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info Newsletter

For Sage MAS 90 and Sage MAS 200

Gain Quick Access To Information With New Business Insights Explorer

If your organization has deployed Sage MAS 90 ERP as its business management software, you have the advantage of a rich feature set across more than 25 modules. Now, with the release of Sage MAS 90 Version 4.2, a new tool is included to make it fast and easy to locate the information you require—**Business Insights Explorer**. With Business Insights Explorer you can enhance productivity, customer service, and decision-making effectiveness across your organization—from personalized customer service to improved cash flow.

Let's take a look at how your organization can benefit.

Customer Service

When a customer calls, it's anybody's guess what they may need. It could be a call to place an order, add a contact, request a return authorization, check their credit balance, find purchased items on an outstanding invoice, add a ship-to address, check product availability—the list is extensive—you can probably think of a dozen more specific to your organization.

Your customer service staff needs to be prepared to handle all of these tasks, and to do it quickly and efficiently. Business Insights Explorer is the perfect tool for quick access to everything you need to assist your customers. Business Insights Explorer gives you view-only access to customer information and is laid out in three sections. The Primary grid, the Secondary or detail grid, and the Navigation bar.

Give your customer service, sales, and collections staff quick access to the information they need with the new Business Insights Explorer functionality.

The Primary customer grid view has been designed so you can quickly locate a customer account. Each staff member can personalize their grid so that the information is organized in the way that is most useful to them. For example, if the quickest way to look up a customer account is by using their telephone number, that column can be moved to the left side of the grid so that it is easy to find. Clicking on the top of the column allows you to sort the grid by values in that column.

Once the customer record has been found, credit limit and outstanding balance information can be accessed right in the main grid. To find further details regarding the customer account, use the Secondary or detail grid.

The contents of this detail grid can be changed simply by clicking on radio buttons contained in the third section of the screen, the Navigation bar. From the **Preview** section of the Navigation bar, you can choose to display any of the following in the Secondary grid: customer

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Headline News

On January 30, 2007 the Internal Revenue Service announced the updated Form 940, *Employer's Annual Federal Unemployment Tax Return*. The form has been in redesign since May 2004. Among other enhancements designed to make it easier to use, the form uses plain language, a more logical sequence, and is compatible with optical scanning. Form 940-EZ has been discontinued.

2074 E County Road E
White Bear Lake, MN 55110

(651) 762-2449
(651) 762-9418 fax

Email:
maltendorfer@techadvisorygroup.com

Website:
www.techadvisorygroup.com

Technology Advisory Group, LLC
ACCOUNTING SOLUTIONS AND CONSULTANTS

sales history, contacts, memos, payments, historical and open invoices, open orders and Return Merchandise Authorizations (RMAs), RMA history, and repetitive invoices.

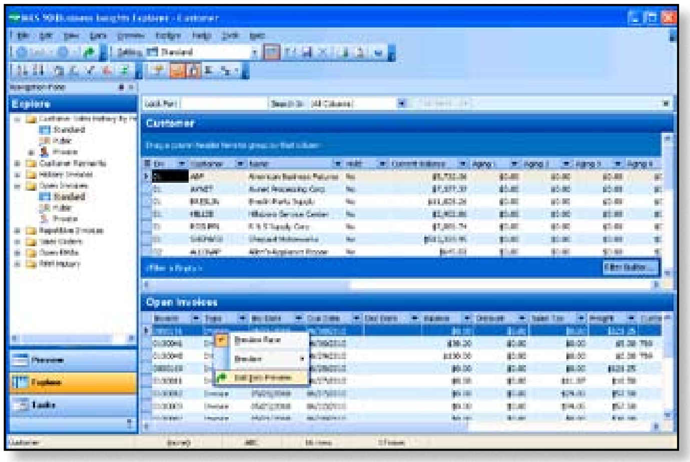
Even more powerful is the **Explore** option on the Navigation bar. Suppose the customer has a question regarding a specific invoice. Once the correct invoice has been located in Preview mode, selecting the Explore option from the navigation bar allows you to quickly drill down into information such as payments, credit memos, and items purchased with a series of options in the context of the current invoice.

The Navigation bar also lets you launch customer-related tasks directly, without having to return to the main Business Desktop menu. From the **Tasks** option the context is also retained. For example, if Customer Maintenance is launched, it will be pre-populated with the current customer record.

Business Insights Explorer places all the tools and data your customer service representatives need into one easy-to-navigate user interface, empowering them to handle virtually any action the customer may require, including:

- Update customer address, contact, and ship-to information. When a customer calls you can easily assist with all branches of their business without delay.
- Quote customer-specific pricing and product availability. You can view the price matrix, price specials, and contract pricing so that you can offer the lowest possible price while maintaining your profit margin.
- Revise an open order. When viewing an order in the secondary grid, simply launch Sales Order Entry from Tasks on the Navigation bar and make modifications to the order.
- Convert a quote to an order.
- Check available credit by viewing real-time credit and aging information.
- View payment status. You can provide the date of receipt and the invoice numbers that were paid by a check in seconds.

You can handle virtually any need the customer may have, and provide the requested information or action promptly and completely using the streamlined access provided by Business Insights Explorer. Not only will you have addressed the customer's needs, you will have saved them time, a priceless commodity in today's hectic business world. Your organization will be able to handle a larger volume of inquiries as well, potentially lowering your overall cost of doing business while improving your customer service.



Access everything you need to quickly and expertly assist customers using Business Insights Explorer.

Collections

Whether a full-time person is assigned to collecting past due amounts, or it is part of a staff member's overall responsibilities, staying on top of delinquent invoices is important to your cash flow. Business Insights Explorer is an excellent tool for managing collections with optimum efficiency.

For collections, you will want to start with one or more personalized customer views. Using the filtering capabilities, you can create a view listing only customers with past due amounts. Another view could display only customers with amounts over 60 days. Or perhaps your concern is mainly large past due amounts—a third view could display only customers with amounts past due over a certain dollar amount. Custom fields can be added to views for special calculations totaling past due values.

Once you have the subset of customers you want to work with, you have a variety of options. You can:

- Sort the list by any column to prioritize the order in which you follow up, by largest amount over 30 days, for example.
- Use the list to make telephone calls. Add memos regarding the conversation from the Tasks section of the Navigation bar.
- Export the list to Microsoft Excel with the click of a button, if you prefer to manage your collections using a spreadsheet. With another click of a button, you can perform a mail merge with Microsoft Word to create dunning letters that include specific past due amounts—ready to send by mail, e-mail, or FAX.

Sales

Your sales management staff can be highly effective if they can quickly view the activity for individual sales staff and top customers. Personalized views of your customer list for sales management might include a customer list sorted by salesperson, with subtotals on current and past activity amounts. You also may want to see a list of top customers by year-to-date revenue and compare that activity to the prior year.

Is Jane's sales volume double what it was last month? You can give Jane a call to congratulate her and pass the secrets of her success on to others. Have sales to a top customer dropped off since last year? Early detection enables you to identify and resolve customer satisfaction issues before you lose the customer altogether.

Sometimes a graphical view of the data is the good way to spot trends and exceptions. You can export your selected view to Microsoft Excel with a right-mouse click. The Excel Chart Wizard can quickly provide you with a graphical view.

These are just a few examples of how Business Insights Explorer can be leveraged to improve productivity, decision-making, and customer service. Give us a call to discuss adapting this powerful tool to streamline your business processes. ☆