

STAR-INFO

Newsletter for Sage ERP MAS 90 and 200

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Headline News

Sage ERP MAS 90 and 200 Version 3.71 has been retired as of September 30, 2010. Telephone support and product updates, including year-end tax law changes, will no longer be provided by Sage. However, customers who are on a subscription plan will continue to have access to the knowledgebase that includes articles about retired versions.

Introducing Product Update 3

New Functionality Features Bank Reconciliation Workflow Improvements

The Sage ERP MAS 90 and 200 roadmap, that Sage published earlier this year, called for more frequent, easy-to-install, focused enhancement releases. And Sage has delivered, providing customers on maintenance plans with three Product Updates since Version 4.4 shipped earlier this year.

In this article, we will cover Product Update 3 (Version 4.40.0.3) that became available September 2010. In this third Product Update, Sage delivers new customer-requested functionality focusing on the Bank Reconciliation module, to streamline workflow and resolve bank reconciliation pain points.

Smooth General Ledger Posting

When you receive your bank statement there are usually transactions, such as adjustments and bank fees, that are not yet in your Sage ERP MAS 90 system. Product Update 3 improves the workflow for these entries, allowing you to enter the adjustments and post to the General Ledger directly from the Check, Deposit and Adjustment Entry, and Reconcile Bank screens. You also can efficiently convert the Bank Reconciliation Report and Bank Reconciliation Transaction Register to a PDF format for easy electronic filing and distribution to others, using new Bank Reconciliation Paperless Office features.



New Columns Facilitate Workflow

The improved flow of information to the General Ledger is accomplished via new columns on the Check, Deposit and Adjustment Entry screen. The new columns are: Select for General Ledger Posting, Distribution Account Number, and Comment for Checks. These fields also are available when entering checks, deposits, and adjustments on the fly. The information that you put in the comment field will flow through to the General Ledger when the transactions are posted.

Quick Access To Bank Recap

Another customer enhancement request is

Introducing Product Update 3

(continued from cover)

the ability to access the Bank Recap Report and the Bank Reconciliation Register more quickly. With Product Update 3, you can access both of these reports from buttons located on the Reconcile Bank window.

New Transaction Register

A new Transaction Register task has been added to the main menu for Bank Reconciliation to provide the ability to post selected transactions to the General Ledger module. You also can print the Transaction Register directly from the Check, Deposit and Adjustment Entry, and Reconcile Bank screens.

To safeguard against unintentionally creating duplicate entries, posting only is allowed for those transactions entered directly into the Bank Reconciliation module.

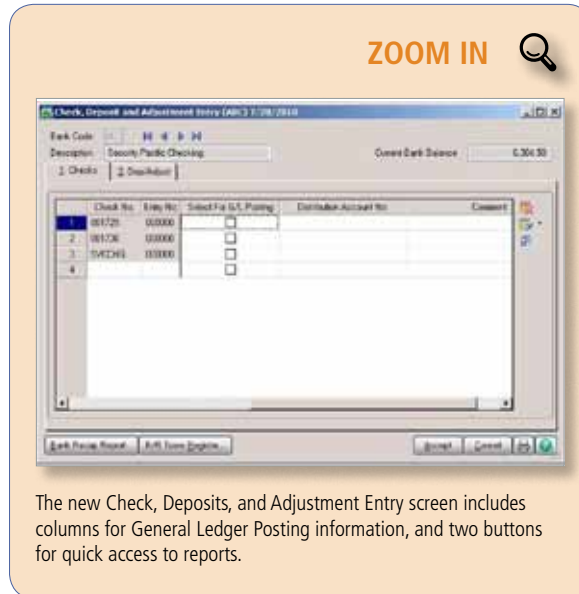
New Security Events

The new workflow includes added security events in Role Maintenance to restrict who can use the new features:

- For the Bank Reconciliation Transaction Register a new *Allow Updating of Registers from Preview* is added as a standard security event.
- For the Bank Reconciliation module a new *Allow Access to the Select for G/L Posting Setting for Check Entries* and *Allow Access to the Select for G/L Posting Setting for Deposit and Adjustment Entries* are added as standard security events.

