Schultheis&Panettieri, LLP
CERTIFIED PUBLIC ACCOUNTANTS

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Newsletter for Sage MAS 90 and Sage MAS 200 ERP

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What's Inside

Headline News

Sage Software offers free Web seminars designed to help you better manage your business. Current offerings include:

- Sage MAS 90 and MAS 200 Job Costing—Control job costs and increase cash flow
- What's New in Sage MAS 90 and 200 Version 4.3?
- Maximize Revenue by Improving Your Billing Process in Sage MAS 90 and 200

For the current Sage MAS 90 and Sage MAS 200 Webcast schedule or to register go to www.sage-webcast.com/mas90.

Business Activity Monitoring Tools Put Your Data To Work

We have all had days filled with troubleshooting problems and remedying mistakes or oversights. Often these problems could have been avoided if only we had some foreknowledge—if somehow we had been alerted to the situation. Of course Sage MAS 90 ERP software captures a great deal of important information about your company and provides the reports essential to running your business. But you may not always have time to read through reports to identify issues requiring your attention. That's where business activity monitoring comes in. Powerful business activity monitoring tools are available to review your data and alert the appropriate persons by e-mail when items needing attention are identified. And these tools can even update your data automatically based on criteria you set. Let's learn more.

Mind Your Business

Imagine if you had an assistant to monitor the situations you deem important, notify the appropriate people of issues for review and action, and help to get at the root of each problem by providing access to the relevant Sage MAS 90 reports and inquiries. Imagine further that this assistant never makes a mistake, and works 24 hours a day, seven days a week! That is the type of assistance you can expect from a business activity monitoring system.

The precise capabilities of business activity monitoring systems vary. At the basic level, they all can monitor your database and automatically e-mail designated persons when a certain condition occurs. More advanced systems can act on the information and generate new transactions in your database to effectively automate your workflows.

Resolve To Stay Alert

The basic capability provided by all business activity monitoring systems, commonly called alerts, monitors the activity in your system and automatically notifies you, your staff, your business partners, and even your customers when important events take place. Alerts use your existing e-mail system to notify you of significant events transpiring within your database. Notifications enable you and your staff to avoid missed deadlines, steer clear

(continued on page 2)

Business Activity Monitoring Tools

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of problem situations, and to capitalize on opportunities. Here are some examples of the types of issues alerts can handle:

» Alert the purchasing manager when an item is below its minimum stock level at a warehouse. Never run out of that best seller again!

» Send an e-mail to the account manager when one of their customers has an invoice past due by 30 days.

» Notify your purchasing agent when the cost of items received exceeds the Standard Cost.

» Communicate to the sales staff when an inventory item price changes.

» E-mail a customer when their credit status changes.

» Notify the sales manager when an order does not ship by the due date.

» Help prevent fraud or catch data entry errors with an alert when an Accounts Payable check over a certain amount is created.

Alerts can even act as a complete receivables collections tool by sending your customers an e-mail when invoices become past due and simultaneously adding them to a list for internal follow up.

Scheduled Or On Demand

You will want to schedule most tasks to run automatically at specified intervals, such as daily or weekly, so that the system can notify you automatically when the selected conditions are met. However, you also may run alerts on demand to run a quick check or to update the list of items meeting the criteria.

Workflow Automation

More powerful business activity monitoring systems can take action based on events that occur. For example, you can generate a work order when an order is received, and then when the work order is completed, generate an invoice and e-mail it to the customer. You can set workflow to route purchase orders for approval, and when integrated with your CRM solution, schedule follow-up calls with customers and leads. More advanced systems can even monitor and auto-respond to the content of incoming e-mail messages and Web form submissions. In addition to sending e-mail alerts, some systems can send alerts via fax, pager, cell phone, screen pop up, or Web browser, so you can be sure to reach the required person anywhere at any time.

Choosing A Solution

Two of the business activity monitoring systems available for Sage MAS 90 are the Business Alerts Professional module and KnowledgeSync, a powerful Sage Endorsed Solution. Below we have summarized the capabilities of each solution.

Business Alerts Professional

» Monitor date and time-sensitive events.

» Receive notifications regarding credit holds, inventory thresholds, sales ratios, urgency levels, and priority client transactions.

» Merge data into e-mail messages.

» Include e-mail attachments to provide additional information.

» Send automated responses to customers and vendors.

