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SAGE MAS 90/200 NEWSLETTER JANUARY 2009

What's Inside

Headline News

Sage Software has recently created an Online Community for Sage MAS 90 ERP customers. The online community offers customers the opportunity to engage and interact with one another through a variety of different communication forums and tools. Jump right in, join a discussion, and share your experiences: click here.

Outgrowing Your Software? Re-implementation May Be The Answer

Have you been using Sage MAS 90 ERP for a long time? Have you wondered whether it is still the best solution for your business? If you've been using the software for a long time, chances are your organization has experienced growth and significant changes to business processes. The Sage MAS 90 implementation you have may no longer be supporting your efforts as well as it could.

Sage MAS 90 has grown too. Now entering its third decade as one of the premier solutions for medium-size businesses, the product has grown and evolved significantly to meet the needs of growing organizations like yours. You may not need new software, just a re-implementation of the software you have.

Ease Your Growing Pains

When our company, or another consulting company, first helped you implement the software, we configured it in the best way possible based on the needs of your organization at the time, and the then-current feature set of the software. Once things are up and running smoothly, most companies tend to leave the software alone and get on with the business of running the business. You may not have taken the time to evaluate new features in subsequent releases and analyze how they could be used to improve your business processes.

Over time, frustrations with the "old way of doing things" accumulate, and one day you wonder if you need new software. Changing systems is expensive both in terms of new software and conversion costs. Additionally, data migration is complex, and there is the learning curve of your staff to be considered. A well-planned re-implementation of Sage MAS 90 may be a better solution, saving significant money in software and training costs. In upcoming sections, we review some common issues customers experience as they grow, and cover ways in which the latest versions of Sage MAS 90 can help solve them.

Multiple Company Management

You may have set up additional companies within Sage MAS 90, whether as a result of acquiring another company or starting a related line of business. The more of these you have, the more difficult their management becomes. You may have the same vendors and customers in several companies. Your staff has

(continued on page 2)

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to be certain they are in the proper company when entering transactions. And at financial reporting time, you have to deal with the complexities of consolidating information with FRx or other reporting tools.

In the past Sage MAS 90 contained only a nine character, three segment general ledger account number, so setting up multiple companies may have been your best option. Today, the Sage MAS 90 General Ledger supports up to 32 characters with 10 segments. The main account (also known as the natural account) now is maintained separately from the other individual segments. With this much flexibility in the account, you may very well be able to run all your lines of business from within one company code. Divisions or departments can be carefully set up in Accounts Payable and Accounts Receivable to reference the proper segment of the General Ledger accounts used for each company.

Information Access

Until recently, if you needed a special report to organize and summarize information in ways not available with standard reports, you needed to have a custom Crystal Report written and added to the menu. Today, Business Insights Reporter and Business Insights Explorer (BIR and BIE) are easy-to-use tools that even a novice can use to create queries and reports quickly and easily. A re-implementation project could include full training in the use of BIR and BIE, empowering your team to get the information they need.

Customer Management

Are issues surrounding customer disputes, warranties, or returns starting to bog your company down? Do your salespeople each keep their leads, opportunities, and contact information on spreadsheets accessible only to themselves? Customer service can be a key factor that distinguishes one company from another. Therefore automating your customer-related processes can be important in a competitive marketplace. Your re-implementation plan could include SageCRM. By migrating to the Sage MAS 90 and 200 Extended Enterprise Suite, this customer relationship management tool is included. You can use it to automate both sales and customer service processes. The RMA (Return Merchandise Authorization) module is another tool that both automates the return process and allows you to track reason codes and collect data to help you refine your product or service offerings.

The Paper Trail And Workflow

Is paper overtaking your office space? With Paperless Office, included with Sage MAS 90 as of the 4.3 release, printing and filing paper copies of accounting documents is no longer necessary. Save all the money and time involved with printing, filing, and archiving paper documents. Paperless Office contains built-in workflow so you can choose how and where documents will be stored and who will have access to them. The process of saving a document as a PDF formatted file and storing it in the proper archive, can be completely automated. Consider a well thought-out implementation of Paperless Office as part of your re-implementation plan.

