

Sage ERP MAS Intelligence Module

Replacement Module For FRx Produces Reports With A Familiar Interface

When Microsoft announced the retirement of the FRx financial reporting software, which has for many years been included with Sage ERP MAS 500, Sage began searching for a replacement. Sage ERP MAS Intelligence has been identified as the ideal FRx replacement solution. It provides powerful and easy-to-use financial reporting and it also can provide Business Intelligence from across your entire system, including Sage SalesLogix and Sage Abra.

Power And Familiarity Of Excel

Microsoft Excel® has become the reporting and analysis tool of choice for accountants and executive management alike, so it made sense to choose a reporting tool for Sage ERP MAS 500 that is based on this familiar interface. Sage ERP MAS Intelligence comes with a selection of report templates that help you quickly and effortlessly produce pre-formatted reports. Then you simply can refine and expand your reports using all the flexibility and power of Excel. Sage ERP MAS Intelligence allows you to spend more time focusing on analysis and less time pulling data together.



Comprehensive Integration

Sage ERP MAS Intelligence is integrated so that it already recognizes the data structures within Sage ERP MAS 500. The software reads your data and knows your fiscal periods, chart of accounts, detail transactions, and various types of balances. As a result, you quickly will be able to build your intelligence solution to work the way you do.

Informed Decision Making

The Dashboard Analysis report provides a one-page summary of key business information, featuring Top-N details on customers, items, and expenses. View information both textually and graphically to help with daily and long-term planning. In addition, comparative profit and loss figures are displayed for current month and financial year-to-date. You can drill down

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to get further insight into what makes up the numbers.

Components

Sage ERP MAS Intelligence is organized into several components, similar to that of the FRx system it replaces. The components are Report Manager, Report Viewer, Report Designer, and the Connector Module. You can select the components based on the level of functionality you require.

Report Manager

At the heart of the system is Report Manager. This is where you create and edit new reports, as well as filter and aggregate data. Here you will find built-in report templates that help you get a quick start using the system. There are templates for financial reports as well as Financial Analysis, Dashboard Analysis, General Ledger Transaction Details, Inventory Status, Vendor Purchases, and Customer Sales.

With Report Manager it is a simple matter to create your layout, set multilevel groupings and consolidations, and add formulas where you want them, all using intuitive selection tools. You even can use what-if analysis by changing a set of values on your reports to instantly see the impact of a change on an area of your business. Report Manager includes flexible security settings that allow you to set permissions and protect sensitive data from unauthorized access.

Report Designer

Report Designer gives you the ability to author new reports. When you have a Report Designer license you also can import data from external sources to be included in your reports.

Report Viewer

Report Viewer Licenses are available for staff members who need to run reports, but not create them. A Report Viewer License allows you to view existing reports with real-time information, perform basic filtering capabilities such as selecting the date range, and drill-down to detailed reports.

Connector Module

The Connector Module gives you access to information from multiple data sources and multiple Sage ERP MAS 500 companies. With this module you can produce consolidated financial reports for multiple companies and connect to and report on data from other ODBC-compliant data sources, including Sage Abra.

What Is Included?

The Sage ERP MAS Intelligence Module will be available for customers on Sage ERP MAS 500 Version 7.3. Customers on a current subscription plan will receive, at no charge as a replacement for their FRx licenses, four single user Report Manager licenses. These licenses give you the ability to:

- Author new reports (organize, create, edit) as well as filter and aggregate data based on existing data containers.
- Run, edit, and clone the standard report templates, including financial reports, dashboards, financial trend analysis, general ledger, sales, purchases, and inventory transactional reports.
- Set security and permissions on all reports.
- Connect to one company database at a time. If you are running two or more companies, you can redirect the

software as needed to access data from your other company codes or purchase an additional Report Manager or a Connector license if you wish to generate reports that include data from multiple companies.

If you own and trade-in additional FRx licenses, only maintenance will be charged. Maintenance will not be charged on the initial free Sage ERP MAS Intelligence licenses.

Advanced Capability Add-ons

You can purchase advanced capabilities to add to the Sage ERP MAS Intelligence module.

- Import/Export functionality requires the purchase of an additional Report Manager License, a Report Designer License, or the Connector Module.
- Optional Report Scheduling requires the purchase of an additional Report Manager License, the Report Designer, or the Connector Module.
- Connections to other types of databases or more than one company database at a time requires the purchase of a Connector Module.

Note: Because Sage ERP MAS Intelligence utilizes Microsoft Excel it requires Excel 2003 or Excel 2007. In order to run the Report Designer, customers will need Excel 2007.

Sage will not include FRx in the Sage ERP MAS 500, Version 7.4. However, Sage will continue to support FRx as part of previous releases, according to the published Supported Versions Policy.

Please give us a call with your questions. ✨

Product Roadmap—Sage ERP MAS 500

Sage recently has published a Product Roadmap for Sage ERP MAS 500. In this article we provide an overview of the roadmap, as well as highlights of current and upcoming releases, including Product Update 3, released in May 2010.

Sage ERP MAS 500 Strategy

Sage developed the Product Roadmap with the intention of providing value to customers with minimal disruption to customer business processes, through a combination of frequent small enhancement releases or Product Updates, and less frequent major new version releases.

To determine what will be in its releases, Sage obtains customer feedback from a variety of mechanisms. These include customer input via surveys, customer site visits, and Customer Advisory Board meetings. Support cases are reviewed and enhancement suggestions from the online community are considered. Additional input comes from business partners through the Advisory Council, and technology direction is recommended by Sage Research and Development.

Product updates will include top customer-requested enhancements. Sage also is focusing on reducing the impact of upgrades on customers' customizations to the software.