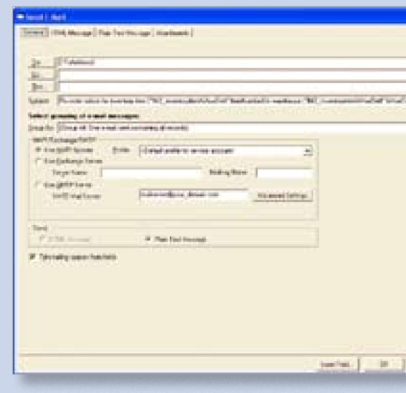
» Keep employees informed for better decision making.

» Track important business events.

» Improve customer service for better customer retention.

» Provide response to changing business conditions 24 hours a day, seven days a week.

» Includes a range of pre-built alerts for A/R, A/P, Job Cost, Purchase Order, Sales Order, Inventory, and General Ledger that you can easily customize to your needs.



An example of an Alert setup to notify the purchasing manager when a key item has reached its reorder point.

KnowledgeSync

» Enterprise-wide solution featuring scalability, flexibility, and dependability.

» Trigger personalized alerts about any business conditions via e-mail, fax, pager, cell phone, screen pop up, and Web browser.

» Automate the delivery of forms, documents, and reports to clients and staff.

» Execute workflow to deliver invoices and purchase orders, and schedule intelligent follow-ups.

» Monitor and auto-respond to the content of incoming e-mail messages and Web form submissions.

» Dynamically analyze data between multiple business functions (e.g., Accounting and CRM).

» Includes a range of pre-built alerts that you can easily customize to your needs.

Here we have just provided a brief overview, please give us a call to discuss the best business activity monitoring tool for your company.

Benefits Of Keeping Your Sage MAS 90 Solution Current

Are you still running on an older version of Sage MAS 90 ERP? Sage MAS 90 has always been a powerful accounting product – maybe that's why you didn't feel you needed to upgrade – but every release has been carefully designed to help customers operate their businesses more efficiently and securely, save time and money, and improve customer service. In this article, we'll recap the significant global features added in 4.0 and later releases that we think you should consider.

Work On Your Business

If you're like most business owners, you may find yourself mostly working ***in*** your business, not ***on*** your business. You're putting out fires and making tactical decisions about orders, products, and schedules. You don't have hours to spend analyzing your data, and yet if you did, the results of that analysis could have a profound impact on your business. You may discover unprofitable products and eliminate them, or identify top customers and offer additional purchase incentives.

Business Insights

If you feel you should be performing this type of analysis and haven't found the time, the Business Insights (BI) group of capabilities have been designed just for you.

BI Explorer, added in version 4.2, is an easy-to-use, on-the-fly inquiry and analysis tool. A familiar grid interface gives you access to information from all areas of the Sage MAS 90 system. Turn your data into fact-based knowledge using the powerful sort, group, and filter capabilities, and save the views you've created for future use.

BI Reporter was added in 4.0, and is designed for you to find the data you need and generate a report quickly and easily. The wizard-based tool displays data in a logical tree view, making it easier to locate the fields you need. You can specify options, such as date range, each time the report is run, and you can add it to a menu, refine it using Crystal Reports, or export it to Excel.

The BI Dashboard is a series of 12 charts that give you an instant picture of overall business performance. In 4.3, the Dashboard received a face lift, along with the ability to print graphs to a PDF file.

Customize Any Report

Have you ever wanted to customize a standard Sage MAS 90 report? With version 4.0 and above, you can. All reports are built in Crystal Reports, so you can easily customize any report, and output reports to several formats, including Excel, Word, PDF, and e-mail.

Personalized Report Settings allow you to set report defaults so you don't have to reselect them each time. Do you print the A/R Aging weekly with past due items only, and the full report at the end of the month? You can save them with an appropriate title and run as needed.

Faster Data Entry

Perhaps the biggest time saver in the 4.0 versions is the dual-grid data entry screens. Designed with direct user input during development, the dual-grid brings data entry speed and flexibility to a new level. In most screens, you enter data in only a handful of fields, allowing the system to default the information into the others. With the dual grid, you can place the most commonly accessed fields in your main grid, and speed through entry. If you come upon an entry that requires a change to one of the other fields, a click of a button takes you into the secondary grid.

