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For Sage MAS 90 and Sage MAS 200

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Custom Office Customizer

Sage MAS 90 ERP is at home in companies spanning dozens of industries—from wholesale distributors to service organizations. Some reasons this solution works so well for such diverse organizations include the software's strong core functionality, large number of available modules, various industry-specific add-on applications, and perhaps most importantly, its ability to be customized and configured to meet a wide variety of business needs.

Customizer is a component of the Custom Office module and is behind much of its customization capabilities. The Custom Office module also includes MS Office Link, a tool that allows you to merge Sage MAS 90 information into Word, Excel, or Access to create customized documents, messages, and attachments. This article will focus on the Customizer's functions that fall into two broad categories: adding user-defined fields (UDFs) to data files across the modules; and changing the look, layout, and navigation of screens.

The Custom Office Customizer can turn your Sage MAS 90 application into a tailored, optimized business solution.

Let's take a closer look at Customizer and how you can use it to tailor your Sage MAS 90 implementation to your best advantage.

Add User-Defined Fields

Customizer enables you to add UDFs to virtually any entry screen. You can add a field for Support Technician to the Customer Masterfile, a field for Referral Source to the Sales Order Header, and a field for UPC Code to the Inventory Item Masterfile, for example.

The UDFs you create may be printed on forms and be imported and exported. You can easily include the UDFs in reports you create in Crystal Reports in the same way as other data in the system. They also are automatically available for inclusion on reports created with Business Insights Reporter.

You can populate a UDF value from another table within Sage MAS 90, and specify default values for the UDFs. In this way, you could cause a Sales Order UDF to default from the value of a Customer Masterfile UDF, yet allow it to be overridden for an individual order. Or, you could default Item UDFs into Sales Order Line UDFs to hold a warranty code, for example.

Build a user-defined table (UDT) for each UDF if you wish to validate the data entered.

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Headline News

Sage MAS 90 version 3.71 is slated for retirement. In December 2007, customers will receive the final 3.71 Year-End Tax Table updates and any mandated year-end changes to Accounts Payable, Payroll, and Electronic Reporting for calendar year 2008 processing. Telephone support for version 3.71 will continue through December 2008. Support will continue for all subsequent versions, including Sage MAS 200 SQL 3.72 and 3.73.

New Fixed Assets Module

See page 4 for more info!

What's Inside

Then, when entering data in the field, users can choose from the list of values from the user-defined table. The tables are simple to maintain and you can include data from the tables in Crystal Reports and forms.

The UDFs and user-defined tables you create are stored directly within the related file. For example, Customer UDFs are stored in the Customer Masterfile and Sales Order Header UDFs are stored in the Sales Order Header file. In this way, you can easily access the UDF from the appropriate data entry screen, lookup, or Crystal Report allowing you to fully integrate UDFs into your business processes. Another significant benefit of this technique is that your UDFs and the user-defined tables are easy to find and upgrade automatically when you upgrade your Sage MAS 90 software.

Customize Screens

In addition to creating new user-defined data fields, Customizer allows you to change the look, layout, and navigation of your Sage MAS 90 screens.

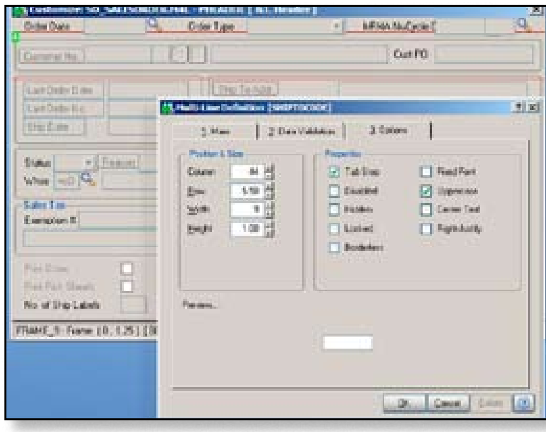
Add New Buttons

You can use Customizer to add buttons to screens that will launch application tasks or other Windows applications.

Get creative with this function: add a button to display a map of your customer's location or to play back a sound annotation of the correct pronunciation of a difficult customer name. Include a photo of employees in the masterfile, accessible by a new button linked to the image file. Scan contracts, credit reports, vendor invoices, and other important documents and link them to the appropriate record through a new button. You can create your own Help screens and provide instructions to users that are available with the push of a new custom button during Invoice Data Entry. You'll likely find numerous uses for this valuable feature.

Security And Data Validation

With Customizer, you can bring security to the individual field level by hiding particular fields from the view of specified users or user groups. Designate other fields as View Only. Add data validation characteristics to certain fields, such as a range or list of allowed values. These characteristics can vary by user, so you can limit certain users to using a defined list of General Ledger accounts or hide the Item Cost from another user group.



Customizer makes it easy to change the layout of screens and even add new user-defined fields.

Rearrange Screen Layout

Customizer allows you to change the layout of any screen by moving fields to suit your data entry process. You can ignore unused fields, designate a field as a tab stop, and define the initial value for a field.

