eagle Consulting Group

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For Sage MAS 90 and Sage MAS 200

What's Inside

Did You Know?

We know you're passionate about your businesses, but did you know that one in six business owners indicate that, if given the choice, they wouldn't do it again? This finding comes from the Sage Software Business Minds Survey, a study of the ups and downs of business life in North America conducted on behalf of Sage Software. The survey explored issues of business confidence, passion for business, pace of change, and external influences.

Extended Solutions

See page 4 for more info!

Step Up Your Efficiency Sage MAS 90 Business Alerts

We're all busy and value those tools that allow us to operate more efficiently. The Sage MAS 90 Business Alerts module is designed specifically to assist you in better managing your operational tasks. Let's learn more.

Solve Common Business Problems

The **Business Alerts** module has the potential to change the way you work. You can take proactive action to ensure processes and procedures run smoothly and that you are alerted to exceptional events. Chances are your employees are already performing some of these tasks manually. This tool allows them to work smarter and let Business Alerts work harder. Here are some common business problems and situations the Business Alerts module easily can address.

Business Alerts gives you a better way to track important events and be sure that you take advantage of business opportunities.

Don't Run Out

One of the best ways to boost sales and deliver quality service is to ensure you always have sufficient stock on hand to meet your customers' demands. Most customers will shop elsewhere rather than wait for you to replenish. While Sage MAS 90 ERP includes some excellent reports to help make you aware of low stock situations, you must remember to run reports to get that data.

Using Business Alerts, you can set an alert to notify your purchasing agent when the quantity of an item drops below the reorder point. This way, the agent can begin the reorder process and you're more likely to prevent an out-of-stock situation.

Set an Alert to notify your salespeople when the quantity available of your best-selling items falls below a specified amount so they can follow-up on open quotes and close the sale while stock is still ample.

Alert your marketing manager when the Quantity On Order of an item tops a certain number, allowing them to gauge the effectiveness of their marketing efforts.

Communication Is Key

Business Alerts can send an email to a customer as an Accounts Receivable or a Sales Order Invoice is created, including the detailed sales order information. Customers will then be expecting the invoice in the mail, and you just may get paid more quickly.

Use a similar Alert function to email a customer with the tracking number as an order is shipped. Include a link to the carrier's Web site to make it simple for your customer to track their order's shipping information. You're likely to reduce the num-

Continued on Page 2

ber of calls to your customer service department.

When you reward prompt-paying customers with a higher credit limit, Business Alerts automatically can generate an email to congratulate them on their good credit and inform them of their new limit.

Some staff may frequently be away from the office and could miss that change order you printed and placed on their desk. Ensure they're informed by creating an Alert to email team members when a Job Cost Change Order is added or when a Job Status changes. When that email arrives on their hand-held device or when they check email from home, your message will come through loud and clear.

Company Watchdog

Check fraud is a growing concern for businesses. Help curtail that fraud by using an Alert to the accounting manager and you when an Accounts Payable check is issued that exceeds a specified dollar amount.

Use Business Alerts to watch the company budget. Set up a General Ledger Alert to notify you when an account balance exceeds the budgeted amount.

Business Alerts can help you monitor the Sage MAS 90 database by detecting changes, additions, and deletions of records. You can specify specific files or folders to monitor, and receive an alert notifying you of specific conditions occurring with those files or folders. This can help you identify potential data problems or even inappropriate activities happening within the database.

Creating And Using Alerts

How Alerts Work

There are dozens of predefined alerts spanning several modules that you may use as they are or customize to fit your company's needs. Alerts can be both time and date sensitive and you can configure them to include relevant Sage MAS 90 data such as Names, Amounts, and Dates. Whenever an alert runs, it scans the database to determine whether the specific condition that it is looking for exists. If the Alert condition is found, an email notification is sent to the recipients you define.

Alerts are possible within the General Ledger, Accounts Payable, Accounts Receivable, Job Cost, Purchase Order, Inventory, and Sales Order modules.

Setting Up New Alerts

Setting up a new Alert involves three simple steps: setting alert criteria, selecting notification options, and defining a schedule.

To define your alert criteria, simply select one of the **Standard Alerts** and modify it to suit your specific needs. The alert determines what condition is monitored, such as a check created over a specified amount or a Purchase Order item some number of days late. You define the parameter values for the alert. For example, the standard alert "Notify when a check is created with an amount in excess of {Amount}" consists of the parameter value ***Amount.*** You must determine what this value will be, for example, $5,000.00.

The next step is to select the recipients of your alert. You may specify one or more email addresses.

The final step is to schedule your alert. For example, you can set up an alert to run every evening at 8:00 p.m. You can schedule the system to scan for the alert condition on a daily, weekly, or monthly basis. Additional scheduling choices allow you to specify the frequency (for example, once every hour) and duration (starting and ending dates) of the schedule.

