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For Your Information

Two new features in the Sage Knowledgebase make it easier to find what you're looking for:

The Resolution ID number now displays in the upper right pane, so you can make note of the number for future use.

Now you can display either the most frequently used or the most recently published Knowledge Objects for a particular application.

DynaLink

See page 4
for more info!

FRx

Financial Reporting Powerhouse

It's 5 p.m. Friday. Just as you're headed for the door, your boss requests a complex *What-if* analysis report based on restructuring your cost centers—for a Monday morning meeting! There goes your relaxing weekend—you'll be in the office all weekend, right? Not if you've been using FRx Desktop—the premier Financial Report Writer. Now those difficult reports are at your fingertips.

Any way that you—or your boss—want them.

Are you frustrated with the lack of flexibility of your standard reporting tools? Do you spend hours building worksheets only to redo them next month when something changes? It's time to consider using the best-of-breed financial report writer bundled with Sage MAS 500—FRx. With FRx, you can produce presentation-quality general ledger reports, with more flexibility than ever before, and with far more functionality than worksheet software offers. You can restructure account segments, produce multi-company consolidation reports, perform division-specific calculations, and much, much more.

FRx Overview

Easy to Use

FRx 9.7 includes the FRx Report Wizard that simplifies report generating and gives you the confidence to use FRx to its full capacity. FRx

Software identified five key accounting documents essential to a business including a balance sheet, three types of income statements, and a trial balance report. FRx Report Wizard walks you through the steps for building these reports so that you can deliver timely and accurate financial information.

Building Blocks

Flexibility is FRx software's biggest asset. Column layouts, row formats, and reporting trees are each created and defined independently, forming what FRx refers to as report building blocks. You can then use these building blocks to create virtually any report desired. Use the templates provided and modify them to your exact needs. You can elect to include or exclude departments for different views, perform division-specific calculations, then view your reports on screen or print them.



FRx gives you the ability to easily create reports to illustrate your What-If scenarios.

Row And Column Formatting

Creating a report row is as simple as indicating the source of the data and what you want to do with it. FRx is linked to your Sage MAS 500 ERP general ledger data, so you can use your chart of accounts to select individual accounts, a range of accounts, a saved group of accounts, or a list of accounts to include in a report. Then you can specify how you would like each row to perform. A few of the choices include: descrip-

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FRx Financial Reporter CONTINUED

tions, totals, and math calculations, which can be anything from simple formulas to embedded *if/then* logic. Once created, save your **Row Formats** and use them again to speed the creation of new reports.

For each report column, you simply specify the source of the data and the type of column you want from a list of several types. You can define relative ranges of time periods, such as rolling quarters or trend reporting, by automating the columns to update every time the report is run, using the base-period information you provide. Once you set-up a column layout the way you want, save it for use in other reports.

Reporting Trees

Reporting Trees are the key to this report writer's flexibility. Think of a Reporting Tree as a hierarchical picture of your organization's reporting structure.

Imagine the following example Reporting Tree. At the top you've got a Corporate Summary, underneath are your Denver and your Cleveland offices. Under each location are sales, accounting, and customer service cost centers. What would happen if you consolidated accounting functions to the Denver office? With FRx, you can simply drag and drop Cleveland's accounting under Denver and you've got a new report! The ease of changing or reorganizing the reporting structures by merely dragging and dropping—without touching your chart of accounts—is all contained within FRx.

Share Your Reports

FRx allows you to schedule your reports for automatic email distribution or publish them for on-line viewing. The **DrillDown Viewer** simplifies online report viewing. You can distribute this viewer with your reports. It allows others to view the report without access to your data and without requiring that they run FRx. Users with security can drill down from the summary level all the way down to core transaction level detail.

Licensing And Options

A four-user copy of **FRx Desktop** is bundled with your Sage MAS 500 General Ledger module. It allows you to design, generate, and view financial reports. Additional seats are available

for purchase in three-user increments.

Report Distribution Add-Ons

There are many options available for distributing and sharing your reports. Here's a quick overview of the additional functionality available to FRx users.

DrillDown Viewer

The **FRx DrillDown Viewer** simplifies online report viewing. You can distribute this viewer with your reports, allowing others to view the report without access to your data, and without requiring that they run FRx. Using the **FRx Drill-Down Viewer**, you can allow your report recipients to drill down from the summary level all the way down to core transaction level detail, answering their own questions. With **FRx Drill-Down Viewer** you can generate a single, comprehensive report and comfortably send it to all report reviewers. Security rights are predefined and each recipient can access only the information allowed under their viewing rights. **Drill-Down Viewer** licenses are sold individually, with a price break for quantities above 50.

Report Launcher

You will likely have personnel who need to generate and view FRx reports, but do not require the ability to create new or modify existing reports. For these users, the **Report Launcher** is less expensive than buying a full Desktop user license. Using the **Report Launcher**, users can modify report properties including the report date and output format but cannot change the report design. The **DrillDown Viewer** is included in the **Report Launcher** license. The **FRx Report Launcher** is ideal for executives, managers, and others who need quick access to the information in commonly used company reports. **Report Launcher** licenses are sold individually.

