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NEWSLETTER for Sage ERP MAS 500

Sage Product Roadmap Update

Including Product Update 1 And Upcoming Version 7.5

The Sage ERP MAS 500 Product Update 1 download now is available from www.sagesoftwareonline.com. This release includes useful enhancements, some of which are being made available for both Version 7.3 and Version 7.4. Here we cover the features of Product Update 1 and preview the recently updated product roadmap for Sage ERP MAS 500.

Product Update 1 Enhancements

Credit Card Processing

Product Update 1 gives you the capability to process a Credit Card Post-Authorization in excess of the Pre-Authorized Amount. This enhancement is included in the August 2011 Product Update for both Sage ERP MAS 500 Version 7.3 and 7.4.

Typically the pre-authorization is run when an order is received to verify available credit. When the order ships, the post-authorization is processed. This enhancement enables you to set a limit on how much the post-authorization amount can exceed the pre-authorization amount. The limit can be either a percentage or a dollar amount, and can be set separately for each customer.

When a post-authorization is processed, if the amount exceeds the pre-authorization and is within the limit, the transaction goes through using the original authorization code. If the amount exceeds the pre-authorization and falls outside the limit, the transaction fails and the user is prompted to contact the customer.

ACH Remittance Advice

Another new feature, Print ACH Remittance Advice, has been added for Version 7.4 only. A new task has been added to the Accounts Payable Activities menu. Once an ACH Remittance batch is successfully generated and posted, you can use this task to print the Remittance Advice, which is essentially a voided check with the remittance details. The ACH Remittance Advice provides an audit trail or file copy for those businesses whose processes require copies of vouchers to be filed with a check copy, or to be mailed to the vendor for reference.

(continued on page 2)

Product Roadmap Update

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Product Roadmap Update

Sage keeps customers up to date on the future development of the software by publishing a Product Roadmap. It is worth noting that Sage develops products using an Agile development methodology, so any of the milestones, features, release periods or versions can change, but here is the current plan.

The current roadmap extends to the end of 2012. Product Updates are scheduled to be released on a regular basis during this period, with the next big release, Version 7.5, scheduled for Q4 2012. Between now and then, there will be two releases for Sage MAS Intelligence.

Sage MAS Intelligence

Planned for release this quarter are reporting tree, report distribution, and performance enhancements for Sage MAS Intelligence (SMI). Reporting trees will add easy-to-learn organizational reporting, and include support for multi-company consolidations. Performance improvements are planned to focus on the areas of GL data loading and general report loading. Report distribution is enhanced as well, allowing you to easily set up and fully automate report distribution to all the stakeholders in your organization. Rich text e-mail distribution is supported, as well as conditional distribution based on report content. You will be able to publish reports in multiple formats (PDF, XLS, HTML) on local and networked locations, and create convenient Windows shortcuts for any report.

Sage also is working on a utility to convert Microsoft FRx reports to SMI, with a planned release date in early 2012. The utility will convert native columns like Actual/Budget columns as well as calculated columns that involve basic arithmetic. Reporting Trees and Catalogs are planned to be converted as well. Due to limited correlation between FRx and Intelligence row formatting, manual rework will likely be required post-conversion. No conversion is planned for multi-currency calculations.

Version 7.5

Planned for Q4 2012, Sage ERP MAS 500 Version 7.5 enhancements will fall into several areas including: productivity, manufacturing, upgrades and customization, and Sage Exchange.

Productivity Enhancements

The planned productivity enhancements focus on feedback from customers. The following features are under consideration for the release:

- Multiple e-mail recipients for document transmittals
- Means to perform mass pricing updates
- Reversal of Credit Memos applied to Debit Memos and Invoices
- Hard close of sub-ledger fiscal periods
- Track miscellaneous cash receipts in AR
- Import pending cash receipts
- Batch authorization for recurring credit card transactions

Manufacturing Enhancements

Sage is focused on improving workflow and usability in the manufacturing modules. Features under consideration include:

- Batch entry of material issues
- Add scrap factor to material step to allow for shrinkage
- Support use of non-inventory items
- Backflush setup hours option
- Easily cancel work orders created in error

Customization Enhancements

Sage continues to work to ensure customizations survive upgrades. In addition, the following new customization capabilities are under consideration:

- Base form fields available in the form chooser
- UDF data flow from one module to another
- Call control events within Customizer Script Editor
- Customize grid lines in Enter Sales Order
- Additional APIs to isolate custom work

Upgrade Enhancements

Sage has an ongoing commitment to reduce costs associated with upgrades and updates. Under consideration in this area are:

- Smart Install of Customization Report
- Smart Install Comparison Tool
- Auto Update Tool

Sage Exchange

It is planned that Version 7.5 will take full advantage of the features of Sage Exchange. The Sage Exchange integrated payment solution platform provides a PA-DSS certified environment that facilitates the exchange of payment data. Sage Exchange connects to a new Sage Exchange Virtual Terminal with card swipe capability, and new best-in-class encrypted point-of-sale terminals.

Retirements

Support for Sage ERP MAS 500 version 7.05 and 7.2 ended September 30, 2011. If you are still using either if these versions, it is time to start planning your upgrade. Give us a call for assistance or with your questions about the product update.

Sage MAS Intelligence Tips And Tricks

Sage MAS Intelligence (SMI) is a powerful new tool in Sage ERP MAS 500 that was primarily adopted to replace Microsoft FRx, which is being retired by Microsoft. Naturally there is a learning curve associated with getting the most out of any new tool. Here we provide some tips on getting started with creating custom financial reports in the SMI Report Designer.

