Keystone SOFTWARE SOLUTIONS inc

What's Inside

Headline News

Have you visited the Sage ERP MAS 90 and 200 Online Community lately? The mission of the community is to enable Sage ERP MAS customers to share, learn, and support each other on a broad spectrum of issues and interests. This is your community; you can join a discussion, read a blog, or share in the exchange of ideas and best practices. To access the community, [click here](#).

Thirty Reasons To Upgrade

Productivity And Flexibility Enhancements Provide Quick Return On Your Upgrade Investment

Are you still running an older version of Sage ERP MAS 90? Studies show many customers delay upgrading due to concerns over the cost and effort involved. However, every release is designed to streamline workflow, save you time and money, and improve customer service, so you could experience a fast return on your upgrade investment. In this article, we give you thirty reasons to upgrade, ten each from the last three releases to Sage ERP MAS 90 Version 4.5.

Release 4.5—Reasons To Upgrade

With the enhancements added in Version 4.5 you can:

1. Use National Account Management features and functionality to streamline your branch and corporate customer billing while keeping unique accounts.
2. Handle the increasing complexities of payroll efficiently with new methods of deduction calculations, benefits accruals, and recalculations.
3. Beat the competition with flexible pricing set by combinations of totals, items, groups, and by customers.
4. Reserve specific lots and serialized items for loyal customers or to match previous shipments.
5. Improve cash flow with streamlined Purchase Orders created from Sales Orders.
6. Use enhanced Job Cost processing to flexibly track and bill for work-in-progress.
7. Reward your sales teams with automatic Split Commissions.
8. Choose to migrate to Sage ERP MAS 200 SQL for more efficiency, scalability, and flexibility.
9. Utilize one SageCRM 7.1 user and server license at no additional cost to communicate more effectively, collaborate better internally, and compete in today's marketplace.
10. Establish Reporting Tree structures in Sage ERP MAS Intelligence and use the new distribution features to automatically provide information to key team members.

Release 4.4—Reasons To Upgrade

Version 4.4 added enhancements allowing you to:

1. Use Parallel Migration to conveniently upgrade to the current release while you continue to run your business on the

Thirty Reasons To Upgrade

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existing system until your new Version 4.4 system is tested and ready.

2. Reduce the cost of personalizing your system with easier and more powerful methods of applying customizations that will not be impacted by upgrades to new versions.

3. React more quickly to changes with greater insight into distribution, manufacturing, and purchasing with on-demand ad-hoc views into your business data.

4. Improve employee productivity and reduce errors by adding unique identifying information in expanded customer and item number fields.

5. Increase efficiencies of your system with easy-to-download product updates that provide new customer-requested features throughout the year.

6. Empower your users with easy access to resource information directly from their desktops.

7. Save time and improve accuracy with a streamlined physical count process; default to your on-hand quantities so you only need to update items that have changes; and print inventory items on worksheets in the desired order.

8. Reduce shipping and handling costs through consolidated drop shipments.

9. Achieve greater employee productivity with personalization of data entry screens to match workflows for each role. Quickly launch related tasks, attach related documents to records that flow throughout the system, and set security by role—down to task level.

10. Streamline your inventory processes with accurate data collection using enhancements in the Bar Code module. Use radio frequency hand-held scanners and incorporate user-defined fields such as

expiration dates with serial or lot numbers.

Release 4.3 — Reasons To Upgrade

With Version 4.3 enhancements were added enabling you to:

1. Save money and the environment by using Paperless Office to efficiently store and retrieve documents electronically, and easily email or fax them.

2. Use quick-click charts to graphically represent trends and other knowledge you've gained from your ad-hoc Business Insights Explorer reports.

3. Streamline your tax reporting process for Federal, State, Unemployment, Payroll, New Hire, 1099s, and W2s.

4. Reduce the time and cost associated with processing and printing payroll checks by using direct deposit, and provide your employees with secure online access to view their information.

