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Headline News

Best Software, soon to be Sage Software, announced that it is expanding its hosted service offerings with the new Sage Payroll Services for mid-market companies and organizations—including Sage Payroll Service for MAS edition, and Sage Payroll Service for Abra edition, and a stand-alone service edition for companies using any in-house accounting system. Look for more information in upcoming issues of *info.

Extended Solutions

See page 4
for more info!

Customizer Version 4.1

MAS 90® from Best Software provides an ideal business management solution for tens of thousands of businesses across hundreds of industries. Part of what enables MAS 90 to meet the enormously varied needs of this diverse client base is its ability to be customized and personalized for the way you do business. And with the Custom Office Module, much of that personalization and customization can be done without hiring a programmer.

Customizer, a powerful component of the MAS 90 Custom Office module, is the tool behind much of this customization capability. The upcoming 4.1 release of MAS 90 will include substantial changes to Customizer available within the Accounts Receivable, Sales Order, Bank Reconciliation, and RMA modules. In this article, we'll start with an overview of the new features planned for the upcoming Version 4.1 release. In the second part of this article, we look at ways Customizer can help you do business your way.

Changes In Customizer Version 4.1

In The Same File

Prior to the 4.1 release, User Defined Fields

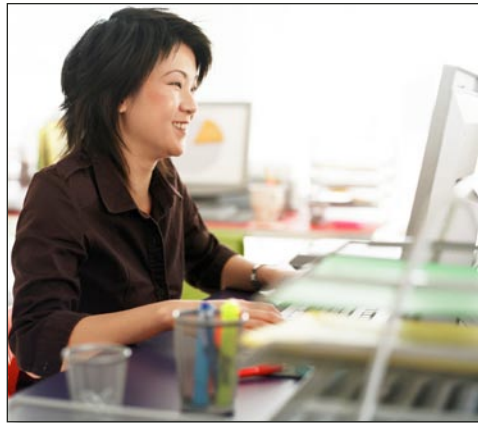
(UDFs) have been stored in a separate UDF data file. To include the UDFs on a report, or to import into or export out of, you often had to create a link between the primary file and the file holding the UDFs. A customer-related UDF for example, was stored in its own UDF file and then had to be linked to the Customer Masterfile. With the release of 4.1, using UDFs becomes more straightforward.

With this upcoming release, Best Software has completely restructured the way UDFs are stored. UDFs you create in version 4.1 are stored directly within the related file. Customer UDFs are stored in the Customer Masterfile. Sales Order Header UDFs are stored in the Sales Order Header file, and so on.

By providing this table extension, you can easily access the UDF from the appropriate data entry screen, lookup, or Crystal Report allowing you to fully integrate UDFs into your business processes.

Source Defaults

The restructuring of the way that UDFs are stored is more efficient too. Let's say, for example, that you have established a Customer Maintenance UDF to hold *Territory* data and you need a separate Sales Order Header UDF to hold that same data. You'll now be able to specify that the Terri-



Customizer gives you the ability to easily customize MAS 90 to meet your specific needs.

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Customizer CONTINUED

tory UDF on the Sales Order Header UDF is to be populated with the Territory value from the AR Customer Maintenance UDF. Or you could default Item UDFs into Sales Order Line UDFs to hold a warranty code. You also can specify that the default value of a UDF is a fixed value or a value from another MAS 90 data field.

This change will make using UDFs easier, it will speed data entry as users won't always need to enter the data, and it broadens the usefulness of the UDFs.

Validation Tables

With version 4.1, Best Software is introducing **User-Defined Tables**. The tables are used to ensure that the data entered into UDFs remains consistent and useful. With this release, these tables are available only for the Accounts Receivable, Sales Order, Bank Reconciliation, and RMA modules.

You can define tables to validate UDFs, and even define custom tables to validate some existing MAS 90 data fields. For example, you may wish to have a selection of possible Project Codes that will ultimately be assigned to a new project UDF. The User Defined Tables would be used to maintain the allowable Project Codes and descriptions. Maintaining the tables is simple, and you can even include data from the tables in Crystal Reports and forms.

Now that you see how Customizer will be enhanced in Version 4.1, let's take a look at the power of Customizer that exists right now.

The Power Of Customizer

If you have not yet used Customizer, here's a look at what else you'll find as you explore this useful tool.

Add Fields And Buttons

Customizer enables you to add UDFs to virtually any entry screen. You can add a field for *Support Technician* to the Customer Masterfile, or a field for *Referral Source* to the Sales Order header. The UDFs you create may be printed on forms, included on Crystal Reports, imported into, and exported out of. Their use is limited only by your imagination.

In addition to creating new data fields, you can use Customizer to add buttons to screens that will launch application tasks or other Windows applications. Get creative with this func-

tion; add a button to display a map of your customer's location, or to play back a sound annotation of the correct pronunciation of a difficult customer name. Include a photo of employees in the masterfile, accessible by a new button linked to the image file. Scan contracts, credit reports, vendor invoices, and other important documents and link them to the appropriate record through a new button. You can create your own Help screens and provide instructions to users that are available with the push of a new custom button during Invoice Data Entry. In what way could Customizer make your workflow smoother and more efficient?

