*info
Newsletter
For Sage MAS 90 and Sage MAS 200

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What's Inside

Headline News

On January 30, 2007 the Internal Revenue Service announced the updated Form 940, *Employer's Annual Federal Unemployment Tax Return*. The form has been in redesign since May 2004. Among other enhancements designed to make it easier to use, the form uses plain language, a more logical sequence, and is compatible with optical scanning. Form 940-EZ has been discontinued.

Gain Quick Access To Information With New Business Insights Explorer

If your organization has deployed Sage MAS 90 ERP as its business management software, you have the advantage of a rich feature set across more than 25 modules. Now, with the release of Sage MAS 90 Version 4.2, a new tool is included to make it fast and easy to locate the information you require—**Business Insights Explorer**. With Business Insights Explorer you can enhance productivity, customer service, and decision-making effectiveness across your organization—from personalized customer service to improved cash flow.

Let's take a look at how your organization can benefit.

Customer Service

When a customer calls, it's anybody's guess what they may need. It could be a call to place an order, add a contact, request a return authorization, check their credit balance, find purchased items on an outstanding invoice, add a ship-to address, check product availability—the list is extensive—you can probably think of a dozen more specific to your organization.

Your customer service staff needs to be prepared to handle all of these tasks, and to do it quickly and efficiently. Business Insights Explorer is the perfect tool for quick access to everything you need to assist your customers. Business Insights Explorer gives you view-only access to customer information and is laid out in three sections. The Primary grid, the Secondary or detail grid, and the Navigation bar.

Give your customer service, sales, and collections staff quick access to the information they need with the new Business Insights Explorer functionality.

The Primary customer grid view has been designed so you can quickly locate a customer account. Each staff member can personalize their grid so that the information is organized in the way that is most useful to them. For example, if the quickest way to look up a customer account is by using their telephone number, that column can be moved to the left side of the grid so that it is easy to find. Clicking on the top of the column allows you to sort the grid by values in that column.

Once the customer record has been found, credit limit and outstanding balance information can be accessed right in the main grid. To find further details regarding the customer account, use the Secondary or detail grid.

The contents of this detail grid can be changed simply by clicking on radio buttons contained in the third section of the screen, the Navigation bar. From the **Preview** section of the Navigation bar, you can choose to display any of the following in the Secondary grid: customer

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Version 4.2
See page 4 for more info!

sales history, contacts, memos, payments, historical and open invoices, open orders and Return Merchandise Authorizations (RMAs), RMA history, and repetitive invoices.

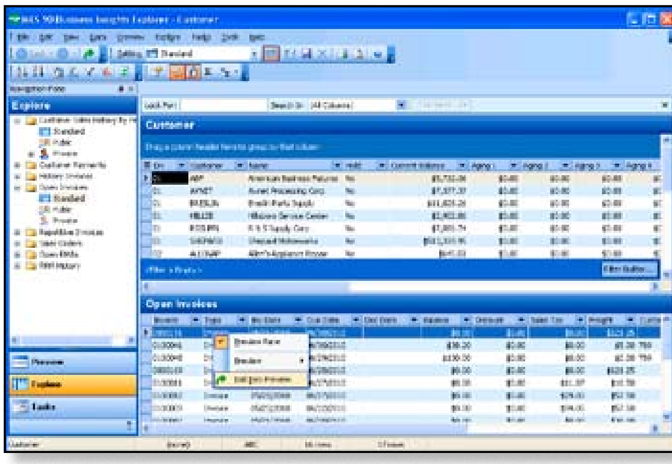
Even more powerful is the **Explore** option on the Navigation bar. Suppose the customer has a question regarding a specific invoice. Once the correct invoice has been located in Preview mode, selecting the Explore option from the navigation bar allows you to quickly drill down into information such as payments, credit memos, and items purchased with a series of options in the context of the current invoice.