Report Server Engine

The **Report Server Engine** allows you to schedule automated report generation on a dedicated server or PC. By sending your reports to the **FRx Report Server** for processing, you free your workstation from that overhead. The reports generated can be automatically emailed in a variety of formats to the finance department, department managers, and others. The **Report**

Server Engine is sold on a per machine basis.

Web Servers And Viewers

The **WebView Server** is a fabulous tool to provide to your remote or mobile users, your accounting firm, even select customers. It allows users to view generated FRx reports from a browser, over the Internet or Intranet. Full drill-down capabilities are available from the browser view, but users are unable to make changes to the reports. No client software is required, making it simple and easy to share. Each **WebView Server** is bundled with 20 viewers and additional **WebView Viewers** can be purchased in blocks of 10.

The **WebPort Server** is an extension of the **WebView Server** and is a financial portal that allows you to publish, store, and manage FRx reports via the Web. It provides both report administration and report viewing online via a Web browser. In addition to FRx reports, **Web-Port Server** also can store and view other documents and files such as Microsoft Word and Excel files, Adobe Acrobat documents, and OLAP cube files.

FRx Professional

FRx Professional is available as an upgrade from your **FRx Desktop** version. It includes two **Designers**, four **Report Launchers**, eight **Drill-down viewers**, and ten **WebView Viewers** with the **WebView Server** and **Report Server**. An ideal combination of tools for the power user.

Reporting Power To Share

With the flexible design of FRx, you can track key performance goals in real-time, generate customized reports on-the-fly, and perform complex consolidations with just a few mouse clicks. A single-user copy of **FRx Desktop** is bundled with your Sage MAS 500 General Ledger module. It allows you to design, generate, and view financial reports. Additional seats are available for purchase in three-user increments. Give us a call for full details and pricing.

We would like to help you learn more about FRx and the powerful add-on tools available. Please call us for additional information or training on FRx. ☆

New Wi-Fi Warehouse Automation Solution

Wi-Fi or Radio Frequency (RF) networking gains popularity every day. Coffee shops, airports, hotels, libraries, even our own homes are going wireless. The freedom from cords combined with real-time access makes wireless networking attractive and efficient. Large warehouse operations have taken advantage of these efficiencies for years. Now it's your turn. With the release of the Warehouse Automation module for Sage MAS 500, your distribution or manufacturing operation can have an affordable wireless solution allowing you to feed warehouse task data instantly to Sage MAS 500. Let's take a closer look at the new Warehouse Automation module.

Powerful Functionality

The Warehouse Automation module delivers functionality in five major areas. First is the ability to use a hand-held computing device to scan bar-coded labels while performing the various data entry tasks. Second is radio frequency (RF) communication to the host resulting in real-time validation of the data you collect. Third is a user interface that allows users to reconcile data records that fail validation. Fourth is the ability to work offline in the event the Sage MAS 500 Server or RF connection is unavailable. Finally, the Warehouse Automation module allows you to print item bar-coded labels. Custom designed bar-coded labels can be created using the **LabelXpert Designer**.

System Overview

Let's begin our overview with the handheld device that runs the Warehouse Automation module's handheld application. Warehouse users perform tasks such as order picking, receipt of shipment, or cycle counts and enter the data. The data entered is picked up by Wi-Fi access points that then transfer the signal from the handheld into the server that communicates with the Sage MAS 500 server. The communication server is running the Warehouse Automation module's **Handheld Listener Service**, a separate application whose purpose is to communicate with the Wi-Fi handheld devices and pass that information on to the Sage MAS 500 server. The information is validated and updated to Sage MAS 500.

Handheld Tasks

In addition to the Warehouse Automation server-based software, each handheld will run a handheld version of the Warehouse Automation module. This handheld software allows you to accomplish all the warehouse operations, including: Receive Goods, Warehouse Transfers, Bin Transfers, Sales Returns, Picking, Packing, Shipping, Cycle Counts, and Physical Counts. Cycle Counts and Physical Counts are handled as batch postings, while the other tasks occur real-time. Real-time activity is updated to Sage MAS 500 after each single transaction.



The Warehouse Automation module gives you an affordable option for automating your warehouse tasks.

The Warehouse Automation module's handheld software can be run on any Windows Mobile 2003, 2005, or CE.net device with a wireless connection. Sage Software recommends using an industrial grade handheld device.

Receive Goods

The **Receive Goods** task can be performed either in real-time or in batch mode. Real-time posting occurs as the handheld user clicks the update button on the handheld, which prints and saves an electronic copy of the register and updates the quantities in the Sage MAS 500 Inventory module instantly. When purchase order receipts are completed on the handheld, the user can be prompted to print bar-coded item labels for the items received—either to a desktop printer or a portable RF belt printer.

