

# ★ info

Newsletter for Sage MAS 90 and Sage MAS 200 ERP

## What's Inside

### Page 2

Version 4.3 CONTINUED

### Page 3

Version 4.3 Usability  
Enhancements

Tips & Tricks

### Page 4

The Latest Extended Solu-  
tions For Sage MAS 90

## Did You Know

Sage Software offers free Web seminars designed to help you better manage your business. Current offerings include:

- Business Intelligence Solutions
- Distribution Solutions
- Gain Better Control Over Your Inventory With Extended Solutions
- Sage MAS 90—Business-Works Edition

For the current Sage MAS 90 and Sage MAS 200 Webcast schedule or to register [click here](#)

## Powerful New Functionality Included In Version 4.3

**S**age MAS 90 and Sage MAS 200 ERP version 4.3 is scheduled for release this summer. In this article, we'll provide you with an overview of the powerful new features and functionality in this release.

### New BIE Views

Business Insights Explorer (BIE) is a powerful ad-hoc inquiry, drill-down, and drill-around tool included with your Sage MAS 90 system. BIE comes standard with several pre-built views of your data. The pre-built views give you immediate access to information most commonly needed. In version 4.3 a dozen new views that focus on data contained in the General Ledger, Accounts Payable, Inventory Management, and Purchase Order modules are added. The new views are:

- Account
- Account Transactions
- Account Budgets
- Vendor
- Vendor History Invoices
- Vendor Open Invoices
- Vendor Repetitive Invoices
- Vendor Payments
- Item
- Item Transactions
- Purchase Order
- Vendor History Receipts

### Charting Tab

Charts allow you to quickly detect trends or pinpoint potential problem areas. Version 4.3 introduces a new Chart Tab within Business



Insights Explorer. With the Chart tab you can generate a chart based on a view you create in BIE. Charts have customized titles to display the data series you select and are available as bar, line, area, and pie chart types.

Additional options for designing your chart include the ability to set the number of data points for each series you want to display. The series information appears in the order that it is selected.

### Updated Dashboard

Version 4.3 of the Business Insights Dashboard has an overall updated look and incorporates a number of customer-requested options. From your desktop, you can select up to 12 different standard graphical reports and include them on an HTML-based start page. A convenient start page wizard helps

*Continued on page 2*

## Version 4.3

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you select which reports and graphs to display, the order they are displayed, and the level of detail to be included.

You can place detail or summary views on the main dashboard page. You even can generate dashboard pages independent of Internet connectivity or use Microsoft Internet Explorer and Outlook. The charts and graphs displayed on the dashboard can include active links that allow you to drill down into the detailed information in the chart. And you can print any of the charts that you create, including printing to a PDF file.

### Paperless Office

Paperless Office gives you the ability to save time and money by eliminating the need to print lengthy reports and use precious office space for storage. It also delivers quick and easy access to files and makes them available electronically to workers in separate physical locations. Imagine being able to quickly recall the report you want, search for the information you need within that report, and then print only the pages you want. Paperless Office also includes powerful electronic forms delivery functionality to improve and streamline communications. You can send electronic documents by e-mail or fax to your vendors and customers.

In version 4.3, many of the Paperless Office add-on solutions have been incorporated into standard Sage MAS 90 and MAS 200.

The following paperless forms and reports are included in version 4.3:

- Payroll Direct Deposit Stubs
- Purchase Orders
- Vendor Returns
- Sales Orders
- Sales Order Invoices
- Return Merchandise Authorizations
- Accounts Receivable Invoices
- Job Cost Invoices
- Journals and Registers

- Period End Processing Reports
- All standard reports generated by the system, including reports created in Business Insights Reporter

If you already own Paperless Office Extended Solutions titles, this change will lower your total cost of ownership because you'll no longer have to pay a separate maintenance and support fee on the 11 Paperless Office Extended Solutions titles included in this release. Call for a list of the included titles.

If your company utilizes the Sage MAS 90 Payroll module, the Paperless Office Employee Self-Service functionality also is included. This solution allows employees to securely access their historical payroll information and conveniently view and print their own payroll pay stubs without assistance from your busy human resources personnel.

