

**Volume 3
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Compliments of:



Headline News

MIS Consulting will be releasing an Inventory Management Suite of utilities and reports for Sage PFW and BatchMaster 5.5, in May. Our powerful Inventory Auditor is included in the suite as well as new utilities to facilitate Inventory Reconciliation, Physical Count Processing, Inventory Movement, and Production Commit/DeCommit. Many new reports are available including: Purchase Price Variances, Inventory Valuation, Sales by Weight, Inventory Trend, Production Schedule, and more! If you are interesting in participating in our Controller Release process, please talk to your consultant.

Vista OS Compatibility

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for more info!

Previewing Version 5.6

Sage PFW ERP Version 5.6 is scheduled for release in late summer 2007. Sage Software is planning dozens of new features. In this article, we'll preview many of the proposed enhancements, and let you know how the new functionality they provide can help your organization operate more efficiently.

Managing Customer Credit

To ensure adequate and reliable cash flow, it's crucial for your organization to carefully monitor and manage its receivables. Allowing customer accounts to remain past due can have serious consequences for your company's financial health. Version 5.6

includes several new features to help you better manage customer credit.

New Customer Status Codes

Version 5.6 adds new Customer status categories: In Collection, Prospect, and Inactive.

When an account has reached the point where you have to take further action to collect the balance due, use the In Collection status to allow your representatives to understand the situation at a glance. Use the Prospect status to identify contacts

who haven't become an Active Customer yet; this allows you to segregate these contacts for reporting or marketing purposes. Use the Inactive status for customers who are no longer in business or those you are not currently doing business with. The new Customer Statuses prevent inappropriate activities from occurring such as the selection of an order for shipment to a customer with a status of In Collection. When you change a customer from an Active

status to one of the new statuses, you'll be warned if that customer has open orders, so that you can address these orders appropriately.

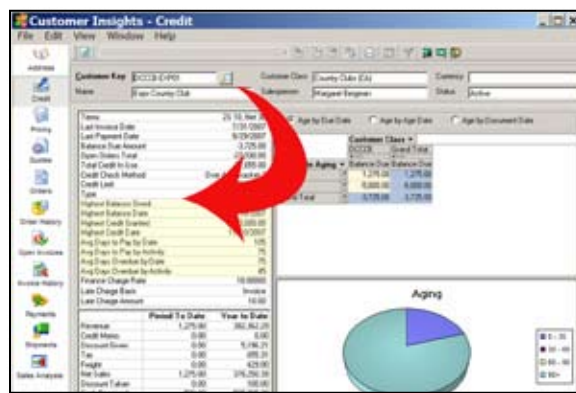
Credit Tracking

Several new fields are being added to Customer File Maintenance to help you better manage a custom-

er's credit, including: Average Days to Pay by Date, Average Days Overdue, Highest Balance, Highest Balance Date, Highest Credit Granted, and Highest Credit Date. In addition to the Customer File Maintenance, you can view these new data fields from the Customer Insights Customer Credit view.

New Hold Functionality

New in Version 5.6 is the ability to assign a Hold status to a Sales Order. This prevents the



Eight new credit tracking fields are available in Version 5.6, as shown here on the Customer Insights Credit screen.

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order from being shipped until the condition is resolved. You also can note a Hold Reason to briefly explain the issue.

Enhanced Find Historical

The **Find Historical** feature allows you to bring in data from historical Sales Orders to populate a new order. Version 5.6 adds more flexibility to this popular feature by giving you complete control over precisely which historical data elements transfer into the new document. For example, you may choose to bring in the items, but update the order with current pricing, rather than using the historical pricing.

Multiple Customer Contacts

New in Version 5.6, a Contact table gives you the ability to store up to five customer contacts. You can organize these contacts by type; a sales contact or an accounting contact, for example. The new table will allow you to store full address information for each contact in addition to the name and phone number.

Field Sizes Increase

Version 5.6 increases the size of the Customer Name, three Address lines, City, and State fields. The increased field size includes the Customer Ship To Address field. This change should make it much easier for you to manage lengthy international addresses.

Invoice History Report

Fulfilling an often-requested enhancement, Version 5.6 adds Invoice History Report capability. You'll be able to reprint an invoice that exactly matches the original in data and layout. This is ideal when a customer requests a copy, or when your staff needs to see what the customer is looking at when discussing a particular invoice.

Vendor Statuses

With Version 5.6, you can assign one of three status codes to your Vendors: Active, Active No New Purchases, and Inactive.

Both the Inactive and the Active No New Purchases status codes prevent users from creating an Invoice or Purchase Order for the vendor.

Enhanced Universal Notes

It's likely that you already make extensive use of the powerful **Universal Notes and Attachments (UNA)** features.

