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ACCOUNTING SYSTEMS

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THE PASSAGE

A Newsletter for Clients of Parkinson Accounting Systems

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Welcome New Clients!

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Module Spotlight: Business Insights for MAS 90 and MAS 200

Included at No Charge in Version 4.2!

Business Insights Explorer is the most convenient way to navigate your business. It brings ad hoc inquiry, drill-down, drill-around analysis up to a whole new level. Turn your data into knowledge that you can act on by using powerful sorting, grouping, and filtering capabilities that you personalize to your specific needs and role within your company.

This easy-to-use inquiry and analysis application optimizes your daily decision-making tasks in the most critical areas of your business. A streamlined grid interface spans multiple data elements in one view, and you can choose between 11 views for the same company, including contacts, payments, invoices, and sales orders. Change views for the same customer, plus drill down to the transaction level and access customer maintenance for edits without having to go to other modules in your Sage MAS 90 or Sage MAS 200 ERP system. What's more, you can launch your familiar Sage MAS 90 and 200 tasks directly from within Business Insights Explorer and find the information you're looking for without losing your place. This 360-degree view gives you the ability to quickly access timely, up-to-the-minute business information. The result favorably impacts your bottom line and your long-term success through more accurate decision-making and enhanced customer satisfaction.

Business Insights Explorer provides you with a better way to access and understand your data - offering you a powerful, intuitive reporting tool - and you don't have to be a programmer to use it! First-time users can start right away. Even more important, Business Insights Explorer is great for analyzing "what-if" scenarios that can keep you awake at night. Who are the top customers for each of your salespeople? What products do they buy? How many new customers did you gain last month? And, because of the depth of functionality, Business Insights Explorer will continue to grow with you and your business far into the future.

Features

Easy-to-Use Interface — Business Insights Explorer provides a single, user-friendly interface that gives you quick access to crucial information, and related data—all the way down to the individual transaction.

Module Spotlight: Business Insights for MAS 90 and MAS 200 (cont.)

Quickly Preview Key Information — View key information about a specific entity, such as a customer and related transaction information, including invoices and orders, in a single view using the Preview option. Apply filters to any view, displaying data according to your preference.

Access Sage MAS 90 or 200 Tasks — Use Task view to launch familiar Sage MAS 90 and 200 tasks from the Business Insights Explorer screen. When you're finished with that task, just close the Sage MAS 90 or 200 pop-up screen to return to where you were in Business Insights Explorer.

A Single Point of Access for Related Data — The Explore option allows you to perform extensive drill-down and drill-around investigations into related data records. You can easily click on another selection in the primary grid, and the secondary grid shows related data. Click on specific data to further drill into that entry. When changing views, context is passed as a filter from the original view to a new view.

Efficient Search — If you're looking for a particular entry, simply type a specific clue (such as "\$825.50") into the Look For field. Then, you can easily narrow the search by a selection in the Search field. This saves you time scrolling and scanning through lines of information.

Convenient Access to Task Management Functions — Task Management options provide an easy way for you to quickly access key tasks for the displayed view, including customer information update and order creation capabilities.

Robust Customization and Personalization — Convenient view filtering capabilities enable you to sort, group, reorganize, and rename columns within the grid, as well as save and share personalized views. You also can create custom fields based on simple or complex formulas.

Microsoft Office Integration — A simple right-click can export your data to pre-defined Word templates, plus Excel, Access, or XML files. Easily create mail merge documents based on the filtered data being viewed.

Business Insights for MAS 90 and MAS 200

Frequently Asked Questions and Answers

Q. What is the difference between a view, setting, and filter?

A. Settings are saved modifications made in the Business Insights Explorer window to the layout of columns, formatting of numeric fields, and option preferences. Changes made to the Data View grid, Navigation pane, and Preview pane can be saved as a new setting.

Views are predefined sets of data provided in the Business Insights Explorer window. A setting is applied to the current view. A view can have multiple settings defined, both public and private, with one setting designated as the default setting.

A filter allows you to refine the data you can see in the selected view. You can customize a view by applying filters to it. A filter is saved with a setting. You can define multiple filters for each view.

Q. What information is saved with a view's setting?

A. The view information is saved in a view setting file, where the starting default view setting is stored. The following information is saved in each view setting file.

Note: *The information in the first six bullet items below cannot be modified through Business Insights Explorer.*

- Column captions used in views and previews
- Related previews
- Related Explorer views
- Related task information
- Fields to suppress when the view is being previewed to the Data View grid
- Tables that are part of the data source definition for the view
- Global formatting settings
- Columns that are part of the data source definition for the view (columns that cannot be removed)
- Group-By panel visibility (none, always, or group expand)
- Whether the Filter panel is in a show or hide state
- Filter applied to data in the Data View grid
- Whether the Group Summary footer is visible
- Column settings, such as: visibility, order in the Data View grid, column captions, widths, format type, cell-merge setting, level formatting values (overrides default formatting), column summary value settings, group summary value settings, and sort order

Business Insights for MAS 90 and MAS 200

Frequently Asked Questions and Answers (cont.)