The Navigation bar also lets you launch customer-related tasks directly, without having to return to the main Business Desktop menu. From the **Tasks** option the context is also retained. For example, if Customer Maintenance is launched, it will be pre-populated with the current customer record.

Business Insights Explorer places all the tools and data your customer service representatives need into one easy-to-navigate user interface, empowering them to handle virtually any action the customer may require, including:

- Update customer address, contact, and ship-to information. When a customer calls you can easily assist with all branches of their business without delay.
- Quote customer-specific pricing and product availability. You can view the price matrix, price specials, and contract pricing so that you can offer the lowest possible price while maintaining your profit margin.
- Revise an open order. When viewing an order in the secondary grid, simply launch Sales Order Entry from Tasks on the Navigation bar and make modifications to the order.
- Convert a quote to an order.
- Check available credit by viewing real-time credit and aging information.
- View payment status. You can provide the date of receipt and the invoice numbers that were paid by a check in seconds.

You can handle virtually any need the customer may have, and provide the requested information or action promptly and completely using the streamlined access provided by Business Insights Explorer. Not only will you have addressed the customer's needs, you will have saved them time, a priceless commodity in today's hectic business world. Your organization will be able to handle a larger volume of inquiries as well, potentially lowering your overall cost of doing business while improving your customer service.



Access everything you need to quickly and expertly assist customers using Business Insights Explorer.

Collections

Whether a full-time person is assigned to collecting past due amounts, or it is part of a staff member's overall responsibilities, staying on top of delinquent invoices is important to your cash flow. Business Insights Explorer is an excellent tool for managing collections with optimum efficiency.

For collections, you will want to start with one or more personalized customer views. Using the filtering capabilities, you can create a view listing only customers with past due amounts. Another view could display only customers with amounts over 60 days. Or perhaps your concern is mainly large past due amounts—a third view could display only customers with amounts past due over a certain dollar amount. Custom fields can be added to views for special calculations totaling past due values.

Once you have the subset of customers you want to work with, you have a variety of options. You can:

- Sort the list by any column to prioritize the order in which you follow up, by largest amount over 30 days, for example.
- Use the list to make telephone calls. Add memos regarding the conversation from the Tasks section of the Navigation bar.
- Export the list to Microsoft Excel with the click of a button, if you prefer to manage your collections using a spreadsheet. With another click of a button, you can perform a mail merge with Microsoft Word to create dunning letters that include specific past due amounts—ready to send by mail, e-mail, or FAX.

Sales

Your sales management staff can be highly effective if they can quickly view the activity for individual sales staff and top customers. Personalized views of your customer list for sales management might include a customer list sorted by salesperson, with subtotals on current and past activity amounts. You also may want to see a list of top customers by year-to-date revenue and compare that activity to the prior year.

Is Jane's sales volume double what it was last month? You can give Jane a call to congratulate her and pass the secrets of her success on to others. Have sales to a top customer dropped off since last year? Early detection enables you to identify and resolve customer satisfaction issues before you lose the customer altogether.

Sometimes a graphical view of the data is the good way to spot trends and exceptions. You can export your selected view to Microsoft Excel with a right-mouse click. The Excel Chart Wizard can quickly provide you with a graphical view.

These are just a few examples of how Business Insights Explorer can be leveraged to improve productivity, decision-making, and customer service. Give us a call to discuss adapting this powerful tool to streamline your business processes. ☆

The Power Of The Sage MAS 90 ERP Business Framework

The new Business Framework for Sage MAS 90 was introduced in Version 4.0 for the General Ledger and Library Master modules. The Accounts Receivable, Sales Order, Return Merchandise Authorization, and Bank Account Reconciliation modules were updated to the new framework in Version 4.1. The Version 4.2 release, scheduled for first quarter 2007, incorporates the enhanced user interface for the Accounts Payable module.

Let's take a look at what the new technology of the Business Framework brings you.

