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Headline News

On October 1 2009, Wisconsin became the 20th state to become a full member of SST (Streamlined Sales Tax). Also on this date, no less than 574 sales and use tax changes went into effect, according to an article on the Sales Tax Buzz Web site (<http://salestaxbuzz.org/>). See our article on page 4 for more on the rapidly changing sales and use tax trends.

Customer-Requested Enhancements In Sage MAS 90 Version 4.4

The Version 4.4 release of Sage MAS 90 and 200 ERP is just around the corner. Version 4.4 includes some major customer-requested enhancements. Let's take a look.

Expanded Customer Number

The Customer Number field can be expanded to 20 characters in Version 4.4. Existing customers can continue to work with the seven character customer number, however if you have ever wished you could put more intelligence into customer numbers you will be able to do so with Version 4.4. For example, if you work with organizations that have a large number of locations, the customer number could include the company name, the store number, or city to assist you in more quickly identifying a particular store.

Expanded Item Number

Similarly, you will be able to expand the Inventory Item Number field from the current 15 characters to up to 30 characters. Here again, if you have no need for a larger item number and would rather save the real estate on your screen, you can stay at 15. But if you are like many businesses, you will be pleased to be able to use the standard UPC code for the item number, or to accommodate your vendors' part numbers. You also could incorporate the original part number of a discontinued item when replacing it with a new item, and add an additional extension to associate the two items, thereby retaining the



historical information.

If you are a manufacturer, you can design smart part numbers that allow staff and customers to instantly recognize key materials used in the manufacturing process of the item. Smart part numbers also can include information that informs personnel of recycling or special handling requirements.

Streamlined Physical Count

To streamline the physical count process, in Version 4.4 the Quantity On Hand system information will be printed on the worksheet in the same sort order as what is in the system. Space is provided for the employees to record the physical item count alongside the system information as they go through the warehouse. When the physical count is complete, you can set the system quantity as the default,

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Customer-Requested Enhancements In Sage MAS 90 Version 4.4

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so that data entry personnel need only make an entry when there is a discrepancy between the system count and the physical count. Because physical count is easier, you will be able to perform it more often to prevent over-ordering, reduce obsolete inventory, and help ensure that your sales staff has access to accurate inventory information.

Automated Standard Cost Adjustments

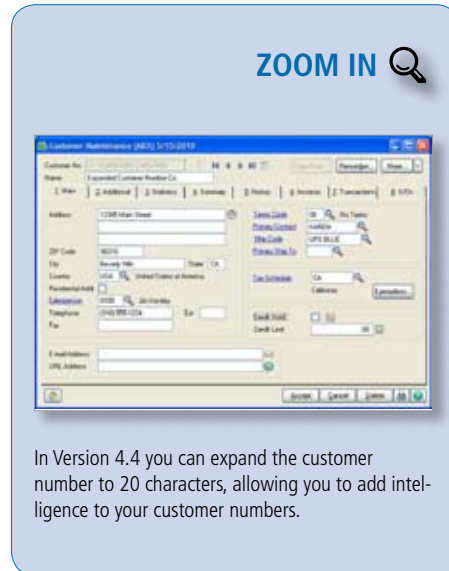
Companies using the Standard Cost method typically do so because they have raw material costs, or other costs, that fluctuate and they only want to make adjustments to their standard costs once or twice a year. When making these changes, the new Standard Cost Adjustment feature will simplify the process by automatically calculating and posting the change.

Increased Decimal Precision

The number of decimal places in the Quantity field in Inventory Management will be increased to four, making it consistent with the four decimal places in Bill of Materials. Consistency throughout the system will help reduce any rounding discrepancies when raw materials are converted to inventory items. Organizations using very small amounts of raw materials in their products, such as ink in pens, will be able to calculate usage and yields with greater accuracy.

Purchase Order

Organizations processing a large number of drop shipments will gain some significant efficiencies in Version 4.4. Additional selection criteria—Expired Order and Only With An Open Status—make it easier to identify the Sales Order from which you need to generate Purchase Orders. The new ability to summarize by primary Vendor, and select to either roll up all orders for the vendor into a



single PO or create individual POs for each item will be a great time saver as well.

