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Sage MAS 90

Extended Solutions For

Shipping

### Headline News

Sage Software recently received recognition from two top industry publications. The company ranked in the top 30 of *Manufacturing Business Technology's Global 100* for the sixth straight year. And for the second year in a row, Sage Software was selected to the *Supply & Demand Chain Executive 100* for outstanding innovation in supply and demand chain services and technologies.

**Extended  
Solutions  
For Shipping**

See page 4  
for more info!

## Sage TimeSheet—MAS 90 Edition

**D**o you track employee time and expenses associated with your company's projects? Do you rely on spreadsheets, or perhaps even pencil and paper? If so, let us introduce you to a better way.

Sage TimeSheet is an ideal project-oriented time and expense entry and tracking tool, and it's now fully integrated with Sage MAS 90 ERP. Sage TimeSheet provides your employees with an easy-to-use tool to manage their tasks and track their time, and it shares the data with your Sage MAS 90 software. In this article, we'll provide some details of the general capabilities of Sage TimeSheet, and then discuss the specific benefits of combining Sage TimeSheet with Sage MAS 90.

### Expense Tracking

Sage TimeSheet includes an **Expense Sheet view** where users can enter their expenses directly into an entry grid completely separate from time-sheet entry. Most of us are familiar and adept with spreadsheet-style type of data entry where we can press the *Enter* key to quickly save an entry and move to the next cell. In the Expense Sheet view, the rows represent tasks and the columns represent dates. If a user needs details about the expense codes or

expense groups associated with a task, they simply expand the task cell to display the details.

Expenses can be either price or quantity based. *Airfare* is an example of a priced-based expense item, while *Copies* is an example of a quantity-based expense item. You can attach notes to an expense entry to offer supporting details. You can see a running total of your expenses by day and period, and Sage TimeSheet even applies any markup/markdown or tax rate to the expenses before displaying the total.

Using defaults can save you valuable data entry time, and reduce the opportunities for data entry errors. With Sage TimeSheet, you can define several default expense values, for example: price, quantity, markup/markdown percentage, or tax percentage for each expense item. In addition, you can

define a default description for each expense. For example, you could establish an expense item description *Rental Car* with a default quantity of one.

### Approval Process

It's not always convenient to approve expense reports along with an employee's timesheet. Many companies process timesheets weekly, or twice a month, while expense reports are processed on a



Sage TimeSheet offers a Web-based timesheet interface, this means that your employees can have easy access even when they are on the road.

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Compliments of:



# Sage TimeSheet—MAS 90 Edition CONTINUED

monthly basis. Sage TimeSheet facilitates this by allowing managers to approve employee expense sheets independent of timesheets.

## Time Tracking

In addition to providing an ideal tool for the entry, tracking, and approval of employee expense reports, Sage TimeSheet is an efficient and effective time-tracking tool.

Sage TimeSheet offers three different views from which employees can enter their time. You can decide which views to use depending on the workflow of your organization.

The **Time Sheet** view displays a list of tasks assigned to the employee. The spreadsheet look and feel of this view provides an easy, intuitive interface. Entering time is as simple as entering time in the cell representing the correct date and task.

The **Day** view provides a desktop calendar interface. Rows represent the hours of the workday. The range of time displayed is customizable for each employee. For example, you might choose to have the Day view display the hours from 8:00 AM to 6:00 PM in one-half hour increments. Employees simply click on the appropriate row, and a dialog box opens allowing the employee to enter the details of their time entry.

The **Time Card** view allows employees to enter start and stop times for a specified day and task. The program then calculates the elapsed time. This view is useful for organizations that must capture start and stop times.

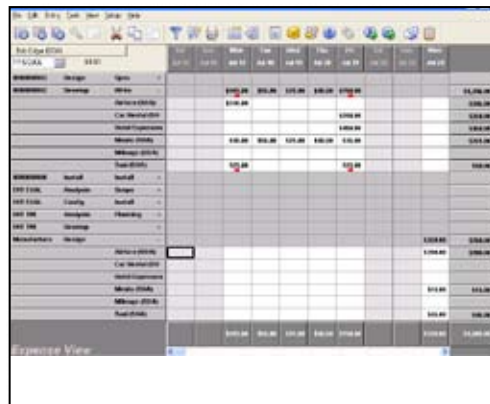
Time entries recorded in one view are visible from any of the other views and you can select the entry view most appropriate at the time.

The Sage TimeSheet time entry screens are clean, uncluttered, and user-friendly. As a result, time and expense entry is likely to be completed accurately—and on time—regardless of the number of employees, job codes, or cost codes you're managing. After approval, the time employees enter into Sage TimeSheet can flow directly into your payroll system—eliminating the need for another data entry step by your payroll or administrative staff.

## Flexible Approval Process

Sage TimeSheet provides an approval process that allows for multiple approval steps and can be configured to match your company's procedures and policies.