The Sales Order Entry screen shows three of the many enhancements in Version 5.6: Caption Hyperlinks, Hold Order and Hold Order Comments, and the UNA button.

Version 5.6 adds a new Category field to UNA. Now you can assign your notes and attachments to a meaningful category such as Collections or Personal Data. Since the UNA information can be printed on reports, you can elect to include only a certain Category of notes on a specific report.

Universal Notes and Attachments functionality is also added to the **Order Entry Pro** and **Purchasing Pro** modules in Version 5.6.

Navigation Aids

Version 5.6 adds **Caption Hyperlinks** to File Maintenance tasks throughout the software that allow you to efficiently and rapidly access related maintenance tasks. For example, while performing Sales Order Entry, you'll find a hyperlinked Salesperson Key field—providing direct access to the maintenance task if you need to edit or update the field.

Expanded Third Tier Processing

The **Third Tier Processing and Scheduling** functionality has long been a popular feature across the financial and distribution modules. Version 5.6 brings this functionality to the **Inventory Pro** and **MRP** modules.

Third Tier Processing and Scheduling allows you to schedule and execute reports and

postings using a separate process application server, freeing your own workstation from the processing burden.

With this feature, you can, for example, schedule resource-intensive updates and reports to run during non-peak usage periods. The resulting reports are placed in your queue, allowing you to review them at your convenience and share

them with other users.

Data File Optimization Utility

As your Sage PFW database grows, processing speeds can suffer. With Version 5.6, you will be able to use the included Pervasive Rebuild Utility on all your Sage PFW data files. The Rebuild Utility is designed to optimize file sizes and help speed processing.

Vista Compatibility

Version 5.6 will bring Microsoft Vista compatibility. Sage Software is currently testing the software to ensure that Sage PFW will be fully Vista compatible. Please see our article on page four for more information on Sage PFW and Microsoft Vista compatibility.

As we mentioned, Sage PFW Version 5.6 has an expected availability of late summer 2007. Should you have any questions, don't hesitate to give us a call. ☆

Keep Your Data Safe

Data security has always been a top concern of businesses. Threats seem to be everywhere: viruses, malware, natural disasters, power surges, disgruntled or simply careless employees—and the list goes on. What are some practical steps you can take to ensure better security of your company's valuable data? In this article we offer a few suggestions for securing your Sage PFW ERP database, and the rest of your company's electronic data.

Access On A Need-To-Know Basis

While you must give your employees enough access to your company's databases to allow them to do their jobs, it's prudent to tightly control that access. It's far safer to grant the access as it becomes evident the employee needs it than to risk providing that access before they do.

With Sage PFW you can limit access by company and by module. Furthermore, you can assign privileges to Read, Write, and Delete to specific menu items. You also can deny access by setting user privileges to No Access. While it may seem time consuming to set up such detailed security parameters for each employee, it really isn't. Security setup within Sage PFW is easy and straightforward. Security Groups within Sage PFW speed and simplify security setup. You can use Security Groups to assign the same security rights to similar sets of employees—accounts payable data entry clerks, for example. An on-screen wizard guides you through the security setup process, and special shortcut buttons are active to grant selected access to all items at the current level or lower.

One convenient, safe, and effective way to provide your staff with the Sage PFW information they need is to use the Customer Insights module. For each Customer Insights view, you define which user groups have Read or Read/Write access. Similarly, the Business Insights Professional module provides view-only access to many key performance indicators.

Strong Passwords

Did you know that a blank password (no password) is more secure than a weak password, such as 1234? Many users select a password because it is easy to remember, but criminals

can easily guess a simplistic password. On computers using Windows XP, an account without a password cannot be accessed remotely by means such as a network or the Internet.

However, we don't recommend that you use a blank password—we want to stress the danger of using a weak password. Sage PFW supports what are often termed *Strong Passwords*, and it makes sense to take advantage of this capability. So just what makes a password strong?

While the definitions vary, a strong password typically has a minimum length of seven characters and includes upper and lowercase letters, numerals, or symbols. Sage PFW allows you to enforce strong passwords and also to set a number of days value until password expiration. This will require users to select a new password every 30 or 60 days, for example.

Back It Up

Without a doubt your company has established backup procedures for its servers. Be certain to periodically test your ability to restore from a backup and invest in secure off-site storage. Should you ever find yourself in need of that backup, any costs and inconveniences you experience maintaining a usable back up will be well worth it.

Beware Of Malware

It is likely that you have strong anti-virus software installed and running on your company's network, but there are other sinister threats to your system lurking.

