experienced.

These errors are typically caused by issues on YOUR network, be it a hardware malfunction or interference from another software program, such as anti-virus or even something as simple as the latest Windows update.

If you have ever been exposed to one of these errors, you know that it could take a long time to ferret out what is the root cause, and the intrusion to your business is costly.

Since C/F Data is in charge of the infrastructure we are also responsible for doing daily backups of your data thus eliminating the time and cost involved for personnel and anti-virus software. We even offer an option for multifactor authentication for those of you who are highly security conscious.

Another advantage of moving to our cloud is performance enhancements. Most companies who have moved to our cloud have commented how the speed of the software has increased significantly over what they had experienced on their own servers.

On the flip side, to make the switch we need to copy all of your data on to the cloud environment and this takes time.

Usually we can migrate a company in less than one day; during this time you cannot use STRUCTURE, however we do allow for the option to run the migration after business hours.

There will be an increase in your C/F Data expense.

A typical company will experience, on average, an additional 30% over what you currently pay for support but the majority of our clients are saving a lot more by eliminating all of the aforementioned expenses.

Some of you have commented to me that you don't want to have to retrain your team.

The beauty of StructureCloud is that there is ZERO change to the way that STRUCTURE works, the only difference is the way that you access the software.

We can teach your team how to get to StructureCloud and navigate all the nuances in under an hour.

Don't forget that our objective is to provide you with the most reliable and worry free system for your staff to maximize efficiency day in and day out.

Please contact me if you would like to discuss.

Eric Goldstein

Eric Goldstein
President
C/F Data Systems

News from the Office

Welcome Betty-Ann Davis

Please join me in welcoming Betty-Ann Davis to the C/F Data Systems team.

Betty-Ann will be assisting the support staff to help all of you by sharing her many years of STRUCTURE experience.

Betty-Ann was born and raised in Lynn, Massachusetts and ultimately moved to the great state of Maine where she eventually landed at Houles Plumbing & Heating in Waterville, Maine managing the office and running the entire STRUCTURE program for over twenty years.

Betty –Ann recently moved to Florida with her husband Tom to start the next chapter and decided to utilize her software knowledge to help others with the use of our program.

Betty-Ann tells me that she and Tom are totally enjoying the sunshine and not having to constantly shovel snow. She has a son who lives in Madison, Wisconsin and a daughter who lives in London with her husband.

In her spare time Betty-Ann enjoys playing golf, swimming, scuba-diving and loves to hang out at the beach. She is truly enjoying Florida and looks forward to getting up to speed soon so that she can help all of you.

Upcoming Holidays

The C/F Data Systems offices will be closed on:

- Thursday, November 23rd - Thanksgiving Day
- Friday, November 24th
- Monday, December 25th - Christmas Day

The Support Team will not be available on these days.



Starnet Fall Meeting

Vic Hansen, our vice president of sales, will be at the Starnet Fall Meeting at the Omni Louisville Hotel in Louisville, KY from October 13th through October 15th.

If you have any questions for us, or just want to say hello, be sure to stop and see Vic.

Support News



The Support Team is Offering a Series of Free Training Webinars Register Now!

Purchase Orders

Oct 5 - Learn How to Enter Detail, Lot Price and Lump Sum PO's

This webinar will cover the different types of PO's available to you.

Erin will review the different benefits of each type.

Register

Accounts Payable

Nov 2 - Learn the Basics of Voucher Entry

In this webinar Donna will show you the uses of all the different pay codes available as well as when to use a voucher memo. Also learn about the option to attach an image to the entry, and how to use recurring voucher entry.

Register

Job Cost

Oct 12 - How to Use Phases, Categories & Types for Budgeting & Costs

Jena will discuss the benefits of setting up phases/categories/types and entering them in a standard for easy entry of budgets and costs for your jobs.

Register

Payroll

Nov 9 - Certified Payroll - Introducing the New ECE Procedure (Coming Soon!)

Janice has some great news to share. Coming soon, we will have a new process (PROC) to run your certified payroll reports.

Register

Accounts Receivable

Oct 19 - Learn How the Reporting Tool RTC Can Enhance Your History Reports

Join Marilyn to learn how the new reporting tool RTC can enhance your A/R reporting. Learn how we can turn a history report into a customer lien waiver or an Excel spreadsheet.