Field-Level Security And Data Validation

With Customizer, you can bring security to the individual field level. Create field-level security by hiding particular fields from the view of specified users or user groups. Designate other fields as View Only. Add data validation characteristics to certain fields, such as a range or list of allowed values. These characteristics can vary by user, so you can limit certain users to using a defined list of General Ledger accounts or hide the Item Cost from another user group.

Rearrange Fields To Fit Workflow

Customizer allows you to change the layout of any screen by moving fields to suit your data entry process. You can ignore unused fields, designate a field as a tab stop, and define the initial value for a field. Consider making the Credit Hold field in the Customer Masterfile default to *Yes* when creating new customers, until you review their credit application. Make an important field stand out with bold font or by designating it to appear in red.

Relabel Fields And Add Text

Do you refer to your customers as clients, or refer to your item numbers as part numbers? Use Customizer to relabel any field to suit the terminology of your business, or to enable the field to serve another purpose.

Customizer allows you to add text to any screen for additional information, reminders, or instructions for your users. For example, you can add an on-screen message in Sales Order Entry to operators reminding them to tell customers about your upcoming summer sale.

Windows Scripting


The **Windows Script Control** feature of Customizer allows you to execute an external script to perform calculations or to start up external applications from a button you create in MAS 90. Think of a script as a mini program written to perform a specific task. Typically, a script is used to draw data from one program and write results to another program.

You can select values from a MAS 90 screen to pass to the script and designate values to be returned by the script after processing is complete. The script can be simple or complex. It can even contain a series of If/Then statements and different levels of calculations using data within MAS 90 and from an external program. You could use Customizer to perform a custom discount calculation in Sales Order Entry, or insert values into a Microsoft Excel spreadsheet or Microsoft Word document. Program logic that would normally be executed if you manually changed the field will be performed automatically, thereby protecting the integrity of your data.

Imagine performing customized freight calculations, calculating customer-specific discounts, defining a new commission structure, writing sales values to an Excel spreadsheet, creating an instant dunning letter in Word, or automatically creating new Outlook contacts by simply clicking a button within your MAS 90 software!

The Microsoft Windows Scripting Host must be installed and operational in order for you to use this feature. If you plan to create your own scripts, a good working knowledge of VBScript (Visual Basic Script) and/or Jscript (Microsoft's version of JavaScript) is also a requirement. If you don't have that knowledge, we can assist you in creating your scripts.

As you can see, Customizer is a tool that any business can use to maximize the power of MAS 90. From simple field relabeling to complex scripting, Customizer can turn your MAS 90 application into a tailored, optimized business solution.

Call us for full details on the MAS 90 Custom Office module. 

Crystal Reports

Putting Your Data To Work For You

Your MAS 90® database holds a wealth of data vital to your business operations. When that data can be organized and presented in informative, dynamic, and even graphic ways, it becomes more than data—it becomes information you can utilize.

As MAS 90 Version 4.1 is released, all reports and forms within the General Ledger, Accounts Receivable, Bank Reconciliation, Sales Order, and RMA modules will use Crystal Reports for design and output. Crystal Reports is the industry-standard graphic reporting and analysis tool. If you are not yet familiar with Crystal Reports, it is time to get friendly with this powerful, flexible report writer. Let's take a closer look.

Added Flexibility

Crystal Reports is a graphical WYSIWYG (what you see is what you get) report writer. It is easy to learn, easy to use, and amazingly powerful. Beyond just report writing, using Crystal Reports you can create customized mail merges and exports as well. By pairing Crystal Reports with MAS 90, you have access to an enormous set of powerful and flexible features and capabilities. Not only does this give you unlimited opportunity to customize standard forms and reports, but you can add graphics, logos, charts, and even embed other reports within a report.

Using Crystal you also can print Bar Codes, MICR font for checks, and any of the User Defined Fields (UDFs) you've added with Customizer.

Creating Custom Reports Is Easy

Crystal Reports is easy to learn. A built-in tutor and an online help system offer context-sensitive help and tips for successful report writing. Simply follow the instructions and you will be well on your way. You can quickly design interactive reports using an intuitive drag-and-drop interface. Experts and Wizards guide you through common tasks such as connecting to the data source, linking tables, selecting fields and records, grouping, sorting, and formatting. Reports created with Experts and Wizards can be further customized using easy drag-and-drop operations. With a bit of instruction and practice, you'll be an "expert" in no time.

Infinite Reporting Flexibility

Crystal Reports includes more than 160 built-in functions and operators as well as user-defined functions for complete control over report formatting, complex logic, and data selection. The powerful **Formula Workshop** lets you create valuable summary data that might not be present in your MAS 90 database.