Efficiency Resolution

Use Business Alerts to keep employees and vendors up-to-date for informed decision-making, or to improve customer service by giving your customers personalized attention with each transaction. This module allows your business to respond to rapidly changing business conditions 24 hours a day, 7 days a week.

This year, make a resolution to work smarter and more proactively using Business Alerts. It is like having an organized and proactive assistant on your staff. It will monitor corporate activities and notify you of the events important to you. Call us for a demonstration and see what the Business Alerts module can do for you! ★

Standard Business Alerts

You can set any of the following Standard Alerts to notify you (or others) whenever the following conditions are met:

Accounts Payable

- Check exceeds specified amount.
- A Discount Amount over a specified amount is due to expire within *X* number of days.
- Accounts Payable Invoice exceeds specified amount.
- Invoices past 90 days due.

Accounts Receivable

- A Past-due amount for a customer exceeds the specified amount.
- A customer has not had any account activity within *X* number of days.
- A new invoice is created.
- New customer welcome.
- Customer account On Hold.
- Accounts Receivable Credit Limit change.

Job Cost

- Job approaching/exceeding estimate.
- Job status change.
- Job change order.

Purchase Order

- Returned merchandise.
- Purchase order approval.
- Purchase order not received by date.

Sales Order

- New sales order invoice is created.
- Sales order is entered with a Total exceeding specified amount.
- The Open Order Amount for a customer exceeds specified amount.
- Sales order package tracking is sent to customers when the order is shipped.
- An Order is older than *X* days and has a Total greater than specified amount.

Inventory

- The Quantity Available for a given item is less that the reorder level.
- The On-hand Quantity for an item falls below zero.

General Ledger

- Account balance exceeds budgeted amount.
- Expense transaction exceeds specified dollar amount.
- New General Ledger account added. ★

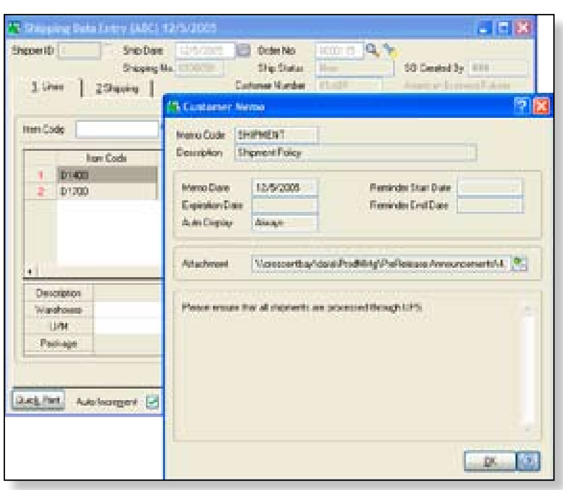
Memo Manager Makes Sharing Important Information Easy

It's always been a challenge to know where and how to store and track all the bits of information concerning your business operations. If easily accessible, this information could be shared with your staff to allow them to make timely decisions, offer superior customer service, and avoid searching through files or piles of notes. The Sage MAS 90 Memo Manager feature provides a convenient mechanism to record important information and store documents relating to your customers, vendors, account numbers, and more—and make that information available to those who need it.

The **Memo Manager** feature was first introduced into the General Ledger module with Version 4.0, and expanded to several other modules with the latest 4.10 release. Let's look at the enhanced Memo Manager and how you can put it to use in your organization.

New Memo Manager

Memos have been part of Sage MAS 90 for years, so you may be wondering what's new about Memo Manager. Memo Manager delivers enhanced memo management functionality including a standard interface for creating, managing, and displaying memos. Memo Manager is available from within the modules that have been converted to the new Sage MAS 90 Business Framework: General Ledger, Accounts Payable, Accounts Receivable, Sales Order, Bank Reconciliation, and Return Merchandise Authorization.



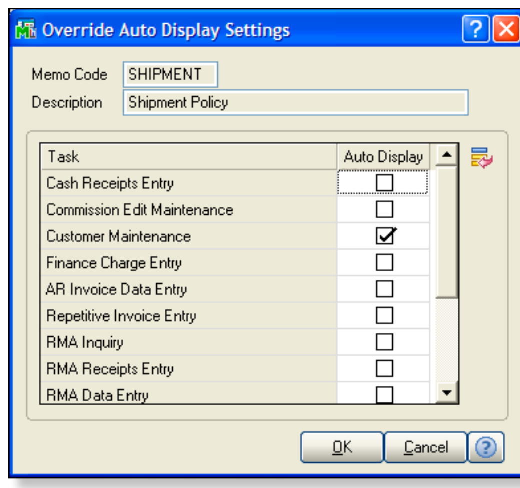
Set a Customer Memo to contain special shipping or driving instructions.