Register

Orientation

Nov 16 - STRUCTURE Toolbar: Reviewing All the Functions

Need a refresher or have a new employee? Join Jen in reviewing all the icons at the top of your STRUCTURE main menu.

Register

Work Orders

Oct 26 - Entering Service Locations in WSC

In this webinar, Marjorie will break down WSC in Work Orders.

Register

Library

Visit the support site to watch the video recordings of our previous webinars.

If you can't make one of our webinars live, watch it in the library.

Visit

C/F Data Support Tips & Tricks

Year End Webinars Register Now!

Thurs, Dec 14th 2pm EST

Year End Payroll [Register](#)

Tues, Dec 19th 2pm EST

Processing 1099's [Register](#)
Wed, Dec 20th 2pm EST

Year End Payroll [Register](#)



Retiring Programs



At the end of the year, we will be retiring the following PROCs:

JOR - Job Information

JWW - Work in Process

JJR - Single Line

You will be able to configure these reports in JMG - Master Report Generator.

Please contact support if you have any questions about how this may affect you.

Support Contact Information

Phone: 800.370.HELP (4357) | Fax: 781.337.9991 | Email: support@cfdatasystems.com

The phone lines are open from 8:30am to 5:00pm Monday through Friday (ET). Email support is available Monday through Friday 8:30am to 7:00pm.

Support may be unavailable Monday (9:00am-9:30am) and Thursday (8:45am-9:45am) for staff meetings.

C/F Data Support Tips & Tricks

Voiding Accounts Payable Payments

When using VVC – Void Check/Reopen Voucher, it is important to know the difference between [Reopen Vouchers] and [Don't Reopen Vouchers].

Choose [Reopen Vouchers] if there was nothing wrong with the voucher, and you just need to void the check because there is an issue with the payment. If you have made multiple payments against a single voucher, it is important when voiding a check that you reopen the vouchers.

If a voucher has multiple payments made against it and you are voiding a single payment made against it, you must reopen the vouchers. If you choose [Don't Reopen Vouchers], the entire voucher will get voided – but the other payments will not be voided, which will result in an open credit amount on the vendor's account.

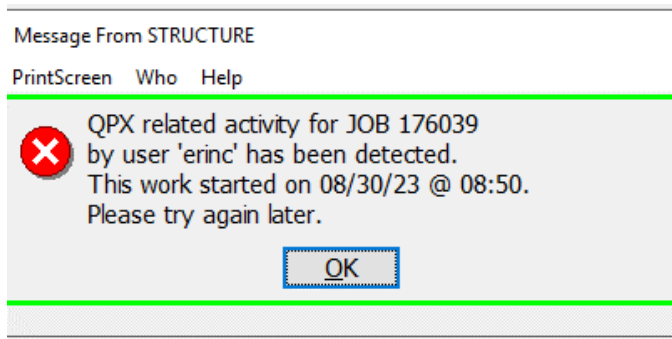
The [Don't Reopen Vouchers] option should only be used when the payment being voided is the only payment against the voucher(s) on it and the voucher was entered in VVE – Voucher/Invoice Entry and needs to be voided as well.

If the voucher was entered through PRE – Invoice Receipt Entry, and the PO needs to reflect that the voucher was voided, you would need to choose [Reopen Vouchers] when voiding the payment in VVC. Then enter a credit invoice in PRE.

If you don't need the voided voucher to be reflected on the PO, you can choose [Don't Reopen Vouchers] when voiding the payment in VVC.

Quotes Users

If you get this message when creating a PO in QPX – Create Purchase Order:



First, check with the user whose name displays in the message to make sure they are not currently in that job in QPX or QPE. If they are, they will need to exit QPX or QPE in order for you to access that same job in QPX.

You don't want to be writing a PO for a quote that someone may be editing in QPE.

Multiple users cannot access the same job at the same time in QPX.

If the user whose name displays in the message is not currently in the job in QPX or QPE, please have them go into QPX. Enter the job number and then click Exit in the bottom right corner of the QPX screen. This will properly exit them from QPX and will allow you to now access the job in QPX.

Year End

Preparing for Year End

Enclosed in this issue are the “Preparing for W2s Summary”

Pick the appropriate summary for your company.

Use these to help you keep track of what steps you have completed.

If you think you may have special circumstances for your year end, call now!

Discuss your issues with someone in our Support department before it gets too busy.