Paperless Office For Bank Reconciliation

The Bank Reconciliation module goes green and joins the other core modules with the ability to create a PDF file of Bank



The new Check, Deposits, and Adjustment Entry screen includes columns for General Ledger Posting information, and two buttons for quick access to reports.

Reconciliation reports. You can choose to print the Bank Reconciliation Report and Bank Reconciliation Transaction Register by specific bank codes, or by all bank codes.

Flexible Paperless Office features give you the ability to easily e-mail or fax the PDF documents. Once converted, the Bank Reconciliation Report and Bank Reconciliation Transaction Register can be saved in the archive for easy recall, with complete security.

Microsoft Office 2010 Compatible

With the release of Product Update 3, Sage ERP MAS 90 and 200 now are compatible with the latest version of Microsoft® Office, Office 2010. Now you can take advantage of the new features of Office 2010 when creating mail merge letters or exporting to Excel from Sage ERP MAS 90 and 200.

Available Via Download

Product Updates have been designed to be easy to download and install. The compact file containing Product Update 3 can

be downloaded from Sage Online. Product Update 3 includes a Pre-Installation Data Scan utility to help identify any data issues prior to installation, thus mitigating the possibility of running into trouble with data conversion. Please give us a call for assistance with the Product Update or with your questions about the new features. ✨

((Tips & Tricks))

Printing Journals And Registers To PDF Files

In order to print journals and registers to PDF files, you first need to configure Paperless Office Options, as follows:

1. Expand Modules, Paperless Office, and Setup. Double-click Paperless Office Options.
2. Select the Journals and Registers check box under Enable Electronic Delivery and PDF Storage.
3. In Setup, double-click Journal and Register Maintenance.
4. Select either a company code or the All Companies option.
5. Select either a module code or the All Modules option.
6. Select either a particular document or the All Documents option.
7. Click the Browse Directory button, and select the folder to use for storing the PDF files.
8. Select an option from the Auto Create PDF list: Yes = The document always prints to PDF; No = The document always print to hard copy; Prompt = The "Do you want to print in PDF format" dialog box always appears.

Helpful Hints For Sage ERP MAS 90

Changing Mailing Label Formats

The default graphical mailing labels in Sage ERP MAS 90 and 200 are designed to print one, two, or three labels across and 10 labels down. Here we give you several options if you need to print using a different label layout, such as 2 across and 3 down. Before you start, make sure you know the exact size of your labels.

Option 1 - Crystal Reports®:

1. In Crystal Reports, in the form design screen for mailing labels, right click on any of the Details sections.
2. Select the Format Section option and highlight the Details section.
3. Click on the Layout tab and change the height and width to the appropriate size. Notice at the bottom of the Layout Tab, the Number of Details has changed.

Option 2 - The Report Expert:

The Report Expert found on the Report menu also can be used to modify forms to a standard Avery size; however, it tends to reformat the form quite a bit. Be sure to make a copy and work with the copy of the label form if you select this option.

Option 3 - Custom Report:

Create a Custom Report from scratch. Choose Mail Label from the Report Gallery in Crystal Reports. A wizard will step you through the creation of a label type report. You can then add the labels to the Custom Reports menu using Report Manager.

