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Newsletter
For Sage MAS 90 and Sage MAS 200

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**Sage MAS 90
Version 4.3**

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for more info!

Leverage Your Data With FRx Report Designer

The need for financial accountability is greater than ever—driven by standards such as Sarbanes-Oxley. Financial reports should no longer be simply printed and filed until audit or tax time. Included with every Sage MAS 90 ERP General Ledger is Microsoft FRx Report Designer (FRx), an industry-standard financial reporting tool. Taking full advantage of FRx, you can share information and encourage fiscal responsibility at all levels of the organization. It is easy to build and format financial reports within FRx. In this article, we'll cover tips for getting the most out of FRx and then we'll take a brief look at the add-on solutions available for FRx, including templates from Sage Extended Solutions.

Give your staff the data they need for informed decision making with FRx.

Getting The Most Out Of FRx

Here are some tips to maximize the power of FRx and get the most out of your financial reporting system. Think of FRx as a spreadsheet with individual columns representing actual and budget amounts for various fiscal periods, and rows representing General Ledger accounts, account groups, totals, and subtotals.

Column Headings

Variable Column Headers are a powerful feature of FRx. With Variable Column Headers, when you change the Base Period for the report, each column and column heading automatically changes to the correct period.

To use Variable Column Headers, choose the Insert Code button from the Column Header Options Window, and select a predefined code beginning with the @ symbol.

You can customize the column heading by combining text with any of the codes. First select the code, then type the desired text before or after the code, making sure to leave the @ symbol intact.

Tip: the @PERDESC header code uses the period description from your Sage MAS 90 General Ledger. This is especially useful if your company has periods that do not close on the last day of the month.

Enhanced Report Appearance

Does your company have a standard set of fonts it uses in its communications? You can customize your fonts in FRx Report Designer to match your company's preferred fonts or to make your reports easier to read and understand. Here's how to customize a font:

1. From the FRx Report Designer, select *Catalog of Reports.*
2. From the Catalog window, open an existing report.
3. On the menu at the top of the screen, point to Edit, and then click *Font Styles.*

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4. In the Font Styles window, click *New.*
5. Click the *Font* button, and select the type of font, whether it should be bold or italic, and the size and color.
6. To add custom shading or color to the style, click the *Shading* button.
7. In the Font Style Name box, type a description of the font for future reference.
8. Click *Save.*

The new font will now be available for use in the Font Style setting of any FRx report. To make the font the default for all new reports created, click the *Find* button in the Font Styles window, select the *Default Font Style*, and select your new font.

FRx Reporting Tree

Would you like to automatically generate and send a financial report for a particular department, division, or location to the appropriate manager? The FRx Reporting Tree allows you to define the relationship between reporting units, so you can quickly and easily deliver the information managers need to make better business decisions. You can use the tree to automatically send reports by e-mail to all of your management team at once. You can incorporate the e-mail addresses directly into the Reporting Tree, as follows:

1. In the report to be sent, open the Tree.
2. In the *Security/E-mail* column enter the e-mail address for that unit's reports.
3. Save the Tree.
4. In the Report Catalog, click the *Output* tab.
5. If the recipient does not have FRx Drill-Down Viewer, click *Send as Excel File* on the Output Options tab.
6. Click the *E-mail Options* tab.
7. Select the *Enable E-mail* check box.
8. Select the *Use Tree* check box.
9. Run your report.

Drill-Down Options

The FRx DrillDown viewer is a popular add-on for FRx. It's important to note that to enable drill down, the original report must be created with the Detail Level of something other than *Financial.* Any of the other settings can be used, such as *Financial and Account.*

Once the report is created in this way, drilling into a financial row will display all of the individual accounts. If you have a large chart of accounts, this may be an overwhelming amount of information. Here's a tip on how to use the Subtotal option to display an intermediate level of detail:

1. Open a report in the FRx DrillDown Viewer that includes account detail.
2. Click on *View*, then *Subtotals.*
3. Select the check box *Subtotal On Segment.*
4. Specify which segment to subtotal.
5. Click *OK.*
6. Drill into the report.

This subtotal setting also can be applied in the Catalog of Reports, Report Options, or Account/Transaction Detail tab.

Optimize FRx With Add Ons

A number of add ons for FRx can enhance your ability to securely and automatically put the right information in the hands of the right people in your organization.

