

**Volume 6**  
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**Headline News**

Sage MAS 90 and Sage MAS 200 Version 4.1 was awarded a perfect 5-Star score by *The CPA Technology Advisor* in its December 2005 Review of High End Accounting.

Products were judged in several categories, including: Modules Available/Scalability, Ease of Use/Transaction Entry, Customization/Security, Integration/Import/Export, Reporting, Support/Training/Help System, and Relative Value. Sage MAS 90 and Sage MAS 200 received perfect scores in every category.

**A Case Study**

See page 4 for more info!

**Why You Should Upgrade To Version 4.1**

If you're looking for tools that will make your job easier and allow you to be more productive and efficient, look no further than Sage MAS 90 ERP Version 4.1. Let's take a closer look at what this very significant upgrade has to offer.

**Custom Reporting Simplified**

Sage MAS 90 has long employed the industry-standard custom report writer Crystal Reports® to enable users to create custom reports. Crystal is enormously powerful, but it can be difficult to master. Business Insights Reporter, introduced in Version 4.0 and enhanced in Version 4.1, combines the power of Crystal Reports with a user-friendly Wizard-based front end.

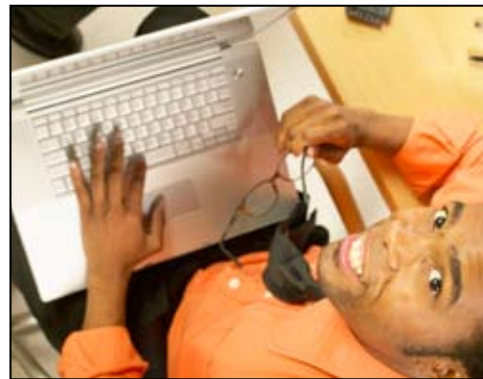
Business Insights Reporter is easy to use and presents your Sage MAS 90 data in logical views that make selecting the right table for your report simple. While you don't have to be an expert to create reports using this tool, expert users will appreciate that you can use Crystal Reports to further define, refine, and customize your Business Insights Reporter reports. The new role-based security is fully supported under Business Insights Reporter, enabling you to define which roles have access to which reports.

As a true Windows product, Business Insights Reporter includes several output option formats including Excel, Adobe PDF, or XML. All those new User Defined Fields (UDFs) you can add with the Custom Office module are available for inclusion on your reports, and since those UDFs are now held in the corresponding main data file, you won't have to bother with the complex linking of files to locate those UDFs.

**Dual Grid Entry Screens**

Dual grid entry screens were introduced in the Version 4.0 General Ledger module. Version 4.1 incorporates the flexible dual grid entry screens into the Sales Order, Accounts Receivable, Bank Reconciliation, and RMA modules.

The dual grid entry screens offer a clean, efficient interface. Move rarely used fields to



New dual grid entry screens help speed data entry in the Sales Order, Accounts Receivable, RMA, and Bank Reconciliation modules.

the secondary grid to reduce screen clutter and speed data entry. You can resize columns to fit your data, arrange the columns to make data entry more efficient, and even move them on-the-fly to accommodate a desired order. You can place the secondary screen below the initial line details or alongside it.

Customize your column widths to fit your data viewing needs. A new button allows you to quick-

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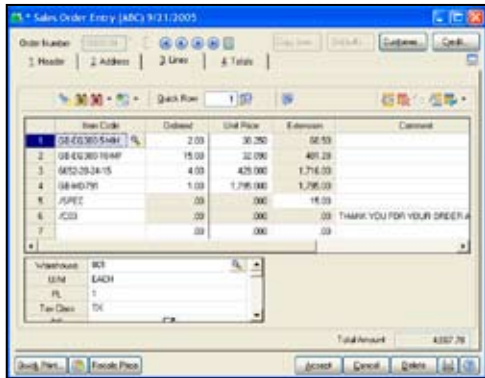
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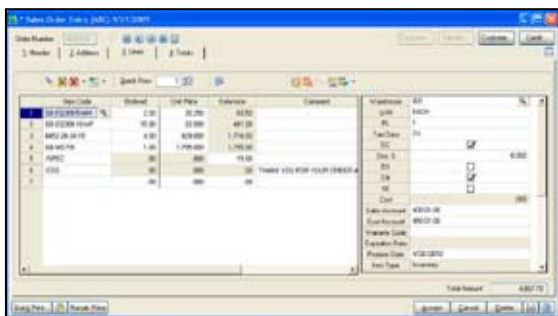
# Why You Should Upgrade To Version 4.1 CONTINUED



Flexible, customizable dual grid-entry screens streamline data entry tasks.

ly undo any unsaved changes. Now you can scroll through all data entry lines; this will vastly improve data entry efficiency. New hyperlinks provide quick access to related information. For example, from Sales Order entry you could hyperlink to Terms Code Maintenance. A Quick Row feature lets you instantly jump to the line you want without scrolling through lines you don't want.