Power, Performance, And Remote Access

As your organization grows, so does the amount of data stored and the number of users on the system. You also may have employees working remotely. If any of these factors are beginning to impact your system performance, you might consider an upgrade to Sage MAS 200 as part of a re-implementation plan. Sage MAS 200 has been optimized to perform faster with large data sets and can support more users. Remote access is supported as well, and the enhanced security features added since the 4.0 release give you more flexibility in user access while retaining careful control of sensitive data.

ZOOM IN

Business Insights Explorer is so easy to use, your team can quickly create the reports and queries they need for decision support.

Extend Your Solution

No re-implementation discussion would be complete without considering Extended Solutions. There are hundreds of specialized add-on components that can help you meet your specific business needs. For example, if you need more refinement in multi-company handling, there are Extended Solutions that can help. Multi-currency and National Accounts solutions are also available.

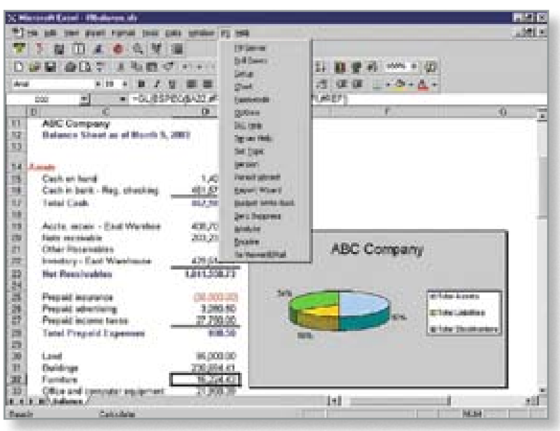
In addition to the functions mentioned here, there are hundreds of smaller enhancements that may benefit you to implement. In these tough economic times, re-implementing your software can be a cost-effective way to streamline business processes and cut costs. We can help you evaluate your current processes to see if re-implementation is a good option for your organization.

F9: Financial Reporting And Analysis For Excel Power Users

Sage MAS 90 ERP includes powerful built-in financial reporting with FRx, but if you like using Microsoft Excel or need financial reports more frequently than once a month, F9 might be the tool for you. Let's take a closer look at F9.

How F9 Works

When F9, an add-in to Excel, is installed, your familiar Excel interface will include a new F9 drop-down menu. A unique hot-link feature allows each cell in your spreadsheet to be automatically linked to any data item in your Sage MAS 90 General Ledger. In this way, real-time financial information is instantly available within your spreadsheet. It is a great tool for performing quick *what-if* analysis to determine the effect of business decisions on your company's financial status, using information from your general ledger.



When F9 is installed, it displays as a new drop-down menu in Excel. Built-in report templates make it easy to get started.

F9 Capabilities

F9 is easy to use. A Report Wizard allows you to go from a blank spreadsheet to a fully formatted, hot-linked report in seconds. Built-in templates assist in the process. By following the graphical step-by-step procedure, you can point and click your way to a finished report, complete with F9 formulas.

Multi Company Reports

F9 allows you to access general ledger data from any number of Sage MAS 90 companies simultaneously. You can use it as your tool to produce consolidated reports from multiple companies. You also can include data from all Sage MAS 90 fiscal years.

Anytime Reporting

Monthly financial reports are fine for fulfilling audit and government reporting requirements. But if you need up-to-the-minute business data more often, particularly if you are in an industry where prices fluctuate frequently, F9 allows you to produce weekly or daily reports so you can stay on top of profitability.

Write Back Budgets

If, like many organizations, you prefer to do your budgeting in Excel, F9 can help. You can export your budgets to Excel and use the macros and other tools to perform your budget revisions. Then, F9 can write back the edited budget to Sage MAS 90 or 200.

Graphical Presentation of Data

Since F9 is an Excel add-in, you can take advantage of all the graphics, font control, and other formatting features of Excel.

Drill-Down Capabilities

When looking at the data in your spreadsheet, unusual values may prompt you to check on their origins. F9 includes complete drill-down capability to the source data.

Error Resolution

If your financial report is out of balance, it is can easily be resolved using the Analyze feature in F9. With just one click, it will scan the entire spreadsheet, helping you troubleshoot your report by identifying missing or duplicate accounts.

Account Inquiry

If as an executive you don't normally run Sage MAS 90 on your desktop, you can use F9 for a quick account inquiry, such as a current bank balance. It is a simple matter to launch F9, select the accounts you want a balance from, and click Get Balance.

