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SAGE MAS 90

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What's Inside

Headline News

Sage MAS 90 ERP has again received top ranking in *The CPA Technology Advisor* annual Review of Mid-Range Accounting Systems. Published in the September 2008 issue, the review awarded Sage MAS 90 (Version 4.3) 5-Stars overall. The rating is based on five key areas: Modules & Notable Features, Integration and Import/Export, Reporting, Support and Training, and Relative Value.

Practical Examples—Using Business Insights Explorer

It is likely that you have heard about Business Insights Explorer (BIE) for Sage MAS 90 ERP and how it can provide customized access to information and increase productivity in your day-to-day tasks. But practically speaking, we understand that you are busy and have a hard time finding the time to explore BIE to decide which views can help with your daily workflow. In this article, we try to make it easier by giving you a few practical examples of how you can customize views. You will learn how to streamline access to data by creating default settings for data viewed regularly, and personalize the display of data to meet your individual needs.

BIE In Review

First, a quick review of BIE. You can access all BIE views from the Explorer folder in the Business Insights module, or access views related to a particular module, such as Sales Order, from the Explorer folder in each module. Each Explorer view is considered a unique Sage MAS 90 task and you must have security rights to launch the Explorer task.

Many default views include a primary and secondary grid. For example, in the Item view, Inventory Item Masterfile information is displayed in the primary grid. The secondary grid displays your choice of transaction detail—Item Transactions, Purchase Order Line Items, Line Items, or Item Vendors—related to the item that is currently highlighted in the primary grid.

Customizing A View

Your right-mouse-button functionality is a handy tool to remember in BIE. Anywhere in the grid, a click of the right-mouse button will give you a variety of options, so if you don't know how to do something, try clicking with your right-mouse button. We will get started using this functionality in the explanation of how to modify the columns in the view. We will continue with the Inventory Item View in this example.

If you right-mouse click on any column header, you can choose Column Settings. Within Column Settings, you can give the column a different caption (perhaps Part instead of Item), you can de-select a column altogether (perhaps Product Line is not particularly useful for your needs), and you can specify the column width (how much room

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Practical Examples — Using Business Insights Explorer

(continued from cover)

do you need for your *Description*?). You can organize the columns in a different sequence by dragging and dropping them to a new location (perhaps you would like *Qty On Hand* closer to *Item Number*). If you are the purchasing manager, the quantity on hand, on order, and on purchase order may be most important to you. You also can sort your view in ascending or descending order based on the column you are working with. For example, if you know your Item Descriptions better than you know your Part Numbers, you can sort by the Description column and quickly find what you need.

Calculated Columns

The ability to create calculated columns can be very useful. Let's say you'd like your item grid to display a standard profit margin based on standard cost and standard price in order to chart the profitability of your products. To do this, in your Column Settings (right-click in the column header to access), press the **Calculated** button. For example you would select the **Inventory Item Masterfile** table, and subtract the field **StdCost** from the field **StdPrice**. See *Zoom In* image on this page.

Formatting Data

You can change the appearance of certain values in a grid. Perhaps you would like the Item Quantity to display in green for positive values, blue for zero values, and red for negative values. From the **Column Setting** option, you would select the **Quantity** field, right-click the **Format Type and choose** *Boolean*. You will be prompted for a Named Value; select *Yes;No*. Then right-click the **Value To Format** and choose **Column Class Format Settings**, and Insert Color Tag for the positive, negative, and zero values. You will need to *Save* and *Load* formatting before you exit.

Filtering

Much of the time, you may want to work with a smaller set of data than all inventory items or all customers. Filtering allows you to work with a subset of data that you select. Use the **Filter Builder** button located on the lower right of the data view. For example, you could filter the default view for a particular product line, save it with a descriptive name, and repeat for each additional product line. A user with security rights to save public settings can create saved views for use by others.

Charting

Once your columns are formatted and positioned and your data filtered, you can create a chart to give you a graphical view. Continuing with our example, we will chart item profitability by warehouse. First, click on the Chart tab at the top of the data grid. Then, simply choose the parameters to the left of the chart. You can save the selected parameters for future use. For this chart, you would choose:

» Chart Type = Bar
» Data Points Per Page = 8
» Series = Standard Profit
» Group by = Warehouse Description
» Sort by = Standard Profit

Reporting And Output

The data set of any customized view that you create can be saved as a report or exported for use in other applications. You can export to Microsoft Excel or Word either as a new document, or to an existing mail merge template you have set up. For example, you could send Requests For Quotes to vendors automatically using a custom BIE view with a mail merge to e-mail option.