### Federal And State eFiling Option

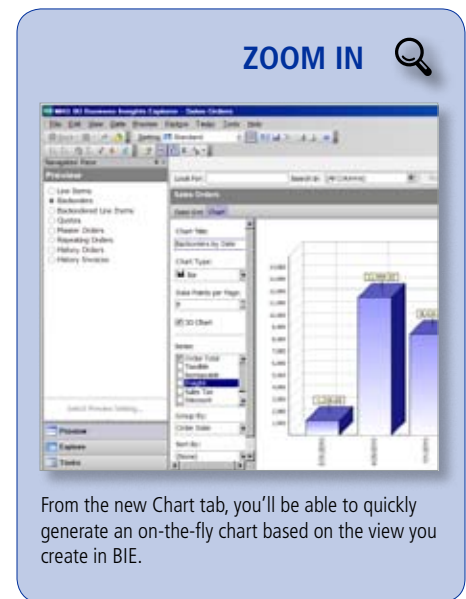
To streamline the tax reporting process, version 4.3 introduces **Federal and State eFiling and Reporting**. The new capabilities include over 250 federal and state Unemployment, Withholding, and New Hire reports. Also included is 1099 reporting through the Accounts Payable module. The eFiling Service is offered on a transaction fee basis to streamline your tax reporting process for W2s, 1099s, and State form reports.

All federal and state forms will be available to print and mail with no fees. You will be able to utilize blank, perforated W2 and 1099 forms, available for purchase from the Sage Software Forms Division, without having to align pre-printed forms.

### Fixed Assets Enhancements

In version 4.3, the Fixed Assets Module will be even more closely associated with the core functionality in Sage MAS 90. You will have the option to auto-create Assets during

Accounts Payable invoice data entry. During Purchase Order Entry and Receipt of Invoice, the register will automatically update the asset to the Fixed Assets Module, based on the asset template you select from Purchase Order Entry.



From the new Chart tab, you'll be able to quickly generate an on-the-fly chart based on the view you create in BIE.

### Embedded Direct Deposit

Beginning with version 4.3, Direct Deposit functionality is available for purchase as an add-on to your Payroll module.

If you currently own the Direct Deposit Extended Solutions title, version 3.71 or higher, you easily can convert over to the new embedded solution.

### And There Is More!

There are dozens of usability and customer requested enhancements included with the 4.3 release that we don't have room to cover in this article. See our article on Page 3 for more about the usability enhancements in version 4.3, or give us a call for more information. ✨

## Version 4.3 Usability Enhancements

Sage MAS 90 ERP and Sage MAS 200 ERP version 4.3 focuses on customer-requested enhancements to help the solution work more the way you do. Many of the usability enhancements included in this release were the direct result of customer usability testing conducted in early 2007. Here we highlight many of those customer-requested options.

### Reporting Enhancements

Unnecessary zeros are eliminated from General Ledger Detail Reports. For example, if a transaction shows a debit amount, the credit amount on the opposite column will now be blank instead of displaying 0.00.

As you set an Income Statement Format, you now will be able to select to print Actual, Budget, and Budget Variance values for any of the three financial periods—Period to Date, Year to Date, or Both Period & Year to Date. Additionally, you can choose condensed formatting to reduce the number of pages printed for a Financial Trend Report.

To improve readability a bolder typeface is used on the most important fields of the Customer Inquiry, Invoice History Inquiry, Sales Order Inquiry, Sales Order/Quote History Inquiry, and RMA Inquiry screens.

To reduce keystrokes when selecting criteria for your reports or forms, all of the available print criteria will appear on one screen—no need to click on multiple tabs. And now you can click in the value field to enter a value without having to first select an operand (i.e. Equal To, Range, Greater Than). When you enter a value in the first value field, the operand will automatically be set to the most commonly used operand, Equal To, and the cursor will move to the second value field for the selection.

Version 4.3 gives you a company-

level option to automatically set reports to print on each user's default printer when printing Standard reports or forms.

New predefined date ranges based on the system date simplify report selection. You now can select from: Yesterday, Today, Tomorrow, Last Week, Last Month, Last Year, This Week, This Month, Next Week, Next Month, Next Year, Last 7 Days or Newer, or 30 Days or Older.

A new user-level option in version 4.3 allows you to keep the report selection window open after selection. This allows you to preview and print reports with different selection criteria, such as date range, or to make changes to the print criteria selections without reopening the report from the menu. Note: This enhancement only affects reports within the Reports menus of GL, AR, AP, BR, and SO, and does not apply to forms or journals.