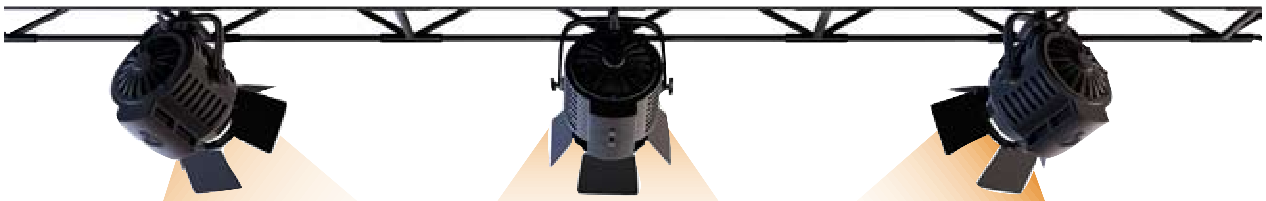
F9 offers highly flexible reporting capabilities, including drill down, multiple date ranges, lists of account segments, and report auditing, all while being dynamically linked to general ledger data. This ensures that your numbers are current, consistent, and complete. Give us a call if you think F9 would be useful in your organization.

((Tips & Tricks))

Setting Up Start And End Dates For G/L Account Numbers

Start and end dates determine when postings to accounts can occur. This is useful when you want to discontinue using one account and start using a different account as of a certain date. Note: When an account is created, the start and end dates are automatically set to the most restrictive dates entered for the main account or any of the sub accounts. To set start and end dates:

1. Open General Ledger/Main/Account Maintenance or General Ledger/Setup/ Main Account Maintenance and Sub Account Maintenance.
2. Select an account from the lookup.
3. In the 'Start Date' field, enter a date, or use the calendar button to select date.
4. In the 'End Date' field, enter a date, or use the calendar button to select date.
5. Click the 'Accept' button.



IN THE SPOTLIGHT:

Using Saved Report And Form Settings

Recent versions of Sage MAS 90 ERP give you a lot more flexibility to add reports to menus and save report settings for future use. In this article, we'll take a look at how to use the saved report settings feature. This information applies to modules that have been updated to the business framework, which as of version 4.3 were the GL, AR, AP, SO, RMA, BR, and eBM modules.

Saved Report Settings

Beginning with 4.0, this new global feature allows you to set up pre-defined report selection options for each report you have access to. When used effectively, this feature can smooth and speed your daily workflow. Instead of having to choose the data you need, summary or detailed output, and the printer to use every time you print or preview a report, you can save these settings.

Based on your security settings, you have three options for how saved report settings are handled. Public report settings are available for all users to modify and resave in a new format. Private report settings are ones you set for yourself and only you see when you go to print a report. Perhaps the most useful is Read-Only. This allows the supervisor or administrator to save the company standard report printing setting, and protect it so that users do not accidentally change it.

Forms Versus Reports

Saved report settings behave differently depending upon whether you are printing forms (invoices, checks, sales orders) or reports (check register, aged invoice report). Forms have the additional complexity of choosing the Form Code design for the form you are printing. For example, you may have different form codes for printing new orders versus backorders. Reports, on the other hand, have additional settings for summary versus detail that forms don't have.

Printing Reports

In order to make sure the Standard, or default, report setting is always available to return to, the only setting saved for the Standard Report Setting is the printer. This means that when you create a Saved Report Setting, you should always give it a new name that is descriptive of what it does. For example, "Aged Receivables in Detail Sorted by Customer Name". If you almost always print a report using a particular Saved Report Setting, you also will want to make the Setting your Default by selecting the Default check box. If you don't do this, the Standard Report Setting will always be the first one displayed when you go in to print a report, and you will need to select your special Saved Report Setting from the drop-down list.

Printing Forms

Suppose Bob prints picking sheets on and off all day long. For ease of use, the system remembers the Form Code used the last time he printed the picking sheet for that company. So the next time Bob goes to print picking sheets, the system defaults to the one he uses. You can copy the form code and give it a different name, such as *Bob's Picking Sheet* and *Mary's Picking Sheet*.

Saved Report Settings are a valuable productivity tool when properly configured. Give us a call if you need assistance.

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