You also have the option to send a dataset directly to someone by e-mail. For convenience, you can add a button to your toolbar for this purpose. Select the **Customize Toolbar** icon on the toolbar, and select the **Commands** tab from the Customize dialogue box that appears. Scroll through the commands in the right window until you find ***Send Page By E-mail***. Drag it to the desired location on your toolbar. Right-click on the icon and chose ***Display Image and Text***. Close the Customize dialog box.

ZOOM IN

Here is an example showing the creation of a calculated column using the BIE expression builder.

Navigation

The drill-down and drill-around capabilities in BIE give you many options to explore and navigate your daily tasks. You can launch Sage MAS 90 data entry tasks directly from BIE, enter or modify information, and then return to BIE without losing your place. You may find that you prefer to dispense with the traditional menu system of navigation and use BIE as your launch pad for all your activities within Sage MAS 90.

We hope these examples have generated some ideas for BIE views that would smooth workflow in your organization. Give us a call for help creating custom views in Business Insights Explorer.

Enhance Customer Service With The RMA Module

How does your organization process customer returns? Today's customers expect a specialized level of service, and a manual system of tracking and resolving returns can be increasingly challenging. The Return Merchandise Authorization (RMA) module for the Sage MAS 90 ERP handles returns and replacements with ease. In this article, we will give you a feel for the power of RMA by following a return through a typical workflow.

Intuitive Interface

A typical RMA starts with one of your customers calling to report a problem with a shipment. It is likely that the customer service employees who enter orders will also be fielding the RMA calls. RMA entry looks a lot like Sales Order entry, making the learning curve easy. As with Sales Order module, selecting a customer populates the screen with many defaults to streamline data entry. Your staff will be able to click a checkbox to require inspection when the return is received in the warehouse. Shipping and billing addresses will default in and can easily be verified on the address tab.

Speed Return Items Entry

Chances are the customer is returning items from a recent invoice. You can select the appropriate invoice from a list, view all the items on the invoice, and easily select the items being returned. The quantity defaults to the quantity from the invoice, and is easily overridden to reflect the actual amount being returned. For each item, you can specify return for credit, replacement, or repair. A cross-ship checkbox allows replacement items to be shipped immediately, without waiting for the return to come in. Another button allows you to check item status to make sure you have stock available for immediate shipping.

Choose Disposition Of Items

Your service staff also can select a preliminary item action based on what the customer is telling them—return to stock, scrap it, or repair it. For purchased items, and with the Purchase Order module integrated, your team can automatically order a replacement from the vendor using the Vendor Action field.

The system handles restocking fees for returned items, and service personnel have the option of waiving restocking fees at the time of RMA entry—if appropriate to the situation—giving you the utmost in flexibility. RMA also can automatically calculate warranty expiration dates based on warranty codes held in the Inventory Management module. The operator is alerted to any expired warranties and can opt to extend the warranty on any item.

Automatic Document Generation

Once the RMA has been completed, clicking **Accept** will give you the option to automatically create a Sales Order for replacement goods. All the information is defaulted into the Sales Order Entry screen, so your customer service representative simply clicks **Accept**, and then is returned to the RMA entry screen.

If you need to send a copy of the RMA document to the customer, access Customer RMA Printing; from there you can print and send the RMA by mail, fax, or e-mail. The next step, RMA Document Generation, allows you to choose the documents you need—the replacement Sales Order, Credit Memo, Purchase Orders, Purchase Order Returns for the vendor, and the receiver document for the warehouse. Simply select the items that you wish to create and a click of a button will generate all the documents at once.

Record Receipt Of The Return

When the returned item comes in, your warehouse staff can record the receipt of the item in RMA receipts entry, and, based on the condition of the goods, make a final decision on item action and vendor action.

