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Headline News

The Sage Group, plc (Sage) recently announced that it intends to resume use of the **Sage** name and mark in North America. Some of you may remember that Sage adopted the Best Software name for its Canadian and U.S. operations in 2001, after a trademark dispute with an American company. The Sage Group plans to fully adopt the Sage brand for its North American business by March 2006.

Extended Solutions

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for more info!

Sales Order Previewing Version 4.1

In our last issue of **info for MAS 90* we highlighted many of the exciting new features you can expect with the upcoming 4.1 release of MAS 90® and MAS 200®. Our focus last time was core elements, this issue we'll outline the changes planned for the Sales Order module. Read on for the details.

Job Cost Integration

The single biggest change planned for the Sales Order module is integration with the Job Cost module. Hundreds of MAS 90 and MAS 200 users are already enjoying similar functionality courtesy of a Best Software Extended Solution. With the Version 4.1 release, all users can benefit from the integration, putting both Sales Order and Job Cost to work in ways you've only dreamed of.

You'll be able to assign a Job Number to an order and assign specific Cost Codes and Cost Types to each line item on the order. Several setup configuration options let you tailor the interface to your needs. For example, you can choose whether or not to post costs from Sales Order to Job Cost. Users will be unable to reference invalid job numbers and cost types on a sales order. If your

company is a job shop or contract-based manufacturer that bills for products and services, this interface will be of particular interest to you. It allows you to use the Job Cost module rather than traditional work orders to track and manage projects. Manufacturers who now use Job Cost can make use of additional invoicing capabilities such as a down payment or fixed price invoice.

Data Entry Features

The dual-grid interface is the data entry standard for modules released in Version 4.x. Sales Order users will find that the grid provides a flexible, efficient, and customizable structure for their data entry tasks.

Users can customize both the primary and secondary screens to allow the data entry flow to match the way they work. For example, you can move less frequently used fields to the secondary grid, where they are visible,

but out of the way. The Item Description, Warehouse Code, Unit of Measure, Tax Class, and Price Level, for example, could be moved out of the primary grid and into the secondary grid.



With the Version 4.1 release the Sales Order and the Job Cost modules are tightly integrated.

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Version 4.1 Sales Order CONTINUED

Choose to display the secondary grid beside or beneath the primary grid, whichever is more convenient for you.

A new Sales Order Personalization feature allows users to set the default values for warehouse, order type, print order, print pick sheet, ship via, or FOB fields. This simple change will not only speed data entry, but eliminate many common data entry errors.

Distribution of serial numbers will become much easier in Version 4.1, thanks to a streamlined Distribution Screen that allows users to select and allocate multiple serial numbers at once.

Security And Entry Controls

Several new security features are added to Sales Order to provide you with better control over order and invoice processing. You will optionally be able to prevent sales orders with an on-hold status from being invoiced, and can prevent new customers from being created on the fly. Inventory managers will appreciate the new control, based on the available quantity, that prevents an item from being oversold. Another control can require a manager's override for back-ordered items.

Currently, the line item warehouse code defaults from the warehouse code you reference on the sales order header. With Version 4.1, the line item warehouse code will default to the item's default warehouse, helping ensure you sell from the preferred warehouse.

StarShip users will appreciate the ability to flag a shipping address as residential, ensuring proper rate calculation and delivery.

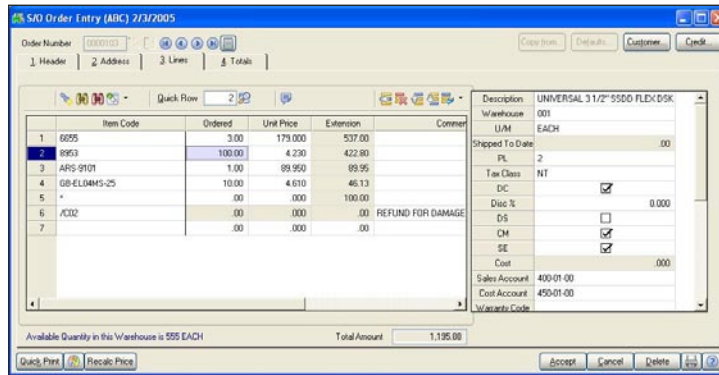
MAS 90® users frequently request the ability to validate a customer's purchase order number against previously entered purchase order numbers. In Version 4.1, as you enter a customer's purchase order number during order entry, the system will check other open orders as well as posted invoices for duplication of that number. In addition, you can look up previously entered numbers to help service a customer's request.

As you view the customer credit history window, you'll appreciate that the aging bucket totals displayed there will be dynamically calcu-

lated based on period-to-date information. This ensures your staff is making decisions based on the most current credit figures available.