May 2010 Product Update

The May 2010 Product Update for Version 7.3 is available for download. This release includes a number of customer-requested usability enhancements, as follows:

- Two security events have been added to Enter Transfer Orders to control updates to the Surcharge Amount and Percentage fields.

- Sales Order Entry Bulk Update now provides an option to update open sales order lines with defaults for Shipping Priority and Dates.

- The ability to select the unit of measure on three reports has been added. You can choose Stock, Sales, Purchase, or Price unit of measure before printing the Stock Status, Inventory Valuation, and Inventory Cost reports.

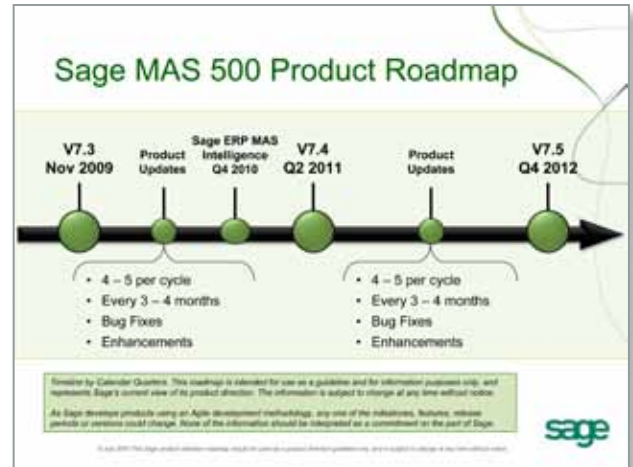
Future Product Updates

Future Product Updates for Version 7.3 are already planned and include such useful features as the ability to copy sales order and quotes to a new customer, and security events to control the deletion of sales order and purchase orders. You can expect new product updates for 7.3 to be available every three or four months until Version 7.4 is released.

Major Release Schedule

Major new version releases to Sage ERP MAS 500 will occur approximately every 18 months. Version 7.4 is targeted for release in the second quarter of 2011. Enhancements planned for Version 7.4 fall under three themes:

- Manufacturing and distribution improvements—such as the ability to change preferred vendor for replenishment, using the transaction date as post date for manufacturing transactions, and the ability to backflush from bin-tracked warehouses.
- Productivity enhancements—workflow



Note: The Sage Product Roadmap is intended as a product direction guideline only, and is subject to change at any time without notice.

improvements such as simplified customer refunds, better tracking of overpaid invoices, and allowing negative line items on Sales Orders.

- Platform and performance updates – Crystal Reports® 11 R2 and Microsoft Office 2010 will be supported, as well as Visual Studio 2010. Performance enhancements are planned for Business Insights Explorer.

Version 7.5 is planned for the fourth quarter of 2012 and is expected to include enhancements to usability, manufacturing, technology platforms, and multi-currency capabilities.

Product Retirement Schedule

In order to focus development resources more effectively on current and future releases, Sage will be reducing the number of prior versions that are supported. Support for Sage ERP MAS 500 Versions 6.3 and 7.0 ends September 2010 and support for Version 7.05 will end with the release of Version 7.4.

Give us a call with your questions, or to plan your upgrade. ✨

IN THE SPOTLIGHT: Advanced Planning And Scheduling

How efficient is your manufacturing operation? Must your production managers maintain laborious spreadsheets to plan production? How often are orders late because someone forgot to schedule an operation? The Advanced Planning and Scheduling (APS) module in Sage ERP MAS 500 is a powerful, yet easy-to-use tool that can increase manufacturing efficiency and make a positive impact on your bottom line.

APS Benefits

With a well-implemented APS module, you will be able to save money by reducing inventory and using your resources more wisely. Your production scheduling personnel will appreciate the ability to create multiple schedule versions to determine optimum efficiency.

Synchronize Supply And Demand

Manufacturing efficiency is maximized when you achieve synchronization between customer demand, material needs, and resource availability. APS helps you accomplish this with the ability to schedule using industry-standard scheduling rules.

Industry-Standard Rules

APS schedules production based on advanced mathematical algorithms. You can choose from the following nine industry-standard rules: Started Operations, Locked Operations, Actual Before Planned, Critical Ratio, Minimum Slack,

Priority Code, Required Date, Due Date, and Entry Date.

The minimum slack formula minimizes the time difference between required and scheduled completion date. You can give each work order a priority code manually and schedule via priority number. The master scheduling screen allows you to use multiple rules at the same time. You simply choose which rule the system should use first, then work your way down the list. A typical rules sequence might look like this:

1. Started operation
2. Locked operation
3. Actual before planned
4. Due date
5. Release date

Flexible Scheduling

Of course, no matter how carefully you plan, new priorities or equipment failures will require schedule adjustments. The APS module gives you flexibility with the drag-and-drop scheduling board, and the ability to maintain multiple schedules and what-if scenarios. The system also allows you to override standard work center, machine, and holiday schedules, so you can schedule overtime if needed.

As the need arises, you can tweak the schedule easily using the graphical scheduling board to accommodate those inevitable situations, such as fitting in high-priority orders or moving operations to a different machine if one breaks down.

A preview window displays late

scheduled Work Orders and special messages so managers can stay on top of problems. You even can use the Alerts module to send alert messages to appropriate personnel when production delays occur. The visual schedule also can improve customer service with visibility into the status of customer orders and scheduled completion dates across manufacturing facilities.

Give us a call to discuss how APS can be put to work in your organization. ✨

CONTACT INFORMATION

ESC Software

1620 W. Fountainhead Parkway
Suite 507

Tempe, AZ 85282

(480) 784-1622

(866) 248-3241 toll free

(480) 784-1623 fax

info@escsoftware.com

www.escsoftware.com

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