Malware, short for malicious software, is software designed specifically to damage or disrupt a system. Malware finds its way onto your computers by stealth. Spyware is the most common class of Malware, but there are others such as zombies, keyloggers, and dialers. While not technically Malware, Phishing scams are on the increase. You may have received an e-mail that appeared to come from your financial institution asking you to follow a hyperlink to their site to update your password or account data. The e-mail is a trick designed to get you to give the thief access to your financial information.

Internet Explorer 7 has a built-in Phishing filter, plus there are several other low and even

no-cost malware and phish-catching software options available.

Building Best Practices

The International Organization for Standardization (ISO) and the International Electrotechnical Commission (IEC) have adopted an information security standard document: Code of Practice for Information Security Management—ISO/IEC 17799 for short.

The standard is lengthy and highly informative. To simplify it greatly, the standard is based on three principles:

- ▶ **Confidentiality:** ensuring that information is accessible only to those who are authorized.
- ▶ **Integrity:** safeguarding the accuracy and completeness of information and processing methods.
- ▶ **Availability:** ensuring that authorized users have access to information when required.

Even if your company is not interested in ISO certification, the best practices laid out in ISO/IEC 17799 are worth considering.

Visit the ISO's Web site at www.iso.org/iso/en/prods-services/popstds/informationsecurity.html.

Let us know if we can help you address your security concerns. ☆

Tips & Tricks

Enter Dates Quickly

Here are a couple of time and keystroke saving tips for you:

If you enter only the two-digit day of the month in a date field, Sage PFW ERP will default the current month and year. For example, enter 04 and press *Enter* and the system returns 5/04/07—when your system date is May 2007.

If you enter the two-digit month and two-digit day in a date field, Sage PFW will default the current year. Enter 0503 and the system returns 05/03/07—when your system date is 2007. ☆



Sage PFW In The Spotlight Vista OS Compatibility



With the Microsoft Vista operating system in the news of late, it's a good time to talk about your Sage PFW ERP solution's compatibility with Vista. Listed below are answers to frequently asked questions regarding Sage PFW compatibility with Microsoft Windows Vista.

Is Sage PFW compatible with Vista?

The current version of Sage PFW is not fully compatible with the Vista operating system—however, it is functional. Should you decide to install Vista now, there are several important issues to consider before the installation. Please give us a call for up-to-date information. It is also important to note that the compatibility issues with Vista are not isolated to Sage PFW, and may also impact your other business applications including Crystal Reports® and Microsoft FRx.

When will Sage PFW be compatible with Vista?

Recognizing the importance of supporting Microsoft Vista, Sage Software is making significant investments to ensure that Sage PFW v5.6 will be fully Vista compatible.

What editions of Vista will Sage PFW support once compatibility is achieved?

Sage Software plans to support Vista Business and Vista Ultimate for use with Sage PFW v5.6.

When is Version 5.6 scheduled to be released?

We anticipate that Version 5.6 will be available in late summer of 2007 and customers with a current ClientCare support agreement will receive the upgrade automatically.

Is there any way I can get a Vista compatible version of Sage PFW sooner?

If you need to receive Version 5.6 sooner than the anticipated release date, you could consider signing up to be a Version 5.6 Controlled Release Site. Controlled Release software is available approximately eight weeks before the release is made available to the public. Call us for more information if you are interested in this option.

I need to buy a new computer. What should I do?

Request a Windows XP operating system (OS) when making a computer purchase. Microsoft has announced that they will continue to sell Windows XP OS until January 2008. Customers purchasing new computers will continue to have the option to purchase and use the Windows XP OS this year. Most hardware vendors, including Dell and HP, will continue to provide business systems with Windows XP OS.

My new computer has Vista, and Sage PFW will not install. What should I do?

Sage PFW should install on Microsoft Vista. You will receive several message dialog boxes that will prompt you for permission to proceed. The dialog will warn you that the installation is not by a trusted

product. This is not an error and you must accept to continue with the installation. If you continue to experience issues, please give us a call.

Will Sage PFW Version 5.6 be supported on the 64-bit version of Vista?

Sage Software does plan to certify Sage PFW on the 64-bit version of Vista. These systems have the capability to run in a 32-bit mode, which would be required for Sage PFW.

Can I use a partitioned hard drive with Vista on one partition and XP and Sage PFW on the other partition?

Partitioned hard drives with differing operating systems have not been tested with Sage PFW and therefore this configuration it is not supported.

How will I be notified when Sage PFW is Vista compatible?

Once compatibility is achieved an e-mail communication will be sent to the primary ClientCare contact.

Additionally, the system requirements will be updated and you can find this information at: www.sagesoftware.com/pfw/supportedenvironments/index.cfm.

You are also welcome to contact us for the latest information. ☆



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