Your Source of Know

Newsletter for Sage ERP MAS 90 and 200

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Headline News

Sage North America recently announced Sage Payment Boss, a mobile tool that allows small businesses to get paid anytime, anywhere, by accepting credit cards using a 3G-enabled phone. With Sage Payment Boss, small businesses can select Sage Payment Solutions or another merchant account provider, and all payments are verified on the spot, ensuring immediate payment.

Simplifying The Upgrade Process

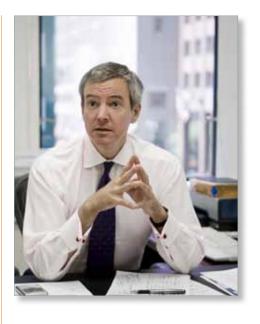## New Tools Help You Keep Your Software Current

Studies show many customers choose not to upgrade due to concerns over the cost, downtime, and effort involved. Are you still running on an older version of Sage ERP MAS 90 or Sage ERP MAS 200? If so, remember that Sage is retiring Version 3.71 on September 30, 2010. The good news is that Sage has made most upgrades smoother, faster, and less costly. And because every release has been designed to help you operate your business more securely, save money, and improve customer service, you will experience a quick return on investment. Here we recap features that were added in Versions 4.0 and later, including the new easier upgrade process.

Simplifying The Upgrade Process

For many customers, an upgrade involves more than simply installing a new version. There are customizations to consider, internal training, and the conversion of data and reports. Sage is attacking this issue in two ways. First, Sage is offering product updates in between major releases that contain additional features and functionality that can easily be downloaded and installed. Second, major upgrades are made easier through enhancements released in Version 4.4—a new Parallel Migration tool, and additional enhancements to the customization capabilities of the software that, when applied properly, ensure that customizations survive future upgrades.

Parallel Migration Tool

The key to improving your upgrade process is the ability to convert your system in two phases. This removes the urgent nature of upgrades—where you need to get everything done over a single weekend in order to avoid downtime, for example. The new Parallel Migration process is available for converting Versions 3.71 and greater to Version 4.4 of Sage ERP MAS 90 and 200. During the first phase, the Parallel Migration Wizard is used to convert your current data to a new installation, either on the same or a different server. Normal operations continue on your old system. Then, at a pace that suits your business needs, the new system can be setup, customized, and tested for proper function. Report printing and integration with other products can be tested. In phase two, your current data is migrated to the new system. In this way, you will very quickly be running on the new software, with less downtime and no surprises. Because upgrading is more efficient and requires minimal downtime, your return on investment is faster too.

Simplifying The Upgrade Process

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Customizations That Survive Future Upgrades

Even prior to Version 4.4, the Customizer module was a powerful tool. For example, a consultant could put a button on a screen that would perform a calculation using the invoice date, calculate three years into the future, and put the result into a user-defined field labeled *Warranty Expiration Date*—all without needing to write program code. However, the user had to remember to click the button, or the calculation would not be made and the field would be left blank.

With the 4.4 Customizer, scripts can be added that will run automatically when a certain event happens, such as tabbing out of a particular field. Using the above example, the script could automatically perform the calculation and fill in the warranty field when the data entry person finishes entering the line on the order. Scripts can run based on many software events, including before and after data is entered in a field, before and after a record is written, and even after a record is read by the software. The net result is that relatively complex capabilities can be added without changing the programs that come out of the box. This means that you will be able to upgrade to new versions and your customizations will continue to work just fine.

Benefits Of Upgrading

Now that upgrading is easier, why not take advantage of the many enhancements offered when you upgrade to the current version? The following are just some major benefits you gain when you upgrade your software to the current version.

Business Insights

If you are like many managers, you may find yourself mostly working in your business—putting out fires and making decisions about orders, products, and schedules. This leaves you with little time to analyze business data. Yet if you did, the results of that analysis could have a profound impact on the success of your business. You could find out which of your products are unprofitable and eliminate them, or identify top customers so that you can offer additional purchase incentives. If you feel you should be performing this type of analysis and cannot find the time, Business Insights can help. Business Insights Explorer, added in Version 4.2, is easy to use for on-the-fly inquiry and analysis. In each new release it has been enhanced with new features, such as quick-click charts. A familiar grid interface gives you access to information from all areas of the system. Turn data into fact-based knowledge using the powerful sort, group, and filter capabilities, and save the views that you have created for future use. Business Insights Reporter was added in Version 4.0, and helps you to generate the reports you need 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 Microsoft® Excel. The Business Insights Dashboard is a series of 12 charts that give you an instant picture of overall business performance. In Version 4.3, the Dashboard received a new look and gained the ability to print graphs to a PDF file.

Easy Report Customization

Have you ever wanted to customize a standard Sage ERP MAS 90 report? With Version 4.0 and above, all reports are built in Crystal Reports, so you can easily customize any report. You also can output reports to several formats, including Excel, Word, PDF, and e-mail. Personalized Report Settings allow you to save report defaults. Do you print the A/R Aging report weekly with past due items only and the full report only at the end of the month? You can save them with an appropriate title and then run as needed.

Speed Data Entry

Perhaps the biggest time saver in Versions 4.0 and greater is the dual-grid data entry screen. With the dual-grid data entry screen, you can place the most common data entry fields in your main grid, and the less used fields into a secondary grid. If you come upon an entry that requires a change to one of the less-used fields, a click of a button takes you into the secondary grid.

A dual-pane view on inquiry screens allows you to see a list of transactions in one pane, and the detail related to a specific transaction in another, allowing you to respond more quickly to customer and vendor inquiries.

Batch Control And Auditing

With the Batch Manager, in Versions 4.0 and greater, you can make batches public or private. Each batch stores the user who created or updated the batch and the date and time it was created or updated. The potential for fraud is greatly reduced and audit trails are more transparent.

We have covered several of the major enhancements; however, there are literally hundreds of smaller enhancements in the releases that we do not have space to cover here. To view highlights of the enhancements included in each version go to: www.4acc.com\upgrade.

Please give us a call with your questions or for assistance planning your upgrade. ✴