Copy To All Entities

You can copy an existing Memo to Customers, Vendors, and Accounts using the handy **Copy Memo** function. This feature lets you instantly create a memo titled CREDIT for all customers, or one titled BUDGET for General Ledger accounts that begin with a certain series of digits. With Memo Manager you can attach your customers' original credit applications to the CREDIT memo, and your Excel budget worksheet to the BUDGET memo. It's a great way to store pertinent information in a convenient location.

Smart Operations

An **Auto Display** setting allows you to instruct a memo to display Always, Never, or only during the listed Reminder Date range. If you select Always or By Reminder Date you can further instruct the memo to automatically display on certain screens and not others—Customer Maintenance but not Invoice Data Entry, for example. This ability to select the specific locations for your memos to display is a tremendous improvement over the old memo technology. It makes it feasible to set up memos to store information specific to a certain user group, without annoying other users with memos not applicable to their roles. For example, a memo containing customer's shipping instructions could be set to appear during Shipping Data Entry and not during Customer Maintenance.



Memos now can be set to appear only on specific screens where the information is needed.

Starting and Ending Reminder Dates for each memo allow you to design date-sensitive memos to better communicate important information to your customers. For example, you can create a customer memo titled *Winter 2006* and copy it to all customers. Configure the memo to pop up during Order Entry and remind your staff to notify customers of your temporary fuel surcharge or shipping delays during this busy season. Once the Reminder End Date passes, the memo will no longer automatically display.

Organize Correspondence

Use Memos to improve customer service. Using Memos creatively, it can serve as a contact management tool. Keep a Customer memo to make note of customer conversations and correspondence. Other Memos could hold product or service preferences, even birthdays or anniversaries for key contacts.

Scan and save all incoming customer correspondence by attaching it to a Customer Memo so that it's always available.

Your customers may have specific shipping and delivery instructions of which your order entry, warehouse, and shipping departments should be aware. Keep those instructions in a customer memo, and elect to have that memo display during Order Entry, Invoice Entry, and Shipping Data Entry to ensure everyone gets the word.

Use a Vendor Memo to track insurance policy information such as policy numbers and expiration dates. Vendor Memos also can hold price lists, a copy of the vendors' W-9, or a list of key personnel and their contact information.

You Already Own It

Memo Manager is part of Sage MAS 90, there's nothing new to buy. Use this convenient and powerful feature to organize and communicate the information important to your organization.

Please give us a call with any questions you may have. ★

In The Spotlight: Sage MAS 90 Communication Solutions

We offered suggestions of how to use Memos to store and share important company information in our article on page 3. Here we feature some Extended Solutions that add enhanced functionality to Memo handling.

Item Memo Pop-Up In Sales Order

Much of the data that you may wish to share involves the products you sell, and Inventory Item Memos provide a great place to store that information. However, since the Inventory Management module has not yet been enhanced with the new business framework, the new Memo Manager feature is not available here. Extended Solution **SO-1226, Item Memo Pop-Up** offers much of the functionality you may be seeking.

With this Extended Solution, a list of all Inventory Item Memos pops up as the user exits the Item Number field during Sales Order Entry and Sales Order Invoice Entry. Users can pick any memo to review, but may not edit the memos from this location.

Item Memo Pop-Up In Purchase Order

If you're after one or more specific memo codes to pop up during Order Entry, another solution may be better suited to the task. **Item Memo Pop-Up in SO and PO (IM-1214)** lets you flag certain memos to pop up during Sales Order Entry, Purchase Order Entry, or both. The memo appears until the user clicks *OK*. If more than one memo is flagged to pop up, the user must click *OK* on each memo—this helps to ensure that your staff is reading the important information, as you intended!

Merge Memo Text Into Order

Sometimes the information you store in your memos is meant to be shared with your customers. A return policy, for example, or detailed payment terms. One Extended Solution, **Enhanced Customer Memo Handling in Sales Order** (SO-1224), makes it possible to merge the text of your memos into the lines section of a Sales Order, so that the text can be printed and shared with your customers.

Sales Order Memos

As more and more companies begin to do business internationally, complications during ordering and shipping are bound to occur. This information is often specific to an order, not to the customer or to the item. To help track the complex data involved with international orders, or any order that requires steps or a checklist, there's an Extended Solution to help.

Memos For Sales Orders Using Custom Office UDFs (SO-1498) is a relatively new Extended Solution, that does not utilize memos to hold information, but uses Custom Office User Defined Fields (UDFs) instead.

Using Custom Office, you'll create a dialog box and place the relevant UDFs inside the box. During Sales Order Entry, and optionally during Shipping Data Entry, if those UDFs contain data, the dialog box will pop up automatically, giving the user a full view of the information specific to this order.

If you have questions about these Extended Solutions or any other Extended Solutions, please give us a call. ★

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