### Sales Order Enhancements

A new column for **Order Status** will appear when using the Order Number Lookup field within Shipping Data Entry. It will display one of three statuses: *New* - when an order is entered for the first time, *Lines Complete* - when the Lines tab is completed and Accepted, and *Shipped* when the Shipping tab is completed and accepted. The Shipping Status is also visible from Sales Order Inquiry, providing your

customer service personnel with up-to-the-minute order status information.

Version 4.3 adds flexibility to the process of scanning multiple items using a wedge scanner for shipments. If the Auto Increment Quantity option is disabled, you can use the scanning device to move through the order efficiently. The system recognizes the items scanned, so you can scan items in any order without keyboard interaction. This allows you to scan the first item and either accept the default quantity of one or enter a quantity amount, and quickly move to the next item.

If you enter a discount amount on the Totals tab of a Sales Order when discounts are not allowed for all line items, a discount warning dialog box displays and will allow you to make adjustments before moving to the invoicing stage.

Call us for more information on Sage MAS 90 ERP Version 4.3. ★

## (( Tips & Tricks ))

### Understanding Sales Order Deposits

When you enter a deposit on a Sales Order, you also must record the deposit through Accounts Receivable Cash Receipts Entry. Because the invoice does not exist yet, enter a GL account (your customer deposits account) and during the update, the appropriate cash account (determined by the Bank Code) is debited and the customer deposit account is credited.

When the SO Invoice is updated, the invoice total is reduced by the deposit amount, the customer deposits account is debited and your receivables account is credited.

At any given time, the balance of the customer deposit account provides an important audit trail of the total outstanding deposits (deposits received for sales orders that are not invoiced).





## IN THE SPOTLIGHT:

### The Latest Extended Solutions For Sage MAS 90

The Sage MAS 90 ERP Extended Solutions group has been busy creating new enhancements that will benefit companies in a variety of industries. These solutions are expected to be available in version 4.3 within 30 days of its release.

In this article we will take a brief look at some of the most recent offerings.

#### Enhanced Paperless Invoices

Extended Solution SO-1555 allows you to include an additional attachment to your Sales Order Invoice. Each invoice will have the same specified attachment. You can use this solution to include a page detailing your credit policy, a sheet of monthly product specials, or an announcement of your participation in an upcoming trade show.

If you have the Custom Office module, you can take this technology one step further and specify the filename of a document you want included in a Sales Order Invoice Header user-defined field.

#### Lot/Serial Costing Flexibility

With these two Extended Solutions you can continue tracking your inventory items by lot or serial number, but use average cost when posting.

The Extended Solution IM-1271 allows serial-valued inventory items to be received into and relieved from the Inventory Transaction File at the items' average cost.

A related Extended Solution, SO-1556, modifies the Sales Order Sales Journal and its update to use a lot-valued item's average cost. The difference between the actual lot cost and

the item's warehouse average cost will post to a global account specified in setup.

#### Enhanced Alternate Item Selection

During Sales Order and Sales Order Invoice Line Entry, Extended Solution SO-1553 will check for the existence of Alternate Items as you leave the item code field. If Alternate Items exist, a pop-up window will automatically display providing data on the item entered as well as its alternate items in up to six warehouses. This Extended Solution provides a straightforward data entry and inquiry feature for your warehouse staff—they can use the up and down arrow keys to navigate the lines and the Enter key to accept the item selected.

#### Pricing By Product Line/ Customer

Extended Solution SO-1547 adds product line and customer pricing to the Inventory Price Code File. Now when accessing the Customer/Item Pricing window, you have the option to enter in a product line instead of an item number to build a pricing record that now will be used for all the items belonging to that product line group.

#### Default Ship Via By Customer Ship To

Extended Solution SO-1543 allows you to specify a default Ship Via value for each Customer Ship To address. Defaulting common values like this helps save time and increase the accuracy of your orders.

#### Alias Item Number On Sales Order Forms

Extended Solution SO-1557 automatically populates the customer-specific alias item number and description in the alias item number field and the line comment respectively, without requiring that the user enter the alias item number on the order.

If you would like additional information on these Sage Extended Solutions, please give us a call. ✨

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