Shipping Data Entry

Your shipping clerks are frequently working from a picking sheet as they perform shipping data entry. A new feature in Version 4.1 allows the shipping data entry lines to be sorted in the same fashion as the picking sheet, allowing



The flexible dual-grid entry screen allows users to move infrequently used fields to the secondary grid.

the clerk to quickly match picked items and fill orders faster than ever.

Here's another feature that will benefit StarShip users—the customer shipping address will now include a field for **Email Address**. The email address is passed along to StarShip for shipment notification purposes.

Many companies make effective use of customer memos to hold shipment and delivery instructions. If you're one of those companies, you'll appreciate that you can now access customer memos from Shipping Data Entry.

Flexibility is key to a successful shipping system, and few companies perform this task in exactly the same way. Version 4.1 will add a new **Shipping Setup Option** that will allow you to set the backorder amount for a shipment to zero, or to leave a line in an unresolved status. These options will aid companies that don't allow backorders, or that need to reprioritize available quantities among waiting orders.

Form Printing

Printing picking sheets by warehouse makes perfect sense, and MAS 90 has always had this

functionality. For companies with warehouses spread throughout the country, each responsible for their own invoicing, it may also make sense to print invoices sorted by warehouse, and Version 4.1 adds this functionality.

Currently, a maximum of three tracking numbers can be printed on an invoice or viewed from history. Version 4.1 allows for the complete list of tracking numbers associated with an invoice to be printed and viewed from History.

Companies that sell bill items will appreciate the added flexibility of being able to print **Bill of Material** bill options on the order and the picking sheet.

Auto Generate Invoices

The **Auto Generate Invoice** selection screen will now allow you to filter based on Ship Date and Promise Date to help narrow the search for the right orders to invoice. For example, customers that invoice daily can use the

Ship Date filter to select the orders that shipped today for invoicing.

Serial And Lot Number Tracking

In many industries it's crucial to identify who purchased a particular lot or serialized item. Textile distributors, for example, may need to identify from which lot number a customer last purchased in order to ensure consistency on a subsequent order. Version 4.1 adds a new **Serial and Lot Number Tracking Inquiry** that allows you to do just this.

Purge Enhancements

Version 4.1 will add a new Sales Order Purge Utility allowing you to purge obsolete orders by date and numerous other sales order attributes.

Version 4.1 is scheduled for release in late summer of 2005. We will provide additional details of this release as they become available. As always, please feel free to call us with your questions. ★

StarShip—The Year Ahead

StarShip is a complete shipping solution that supports multiple carriers in one user interface while storing shipment history in a central location. StarShip is designed to easily integrate with MAS 90® and MAS 200® making your shipping process more efficient and error free. A tremendous time and money saver, StarShip automates much of the mundane shipping process.

With StarShip you can shop rates across carriers, save money with third-party parcel insurance; print bar coded, carrier approved labels; send email shipping confirmation to your customers; and exchange address and shipping charge data with MAS 90.

When integrated with MAS 90 and MAS 200, shipping information is sent from Sales Order to StarShip to be processed. Usually only the weight of the package needs to be added.

Once the shipping information is approved, a shipping label is printed for the appropriate carrier. The tracking number and freight cost is automatically sent back to MAS 90 or MAS 200 to be stored with the shipping history for each sales order. An electronic scale interface allows you to weigh each package and send the weight directly to StarShip. StarShip can even email advance shipping notices directly to your customers.

Three New Versions Coming Soon

The publisher of StarShip, V-Technologies, has announced an array of new features to the product. Three separate versions will be released throughout 2005. Let's take a closer look at those releases to see what new features could benefit you. Please note that the release dates are estimates. We will let you know as each version becomes available.

Version 9.0

Scheduled for release in spring 2005, StarShip Version 9.0 includes the following new features.

Friendly new wizards guide users through the StarShip installation and setup process helping make implementation of this tool eas-

ier than ever. The wizards will help you set up options relating to company, printing, carriers, scale, and interface. Two existing wizards are updated with this release—one that provides for the automatic update of carrier fuel surcharges, and another to configure the use of the UPS On-Line Tools for tracking.

Version 9.1

Following shortly on the heels of the 9.0 release is Version 9.1. Scheduled for May/June 2005, enhancements include:

- ▶ Added support for NPS as a third-party insurance provider. The file StarShip creates can be uploaded at the end of each day.
- ▶ Added support for USPS flat rate box.
- ▶ FedEx carrier enhanced to use Web Direct tools instead of the ATOM server.
- ▶ Added support for FedEx international shipments.
- ▶ Ability to customize the label bottom for UPS, Spee-Dee, and USPS in setup.

