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Headline News

Sage MAS 90 version 3.71 is slated for retirement. In December 2007, customers will receive the final 3.71 Year-End Tax Table updates and any mandated year-end changes to Accounts Payable, Payroll, and Electronic Reporting for calendar year 2008 processing. Telephone support for version 3.71 will continue through December 2008. Support will continue for all subsequent versions, including Sage MAS 200 SQL 3.72 and 3.73.



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Custom Office Customizer

Sage MAS 90 ERP is at home in companies spanning dozens of industries—from wholesale distributors to service organizations. Some reasons this solution works so well for such diverse organizations include the software’s strong core functionality, large number of available modules, various industry-specific add-on applications, and perhaps most importantly, its ability to be customized and configured to meet a wide variety of business needs.

Customizer is a component of the Custom Office module and is behind much of its customization capabilities. The Custom Office module also includes MS Office Link, a tool that allows you to merge Sage MAS 90 information into Word, Excel, or Access to create customized documents, messages, and attachments. This article will focus on the Customizer’s functions that fall into two broad categories: adding user-defined fields (UDFs) to data files across the modules; and changing the look, layout, and navigation of screens.

Let’s take a closer look at Customizer and how you can use it to tailor your Sage MAS 90 implementation to your best advantage.

Add User-Defined Fields

Customizer enables you to add UDFs to virtually any entry screen. You can add a field for Support Technician to the Customer Masterfile, a field for Referral Source to the Sales Order Header, and a field for UPC Code to the Inventory Item Masterfile, for example.

The UDFs you create may be printed on forms and be imported and exported. You can easily include the UDFs in reports you create in Crystal Reports in the same way as other data in the system. They also are automatically available for inclusion on reports created with Business Insights Reporter.

You can populate a UDF value from another table within Sage MAS 90, and specify default values for the UDFs. In this way, you could cause a Sales Order UDF to default from the value of a

Customer Masterfile UDF, yet allow it to be overridden for an individual order. Or, you could default Item UDFs into Sales Order Line UDFs to hold a warranty code, for example.

Build a user-defined table (UDT) for each UDF if you wish to validate the data entered.



The Custom Office Customizer can turn your Sage MAS 90 application into a tailored, optimized business solution.

Continued on Page 2

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Custom Office Customizer CONTINUED

Then, when entering data in the field, users can choose from the list of values from the user-defined table. The tables are simple to maintain and you can include data from the tables in Crystal Reports and forms.

The UDFs and user-defined tables you create are stored directly within the related file. For example, Customer UDFs are stored in the Customer Masterfile and Sales Order Header UDFs are stored in the Sales Order Header file. In this way, you can easily access the UDF from the appropriate data entry screen, lookup, or Crystal Report allowing you to fully integrate UDFs into your business processes. Another significant benefit of this technique is that your UDFs and the user-defined tables are easy to find and upgrade automatically when you upgrade your Sage MAS 90 software.

Customize Screens

In addition to creating new user-defined data fields, Customizer allows you to change the look, layout, and navigation of your Sage MAS 90 screens.

Add New Buttons

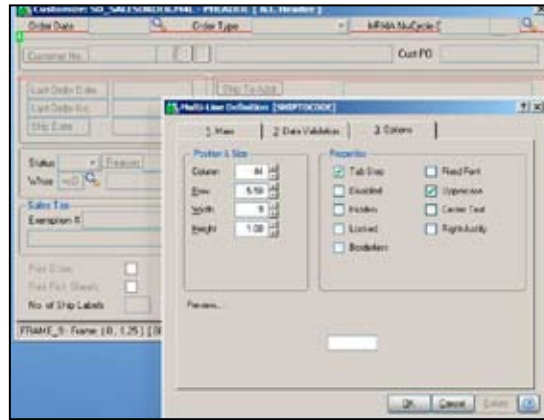
You can use Customizer to add buttons to screens that will launch application tasks or other Windows applications.

Get creative with this function: add a button to display a map of your customer's location or to play back a sound annotation of the correct pronunciation of a difficult customer name. Include a photo of employees in the masterfile, accessible by a new button linked to the image file. Scan contracts, credit reports, vendor invoices, and other important documents and link them to the appropriate record through a new button. You can create your own Help screens and provide instructions to users that are available with the push of a new custom button during Invoice Data Entry. You'll likely find numerous uses for this valuable feature.

Security And Data Validation

With Customizer, you can bring security to the individual field level by hiding particular fields from the view of specified users or user groups. Designate other fields as View Only. Add data

validation characteristics to certain fields, such as a range or list of allowed values. These characteristics can vary by user, so you can limit certain users to using a defined list of General Ledger accounts or hide the Item Cost from another user group.



Customizer makes it easy to change the layout of screens and even add new user-defined fields.

Rearrange Screen Layout

Customizer allows you to change the layout of any screen by moving fields to suit your data entry process. You can ignore unused fields, designate a field as a tab stop, and define the initial value for a field.

Consider making the Credit Hold field in the Customer Masterfile default to Yes when creating new customers, until you review their credit application. Or make an important field stand out with a bold font or by designating it to appear in red.

Relabel Fields And Add Text

Do you refer to your customers as members or refer to your item numbers as part numbers? Use Customizer to relabel any field or folder tab to suit the terminology of your business or to enable the field to serve another purpose.

Customizer allows you to add text to any screen for additional information, reminders, or instructions for your users. For example, you can add an on-screen message in Sales Order Entry reminding operators to tell customers about your upcoming sale.

Windows Script Control

The Windows Script Control feature of Customizer allows you to execute an external

script to perform calculations or to start up external applications from a button you create in Sage MAS 90. Think of a script as a mini program written to perform a specific task. Typically, a script is used to draw data from one program and write results to another program.

You can select values from a Sage MAS 90 screen to pass to the script and designate values to be returned by the script after processing is complete. The script can be simple or complex. It can even contain a series of if/then statements and different levels of calculations using data within Sage MAS 90 and from an external program. You could use Customizer to perform a custom discount calculation in Sales Order Entry or insert values into a Excel spreadsheet or Word document. Program logic that would normally be executed if you manually changed the field will be performed automatically, thereby protecting the integrity of your data.

Imagine performing customized freight calculations, calculating customer-specific discounts, defining a new commission structure, writing sales values to an Excel spreadsheet, or automatically creating new Outlook contacts by simply clicking a button within your Sage MAS 90 software. It's possible using Customizer.

The Microsoft Windows Scripting Host must be installed and operational in order for you to use this feature. If you plan to create your own scripts, a good working knowledge of VBScript (Visual Basic Script) and/or Microsoft Jscript is also a requirement. If you don't have this knowledge, we can assist you in creating your scripts.

Ready To Learn More?

As you can see, Customizer is a tool that any business can use to maximize the power of Sage MAS 90. From simple field relabeling to complex scripting and the addition of new data fields, Customizer can turn your Sage MAS 90 application into a tailored, optimized business solution.

We'd be pleased to speak with you about the ways in which you can put Customizer to work in your organization, just give us a call. If you do not yet own the Custom Office module, call us for details and pricing. ★