Different users can view the same data in different ways without creating multiple



With Crystal Reports you can customize standard forms and reports, add graphics, logos, charts, and even embed other reports within a report.

reports. Users select from pre-defined parameters in a single report to receive their customized data. Sub-reports may be embedded in a main report allowing you to insert information from different tables with different formats into any section of a report.

You'll be able to customize the look of your reports by adding logos, pictures, shapes, and colors, or simply changing the font. Choose from 12 types of graphs, or add hyperlinks, drill downs, underlines, and running totals. Crystal Reports includes customizable templates and more than 100 formatting options for virtually unlimited control over the presentation of your data.

You can publish your reports to the web with automatic HTML output, export your reports to Microsoft Word or Excel, or email the reports in one of over 15 file formats. Publish your finished reports to a variety of formats including: XML, PDF, Word, Excel, and Text.

MAS 90 Data Access

Crystal Reports works by using an ODBC (open data base connectivity) driver that enables it to read MAS 90 data files.

When a Crystal report is generated, it sends a SQL query to the ODBC driver as a command to retrieve the data needed by the report. Crystal Reports creates the SQL query automatically when the report is designed. You don't need to worry about unauthorized user access—reports and forms created with Crystal Reports honor the security setup you have established in MAS 90.

The Workstation Setup program for MAS 90 installs the standard Crystal Reports Run-Time Engine on each workstation allowing all users to view reports created through Crystal. For those users who wish to modify or customize the standard forms included with MAS 90, or to create new reports, the user must have the Crystal Reports Design Environment installed. The MAS 90 Library Master module includes five licenses for the Crystal Reports Design Environment. If you'd like to provide this access to more than five users, you can purchase additional licenses, just give us a call.

What's New

If you're an experienced Crystal Reports user, here are a few recent changes and developments of which you should be aware, as of Version 4.1.

User Defined Fields (UDFs) created with Customizer now are stored within the same masterfile as the primary data. For example, inventory item UDFs are stored within the Item Masterfile. This eliminates the need to link to the UDF file when creating a Crystal report that is to include the UDF.

No discussion of Crystal Reports and MAS 90 is complete without mentioning the Business Insights Reporter, which made its debut in MAS 90 version 4.0. Business Insights Reporter acts as a sophisticated front-end to Crystal Reports, and makes the development of new reports simple, even for new users.

We're Here To Help

If you have questions about Crystal Reports or are interested in specific training or report writing services, do not hesitate to give us a call. ☆



MAS 90 In The Spotlight Extended UDF Solutions



In our Customizer article beginning on page one of this issue, we previewed many of the exciting new features surrounding User Defined Fields (UDFs). UDFs have the capacity to turn MAS 90® into a truly customized solution for your business. Customizer adds UDFs to many of the most used data files, and Extended Solutions for MAS 90 picks up where Customizer leaves off. In this article we'll take a quick look at some of the UDF capabilities you can add with Extended Solutions.

Lot And Serial UDFs

In many industries, it's vital to keep detailed information concerning lot or serialized items. You may need to keep a manufacture date, dye lot, expiration date, or other bits of information. The Extended Solution **CM-1003, Lot and Serial UDFs for Distribution**, adds UDFs to lot and serial numbers, allowing you to enter, store, view, and track this information as your items pass through MAS 90 from initial receipt through final sale.

Job Estimate Line UDFs

When you're preparing a detailed job estimate for presentation to your client, there may be additional data you need to record for each line of the estimate. Start Date, Supplier, or Phase Manager are a few possibilities of data elements pertinent to each line. By using the Extended Solution **CM-1006, User Defined Fields for Job Estimate Lines**, you can record the desired additional data. Using Crystal Reports to print your estimates means the UDFs also can appear on your customer's copy.

Salesperson UDFs

CM-1010, User Defined Fields for Salesperson Maintenance, allows you to add UDFs and default the UDF values in Salesperson Maintenance into Sales Order Header UDFs of the same name. With the variety of commission structures, inside and outside sales roles, and possibility of independent sales representatives that exist, it's likely you can find plenty of uses for these additional Salesperson Maintenance UDFs.

Miscellaneous Charge UDFs

Without the Inventory module, you do not have Item UDFs, but with **CM-1007, Sales Order Miscellaneous Charge Maintenance User Defined Fields**, you can add UDFs to the Sales Order Miscellaneous Charge Code file. The data you enter in these UDFs can default into Sales Order and Invoice line UDFs when each set of UDFs is named the same.

Extended Solutions

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More Info

Click here for more information on products and services featured

Extended Solutions don't stop here, there are UDFs for Shipping Rate Maintenance, TimeCard Entry, and Job Cost Change Orders as well.

UDFs Extend The Power Of MAS 90

Adding UDFs is one way to tailor MAS 90 to meet the specific needs of your business. If you are in need of functionality not available in the standard product modules, chances are there is an Extended Solution that can address it.

Give us a call with your questions on these or other Extended Solutions for MAS 90. ★