

**Volume 1
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Compliments of:



Headline News

Sage Software (formerly Best Software) made the *Manufacturing Business Technology* magazine's prestigious Global 100 for the fifth consecutive year.

Sage Software ranked number 24 on the list overall, and ranked fifth in the Enterprise and Supply Chain Application category. Selection to the list is determined by a combination of data extracted from user surveys, leading market analyst firms, and expert editorial opinions.

Crystal Reports

See page 4 for more info!

Sage PFW 5.4

Platinum® for Windows by Best and BatchMasterPFW™ are now combined into one comprehensive solution—Sage PFW ERP. The powerful financial, distribution, and process manufacturing applications have been combined. With the release of Sage PFW 5.4, modules that were part of BatchMasterPFW will now be referred to as Sage PFW Process Manufacturing modules. The modules associated with the former Platinum for Windows by Best are now the Sage PFW Accounting and Distribution modules. In this article we discuss the changes and enhancements introduced in Sage PFW version 5.4. We've grouped the changes into Global, Sage PFW Accounting and Distribution, and Sage PFW Process Manufacturing module enhancements.



Platinum for Windows by Best and BatchMasterPFW are now Sage PFW!

The Quick Print feature is available only to those users with security rights to run the associated print menu item.

Context Launcher Inquiries

The powerful Context Launcher introduced in version 5.3 allowed you to quickly open related menu options for Customer Keys and Vendor Keys using a right-mouse click from your context menu. Sage PFW 5.4 expands the power of the Context Launcher, allowing you to quickly

inquire into Customer and Vendor information and adding the ability to access Item Key related menu options. This drill down and drill-around functionality promises to save you time and keystrokes, and increase the efficiency of your workflow.

Use the Context Launcher Inquiry option to quickly access Custom-

er or Vendor Profile information and Customer Statement details. You'll have instant access to detailed billing information, aging, transaction, and history information.

As you are entering a customer invoice, for example, you may need to see details of a past invoice. Simply right click on the Customer Key to open the Context Launcher, select the Related Tasks menu item and then the Customer Profile Report option. The program automatically passes the active Customer Key to the Custom-

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Global Enhancements

Quick Print

Sage PFW 5.4 adds a new Quick Print feature that enables you to print documents with a single mouse click from several data entry screens. The new Quick Print feature is available when printing an Invoice, a Credit Memo, Purchase Order, Quote, Sales Order, and Return. Selecting the new option performs the same logic (without posting) as the associated print and post

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er Profile Report Parameter screen enabling you to view the details for that specific customer. Using this Context Launcher inquiry option, you can instantly access Sales History information, Available Balances, Serial or Lot details, and much more.

The new **Item Key Context Launcher** allows you to launch several related tasks, and is available in most screens that include an Item Key. Simply right-click and view the following information for an item: Available Balances, Sales History, Serial/Lot Availability, Material Usage, and Vendor Item List. Additionally, for Sage PFW process manufacturing modules only, view the Item Production List and Vendor Lead Time/Quote.

As you are creating a new Order in Sales Order Entry, for example, simply right-click in the Item Key field to open the Sales History List for the selected Item Key. Both the Item and Customer Key from the Order will automatically pass to the Sales History List lookup and you will see the historical activity for that specific item and customer key combination.

Queue Repair

Sage PFW 5.4 allows you to select multiple users or multiple queues to be repaired. You now can use the familiar Windows *Shift* and *Ctrl* keys to select multiple items from a list. The *Shift* key allows you to select contiguous items and the *Ctrl* key allows you to select multiple items that are not next to each other on the list.

Email Reports

In Sage PFW 5.4, when you email a report it is sent in a PDF format. Sending the report as a PDF formatted attachment means that the recipient will get the information they need, without the possibility of accidentally changing your original report. This method does not require that the user have Crystal Reports installed in order to open the report. Nor does the recipient have the ability to modify the original report—important when you are distributing sensitive financial data. And since the Adobe Reader is commonplace and free, your audience won't have any trouble accessing your report.

Customization Workbench

The **Customization Workbench** allows you to tailor the product to meet your company's

unique business requirements.