Do your employees divide their time between multiple projects, with potentially several project managers? With Sage TimeSheet, project managers can review and approve the hours and expenses for the projects they manage.



Sage TimeSheet's spreadsheet-style Expense view helps make entry of expenses fast and easy.

## Integration With Sage MAS 90

You will need the Sage MAS90 TimeCard module installed to integrate Sage TimeSheet with Sage MAS 90. Once installed, the TimeSheet module data can flow to your Sage MAS 90 Accounts Payable, Payroll, and Job Cost modules. Here's a quick overview of how the various aspects of the integration work.

Employees are created and maintained in the Payroll module, and transferred into Sage TimeSheet with details such as Company Code and Job Number.

Expense information in the form of Cost Codes and Cost Types are imported into Sage TimeSheet from the Sage MAS 90 Job Cost module; and upon approval are sent to the Sage MAS 90 Accounts Payable module allowing you to conveniently reimburse your employees.

Employee time entries created within Sage TimeSheet are exported to the Sage MAS 90 TimeCard module for subsequent transfer to the Sage MAS 90 Job Cost and Payroll modules.

If you wish, Sage TimeSheet also can transfer time directly to the Sage MAS 90 Accounts Receivable module for billing.

## The Benefits Of Integration

Together, Sage TimeSheet and Sage MAS 90 create Accounts Payable invoices for your employee expenses, Accounts Receivable invoices for employees' billable time, and transfer both time and expense data into the accounting software allowing you to maintain an accurate picture of your jobs' profitability.

Entering and processing employee expense reports is time consuming. With Sage TimeSheet you'll save time and effort because the expense data is summarized for you, and after approval is then sent to the Sage MAS 90 Accounts Payable module for reimbursement.

## Easy Access, Informative Reports

Sage TimeSheet offers a Web-based timesheet interface, this means that your employees can have easy access in the office or can access Sage TimeSheets remotely.

Comprehensive reporting tools provide access to the data held in Sage TimeSheet. You can analyze your data in multiple ways—by project, task, employee, manager, and more. Sage TimeSheet expands your project analysis capability with Crystal Reports® and Excel-based detail reports included with the software. Use the reports *as is* or create custom reports of your own design. In addition, it's simple to export your report data to Excel, Word, or PDF for further analysis or to share with others.

## Insight Into Your Projects

Every business is unique, and Sage TimeSheet allows you to utilize up to 10 custom fields for each project level, facilitating sophisticated tracking and analysis.

With greater insight into the time and expenses associated with your company's jobs and projects, you're better able to make strategic decisions that enhance both efficiency and profitability.

We would be happy to answer your questions about Sage TimeSheet—MAS 90 Edition; just give us a call. ★

# Shipping Efficiency

The Shipping Data Entry feature and bar code technology in the Sage MAS 90 Sales Order module—combined with StarShip from V-Technologies, a freight manifesting solution, can give you an automated pick, pack, and ship engine that keeps the sales engine humming and drives distribution quickly out the door and to your customers. Let's take a closer look.

## Shipping Data Entry

### Pick

Warehouse personnel use the Picking Sheets generated by Sage MAS 90 to select the items from your warehouse or storeroom shelves to meet an order's requirements.

### Pack

From the Sage MAS 90 Shipping Data Entry screen, the shipping desk personnel enter an order number and record the quantities shipped for each item on the order. With flexible entry choices, you can key in the item number or scan the bar code of the item number being shipped. The item bar code may come from the item's label or from the bar-coded item number field printed on the picking ticket. The entry automatically increments the quantity shipped. Alternatively, you can press a single button to ship the remaining quantity on the order.

### Ship

Once quantities are recorded, you can assign items to packages, confirm freight charges, and make any necessary changes to the shipping address.

Shipping Data Entry shares the same data files as Invoice Data Entry, so creating a shipping record automatically creates an invoice. Your accounting department can review the invoice data, print the invoice, and update. The Sage MAS 90 Sales Journal update function is still the only means of updating invoice information, no posting occurs from Shipping Data Entry. Until the Sales Journal is updated, you can recall and make any necessary changes to the order, while simultaneously changing the invoice information.

Inventory tracks the *Quantity in Shipping*, and dynamically deducts this quantity from the

*Quantity on Hand* to ensure an accurate real-time count. Appropriately, Drop Ship items do not appear in Shipping Data Entry.

## Bar Code Automation

Bar code functionality can increase accuracy and speed data entry. Scanners to read the bar codes are relatively inexpensive, and when placed at each warehouse packing station will serve to promote fast, error-free order handling.

Your products may already have a label with a bar code on them, or you may print labels containing bar codes from within Sage MAS 90. Many locations within Sales Order and Inventory Management support printing bar coded fields on labels and shipping documents. Using Crystal Reports® and an add-on bar code font software, you can create a bar code of virtually any field, to add automation and efficiency to the shipping and warehouse control functions.