Note: The Fiscal Year End Summary will be available in the January newsletter

as well as on our Support website (cfdatasupport.com).

W2 & 1099 Forms

You will receive a packet from C/F Data Systems Forms.

In this packet is the order sheet for the W2 and 1099 forms.

If you do not receive this packet, please call:

C/F Data Systems Forms at 978.851.0088

How many W2s and 1099s should we purchase?

You can run ETW for your W2s and run VTT for your 1099s.

Be sure to purchase extra forms to use for lineup purposes as well.

Year End Special Programs

File your state W2s electronically:

If you need to file in one of the states listed below, let us know and we'll send you a quote.

Electronic W2 States: AL, AZ, CA, CO, CT, DC, DE, GA, IA, IL, IN, KS, MA, MD, ME, NJ, OH, OK, OR, PA, RI, SC, UT, VA, VT, WI

Quarterly Payroll Filings: AL, CA, CT, MA, MD, NH, NJ, NV, NY, PA

If you do not see the states you need or have questions, please email Theresa (theresa@cfdatasystems.com).

Several special programs are available for year end and tax season:

- Print '4-Up' W2s
- File state W2s and/or 1099s electronically
- Combine office and field payroll for quarterly reports
- Create reports and a file to send to the Massachusetts Labor and Workforce Division via the DUA Quest site
- New York Quarterly Wage Report
- PA/NH/CA/CT Quarterly Wage Report

Year End

Important 1099 Information

- 1099-NEC is used for vendors/subcontractors to which you need to report payments of more than \$600.00 for non-employee compensation made in 2023. Vendors must have an Account Type of 2 or 3 in VMT. You must also enter their social security number or FID number.
- 1099-MISC is used for vendors to which you need to report payments of more than \$600.00 for rent, royalties, award & prizes, medical & health care payments, gross proceeds to an attorney, or excess golden parachute payments and non-qualified deferred compensation.
- If you have questions on which form to use, speak to your accountant or go to the irs.gov/instructions page.
- Address lines 1 and 2 have been combined to print as one line. You may need to edit. Only 30 characters will print.

Refer to the Year End section of cfdatasupport.com for detailed instructions.

Year End

Payroll Year End Timeline

October:

W2 Order Forms will be mailed to you in the next couple of weeks.

- If you do not receive them, please call 978.851.0088 (C/F Data Forms).

Pay special attention to Year End Tips in this Newsletter, including this Timeline and “How Many W2’s and 1099’s Should I Order?”

By Mid November:

- Run ETW to see how many W2s you will need and VTT for 1099s.
- Order W2s and 1099s (Use the order form from C/F Data Systems Forms).

For detailed instructions visit the support website (cfdatasupport.com) to review the Year End Procedures.

Documents will be available for both payroll and 1099s in the Year End section.

All year end documents will be updated by December 1, 2023.

December:

- Follow the “Preparing for W2s Summary Checklist” included in this newsletter.
- Include insurance or vehicle allowance as part of your employees’ weekly check (Early December).

Before the last week of payroll for the year:

- Print employee bonus checks.

Before the first week of payroll for the new year:

- You must complete all required Year End Procedures on “Preparing for W2s Summary Checklist” included in this newsletter.
- Run ENI - Inquiry - look up the “Earnings” for yourself. Everything should be ZERO.

January 2024 - First Week:

C/F Data will send out 2024 tax changes

- Follow all instructions accompanying the tax changes

NOTE: Form 1095-C runs independently of W2s and may be started at any time during the Year End process.

Before January 31, 2024:

- Print W2s and 1099s

Year End

Preparing for W2s Summary

If you DO NOT have a separate company for Office Payroll

This is a summarized list of steps to be followed to close the year.

Detailed instructions can be found on the Support website (cfdatasupport.com) under Year End.

Please read through all instructions. Keep track of each step after it is done.

During December, before the last week of Payroll for 2023:

- ETW - Run to find out how many W2's you will need to order
- Include insurance & vehicle allowances, S Corp owner's health insurance (if applicable) as part of employee's weekly check
- Issue bonus checks

NOTE: W2's for 2022 must be created and EYU run BEFORE running Payroll checks in 2024.