5. Keep your finger on the pulse of your business using your personalized Business Insights Dashboard. Start your day with the business information that you need most right on your desktop.

6. Simplify report selection with straightforward terms, readjust your selection criteria and return to the report selection screen after printing.

7. Get up-to-the-minute status of customer orders in process. Shipping and customer service staff can access and view the status information that includes: New, Lines Complete, and Shipped.

8. Manage your fixed assets by auto-creating assets as you enter invoices in the Accounts Payable module.

9. Establish appropriate discounts for your customers. Reduce errors with the ability to view and make adjustments to the order before processing.

10. Print your standard reports and forms automatically on your default printer, regardless of who previously saved the report.

Sage ERP MAS 90 Version 4.5 offers all of these enhancements and more. Many of the enhancements in the last three releases were added at the request of customers. Call us to plan your upgrade. ✴

((Did You Know?))

A Purpose-Built Website Gives You Access To In-depth Version 4.50 Information

Sage has created a microsite to provide you with an easy starting point to dig deeper into the value of the Sage ERP MAS 90 4.5 release:

www.SageMAS.com/45release

On the website you will find several sections allowing you to learn in your preferred method:

» The *Discover 4.5* section contains half a dozen videos that give you a visual demonstration of some of the key features of the Version 4.5 release.
» The *Look Inside* section provides interactive snapshots of new screens and capabilities.
» The *Be Convinced* section gives you access to several detailed specification sheets and brochures, as well as access to free Anytime Learning Classes and Webcasts.

Of course, we are always happy to give you a personal demonstration of Sage ERP MAS 90 Version 4.5, just give us a call. ✴

General Ledger Tips And Tricks

Setting Up Allocations

Did you know that you can automatically distribute overhead such as rent and electricity to your various departments? Automated allocations are a great way to save time over manual journal entries. Here are step-by-step instructions:

1. Open GL/Main/Allocation Entry.
2. Click the Next Entry Number (#) button for the Allocation No. field.
3. To copy an existing allocation entry, and make any necessary modifications, click the Copy button.
4. Type the description of the allocation in the Description field.
5. Click the Lookup button for the Source Account field and select the general ledger account number.
6. In the Allocation Method drop-down box, select the calculation method to use for the allocation.
7. If *Basis* was selected as the allocation method, in the Allocation Basis drop-down box, select the basis to use. If *Budget* method was selected, select the budget code.
8. In the Allocation Cycle drop-down box, select whether the allocation cycle is to be automatically selected for posting at the end of each period, quarter, or fiscal year, or manually posted.
9. In the Amount to Allocate drop-down box, select the type of amount to allocate.
10. If Manual is selected, enter the amount of the manual allocation in the Manual Amount field.

Note: if a manual amount that is greater than the balance of the source account is entered, it creates an over-allocation.

11. Enter the Journal Comment field, if necessary.
12. Click the Lines tab.
13. Click the Lookup button for the Account No. field and enter a destination account number for the distribution. Asterisks (*) and at signs (@) can be used to create account masks.
14. If Quantity was selected as the allocation method, enter the quantity to be distributed to this account. If Percent was selected as the allocation method, enter the percentage to be distributed to this account. If Basis was selected as the allocation method and you want to link the basis amount to another account, select the Link check box, and enter an account number to use for the basis calculation. To create account masks use @ signs.
15. Enter the Comment field for the distribution and enter other destination accounts as necessary.
16. To view the information entered for accuracy, click the Print button and print the Allocation Listing.
17. Click the Accept button.

Reopening A GL Period Or Year

Transactions cannot be posted directly to a closed accounting period. If an adjustment must be made to a closed period, perform one of the following procedures. Note: Only the General Ledger module can be reopened after the period or year is closed.