Since different industries, different companies, different departments, even different individuals all have unique techniques for performing data entry, the flexibility to customize is key. Some industries rely almost exclusively on the item number, rarely referring to or changing an item's description. Some companies may require a long expanded description, while others can make do with 15 or 20 characters. A company with only one warehouse won't need to see the warehouse code. For one selling exclusively to wholesalers, the item's tax status is superfluous. If you only sell by the board foot, accessing the Unit of Measure field isn't a priority.



Place the secondary window alongside or beneath the main entry window. You can even toggle between the two.

The dual grid entry screens give you the flexibility to configure the data entry windows to fit the way you do business.

The dual-grid screen proves its worth in the Accounts Receivable module. The Customer Maintenance task in Version 4.1 offers a new navigation window that makes exploring current and historical invoice transactions much more straightforward. Highlight a particular invoice and all of the transactions related to that highlighted invoice will appear in the bottom pane; this saves you from having to drill down to uncover the details.

## Easy Mail Merge

Beginning with Version 4.1, a new mail merge output option to Microsoft Word is included in Business Insights Reporter and all standard reports included with the General Ledger, Accounts Receivable, Sales Order, Bank Reconciliation, and RMA modules. When you access a Business Insights Reporter report or a standard report, you'll see a new option to process the report output directly to Word.

Use this option to output your data and then present it dynamically in Word using the embedded Mail Merge capabilities. This feature will allow you to quickly and easily produce customer or vendor mailings that include pertinent Sage MAS 90 data.

## Security Events

The whole security structure of Sage MAS 90 has been improved; it adds flexible controls and streamlines administrative tasks. The new role-based security gives you an exceptional level of control over who has access to various programs and tasks, and even allows you to control what type of access a user has. For example, some users may have full-access rights while others have view-only rights.

You will still set up individual users or user groups and those users' corresponding passwords, but from there on, security setup is decidedly different. Once you've set up users, you will assign those users to one or more roles. Exam-

ples of roles are customer service representative, payroll entry operator, or sales manager. You'll then assign specific access rights to each of these roles. Assigning access rights consists of applying security control attributes such as: Full Control, Create, Modify, Delete, and View Only to each role and task combination. In this way, for each task within a particular role, you have complete control over who can create, modify, or delete entries.

You can structure security events for added control within your organization. For example, you can prevent an On-Hold sales order from being invoiced or prevent an item from being oversold based on the available quantity. Another security event allows for manager overrides of back-ordered items and yet another will allow you to prevent customer records from being created on-the-fly.

Those special module-level override passwords defined in Setup Options in previous versions are replaced in Version 4.1 with security events set in the main security system, providing greater control and much more flexibility in defining user access.

## Sage Information Center

Version 4.1 launched the new Sage Information Center. This handy resource keeps the data and information you refer to on a daily basis at the ready. The Information Center is a component of Sage Desktop, a common resource center being deployed across many Sage Software products.

The Information Center is a dynamically updated source of relevant product information, tips, announcements, training information, including access to Sage Software's regional training calendar, and customer feedback links.

We've highlighted some of the powerful features new to Version 4.1 or enhanced with this latest version.

Read our story on page 3 to understand some of the items you need to consider before upgrading to Version 4.1. Call us for more details about upgrading to Version 4.1. ★

# Upgrade Considerations For Version 4.1

Sage MAS 90 Version 4.1 encompasses a large number of feature enhancements and expanded functionality across the Accounts Receivable, Sales Order, Bank Reconciliation, and RMA modules. Sage Software refers to Version 4.1 as one of the most significant releases to the Sage MAS 90 product line ever.

As modules are released with the new business framework initiated with the General Ledger module in the 4.0 release, there are numerous changes that affect the underlying file structure of the program.

Other changes add similar yet superior functionality as existed in prior versions. As a result, there are a number of considerations you should be aware of before upgrading to Version 4.1. Here are some of the major items you must consider when creating your plan to upgrade to Version 4.1.

## Reporting Changes

### Crystal Reports Forms

Many users enjoy the flexibility and customization capabilities Crystal Reports lends to Sage MAS 90 forms. Due to the major data file structure changes, your customized Crystal Report forms within the Accounts Receivable, Sales Order, Bank Reconciliation, and RMA modules will require reimplementation. We have access to a utility that will allow us to compare your customized Crystal Reports form to a standard form included in that version. This will enable us to more easily duplicate your form changes under Version 4.1.

### Crystal Reports The Standard

Under Version 4.1, all bundled reports included within the Accounts Receivable, Sales Order, Bank Reconciliation, and RMA modules now utilize Crystal Reports for report viewing and customization. All character-based reports and forms have been removed from these modules. Any customizations that may have been made to your character-based forms will need to be migrated into the new Crystal form template.

The benefit to you of this change is that all standard Sage MAS 90 reports within these modules are now readily customizable to meet your specific business needs. In addition, you

have numerous report output options supported through the Crystal Viewer including Word, Excel, and Adobe PDF. Crystal Reports is a powerful tool, adding enormous flexibility to Sage MAS 90.