Bill Of Materials

In Version 4.4 the Bill of Materials Inquiry and the Where Used Inquiry will give you a comprehensive and personalized view of information with fewer keystrokes. From within the inquiry screens, you will be able to see everything related to the bill—its sub-assemblies or components—without having to go to another window, saving time and streamlining the workflow. When using the Indented option, the bill expands into a tree view, so that you can see at a glance the relationship of the component parts.

Bar Code

In Version 4.4, a new Barcode Rejection Maintenance task is added to simplify the resolution of import errors, such as invalid item codes or insufficient quantity available in a lot/serial item. Also, the Bar Code module will be able to scan both Sales Orders and Sales Order Invoices to support a variety of business process workflows. The module will support both existing scanning hardware and radio-frequency handheld devices.

Persistent Report Preview

Do you need to zoom-in to a certain level every time you pull up a report in Preview mode? With 4.4, each user will be able to set a default magnification level, so reports automatically display at the size needed.

New BIE Views

By now we hope your organization is taking full advantage of BIE (Business Insights Explorer) for powerful, easy-to-use inquiry and analysis. Views added in Version 4.4 include Item Quantities by Warehouse, Vendor History Purchases, Bill of Materials, Component Where-used, and Open PO by Vendor Name. Quick-click charts also will be available for these new views.

With this release, four more modules are being migrated to the Business Framework, see our article on Page 3. As we mentioned in the last newsletter, the new Parallel Migration feature will greatly simplify the upgrade process from Version 3.71 and above to Version 4.4. Please give us a call to learn more about Sage MAS 90 and 200 Version 4.4. ✨

((Tips & Tricks))

Partially Disposed Assets Adjustment

For depreciation amounts in the FAS Link to be correct after partially disposing assets, you need to recalculate depreciation as follows:

1. In FAS, depreciate the assets starting in the period with the partially disposed assets. Continue depreciating up to the current period. For example, if an asset was partially disposed of in October and the current period is December, depreciate the assets for October, November, and December.
2. Expand FAS Link and Period End. Double-click Period End Processing.
3. Click Proceed.
4. Click Preview. Accumulated depreciation displays based on the revised basis instead of the original basis.

Modules In The New Business Framework

Over the last four releases Sage has been converting modules into the new Business Framework. With the release of Sage MAS 90 and 200 ERP Version 4.4, the Inventory Management, Purchase Order, Bill of Materials, and Bar Code modules will be migrated to the Business Framework. In this story we will take a look at the time-savings and convenience you and your staff will enjoy with modules in the Business Framework.

Speedy Entry And Personalization

With the flexibility and power delivered by the innovative dual-grid design of the Business Framework, data entry can be more efficient. Do you have staff members who spend long hours entering purchase orders or backflushing production in Bill of Materials? With Version 4.4, these employees will receive a tremendous boost in productivity if they take full advantage of the new design. Each user can personalize the screen to work in their own way. Are there entry fields you rarely need to modify? With the dual-grid design, you can drag seldom-used fields to the secondary grid, de-cluttering your primary entry grid, but fields are still readily available if you need to make a change.

Another big time saver is the ability to easily insert, delete, or reorder lines, and undo your last entry. You also can resize the grid to take full advantage of all the real estate on your screen. You can set the default font size and remove unnecessary tabs. Hyperlinks increase your productivity by providing quick access to related tasks, such as opening Vendor Maintenance while entering a Purchase Order. Similarly, the right-click menu also provides quick access to logically related tasks. For example, from Item Maintenance you can quickly access Warehouse Maintenance or the Inventory Sales History Report.

Better Controls

Powerful role-based security can be set by user. For example, you can allow a user to make production or physical count entries, but require that a supervisor-level user updates the transactions to the system. User and Date timestamps on most entries improve accountability and create useful audit trails.

Batch Manager

You can increase processing efficiencies using Batch Manager to create, verify, and merge batches. Using the Batch Entry feature you can effectively manage batches by numbering, modifying, or grouping them.

With unique batch numbers, more than one user can enter data in the same task, printing and updating independently, without affecting other batches.