## StarShip Interface

Sage MAS 90 boasts a strong interface with StarShip, an industry-leading freight manifesting solution. StarShip includes support for UPS, and FedEx (Express and Ground). Support for USPS, DHL, Spee-Dee, and a user-defined carrier can be purchased optionally. Not only does StarShip calculate the freight charges and produce bar-coded shipping labels, it can even shop for the lowest rates to your customers' locations.

StarShip does not replace your shipping carrier's service, rather it is a tool that adds efficiency by giving you access to multiple carriers from a single interface—and provides two-way communication with your Sage MAS 90 accounting software.

## Automated Shipping Workflow

Here's an overview of the automated workflow:

- 1 Sales Order is entered in Order Entry.
- 2 Picking Sheets are printed.
- 3 At the warehouse, items are pulled for orders using picking sheets and brought to the shipping station.
- 4 At the shipping station, each item is scanned

or entered in Shipping Data Entry and the quantity shipped is recorded.

5 Warehouse worker packs the order. There is an option to either identify the contents of each package or list the number of packages being shipped for the order.

6 Once Shipping Data Entry is complete, the worker clicks the StarShip button on the Shipping Data Entry tab. This brings up the StarShip entry window, populated with critical fields such as the customer's name, e-mail address, ship-to address, invoice number, purchase order number, ship-via method, C.O.D. amount, and declared value.

7 With a system-integrated scale, the worker places a package on the scale and freight is automatically calculated.

8 A shipping label is printed from StarShip.

9 The worker clicks the *Save* button, and StarShip writes essential data including the tracking information and the freight charge back to Sage MAS 90.

10 Lastly, a shipping document—a packing list, invoice, or both—is printed.

We would be happy to help you design and implement a shipping and bar code solution to meet your company's specific needs, just give us a call. ★

## Tips & Tricks

### Sage Software Online

Sage Software Online offers a wealth of information for Sage MAS 90 ERP users. You'll find *Hot Fixes*, support information, product manuals, and more. If you have not yet visited this valuable resource, take a few moments to see what it has to offer. To access Sage Software Online, you must have a current agreement or subscription plan with Sage Software.

If you do not have a current login to Sage Software Online, go to the following URL and click the *Register Now* link:

[www.sagesoftwareonline.com/eServices](http://www.sagesoftwareonline.com/eServices)

If your subscription plan has expired, give us a call to renew it. ★



**In The Spotlight:  
Sage MAS 90  
Extended Solutions For Shipping**



In conjunction with our Shipping Efficiency article on page 3, here we will explore two Extended Solutions for Sage MAS 90 ERP that increase the power and flexibility of this vital function.

**Picking Sheet Printing To Warehouse-Specific Printers**

If you operate multiple warehouse locations, or even a large warehouse with multiple pick and pack stations, this Extended Solution could be a solution for you.

Picking Sheet Printing to Multiple Warehouse Printers (SO-1198) adds the ability to print Picking Sheets to printers designated by warehouse. A Printer Name field is added to Warehouse Code maintenance. As you print Picking Sheets, the program will direct the Picking Sheet to the printer you have specified, based on the warehouse code referenced on each item line.

**Enhanced Shipping Data Entry**

Here's a multi-faceted Extended Solution called Enhanced Shipping Data Entry (SO-1404) that adds the following four options:

**Remove Credit Hold Restriction And Warning**

This option can remove the restriction and warning against processing Sales Orders in Shipping Data Entry when a Customer is on *Credit Hold* or has exceeded their Credit Limit.

If you checked the Setup option, *Process Orders for Customer on Hold*, then the restriction against processing an order for a customer who is on *Credit Hold* is removed. If the order status is *Hold*, the user will still receive a warning message.

If you checked the Setup option *Do Not Warn When Credit Limit Exceeded*, and when the only credit problem is *Over Limit*, the message "Customer Credit Limit Exceeded. Do you want to continue?" will no longer be presented.

**UDF Values That Prevent Freight Recalculation**

This option lets you define up to three values of a specified user-defined field (UDF) that flag the system not to recalculate freight. When you specified *UDF Values That Prevent Freight Recalculation* in Setup, and the Sales Order Header Customer Office UDF is one of the non-blank values specified, the Freight will default from the Order and is not recalculated.

**Audible Alerts**

When you have checked the Setup option *Issue Audible Alert During Certain Error Conditions*, the system will issue audible alerts any time the user over-ships a line or selects an item that is not on the order.

**Color Code Unresolved Lines**

If you checked the Setup option *Color Code Unresolved Lines*, all lines will default into Shipping Data Entry in red. The lines change to black as they are fully shipped.

Extended Solutions SO-1198 and SO-1404 are available for Sage MAS 90 version 4.1. Give us a call for more details on these or other Extended Solutions for Sage MAS 90. ★



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