Before the First Week of Payroll for 2024:

- EWU - Run reports and update the last week of the year
- EMU - Run reports and update the last month of the year
- ECR - 401K Contribution Report and Update (if applicable)
- EQU - Run reports and update the last quarter of the year (if applicable, run payroll specials first)
- EWF - Create the W2 Master File
- EWE - Print the W2 Edit Report - check bottom of report for asterisks indicating an error
- If needed - EWT - make edits to the W2's. Items can be added to boxes 12 and 14 (401K automatically prints in Box 12). Be sure to print new EWE-W2 Edit Report when exiting EWT.
- Compare the EWE (W-2 Edit) report to the total of the four quarterly 941 reports and the Quarterly Tax Figures (EQU/EQF) for state wages (instructions can be found on the support website)

Before the First Week of Payroll for 2024:

Run these optional but recommended year-end reports:

- ESY, EYC, EYF, EYO (all under Year End & W2's)
 - EPD (under Inquiries & Reports) - Can be run anytime
 - EXI (under Tax Check History) - Can be run anytime
 - ELR (set up a report with columns for Deductions and YTD deductions)

***NOTE: Put aside a backup from just prior to updating the year (EYU). ***

VERY IMPORTANT:

- EYU - Update the Payroll year
- ES4 - Set new 401K limit - both the Z and z (Roth) codes will be updated

January 2024:

2024 Tax changes will be ready by the second week of January. Watch for an upgrade notification.

Before January 31:

- EW2 - Print W2's
- EWD - If you need to create your Federal W2's to file electronically
- EXF - Federal EFW2 Transfer if you file electronically

Only if you have special program to file state W2's electronically – run EWS and EXS

NOTE: Form 1095C runs independently of W2's and may be started at any time during the Year End Process

Year End

Preparing for W2s Summary Combining Office & Regular Payroll Companies

This is a summarized list of steps to be followed to close the year if you have a separate company for Office Payroll.

The instructions are for both your Office and Regular payroll companies.

Detailed instructions can be found on the Support website (cfdatasupport.com) under Year End. Please read through all instructions. Keep track of each step after it is done.

During December, before the last week of Payroll for 2023:

- ETW - Run to find out how many W2's to order

In the Office payroll AND the Regular payroll company:

- Include insurance and vehicle allowance (if applicable) as part of employee's weekly check
- Issue bonus checks

NOTE: W2's for 2023 must be created and EYU run BEFORE running Payroll checks in 2024.

Before the First Week of Payroll for 2024 - In the Office payroll AND the Regular payroll company do the following:

- EWU - Run reports and update the last week of the year
- EMU - Run reports and update the last month of the year
- ECR - 401K Contribution Report and Update (if applicable)
- EQU - Run reports and update the last quarter of the year (if applicable, run payroll specials first)

Before the First Week of Payroll for 2024 - In the OFFICE Payroll Company ONLY:

- EWF - Create the W-2 Master File
- EWE - Print the W-2 Edit Report - check bottom of report for asterisks indicating an error
- If needed- EWT- make edits to the W2's. Items can be added to boxes 12 and 14 (401K automatically prints in Box 12). Be sure to print new EWE-W2 Edit Report when exiting EWT.
- Compare the EWE (W-2 Edit) report to the total of the 4 quarter's 941 reports and the Quarterly Tax Figures (EQU/EQF) for state wages (instructions can be found on the support website)

Before the First Week of Payroll for 2024 - In the Office payroll company AND the Regular payroll company - Run these optional but recommended year-end reports:

- ESY, EYC, EYF, EYO (all under Year End & W2's)
- EXI (under Tax Check History) Can be run at anytime.
- EPD & EPH (under Inquiries & Reports) Can be run at anytime.
- ELR (set up a report listing Deductions and YTD deductions)

NOTE: Put aside a backup from just prior to updating the year (EYU).

VERY IMPORTANT:

- EYU - Update the Payroll year. (Both companies.)
- ES4 - Set new 401K limit. (Both companies.) - both the Z and z (Roth) codes will be updated

Mid-January 2024:

2023 Tax changes will be available the second week of January. Watch for an upgrade notification.

Before January 31:

- EW2 - Print W2's
- EWD - If you need to create your Federal W2's to file electronically
- EXF - Federal EFW2 Transfer if you file electronically
- Only if you have special program to file state W2's electronically – run EWS and EXS from office company

NOTE: Form 1095C runs independently of W2's and may be started at any time during the Year End Process may be started at any time during the Year End Process