More Powerful Customization

Do you need a special piece of information to flow through the whole system? How about a lot expiration date or a special item attribute like color or size? Within the Business Framework, the Customizer is more powerful, and user-defined fields can follow a transaction through the system into the detailed history files, and be available for viewing via drill down. You even can automatically total numeric UDFs to a new UDF and perform cumulative calculations on multiple records. All this is accomplished through a menu-driven system, without the need for a programmer, and the modifications will not need to be recreated when you upgrade to a new version.

Other Highlights

The Saved Settings and Default Printers features mean your Indented Bill of Materials report can be set to automatically print with

the parameters you need and your purchase orders can print automatically to the correct printer every time. Memos can follow the workflow throughout the system like an electronic version of a yellow-sticky note, and standard system reports can all be customized using Crystal Reports®.

Here we have discussed just a few benefits of the Business Framework as they relate to the Inventory Management, Purchase Order, Bill of Materials, and Bar Code modules. There is a great deal more to the Business Framework than we have space to cover here. Give us a call for more information. ✨

Sage MAS 90 and 200 Modules In the New Business Framework						
Module	Version	4.0	4.1	4.2	4.3	4.4
General Ledger		✓				
Library Master		✓				
Accounts Receivable			✓			
Bank Reconciliation			✓			
BI Dashboard			✓			
BI Reporter			✓			
eBusiness Manager			✓			
RMA			✓			
Sales Order			✓			
Accounts Payable				✓		
BI Explorer				✓		
Paperless Office					✓	
Bar Code						✓
Bill of Materials						✓
Inventory Management						✓
Purchase Order						✓



IN THE SPOTLIGHT: Sage Sales Tax Powered By AvaTax

Until recently, most small businesses with only one or two locations have not had to worry much about collecting sales tax – when selling locally, they charged the local sales tax rate, and when shipping out of state, no sales tax applied. But that is changing. In this article, we will look at sales tax trends and discuss how Sage Sales Tax Powered By AvaTax can help you remain in compliance.

Declining State Tax Revenue

As Internet sales have become a larger and larger proportion of overall commerce in the last 15 years, state governments have experienced a drop in sales tax revenue that has significantly affected state revenues nationwide. As a result, states are taking action to try to reclaim some of that revenue. Audits are on the increase, especially of companies engaged in catalog and e-commerce sales. And states are steadily joining the SST (Streamlined Sales Tax) initiative. Marketed as a way for organizations to simplify the burden of tax reporting in multiple states, SST also is intended to help maximize state sales tax revenues.

Sage Has The Solution

It is estimated that there are more than 8,000 sales tax jurisdictions—implementing from 900 to 3,000 changes each year. Researching and complying with these increasingly complex requirements is burdensome for smaller businesses. Fortunately, Sage Sales Tax Powered by AvaTax offers Sage MAS 90 and 200 ERP customers a way to inexpensively automate sales tax processing.

AvaTax is developed and maintained by Avalara. The company calculates sales and use taxes on more than 100 million transactions per year, and customers spanning four continents trust Avalara to accurately submit more than 240,000 returns and remit more than \$10 billion in tax filings annually.

Tight Integration

For an automated solution to be efficient, it needs to integrate seamlessly with existing software. Sage Sales Tax powered by AvaTax was designed from the ground up to integrate with Sage MAS 90 and 200, allowing your accounting department to effectively manage sales tax compliance. It is a hosted, Web service solution that automatically performs address validation, sales tax jurisdiction research, and rate calculation — with no change to your existing workflow. Detailed reports are available, and returns are automatically generated. Sage Sales Tax takes just minutes to download and install.

Once installed and activated, you simply validate addresses (customer and ship to) through an automated process, and convert all customers to a single AvaTax tax schedule using a built-in utility. If you have inventory items that are non-taxable, you can map them to the AvaTax Taxability Codes and AvaTax will apply the correct tax rules, rates, sourcing rules, tax caps, tiered taxes, tax holidays, etc. All the calculated tax rates are stored in your normal Sage MAS 90 sales tax fields and the details are readily available through drill-down.

Are you ready to remove the headache of sales tax compliance and leave it to the experts? Give us a call for assistance. ✧



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