Excel Friendly

The SMI Report Designer sensibly starts with Microsoft® Excel®, a tool with which most accountants are very familiar, and adds functionality. The Report Designer requires Microsoft Excel 2007 or above, and gives you flexible report design capabilities from raw data in Excel.

Report Templates

Currently, the Report Designer functionality is available for two reports, one for single-company financial reports and one for consolidated financial reports for multiple companies. You can start creating your custom report by copying these reports to use as templates and then modifying them. After you design a new report format, remember to create and link the template back to the copy of the report you made.

Getting Started

To access the Report Designer, run the desired report. When Excel opens, access the Report Designer using the BI Tools tab. Once Intelligence is installed, the Add-Ins and BI Tools tabs will always show in your Excel workbooks.

Mapping Accounts

You may need to map the Report Designer reporting groups to your system accounts. This is done within the individual report. We recommend that you copy the Financial Reports Designer report and rename it to Mapped Designer Template. Map the accounts as follows:

1. Select the report.
2. On the Parameters tab, set the **Fiscal Year default** to *2010* and the **Budget Code default** to *Original*. To do this, right click on the field and select Properties. After selecting the default, click OK.
3. Select the **Mapped ABX Designer Template** and run the report. Select **OK**.
4. Map the UnMapped System Categories into Reporting Groups. First select a reporting group in the right most column and then select the unmapped category in the left most column. Select **Add**. Select **OK** when all categories have been mapped.
5. Click **OK** to the message about successfully mapping your categories.
6. Minimize Excel and right-click on the Mapped ABX Designer, select to create and link the template.
7. Click **OK** to select the Mapped ABX Designer Template Workbook.
8. Click **Yes** to clear the contents of worksheet 2.
9. Click **OK** to accept the template name. By default the template name is the same as the report name. It is recommended that you keep the template name and the report name the same.
10. Select **Yes** to replace the existing template.
11. Select **OK** to accept that the template was created successfully.

Working With Report Designer

Here is an example of creating a rolling three month report for January (assuming a calendar fiscal year) using the Mapped Designer Template. We will remove the budget columns and add in the appropriate period columns.

1. Copy the Mapped ABX Designer template and paste it into the **Financials** folder. Right click on the copied report to rename it to *Three Month Report*. Click **OK** to assign the new template name.
2. Select the report and click the Parameters tab. Select the Budget parameter and click **Remove**. Click **Yes**.
3. Run the report using the default parameters.
4. From the BI Tools tab, click **Launch**.
5. Click **Load Layout**. All of the available layouts for the report are displayed. Click **Copy** for the row **IS - Actual vs Prior**.
6. Enter January Report – 3 month as the new layout name and click **Next**.
7. In the report designer, note the columns area in the top right section. Click **Clear All** to remove the existing column definitions, then select the columns you need from the green Columns Tab in the center of your screen. Select columns for **ActivityPeriod01**, **PYActivityPeriod12**, and **PYActivityPeriod11** in that order. Click **Add Spacer** to make spaces between the columns.
8. Click **Generate Layout** and click **OK** when the layout has generated successfully.
9. Change the headings from Periods 01, 12, and 11 to January, December, November.
10. Minimize Excel and create and link the template to the Three-Month Report report.

Give us a call with any questions or for assistance with the SMI Report Designer.

IN THE SPOTLIGHT:

New User Blog And Virtualization With Sage ERP MAS 500

New User Blog And Customer Roundtables

Sage ERP MAS 500 customers now have additional sources of information about the product and Sage activities—a new user blog begun by Product Manager Linda Cade. In a recent post she wrote, "My wish is for this blog to be a vehicle to build the Sage ERP MAS 500 user community as we share news and experiences about the software and about how each of you are using it in your business."

You can log onto the blog at: http://sageerpmas500users.wordpress.com. Topics covered on the blog include news about upcoming features, highlights of existing features, thoughts on feedback from customers, news from Sage, and shared experiences as Linda Cade talks with Sage ERP MAS 500 customers.

Linda Cade also has instituted a series of Customer Roundtables on various product-related subjects. The first in the series centered on Business Insights and took place on August 24, 2011. Approximately 32 customers were in attendance. These informal sessions typically will open with a brief demonstration of a particular software feature followed by a peer-to-peer discussion on how customers are using the feature, and how to get the most from it. Linda anticipates these sessions will be held quarterly on various topics as proposed by the group.

If you would like more information about the blog, the round tables or just want to connect with Sage, you can reach Linda Cade in the following ways:

- Facebook: linda.cadeSagePM
- LinkedIn: Linda Cade
- Twitter: @LindaCade1
- YouTube: lscade
- e-mail: linda.cade@sage.com
- Subscribe to the blog: http://sageerpmas500users.wordpress.com

Virtualization With Sage ERP MAS 500

Virtualization allows you to allocate hardware resources among multiple virtual environments all running on the same machine. Application virtualization is the use of software to allow multiple application images (such as Sage ERP MAS 500) to run on the same hardware at the same time. The benefits of Server Virtualization include the ability to parallel process on the previous and new software versions during an upgrade, as well as take advantage of the full CPU capabilities of an under-utilized physical server.

On the workstation side, benefits include the ability to run multiple virtual machines on a single PC, and quickly deploy and reconfigure physical machines. In both cases, you easily can roll back and restore a virtual machine. The main drawback is that you may experience a 12% to 15% performance degradation when running in virtual environments. The hardware and software minimum requirements for a virtual environment are the same as for a normal physical environment.

In general, Sage ERP MAS 500 supports Citrix, VMWare, and Microsoft Terminal Services virtual environments. Microsoft Hyper-V only is supported on Windows 2008 server. Call us for more specifics on supported environments if you would like to deploy a virtual server and/or client environment.

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