The array of add-on tools for FRx give you the ability to securely and automatically get the right information to the right people.

FRx DrillDown Viewer

The FRx DrillDown Viewer gives users view-only access to FRx reports and the ability to get more information for items they have questions about. In this way, the user can locate the source of an entry without the risk of modifying the report. You also can e-mail completed reports.

FRx Report Launcher

FRx Report Launcher is useful for those who need to be able to select pre-designed reports, specify output options, and generate the report on demand. The user does not have the ability to create or modify the original report.

FRx Report Server

The FRx Report Server allows you to schedule reports to be generated and distributed automatically. This is useful if you send reports very frequently, such as a daily revenue report to your sales team. With the FRx Report Server, you can also off-load the processing from your desktop workstation to your server—very handy if you generate a large volume of reports.

FRx WebPort

As its name implies, the **FRx WebPort** allows you to distribute FRx (and other, non-FRx) reports via the Web. This capability is useful if you have remote users or locations, or executives who travel and require access to FRx reports. The remote users may run reports, including the ability to drill down to transaction detail, with no FRx client software installed—only a Web browser is required to use FRx WebPort.

FRx Report Manager

If you need to deliver a group of individual reports as one comprehensive book, the FRx Report Manager is the tool you need. You can combine FRx and non-FRx reports into your report book, and distribute it via e-mail, hard copy, or the Web. Report books can be scheduled to print and distribute automatically.

Report Templates

Trend reports can be very useful for getting the big picture of how your business is doing over an extended period of time. Two new FRx report templates are available from **Sage Extended Solutions.** The **Monthly Trend Report** is an income statement comparing all fiscal periods for the current year side by side. The **Rolling Trend Report** shows the same information for any 12 successive periods you specify.

We have only given a brief description of the FRx add-on options. Give us a call with your questions on FRx add-on modules or for assistance creating and generating FRx reports.

The Inventory Management Module

Do you still keep track of your products on a spreadsheet? Do you know which are your best selling or most profitable products or services? How do you ensure that a top-selling product is always available when a customer calls? The Sage MAS 90 ERP Inventory Management module can increase efficiency as well as track important historical information to help you make more informed business decisions. Let's take a closer look.

Know Exactly What's Available

When a customer calls, it's essential to quickly determine the availability and pricing of an item. When using the Inventory Management module along with the Sales Order module, your customer service staff will have the information they need at their fingertips.

The wealth of information about each product begins with quantities available. Not only can your team see at the touch of a button what is on hand, but they also can see what is already committed to other customers, and what is on purchase order from suppliers. Because the system tracks lead time from your vendors, they can even estimate when back-ordered items will come in.

It is even possible to check on a customer's previous purchases of an item. When viewing an item's sales history, you can see all the invoices on which the item was sold, then select an invoice and drill down into the details of quantities purchased and price paid.

Flexible Pricing Options

With the Inventory Management module, each product can have its own detailed price schedule that is readily accessible during order entry. You can offer discounts based on quantity breaks, and even offer special contract pricing to individual customers or groups. To maintain profitability, you can tie your prices directly to costs by calculating prices as a markup of the cost of the item. Several costing methods can be used to value items, including standard, average, FIFO, LIFO, and lot/serial.

If it is customary for your sales representatives to negotiate prices on every sale, a powerful option allows you to display the gross profit percentage on the order entry screen. In this way your representatives can see how much negotiation room they have. You can also set promotional pricing with expiration dates, so you can coordinate your inventory system tightly with your marketing campaigns.

Precise Commission Tracking

Each item can have a different method of calculating commissions. Commissions can be based on a percentage of price, percentage of cost, or percentage of gross profit plus a base commission amount, and commissions can be split between a salesperson and a sales manager. Payment of commissions can be based on invoiced amounts or only paid once an invoice is paid. Commission information can be automatically generated and sent to the Accounts Payable or Payroll modules for automated check generation.

Never Run Out

With the Inventory Management module, you can set a reorder point for each item or product line. The system can then automatically generate purchase orders in the Purchase Order module for items needed. You can calculate the appropriate reorder quantity as well, based on values you set for economic order quantity, maximum stock quantity, or reorder point. When integrated with the Business Alerts module, the system can generate an e-mail notification when stock quantities fall below specified amounts. You may not need to go this far with every product you sell, but consider the value of never running out of your top-selling items.