Dual-Grid Entry

Dual-grid data entry functionality in the new Business Framework provides for a more streamlined data entry process. The unique dual-grid system allows you to place the most frequently used fields in the primary grid. Fields that rarely change are placed in the secondary grid, where they are easily accessible on those occasions when changes need to be made.

Each user can select the fields to display in the primary grid, customize column widths, and resize windows so that each screen is set up for the most efficient data entry.

Hyperlinks provide quick right-click navigation to related information. For example, in Accounts Payable Vendor Maintenance a simple click brings you to the vendor's primary contact or terms code.

Enhanced Historical Detail

Say goodbye to worrying about timely closing of periods to keep your period-to-date and year-to-date information accurate. With the Business Framework, every transaction is stored with a user/date/time stamp, so that period-to-date information for each period is retained for as long as you choose to retain history. This additional detail allows you to report across multiple periods regardless of whether period-end processing has occurred.

Period-end reporting is simplified too, with a check-box interface for selecting the reports to print prior to closing.

Memo Manager

Memo Manager is a company-wide system for creating, managing, and displaying memos. You can specify whether you want a memo to pop up in specific screens, and whether it should always pop up or only after a specific reminder date.

Batch Manager

In version 4.2, Batch Manager is enhanced to maintain more comprehensive audit trail information and streamline end-of-day processing with the ability to update a range of batches at one time.

Reporting Options

The new Business Framework makes reporting both easier and more powerful in three ways. First, the **Saved Report Settings** feature allows you to set the criteria for a report once and save it for future use. Next, every standard report is now fully customizable using **Crystal Reports® Designer**. You also can benefit from multiple report output options available through Crystal Viewer, including Microsoft Word and Excel, Adobe PDF, and e-mail. A third option, the wizard-based **Business Insights Reporter,** makes creating custom reports simple—data field names are easy to understand and fields from related entities can be readily attached.

Strong And Flexible Security

Security of your sensitive financial information is of paramount importance. At the same time, the flexibility to empower employees with appropriate access is essential to productivity. The Business Framework introduces **Role-based Security** making security administration more efficient and effective. Now administrators can create roles, such as *Payroll Supervisor* or *Accounts Payable Clerk,* and then assign users to one or more of the roles. Each role then has specific task rights assigned to them.

Advanced security options provide even greater control. For each data element, you can specify by role whether the user will have Create, Modify, Delete, View Only, or Full Control access. View Only access is especially useful for things like credit limits, which everyone needs to see, but only one or two people are authorized to change.

The Business Framework places a User and Date/Time stamp on each transaction every time it is changed, providing powerful audit and fraud detection capabilities.

Customizer Enhancements

You may require that your system be customized to match your business processes. User Defined Fields (UDFs), which lie at the heart of any customization, have become much more powerful while still retaining the ease of use Sage MAS 90 is known for. An unlimited number of UDFs can be added to each entity, such as Customer, and you can specify the various screens and history files you want the UDF information to follow through the system.

Custom Modifications Made Simpler

A less visible benefit of the Business Framework is its object-oriented architecture. This enhances the ease with which programmers can customize the system. The Object Interface module allows enhancements to be built without modifying the underlying Sage MAS 90 source code, and decreases or eliminates the impact of future upgrades on custom integrations.

Give us a call with any questions or to find out more about the Sage MAS 90 Business Framework. ☆

Tips & Tricks

Reversing An Accounts Payable Check (without Job Cost)

1. Open *Manual Check Entry.*
2. Select the appropriate Bank Code.
3. Enter the check number to be reversed.
4. If prompted "*Is this a check reversal?*" answer *Yes*.
5. To the prompt "*Recall original invoices?*" Answer *Yes* to reopen the original invoice. Or select *No* and select the *GL Distribution* check-box to leave the invoice closed and only make a correcting journal entry.
6. On the *Lines* tab, the invoice amount will be displayed with a negative amount. Click *Accept*. If using the *GL Distribution* option, manually enter the negative check amount.
7. Print and Update the Manual Check Register. ☆

In The Spotlight: Sage MAS 90 Version 4.2

With the Sage MAS 90 ERP Version 4.2, the Accounts Payable module receives its update to the new Business Framework architecture bringing speedy dual-grid data entry and other benefits. We cover the important benefits of the Business Framework on page three of this newsletter, and highlight Business Insights Explorer, a major component of 4.2, on page one.