### Report Master Impact

Report Master reports created for the Accounts Receivable, Sales Order, Bank Reconciliation, and RMA modules will not work under Version 4.1. Reports important to your business operations can be developed using the Business Insights Reporter module.

### Business Insights Reporter

Business Insights Reporter reports created for the Accounts Receivable, Sales Order, Bank Reconciliation, and RMA modules will need to be reimplemented under Version 4.1 in response to the data changes in those modules.

For all other Business Insights Reporter reports, you will need to run the Business Insights Reporter rebuild utility included with Library Master to recreate these reports for use under Version 4.1. Business Insights Reporter includes a report definition listing that will help identify the view names, fields, sorting and filtering settings that were specified for your existing reports, aiding in the recreation of reports in 4.1. Use this opportunity to learn and master Business Insights Reporter, or let us know if we can help.

## Visual Postmaster Retirement

If you used Visual Postmaster to perform mail merges, you'll now turn to the Business Insights Reporter module for that functionality. When a Business Insights Reporter report or Standard report is accessed, you now have an option to process the report output directly to Microsoft Word. The output can then be presented dynamically in Word using the embedded Mail Merge capabilities. As a result of this superior functionality, Visual Postmaster is retired with the Version 4.1 release.

## Operating System Update

Windows 98 and Windows NT are no longer supported with Sage MAS 90 Version 4.1. It makes sense to upgrade and test each work-

station running one of these older operating systems before upgrading to the 4.1 release. In addition, the memory requirements to run Version 4.1 have been increased to 512MB.

We would be pleased to help you review your system hardware and operating systems for compatibility; give us a call.

## Dot Matrix Printing

Dot matrix printers play an important role in many organizations—valued for their speed and ability to use preprinted form stock. Version 4.1 adds support for high-speed dot matrix form printing to a select set of bundled Crystal Form templates included with the 4.1 release. Note that the Windows printer driver for the given dot matrix printer must support native printer fonts to achieve high speed printing. We will be happy to help set up your printer to operate under Version 4.1.

## Sage Extended Solutions

If you are currently using a Sage Extended Solution you must upgrade your extended solution before you upgrade to Version 4.1. In the case of those solutions that store data but whose feature set is now obsolete, you must wait to upgrade to Version 4.1 until you have obtained a data conversion utility.

If you have an Extended Solution and are concerned about its operation under Version 4.1, give us a call and we'll determine its status.

## Going Forward

We've outlined the major considerations of upgrading to Version 4.1 here. While some of the considerations require time, effort, or expense on your part, the benefits possible as a result of this release means the payoff is worth the effort.

We would be pleased to help you understand how these considerations will affect your business, and to help you develop a comprehensive upgrade plan. Please give us a call. ★



## A Case Study: Getting MAS 200 To Manage And Control Your Business



**R**ecently, we were contacted by a manufacturing client who had hired a new controller unfamiliar with their Sage MAS 200 accounting software. He needed assistance in closing the books at year-end. Although on Sage MAS 200 since the late '90s, personnel changes over the years had left them with an inadequately knowledgeable staff. No one in their employ had the big Sage MAS 200 picture and understood how the different modules could be optimally integrated and used efficiently. Inventory record accuracy was a serious problem of long standing. To conserve expenses, previous controllers had declined our suggested refresher training and our consulting services.

Following our initial review, we proposed a five week plan to analyze current problems, provide integrated, inter-departmental training, set up proper accounting procedures, and to analyze and correct any Sage MAS 200 database issues. Our goal would be a trained staff, proper procedures, accurate books, and the promise of operational reporting that management could rely upon.

First, we purged the inventory files of almost half of the 10,000 items that had become obsolete. The result was greater usability and faster lookups. Unreliable inventory counts and valuation were traced back primarily to the improper use of Bill of Materials. Cross training the Production, Design and Inventory departments resulted in better workflow integration and data integrity. We instituted new setup and production recording procedures through Bill of Materials resulting in accurate inventory cost and on-hand quantities.

Next, we looked at shipping. Only one of the three stations was using the Sage MAS 200 shipping function. Freight information was being transcribed and later entered manually by the accounting department. Implementing inexpensive bar code scanners at the point of shipping virtually eliminated errors in the sixteen-digit tracking numbers and reduced the accounting data entry workload by several hours a day.

Historically, most of the items produced by the company were serialized. However, in a review of the business requirements with management, we concluded that maintaining and tracking many of the items by serial

number was not necessary. Changing to average cost valuation for these items eliminated many hours a week in data entry.

We applied the "good housekeeping" practice of periodically copying the active data to an on-line backup company and purging obsolete history. We showed users how to create customized lookups for their specific needs and preferences. We created Visual Integrator imports for efficient setup of new Inventory Items and their Bill of Materials from the Design Department. And finally, we proposed and implemented PC Charge to expedite processing of credit card payments by the Customer Service Department.

At MBA, our job is to empower you to successfully manage and control your business.



SAGE MAS 90 SAGE MAS 200  
SAGE MAS 500

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