Consider making the Credit Hold field in the Customer Masterfile default to *Yes* when creating new customers, until you review their credit application. Or make an important field stand out with a bold font or by designating it to appear in red.

Relabel Fields And Add Text

Do you refer to your customers as members or refer to your item numbers as part numbers? Use Customizer to relabel any field or folder tab to suit the terminology of your business or to enable the field to serve another purpose.

Customizer allows you to add text to any screen for additional information, reminders, or instructions for your users. For example, you can add an on-screen message in Sales Order Entry reminding operators to tell customers about your upcoming sale.

Windows Script Control

The Windows Script Control feature of Customizer allows you to execute an external script to perform calculations or to start up external applications from a button you create in Sage MAS 90. Think of a script as a mini program written to perform a specific task. Typically, a script is used to draw data from one program and write results to another program.

You can select values from a Sage MAS 90 screen to pass to the script and designate values to be returned by the script after processing is complete. The script can be simple or complex. It can even contain a series of if/then statements and different levels of calculations using data within Sage MAS 90 and from an external program. You could use Customizer to perform a custom discount calculation in Sales Order Entry or insert values into a Excel spreadsheet or Word document. Program logic that would normally be executed if you manually changed the field will be performed automatically, thereby protecting the integrity of your data.

Imagine performing customized freight calculations, calculating customer-specific discounts, defining a new commission structure, writing sales values to an Excel spreadsheet, or automatically creating new Outlook contacts by simply clicking a button within your Sage MAS 90 software. It's possible using Customizer.

The Microsoft Windows Scripting Host must be installed and operational in order for you to use this feature. If you plan to create your own scripts, a good working knowledge of VBScript (Visual Basic Script) and/or Microsoft Jscript is also a requirement. If you don't have this knowledge, we can assist you in creating your scripts.

Ready To Learn More?

As you can see, Customizer is a tool that any business can use to maximize the power of Sage MAS 90. From simple field relabeling to complex scripting and the addition of new data fields, Customizer can turn your Sage MAS 90 application into a tailored, optimized business solution.

We'd be pleased to speak with you about the ways in which you can put Customizer to work in your organization, just give us a call. If you do not yet own the Custom Office module, call us for details and pricing. ☆

Extended Solutions For Multi-Company Accounting

With its multi-company functionality, Sage MAS 90 ERP allows you to maintain and account for the separate business entities, store locations, or discrete business divisions within your corporate structure. Keeping financial transactions separate is often a necessity, and Sage MAS 90 makes this type of accounting easy.

It's commonly necessary to exchange financial information between these business entities, distributing revenue or expenses or paying common vendors. There are several Sage Software Extended Solutions for Sage MAS 90 that add comprehensive multi-company capabilities to assist organizations like yours. Let's take a look at the most popular of those Extended Solutions.

Multiple-Company AP Processing

If your corporate structure involves multiple subsidiary companies and a single agent company that pays bills on behalf of those subsidiaries, the Extended Solution **AP-1027 Multiple-Company Accounts Payable** will save you hours of duplicate data entry.

With this solution in place, Accounts Payable Invoice Data Entry and Manual Check Entry support the entry of a separate Sage MAS 90 Company Code for each distribution line and a single company code for the invoice header. The object is not to create invoices in the subsidiary companies, but rather to post expenses to those subsidiaries from a single point of entry. During Invoice and Manual Check Update, the Detail Item postings will be distributed to the specified company code, with offsetting entries posted to the Offset Account number you maintain in Setup.

To complete the processing in each subsidiary company, it is necessary to update the Daily Transaction Register. Another Extended Solution, **GL-1026 Multi-Company Update of the Daily Transaction Register**, makes this process easier and faster.

Consolidated Check Printing

Alternately, you may perform Invoice Data Entry normally in each of your subsidiary companies, but want to streamline check printing by performing invoice selection and check printing from a single company. You may even want to generate a single check to pay the same vendor's invoices that may exist in multiple subsidiary companies. Two Extended Solutions: **AP-1016 Multiple Divisions/Companies on Checks** and **AP-1073 Multiple Company Check Processing**, aid this scenario by allowing you to select invoices to be paid from any or all of your subsidiary companies and print checks from a single agent company. If desired, you can generate a single check to pay invoices from the same vendor that exists in more than one subsidiary.

When you operate in this way, reconciling your bank account can get a bit tricky. Another Extended Solution, **BR-1002 Multiple Company Bank Reconciliation**, allows reconciliation to be performed from a single company for an unlimited number of company codes. Checks with the same number, date, type, and source are consolidated into a single entry consisting of the sum of check totals.

Rapid Manual Check Entry

When you simply need a fast, effective way to record manual checks for multiple companies, without the need to print checks or perform due to/due from postings, here's a pair of Extended Solutions that will save you time. Extended Solutions **AP-1096 Rapid Manual Check Entry for Multi-Companies** adds a new Multi-Company Manual Check Entry menu option that allows you enter the following information: Company Code, Check Number, Check Date, Amount, Vendor, Comment, Tax Schedule/Tax Class, and G/L Accounts with corresponding Distribution Amounts—and gives you a report that details your data entry.