To help you get the best price and service level on products you purchase, whether raw materials or goods for resale, the module tracks an unlimited number of vendors per item (when integrated with the Purchase Order module). The history for each vendor shows the lead time, the last purchase price, and available quantity price discounts.

Manage Stock Efficiently

The Inventory Management module is an excellent tool for managing your inventory assets. You can maintain multiple physical or virtual warehouses, track the quantities and costs of items in each, and track the transfer of goods between warehouses. You can perform a physical count without interrupting the ordering and shipping processes. You can print physical count worksheets, and the system produces a variance report that provides data highlighting differences between the current physical count and count shown in the system.

To facilitate tracking and shipping of goods, you can print inventory labels with bar codes to be scanned during shipping. You can set up sales kits for simplified processing of items that are normally priced and sold together. Alias item numbers allow you to use one part number for tracking items internally, and other part numbers for customer orders and vendor purchases.

The system supports warranty tracking as well. A warranty expiration date is optionally calculated based on shipment or invoice date, and can be printed on invoices and packing slips. Warranty history is maintained and automatically recalled when items are returned using the Return Merchandise Authorization module.

E-Commerce Made Easy

Web commerce can be very profitable, but the process of managing part numbers, images, and promotional prices on your Web site can be challenging. When you integrate the Inventory Management module with the Sage MAS 90 E-Business Manager module, the E-Business Manager module draws images, prices, and stock information directly from the Inventory Management module.

Reporting And Analysis

Because a detailed transaction history is retained indefinitely, information is readily available for you to make informed decisions about the products you sell. The **Inventory Turnover Report** and **Sales Analysis** are just two of dozens of reports the system produces to help manage your inventory effectively.

When integrated with the other Sage MAS 90 modules, including the Sales Order, Purchase Order, E-Business Manager, and Business Alerts modules, the Inventory Management module can help you increase the efficiency of your business processes.

Give us a call for more information about the Inventory Management module. ☆

In The Spotlight:
Version 4.3 Preview

Sage MAS 90 ERP Version 4.3, scheduled to be released this summer, will focus on five areas: enhanced business intelligence, new global features, usability enhancements, end-to-end solutions, and performance improvements. Here's a quick preview of what's to come.

Enhanced Business Intelligence

Business Insights Explorer has become an indispensable tool for quickly locating and analyzing the data stored in Sage MAS 90 and 200. Version 4.3 adds views for the General Ledger, Inventory, Accounts Payable, and Purchase Order modules. A new charting tool also will be added.

At the same time, the Business Insights Dashboard is receiving an updated look and feel, and you will be able to print the graphics directly from the Dashboard.

New Global Features

Two popular capabilities, **Direct Deposit for Payroll** and **Paperless Office** document storage and management, formerly available as product enhancements, will be built right into the software beginning with Version 4.3. Direct Deposit will be sold as a module, while Paperless Office will be provided at no additional charge to both new customers and existing customers with a current Customer Care plan.

Usability Enhancements

Sometimes it's not the big features, but the small time-savers that can really help make your day run more smoothly. Version 4.3 adds a number of enhancements to the Accounts Receivable, Sales Order, and MAS Fixed Assets modules as well as to global report selection and formatting.

For example, 4.3 will have a new *In Shipping* status for orders that are processed but not posted. With 4.3, you will be able to create a Fixed Asset directly from Accounts Payable Invoice Data Entry or Purchase Order Receipt of Invoice, thus receiving the product into the accounting system and creating the asset at the same time.

Report selection is being streamlined with all selection criteria on one screen, simplified date selection, and Saved Standard Report settings. Various report formats also are being improved; certain General Ledger reports will no longer print lines with zero dollar values, and new column settings will be available for standard financial reports.

End-to-End Solutions

With Version 4.3, Sage continues to enhance the connectivity between Sage MAS 90 and integrated Sage products. The Act! Link will be easier to implement and use, and new versions of the SageCRM and Sage SalesLogix integrations will then be released.

Performance Improvements

Enhancements made to the underlying technology of Sage MAS 90 will result in faster performance printing long reports and processing large data sets.

We've only touched on the new capabilities coming in Version 4.3; watch for more details in upcoming issues and please give us a call with any questions you may have. ☆