COMPUTER ACCOUNTING SYSTEMS, INC.
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Newsletter for Sage MAS 90 and Sage MAS 200 ERP

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Headline News

Sage MAS 90 ERP has again received top ranking in *The CPA Technology Advisor* annual Review of Mid-Range Accounting Systems. Published in the September 2008 issue, the review awarded Sage MAS 90 (Version 4.3) 5-Stars overall. The rating is based on five key areas: Modules & Notable Features, Integration and Import/Export, Reporting, Support and Training, and Relative Value.

Practical Examples—Using Business Insights Explorer

It is likely that you have heard about Business Insights Explorer (BIE) for Sage MAS 90 ERP and how it can provide customized access to information and increase productivity in your day-to-day tasks. But practically speaking, we understand that you are busy and have a hard time finding the time to explore BIE to decide which views can help with your daily workflow. In this article, we try to make it easier by giving you a few practical examples of how you can customize views. You will learn how to streamline access to data by creating default settings for data viewed regularly, and personalize the display of data to meet your individual needs.

BIE In Review

First, a quick review of BIE. You can access all BIE views from the Explorer folder in the Business Insights module, or access views related to a particular module, such as Sales Order, from the Explorer folder in each module. Each Explorer view is considered a unique Sage MAS 90 task and you must have security rights to launch the Explorer task.

Many default views include a primary and secondary grid. For example, in the Item view, Inventory Item Masterfile information is displayed in the primary grid. The secondary grid displays your choice of transaction detail—Item Transactions, Purchase Order Line Items, Line Items, or Item Vendors—related to the item that is currently highlighted in the primary grid.

Customizing A View

Your right-mouse-button functionality is a handy tool to remember in BIE. Anywhere in the grid, a click of the right-mouse button will give you a variety of options, so if you don't know how to do something, try clicking with your right-mouse button. We will get started using this functionality in the explanation of how to modify the columns in the view. We will continue with the Inventory Item View in this example.

If you right-mouse click on any column header, you can choose Column Settings. Within Column Settings, you can give the column a different caption (perhaps Part instead of Item), you can de-select a column altogether (perhaps Product Line is not particularly useful for your needs), and you can specify the column width (how much room

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Practical Examples—Using Business Insights Explorer

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do you need for your *Description*?). You can organize the columns in a different sequence by dragging and dropping them to a new location (perhaps you would like *Qty On Hand* closer to *Item Number*). If you are the purchasing manager, the quantity on hand, on order, and on purchase order may be most important to you. You also can sort your view in ascending or descending order based on the column you are working with. For example, if you know your Item Descriptions better than you know your Part Numbers, you can sort by the Description column and quickly find what you need.

Calculated Columns

The ability to create calculated columns can be very useful. Let's say you'd like your item grid to display a standard profit margin based on standard cost and standard price in order to chart the profitability of your products. To do this, in your Column Settings (right-click in the column header to access), press the **Calculated** button. For example you would select the **Inventory Item Masterfile** table, and subtract the field **StdCost** from the field **StdPrice**. See *Zoom In* image on this page.

Formatting Data

You can change the appearance of certain values in a grid. Perhaps you would like the Item Quantity to display in green for positive values, blue for zero values, and red for negative values. From the **Column Setting** option, you would select the **Quantity** field, right-click the **Format Type and choose** *Boolean*. You will be prompted for a Named Value; select *Yes;No*. Then right-click the **Value To Format** and choose **Column Class Format Settings**, and Insert Color Tag for the positive, negative, and zero values. You will need to *Save* and *Load* formatting before you exit.

Filtering

Much of the time, you may want to work with a smaller set of data than all inventory items or all customers. Filtering allows you to work with a subset of data that you select. Use the **Filter Builder** button located on the lower right of the data view. For example, you could filter the default view for a particular product line, save it with a descriptive name, and repeat for each additional product line. A user with security rights to save public settings can create saved views for use by others.

Charting

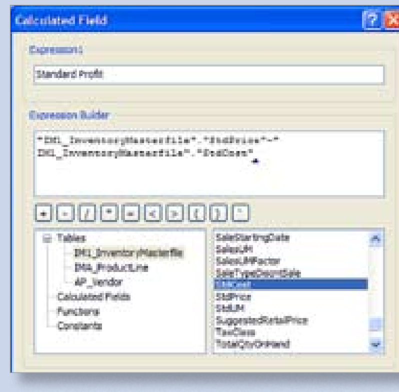
Once your columns are formatted and positioned and your data filtered, you can create a chart to give you a graphical view. Continuing with our example, we will chart item profitability by warehouse. First, click on the Chart tab at the top of the data grid. Then, simply choose the parameters to the left of the chart. You can save the selected parameters for future use. For this chart, you would choose:

» Chart Type = Bar
» Data Points Per Page = 8
» Series = Standard Profit
» Group by = Warehouse Description
» Sort by = Standard Profit

Reporting And Output

The data set of any customized view that you create can be saved as a report or exported for use in other applications. You can export to Microsoft Excel or Word either as a new document, or to an existing mail merge template you have set up. For example, you could send Requests For Quotes to vendors automatically using a custom BIE view with a mail merge to e-mail option.

You also have the option to send a dataset directly to someone by e-mail. For convenience, you can add a button to your



Here is an example showing the creation of a calculated column using the BIE expression builder.

toolbar for this purpose. Select the **Customize Toolbar** icon on the toolbar, and select the **Commands** tab from the Customize dialogue box that appears. Scroll through the commands in the right window until you find ***Send Page By E-mail***. Drag it to the desired location on your toolbar. Right-click on the icon and chose ***Display Image and Text***. Close the Customize dialog box.

Navigation

The drill-down and drill-around capabilities in BIE give you many options to explore and navigate your daily tasks. You can launch Sage MAS 90 data entry tasks directly from BIE, enter or modify information, and then return to BIE without losing your place. You may find that you prefer to dispense with the traditional menu system of navigation and use BIE as your launch pad for all your activities within Sage MAS 90.

We hope these examples have generated some ideas for BIE views that would smooth workflow in your organization. Give us a call for help creating custom views in Business Insights Explorer.