Adjusting Margins For Labels

The default three across labels normally fit on Avery 5160 label stock, but on certain printers you may need to adjust the margins slightly. This is done from the File menu by selecting Page Setup. Changing one margin to 0.18" will usually correct the problem. ✨

Improving Performance In Sage MAS Intelligence

Sage MAS Intelligence is the new reporting and analysis software that replaces Microsoft FRx. If you have large amounts of data, compacting the metadata can improve the performance of the system as it removes unnecessary connections and unneeded background files. To compact metadata:

1. Open Sage MAS Intelligence Report Manager.
2. Select File/Compact Metadata.
3. Select **Yes** to the question: *To compact your Metadata Alchemex must shut down. Do you wish to continue?*
4. In the Maintenance Utility window select the **Compact SVD** button.
5. Select **Yes** at the prompt: *This will attempt to compact your server Metadata file. Please make sure that there are no users logged on to the system before continuing. If you want to proceed press Yes, or else press No to abort.*
6. Once the process has completed Copying, Deleting, and Compacting you will receive a prompt: *Completed Successfully*. Select **OK**.

A backup copy file named *alchemex_backup.svd* will be created during this compact process. Once you have verified that the system is working correctly after the compact then you can delete it, or keep it as an additional backup. ✨

Customizer Changes Do Not Appear To Take Effect

If you have made changes to Sage ERP MAS 90 windows through Customizer, but the changes do not appear to take effect, they may have been overridden by Personalizations the individual user has made to the screen. For example, the user moved the Comment field to the lower grid on the Lines tab for Sales Order Invoice Data Entry. To have the customizations show up, you can reset the default window settings as follows:

1. Open the window that displays incorrectly and right-click anywhere within the window.
2. From the context menu, point to Form Settings, and click Reset Form.
3. Select one of the following check boxes and click OK.
 - Reset All Grids (windows with data entry grids).
 - Reset Window Size and Position (all other windows).
4. Close and reopen the window. The window should reset to the default settings, and the Customizer changes should now display.

Note: This hint applies to modules upgraded to the Business Framework in level 4.0 and higher. ✨

IN THE SPOTLIGHT:

Provide Feedback To Sage With The New In-Product Survey

Do you have ideas about improving your Sage ERP MAS 90 and 200 system? Sage takes customer feedback very seriously. Recently, Sage made it even easier for you to provide input. Let's learn more.

A History Of Customer Input

Using customer feedback to improve the product is nothing new at Sage. Usability tests are performed with actual customers before a new version is released, and a Customer Advisory Council provides input on a regular basis. Over the years you may have participated in various types of surveys in which you were asked for product feedback, whether by mail, on the phone, or via the Internet.

This extremely valuable information helps Sage understand your challenges and then determine what can be done to improve your experience. Your feedback influences product plans, helps prioritize features and functionality in each release, and drives product roadmaps.

New In-Product Survey

Rather than you having to go to a particular screen or website to provide feedback, the new in-product survey launches automatically. After you install a new release or Product Update, the software gives you a few weeks to absorb all the new features, and then prompts you for your feedback while it is still fresh in your mind.

Launching surveys within the Sage ERP MAS products is an effective way of obtaining

feedback from those people on your team who use the software on a regular basis. The following versions of Sage ERP MAS products support in-product surveys:

- Sage ERP MAS 90 and 200 4.4 (after applying a Product Update)
- Sage ERP MAS 90 and 200 4.3 (after applying recent Product Updates)

Your Choice

It is not always convenient to complete a survey on the spur of the moment. Taking the survey is optional; you may opt to take it immediately, decline the survey, or ask for a reminder at a later time. A Privacy Statement explains how the information will be used.

When you choose to take the survey, it will open a browser window and link to a Web-based survey. The survey will take approximately five minutes to complete, is comprised of no more than 12 single select questions, and also provides the opportunity for you to make comments and provide open feedback.

The in-product survey is one of many Sage initiatives focused on gaining a deeper understanding of your needs. Also available is the Sage ERP MAS 90 and 200 Feedback site, www.sagemas.com, where you can submit enhancement requests, or read and vote on others' suggestions. The Sage ERP MAS 90 and 200 Online Community is a collaborative space where you can share product tips and tricks with other customers: [click here](#).

We encourage you to take the time to tell Sage about your product experience. Of

course if you prefer, you may provide your feedback directly to us and we will make sure Sage hears about it. ✧

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