Another Extended Solution, **AP-1097 Multi-Company Manual Check Update** gives you the ability to update the Manual Check Registers for each referenced Company.

Data Synchronization

When the same Vendor, Customer, and General Ledger accounts exist between companies, you'll want an efficient way to keep standard data synchronized between the agent and subsidiaries. Three Extended Solutions allow you to make changes to the entity in one company, and push those changes out to the subsidiaries. Extended Solutions **AP-1025 Multiple Company Vendor Synchronization**, **AR-1039 Multiple Company Customer Synchronization**, and **GL-1054 Multiple Company G/L Account Sync** will help you keep data in sync across your companies.

Journal Postings

Extended Solutions **GL-1034 General Journal Entry**, **GL-1057 Transaction Journal Entry**, **GL-1058 Recurring Journal Entry**, and **GL-1059 Allocation Entry** bring multiple company support to the various General Ledger posting operations. They allow multi-company journal entry from one company by the adding of a Company Code to each distribution line.

These and more Extended Solutions are available to streamline multi-company operations. Please give us a call with your questions regarding these or other available Sage MAS 90 Extended Solutions. ☆

Tips & Tricks

This tip takes you step by step through the creation of an Item Masterfile user-defined field (UDF).

1. Open Custom Office/Main/User-Defined Field and Table Maintenance and expand the ***Common Information*** folder.
2. Select the ***CI Item Master*** field and click the ***Edit Fields*** button to open the User-Defined Fields window.
3. Click the ***Add*** button to open the ***CI_Item: Add Field*** window.
4. Enter the UDF name and press *ENTER*.
5. Click the desired radio button: Manual Entry—the UDF values are entered manually or Business Object—the UDF values update from another field.
6. Click *OK* to open the next ***CI_Item: Add Field*** window.
7. Enter the description and select the desired settings. ☆

In The Spotlight
Sage MAS 90
Fixed Asset Module

Accurately managing and tracking your company's fixed assets is a necessary, if less than glamorous task. Many companies rely on spreadsheets to keep a listing of those assets and turn the documents over to their CPA at tax time to perform the necessary calculations. If you're ready to take a more active role in managing your fixed assets, there's an effective, easy-to-use solution designed just for you.

With the new Fixed Assets module for Sage MAS 90 ERP, you'll have the ability to manage up to 1,500 assets from acquisition to disposal. Let's learn more.

Easy To Use

This user-friendly module is designed to make the job of tracking and reporting upon your company's assets easier and more accurate. For example, templates can help you to create a new asset. When you add a new asset, the selected template automatically fills out the asset information, saving time and reducing errors. You also can store image files associated with your assets; keep a photo of an asset, a scanned copy of the maintenance agreement, or warranty easily accessible with the Fixed Assets module.

Automatic Depreciation Calculations

Fixed Assets can automatically create AMT and ACE schedules using your choice of over 50 depreciation methods, including MACRS 150% and 200%, ACRS, Straight Line, Modified Straight Line, Declining Balance, and Sum-of-the-Years Digits. There are other automatic calculations available, such as: Full Month Convention, Mid Quarter Convention, and Half Year Convention to Section 179, ITC, Gain/Loss, Salvage Value, and Tax Preference Amounts. If one of the many included methods does not meet your needs, Fixed Assets provides the flexibility to create customized methods.

Flexible To Suit Your Organization

Use the Group Manager feature to define groups of assets. With the Group Manager you can sort and report in a flexible and efficient way. By establishing groups, you can find the data you need more quickly. You can group by department, administrator, location, and asset type, whatever makes sense for your organization.

Rich Reporting

Fixed Assets includes more than 30 standard reports, each allowing user-defined sort and range criteria on all fields. Plus, you can print ready-to-file IRS tax forms or worksheets, including IRS forms 4562 and 4794.

Find And View The Data You Need

A built-in search function makes it easy to find the asset you are searching for. You can view the details of a single asset from all seven books: Internal, Tax, ACE, AME, State, and two user-definable books—all from a single screen.

Monitor History

Fixed Assets allows you to instantly switch between Main and Disposal functions, and provides a complete audit trail of the major events in an asset's life. Attach notes and record important details to preserve a complete picture of each asset's history.

Security And Compliance

Data security is always a concern, and the Fixed Asset module helps to ensure complete security at the user, user-defined menu, system, and company levels to protect your data from unauthorized access or manipulation.

A solution like the Fixed Asset module can help simplify Sarbanes-Oxley compliance for your business with strong security features and an advanced audit trail that red-flags potential compliance issues.

Streamline And Save Money

The cost of losing track of a valuable piece of equipment or overpaying on insurance or taxes for an item quickly exceeds the software and time investment involved in implementing Fixed Assets. Fixed Assets is available for Sage MAS 90 version 4.2.

Call us for more details and pricing. ☆

sage software Authorized Partner Select | sage software Master Developer

SAGE MAS 90 | SAGE MAS 200 | SAGE MAS 500

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