Version 9.2

Scheduled for release in August 2005, this version promises the widest variety of changes. With this version, you'll be able to customize and design shipment email notifications to send to your customers. Customize those emails to include your company logo and even an attachment such as a PDF copy of the invoice. You can send these emails immediately as shipments are processed or in a batch at the end of the day.

New freight rules will be added that control how and when freight is written back to MAS 90 orders and invoices. Users can make use of these rules based on fields in MAS 90 or in StarShip.

When late deliveries cannot be avoided, this version of StarShip can perform time-in-transit and tracking tasks in the background. You can then generate a report detailing late deliveries for a specified time period.

If you have questions about how StarShip can fit into your company's operations, please give us a call. ★

Business Insights Reporter

Business Insights Reporter alleviates much of the learning curve required to master Crystal Reports for MAS 90. Business Insights Reporter, which premiered in Version 4.0, is a sophisticated front end to Crystal Reports, simple and intuitive for users. The Business Insights Reporter is an easy-to-use tool designed to help even a novice user create simple reports quickly and easily. Backed up with the power of Crystal, expert users can benefit from the streamlined functionality as well.

Here are the top features found in Business Insights Reporter:

- ▶ Wizard driven for ease of use.
- ▶ Data presented in logical views making the selection of the right data table simple.
- ▶ No need to understand underlying data structure to produce informative reports.
- ▶ Output reports to multiple formats, including: Excel, Adobe PDF, or XML.
- ▶ Point-and-click calculations based on the Advanced Lookup Engine (ALE) Customization Wizard.
- ▶ Support for the new role-based security—you define which roles have access to reports.
- ▶ Support for three-hole punch margin and page collation controls.
- ▶ Create links to additional data sources.

We've covered Business Insights Reporter in greater depth in earlier issues of **info for MAS 90*, but the upcoming 4.1 release adds a bit of additional functionality worth talking about.

Beginning with Version 4.1, Business Insights Reporter and all standard reports included with GL, AR, SO, RMA, and BR, will include a new Microsoft Word mail merge output option. When you access a Business Insights Reporter or a standard report, you'll see a new option to process the report output directly to Word. The output can then be presented dynamically in Word using the embedded Mail Merge capabilities. As a result of this new functionality, Visual Postmaster will be retired with the 4.1 release.

We would be pleased to help you get better acquainted with Business Insights Reporter as well as Crystal Reports; just give us a call. ★



MAS 90 In The Spotlight Order Tracking And Commenting Tools



This issue of **info for MAS 90* focuses on MAS 90® Sales Order and shipping functionality, and we thought it would be appropriate to take a closer look at some of the many related Best Software® Extended Solutions.

Comment Fields In Shipping Data Entry

We all rely on notes to explain, clarify, or document our actions. Comment fields are used in Sales Order and Invoice Data Entry to preserve important information about the order or lines on the order. Shipping Data Entry does not offer the ability to add these free-form comments—comments which would be handy to explain item substitutions, for example. That's where this Extended Solution comes in.

Comment Entry in Shipping Data Entry, SO-1407, allows you to add “/C” comment lines to the Shipping Data Entry screen. These comment lines will only print on the Master Packing List, not on each individual Package IDs Packing List. They will update to the invoice, but are not written back to the Sales Order.

Shipping Instructions By Ship-To Address

When you ship to your client's main office, your delivery service must remember to call just before arrival. When you ship to that same client's warehouse, the delivery service must go around the back to the loading dock. To offer exceptional service, and to ensure that your goods are delivered expediently and efficiently, it's often helpful to have written delivery instructions. That's the purpose behind this Extended Solution.

Shipping Instructions By Ship-To Address, SO-1204, adds two 50-character shipping instruction fields for Ship-To Codes. The data you enter here is displayed during Sales Order and Invoice Data Entry. The instructions may be printed on Orders, Picking Sheets, and Invoices.


Who Deleted That Line?

You can already elect to save deleted lines in the Sales Order history files, but you don't know who deleted the lines, or who added any new ones. Sales Order Line Entry Tracking By User, SO-1470, tracks the user ID of the person who added or modified each Sales Order line item along with the date of the addition or change. This could be a valuable feature if your company runs a call center where customers simply “Press 1 for Sales” when they call. If a customer later calls inquiring about an existing order and requests changes, you want to know who made the changes, and when those changes were made.

Who Changed That Order

Maybe you don't need the detailed line level tracking offered by SO-1470, but you'd still like to know who last changed an order and when. Here's the Extended Solution for you.

Sales Order Data Entry Tracking By User ID, SO-1010, displays a new box during Sales Order Data Entry that contains the ID of the user who created the sales order and the date it was created. If the sales order was modified, it also will provide the ID of the user who last modified it and the date it was modified.

Call us for pricing and details for these and other Best Software Extended Solutions. 



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