Note: *Preview pane settings, such as the currently selected preview, sorting applied to columns, and filtering applied to columns are not saved as part of the view setting.*

Q. What settings persist when I reopen the Business Insights Explorer window?

A. Global-state information for Business Insights Explorer, which is stored in the registry, is loaded when each instance of Business Insights Explorer is opened. If there are multiple instances of Business Insights Explorer running, the last instance closed has its state information saved. The following states persist when the Business Insights Explorer window is reopened:

- The window size (width and height) and location (top and left).
- The window state, such as normal or maximized.
- Note The minimized state does not persist.
- The state of the Navigation pane, such as docked, undocked, auto hide, and width. Additionally, the active Navigation pane group persists (Tasks, Preview, or Explore group).
- The state of the Preview pane, such as the pane height and whether it is in a show or hide state.
- Whether the Search pane is in a show or hide state.
- Whether the Status bar is in a show or hide state.
- Whether the Selected Record Only option is selected under File menu > Export Options.
- The layout of all toolbar and menu items, including the Customize options (accessed by selecting Tools menu > Customize).

For more information on Business Insights for MAS 90 and MAS 200 please contact Kurt Kunselman, Parkinson Accounting Systems, at 415-499-9959 ext. 102



QuickBooks Corner

with Kurt Kunselman

Title Detecting Data Damage and Using the Verify Data Utility

The Verify Data utility detects many types of data damage. The utility looks at the data and then logs any errors it finds in a file named Qbwin.log.

To run the Verify utility:

1. Select the Window menu and select Close All.
2. Select the File menu and select Utilities > Verify Data.
If the Verify completes with the message QuickBooks detected no problems with your data, your data is clear of issues.
If the Verify completes with the message Your data has lost integrity..., there is damage in the file, and QuickBooks will display a message with instructions for running the Rebuild Data utility to attempt to repair the data damage:
Before starting the Rebuild process, note the file information in the Product Information window for future reference (press F2 to open the Product Information window).
If the file is on a network drive, it should be copied locally before running the Rebuild Data utility.
Important: The Rebuild Data utility should never be run across a network.
3. Click Yes at the prompt to make a backup of the data file. Rename your data file to avoid overwriting the existing data file.
Important: Do not overwrite your existing backup file.
The Rebuild Data utility will run as soon as the backup completes, and it should only be run once.
4. When the Rebuild process has finished, close your company **file** and then reopen it in order to refresh the lists in the file.
5. Run the Verify Data utility again to check for any remaining data damage.

PAS NEWS



Big News!: PAS welcomes two new employees. First, Nancy Matranga worked for Sage Software in technical support prior to joining the PAS team. Nancy brings a great background in understanding the complex data structures of the MAS 90 / 200 system. She will join Kurt in providing our front line of technical support. Please don't hesitate to contact Nancy directly at extension 105.

PAS also welcomes Theresa Bavero as our administrative and marketing manager. Theresa has an extensive background in software graphic design and organizational skills. She recently moved to Marin from New Mexico, and previously lived in New York. Welcome, Theresa!

On May 11th PAS held a client conference in a new location. LearnIt! Has moved just south of market street and we used a large conference room to provide beginner training on Crystal Reports and review the newest version of MAS – version 4.20. Turnout was great and our feedback was very positive, thank you to all who attended.

As just mentioned, Sage MAS 90 and MAS 200 version 4.20 has been released. We are very pleased with this new version of MAS – especially the new Business Insights Explorer. PAS passed our 4.20 certification exam with a score of 100%. This version has been thoroughly tested and is ready to go. If you haven't already scheduled an upgrade, please call us.

PAS recently reached the top 40 sales partners for Sage Software MAS 90 / MAS 200. Out of over 1000 resellers, we are very happy to achieve this high level.

SPECIAL THANK YOUS

Thank you to Will Noble for recommending PAS to one of our newest clients, The Guardsmen. Thank you to Shawn Westerhoff – Verus Technology for referring us to Searchlight. Shawn, like Jon Parkinson, is an avid MGB fan (There is some kind of defective gene involved). Thank you to Nancy Matranga for moving to Marin in order to join the PAS team.

More thank yous: Joo Kim - Alere Systems, Ron Lin - Global Supply Company, Margaret Clark – Ilypsa



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FEEDBACK FORUM

We welcome your feedback. Please feel free to send us your feedback at any time. Using e-mail is a good way. Send to: office@pas90.com with "Feedback" in the subject line. With your feedback we can provide you with better and more accurate customer service.