Pick, Pack, And Ship

The Warehouse Automation module can streamline your order picking, packing, and shipping procedures. The operator enters the

order selected for picking, and the system will display all the items to be picked, one at a time, including the appropriate bin location in which to find the item. When the picking process is completed, shipments are generated. The packing process can then begin. As items are scanned they will be assigned to a box, and a single shipping line can even be divided into two or more boxes. The shipping information flows into Sage MAS 500 and can be viewed from the Edit Shipments task. Users accessing Edit Shipments from their desktop can view these transactions and complete the shipping cycle by sending the appropriate shipments to StarShip.

Bar-coded Item Labels

The Warehouse Automation module includes three bar-code label formats. If you'd like to customize those labels, or design your own labels, you'll want **LabelXpert Designer**. The LabelXpert Designer module lets you design custom label formats for use with the Warehouse Automation module, including item tags, shelf tags, bin tags, carton tags, and more.

The LabelXpert Designer module supports both laser and thermal label printers, and can even support the printing of RFID (Radio Frequency Identification) bar code labels on several printers. While the LabelXpert Designer module is an ideal companion for the Warehouse Automation module, it can be used on its own for warehouses that choose not to automate. If purchased without the Warehouse Automation module, the basic LabelXpert Designer module provides printing of labels from a single workstation, with the option to purchase additional workstation printing capabilities. When the LabelXpert Designer is purchased along with the Warehouse Automation module, you'll be able to print bar code labels from all Sage MAS 500 workstations or Warehouse Automation module equipped handhelds at no additional charge.

By incorporating Wi-Fi or RF technology in your warehouse operation, you can minimize data entry tasks, saving time and increasing accuracy. Let us help you design and implement an efficient Wi-Fi solution for your warehouse. Give us a call for more information and pricing. ☆



Spotlight On Sage MAS 500 DynaLink CRM Integration Solution

Integrating your Sage MAS 500 business management solution with your company's CRM software just makes sense. It saves duplicate data entry and puts valuable customer information in the hands of your sales staff. DynaLink is a Sage Software application that allows you to integrate Sage MAS 500 with Sage CRM SalesLogix. It is a highly configurable application allowing you to choose what data you wish to synchronize and when. Here we take a brief look at the benefits you'll enjoy with DynaLink and what's included in an upcoming new release.

About DynaLink

DynaLink utilizes powerful synchronization capabilities to allow accounting and other customer information to be available to both the in-house and remote sales forces. Using DynaLink you are creating a direct connection between Sage MAS 500 and Sage CRM SalesLogix. This communication enables Sage CRM SalesLogix users to issue sales orders, perform customer inquiries, or view the detailed sales orders and invoices stored in the accounting software from within Sage CRM SalesLogix. The bi-directional communication between the products means your users have a single point of entry and reference for all sales-related information.

Benefits Both Accounting And Sales

Integration between your front and back office solutions can benefit both the accounting and sales groups.

Sales people can learn the account credit status, terms, and account balance before creating an order. Full product details are available—including special pricing and on-hand quantities available—when quoting or taking orders. With product sales history in Sage CRM SalesLogix, you can use past product purchasing information to plan future marketing campaigns. Use groups within your CRM software to focus on customers with excessive past due balances or those that have not purchased recently. Increase customer satisfaction by setting up reminders in Sage CRM SalesLogix to follow-up with customers after they purchase.

Accounting personnel will save the time involved in re-entering sales orders into Sage MAS 500. They will also be free from answering many routine questions about account balances, customer pricing, or payment terms as this information will be directly available to the sales representatives. Product information from Sage MAS 500 is available for you when creating orders and quotes within the CRM software, resulting in a well-managed, efficient order process.

DynaLink allows each member of your staff to continue working in the environment they are comfortable in, while ensuring that the data vital to processing orders is available to all. The result is a more productive staff, increased service levels, and a faster sales cycle.

What's New In DynaLink 2.2.4

The upcoming release of DynaLink 2.2.4 will include the Sage MAS 500 Direct Order Feature Pack. With the Direct Order Feature Pack, you can move account, contact, and sales orders from Sage CRM SalesLogix



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to Sage MAS 500 staging tables, where stored procedures will populate new customer, contact, and orders into Sage MAS 500. When those records are edited within Sage MAS 500, the results are synchronized back to Sage CRM SalesLogix.

What DynaLink Can Do For You

With DynaLink you can:

- ▶ Synchronize and link Sage MAS 500 customers to Sage CRM SalesLogix.
- ▶ Transfer Opportunity quotes and orders to Sage MAS 500.
- ▶ Displays financial data such as credit limit, on order amount, aged accounts receivable, average days to pay within Sage CRM SalesLogix.
- ▶ View and drill down into invoice history, open order, and payment information from within Sage CRM SalesLogix.
- ▶ Create marketing campaigns for cross-sell and up-sell using customer sales history.
- ▶ Allow remote users to enter quotes and orders into Sage MAS 500 via Sage CRM SalesLogix.

Availability

DynaLink 2.2.4 will be released soon. Call us for full details on this product, or to discuss your company's CRM options. ★