Posting to a Prior Period:

1. Expand Modules/General Ledger/Setup and click General Ledger Options.
2. Make a note of the setting for Current Period.
3. Choose the desired prior period from the Current Period list.
4. Use General Journal Entry to create and post the adjusting journal entry.
5. Reprint all reports for the affected period for a proper audit trail.
6. Expand Modules/General Ledger/Setup and click General Ledger Options to change the Current Period back to the setting in Step 2.

Posting to a Prior Year:

Fiscal years should not be closed until all adjustments have been made and final financial statements produced. Because transactions can be posted to the next fiscal year, keeping the prior year open does not prevent normal processing.

A prior year can only be reopened if detail history was retained for the desired year in General Ledger Options. Also, if Budgets are used, set the Auto Budget Option field accordingly.

1. Expand Modules/General Ledger/Setup and click General Ledger Options.
2. Make a note of the settings for Current Fiscal Year and Current Period.
3. Choose the desired prior year and period from the Current Fiscal Year and Current Period lists. Important note: Be sure to retain history for that prior year or beginning balances will be incorrect for the current year.
4. Use General Journal Entry to create and post the adjusting journal entry.
5. Reprint all reports for the affected year for a proper audit trail.
6. For Versions 3.71 and earlier, expand Modules/General Ledger/Period End and click Period End Processing, and close the year again.
7. For Versions 4.00 and later, expand Modules/General Ledger/Setup and click General Ledger Options to change the Current Fiscal Year and Current Period back to the settings in Step 2.

Please call us with your questions.

IN THE SPOTLIGHT:
Enhance Your Solution With Sage Connected Services

You likely have heard the term cloud computing; it is a paradigm shift in the way we use software technology to manage our businesses. Here we cover some benefits of cloud computing and available cloud-based applications for Sage ERP MAS 90.

Cloud Computing Cleared Up

Providers of cloud computing deliver applications via the Internet. The applications are accessed from web browsers, while the software and data are stored on servers at a remote location. This means you can take advantage of application functionality, without having to deal with the complexities of installing and maintaining the software. Cloud computing is ideal for software applications where government regulations and calculations change frequently. When you contract for the service the provider keeps the software current for you.

Sage Connected Services

Sage Connected Services can be very useful for current on-premise Sage ERP MAS 90 users. Each service connects directly into your on-premise system to enhance your solution. The services include payroll e-filing, sales tax calculations, secure credit card transactions, e-marketing, and customer credit monitoring.

Federal And State e-Filing And Reporting, Powered By Aatrix

If you run payroll inhouse, this e-filing solution is a huge timesaver. In addition to the ability to e-file Form W2s for less than $2 per employee, you also can e-file over 250 federal, state, and local forms and reports such as Unemployment and Withholding. The integration with Sage ERP MAS 90 automatically populates the forms and reports with your data; you simply review, make changes, and submit the reports electronically.

Sage Sales Tax, Powered By Avalara

If you calculate and pay sales tax in multiple jurisdictions, this software service is a great time saver. The software reads customer address information in Sage ERP MAS 90 and automatically performs address validation and rate calculation. The solution also automates the tedious process of filing sales tax returns.

Credit Card Processing, Powered By Sage Payment Solutions

Sage Payment Solutions automatically connects to Merchant Accounts for secure credit card authorizations and settlements. Data encryption ensures your organization is compliant with the Payment Card Industry data security standard. The Credit Card Processing module is free with a Sage Payments account.

Sage eMarketing, Powered By Swiftpage

This e-marketing service is fully integrated with SageCRM Version 7.1 so you can create custom, personalized e-mail marketing campaigns. It includes over 90 templates and a simple three-step wizard for rapid execution. You can create landing pages for easy execution of cohesive, integrated marketing campaigns.

Sage SmartBusinessReports

Sage SmartBusinessReports powered by Experian offers you easy-to-read business credit reports on your customers, and can send alerts if a credit rating changes.

Each of these services are available for an affordable monthly subscription fee. Give us a call with your questions. ✴

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