Let's take a look at the other significant new capabilities in the release.

Vendor Maintenance

Three new tabs have been added for easy viewing of all the detail retained for Vendors. The **Summary** tab provides the Period-to-Date, Year-to-Date, and Prior Year information as of any period-end by choosing the desired Fiscal Period and Fiscal Year.

The **History** tab provides purchase, payment, and discount information for any fiscal year. In addition, you can toggle the screen to show current and prior year comparative information.

On the **Invoices** tab, the dual-grid allows you to highlight a specific invoice in the top grid, and view all the individual transactions related to it, such as payments and credits, in the lower grid. The data on all of the grid-style tabs—*Invoices, Transactions,* and *P/Os*—can be re-sorted by clicking at the top of any column. A *Use P/O Receipt of Invoice Entry* option ensures that invoices from the selected vendor will be correctly received through the Purchase Order module rather than the Accounts Payable module.

Smoother Manual Check Entry And Quick Printing

Quick Print check numbers now are incremented automatically. Alphanumeric characters are allowed in Manual Check entry to facilitate entry of wire-transfer information.

Enhanced Controls For Checks

A security event for the *Clear* button in Invoice Payment Selection provides tighter controls over printing and deleting check selections. A warning message is displayed when accessing Check Maintenance if checks have been printed but not yet updated.

Forms

Accounts Payable checks can be printed in ANSI-Compliant format, and *Address Line 3* and *Remit-to Address* now can be printed on checks. Extended stubs can print the general ledger account distribution, and to streamline processing, check printing programs save the last form type used.

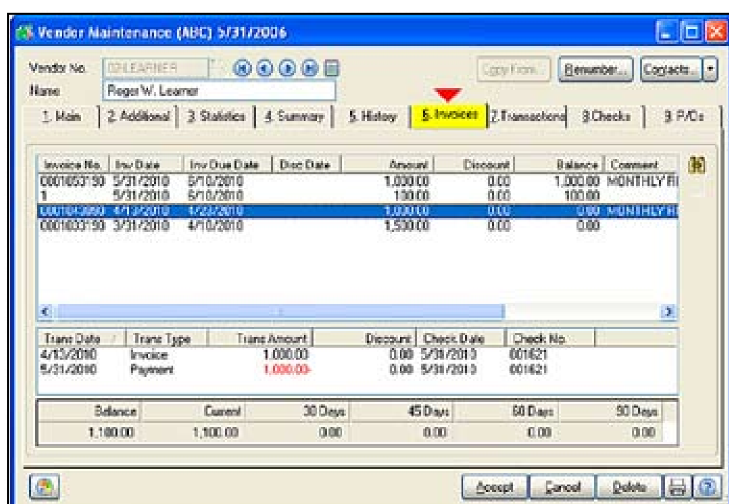
More 1099 History

With Version 4.2, 1099 Payment History is saved indefinitely, eliminating the requirement to purge last year's 1099s before entering the current year's data.

Reporting Options

New choices make reviewing information easier. For example, you can print the Aged Invoice Report based on *Invoice Due Date* and/or *As-Of* a specific aging date. The Check History Report prints alphabetically by Vendor Name to make it easier to read. A summary option on the **Cash Requirements Report** makes it easier to get to the bottom line.

Give us a call to optimize your organization's Accounts Payable functions, or to learn more about the features and functionality available in Version 4.2. ☆



Using the dual-grid system, you can select an invoice from the main grid and view all the transactions related to that invoice in the resizable lower grid.

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