360 Degree View

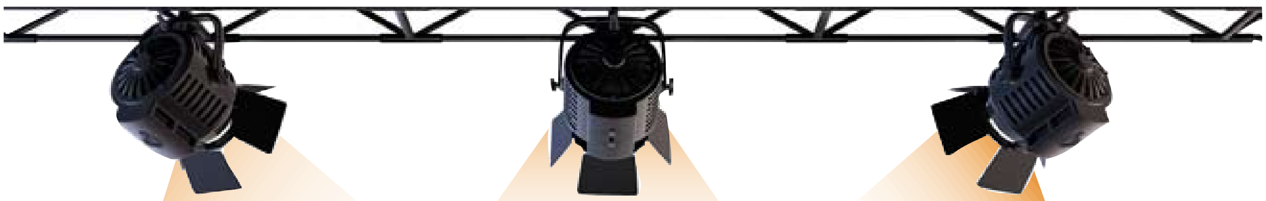
You can drill down to RMA information throughout the Sales Order and Accounts Receivable modules, and even from your integrated CRM application. RMA requires the Sales Order and Inventory Management modules, with optional Purchase Order integration. Give us a call with your questions.

((Tips & Tricks))

StarShip Adds A Helpful Online Knowledgebase

StarShip is another module that helps make the wholesale distribution workflow in Sage MAS 90 so powerful. This shipping software reads the Sales Order information, allows you to shop for the best rate, then transfers the freight cost and tracking numbers back into the Sales Order invoice.

V-Technologies, the developer of StarShip, has recently made their software support knowledgebase available online. If you already use StarShip, you can now get the answers to your questions more quickly. If you are thinking of purchasing the software, the availability of this online resource is another factor in its favor. Below is the link to the knowledgebase.
http://v-technologies.com/kb.htm?prodid=1



IN THE SPOTLIGHT:

Act Now To Take Advantage Of Economic Stimulus Incentives

The Economic Stimulus Act of 2008 was developed to boost the economy. Not only does the act provide for additional refund checks on personal income tax, it also contains significant provisions to help small businesses. But unlike the personal income tax stimulus, the small business provisions require that you act now, before December 31, 2008, to take advantage of the benefits. Let's take a closer look.

Expense Versus Depreciation

Normally, when a business acquires property, such as automobiles, computer equipment, real estate, and computer software, the value of that property cannot be expensed immediately, but must be expensed (depreciated) over a period of years. Section 179 of the IRS Code provides that, instead of depreciating, a business with a small amount of annual property purchases may choose to expense the cost. For taxable years beginning in 2008, the Economic Stimulus Act increased the IRS Section 179 expense limit, allowing more property to be currently expensed.

By taking advantage of this provision you can reduce the net profit reported to the IRS, saving on income taxes while acquiring property to help you run your business more efficiently.

Help For Your Bottom Line

Here's how it works: For tax years beginning in 2008, you can directly expense up to $250,000 for property placed in service that year. This is a 95 percent increase from the previous limitation of $128,000. Keep in mind, though, that the total equipment purchases for the year cannot exceed $800,000, or the amount you can directly expense is reduced by $1.00 for every dollar you spend over $800,000.

Further Incentives

A separate provision provides an additional 50 percent special depreciation for certain types of property. So if you do spend over $800,000, you can take a 50 percent depreciation for the amount above that which you can directly expense. For example, if your company purchased a single piece of property at a cost of $450,000, $250,000 of the cost could be immediately expensed (under Section 179) and the remaining $200,000 would qualify for the 50 percent special depreciation.

The types of property that qualify for the 50 percent special depreciation allowance are: section 168 property with a recovery period of 20 years or less, off-the-shelf computer software, water utility property, and qualified leasehold improvement property.

You will be able to deduct larger depreciation amounts on vehicles this year as well. For passenger vehicles, the maximum amount you can depreciate is $10,960, up $8,000 from the previous maximum of $2,960. For trucks and vans, the new limit is $11,160.

Act Now

The Section 179 tax break provides a great opportunity to acquire property to help run your business better. If you need to upgrade your hardware to take advantage of the latest software releases, including Windows XP and Sage MAS 90 ERP, now would be a good time to do it. Remember, the incentive is for the calendar year, so regardless of your fiscal year, the equipment must be purchased by December 31, 2008 to get the tax break on your 2008 tax return. We would be happy to help you evaluate your system needs, please give us a call.

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