Dual-Pane View Of Transactions

Similar in concept to the dual-grid data entry, the dual-pane view allows you to see a list of transactions in one pane, and the detail related to a specific transaction, in the other. The dual-pane view allows you to respond more quickly to customer and vendor inquiries.

Add Your Own Fields

In 4.0 versions, it is easy to add your own user-defined fields (UDFs) to any data file in General Ledger, Accounts Payable, and Accounts Receivable. The UDFs are treated like any other field, and can be passed through to invoices and history, and used on reports.

Batch Control And Auditing

With the Batch Manager, in versions 4.0 and greater, you can make batches public or private. Each batch is flagged with audit information including the user who created or updated the batch and the date and time the batch was created or updated.

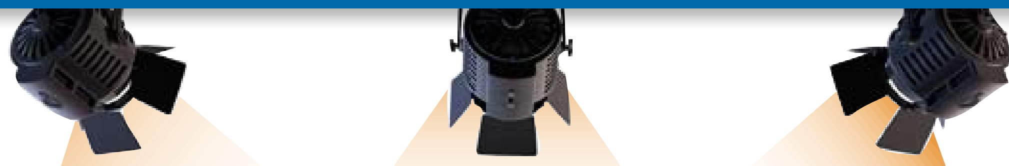
There are many more benefits to upgrading, please call us to discuss the specific benefits of upgrading for your organization.

((Tips & Tricks))

Modifying The Sage MAS 90 Business Alerts Default E-Mail Address

Sage MAS 90 Business Alerts comes with a *Default To* e-mail address in every alert. You can modify the *Default To* address by editing the E-Mail Agent in the Agent Control Panel as follows:

1. In Business Alerts, expand the *Processes* folder.
2. Select the alert to modify, and click on the + button next to the alert.
3. Click on the + button next to *Monitor an OLE DB Data Source*.
4. Right-click *Send E-Mail*, and select *Configure Step*.
5. Enter the new default address information.



IN THE SPOTLIGHT:

EDI: Not Just For Large Companies

Simply defined, EDI (Electronic Data Interchange), is a method of electronically exchanging business documents, such as purchase orders, directly between your accounting system and that of your customer. EDI standards were first developed in the 1960's and early systems were complex and expensive—within the reach of only the very largest companies. The advent of the Internet made EDI processing simpler and more affordable. Let's take a closer look at EDI today.

The EDI Opportunity

You already may have engaged with a customer who requires that you process transactions through EDI in order to do business with them. These are usually large organizations and may therefore represent a significant revenue opportunity. What do you do?

Some organizations have opted to receive the electronic purchase orders and retype them manually into their accounting system. Then when invoicing the customer, they may need to enter hundreds of invoices in a special format to meet EDI requirements. Often termed the *rip and read* method of EDI, this labor-intensive and error-prone method quickly eats into profits. Or perhaps your company simply walked away from the opportunity, concerned that EDI would be too complex and expensive to implement.

EDI Benefits

For wholesale distributors, the biggest benefit of EDI lies in the ability to sell to those very large retail organizations that only accept EDI transactions. These companies have hundreds of locations nationwide and once they have selected your product, will likely order a huge volume. Your organization could experience a big uplift in revenue.

Imagine the ability, with the click of a button, to import a customer's purchase order and have that purchase order automatically become an order in your system. It would save hours of data entry and eliminate data entry errors. Then when you ship the order, the invoice is automatically sent to the correct billing address, and can be received automatically into the customer's accounting system, eliminating errors and payment delays.

How EDI Works

There are three main components to EDI, mapping, translation, and connectivity. Your trading partners require that the information be sent in a certain format. Transactions such as invoices are mapped at each end into a format that can be recognized by the EDI translator. The translator interprets the transaction it receives from your accounting system to the format required by your trading partner. The connectivity component transmits the information securely from one computer to another. Older EDI systems use VANs (value-added networks) to transmit information. Today, the Internet can be used for connectivity at a much lower cost.

Easy And Affordable

Today's EDI systems are cost effective, easy to use, and quick to implement. Even smaller organizations can afford to adopt EDI and enjoy the benefits. The connectivity used, your industry, and the trading partners with whom you want to do business all have a bearing on choosing the right EDI system for your organization. Several solutions are available that integrate with Sage MAS 90 and Sage MAS 200 ERP. Give us a call to discuss the right solution for you.

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