In Sage PFW 5.4, the Customization Workbench is updated in appearance and functionality. It is also easier to use and it supports Windows color schemes. The Customization Workbench Server and Client installation has been streamlined and automated as part of the standard Sage PFW installation. This change will save you time during upgrades since all you need to do is select the new Customization Workbench options during the PFW install, rather than running a separate server and client install.

Several other improvements increase the usability of Customization Workbench. The manner in which you add columns to lookups is improved; in version 5.4 the Column Properties screen is a single screen that defaults with the defined properties of the field. When using the Lookup Editor, you can view the precise size and format of the modified lookup and now a Compare button is available from within the Lookup Editor.

Multi-task while performing translations and save time! You may now launch multiple instances of the Language Editor, allowing translators to view and translate different language files concurrently.

Finally, a new Find/Find Next feature in the Component Browser makes it simple to locate a specific data element in the list.

Merged Data Dictionary

Forget managing two separate sets of Data Dictionary files. Sage PFW 5.4 merges the data file definitions of former Platinum for Windows by Best and BatchMasterPFW tables, eliminating confusion and saving you time during upgrades.

Crystal Reports Version 10

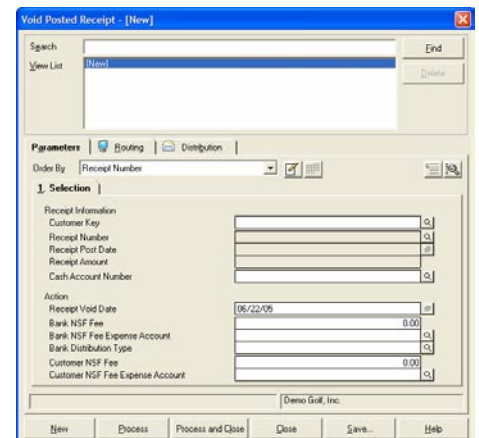
Sage PFW 5.4 utilizes the latest version of Crystal Reports®—Version 10, which adds a number of new features. The ability to dock the Field Explorer will make it easier to work on reports and see the formulas and fields simultaneously. The Report Explorer allows you to see which fields and formulas have already been inserted in the report and where. Also in version 10, finding data in long reports will be easier as the search functionality now searches any sub-report as well as the main report. For more

information on Crystal Reports, please refer to our article on page 4.

Sage PFW Accounting and Distribution

Return Check Utility

Sage PFW 5.4 helps ease the overhead associated with processing returned checks with a new **Void Posted Receipt** utility. The utility can void any posted cash receipt, including those that were applied on account or those posted to history. In addition, you can easily charge bank fees or additional processing fees if appropriate. Once you void a receipt, the invoice is automatically reactivated.



The Void Posted Receipt utility makes returned check handling and processing less time consuming.

Batch Processing In Bank Book

Batch processing by User ID has been added to the Bank Book module. Now in Bank Book you will be able to Post Journal Entries and print a Journal Entry Listing by User ID.

Pre-Payment Processing

Sage PFW 5.4 simplifies pre-payment transactions entered in Sales Order Entry. The Print and Post Invoices posting program will automatically apply the on-account payments to invoices being created, saving you time and reducing the opportunity for data-entry errors.

Enhanced Spreadsheet Import

Another timesaving feature added in Sage PFW 5.4 is a new column token, Line Item Detail Apply Date. The token was added to the Spreadsheet Import Utility and can save you time as you import a Journal Batch containing several different Line Item Detail Apply Dates. Simply

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define the new token with the desired date and the Line Item Detail Apply Dates entered in the column will be automatically assigned during the General Ledger import.

Sage PFW Process Manufacturing

Formulas Approval

Version 5.4 adds additional security to keep unauthorized users from modifying sensitive formula data. The new **Formulas Approval Process** helps to ensure the integrity and safety of your data.

You control the optional Formulas Approval Process through Formulas Setup. By default the program sets the status of all current formulas to *Approved*. Thereafter, users with security access to Formulas, Laboratory, and Costing menu items will be unable to modify or delete approved formulas. The Laboratory/Costing what-if functionality is still available to users but changes made as a result will not be saved.

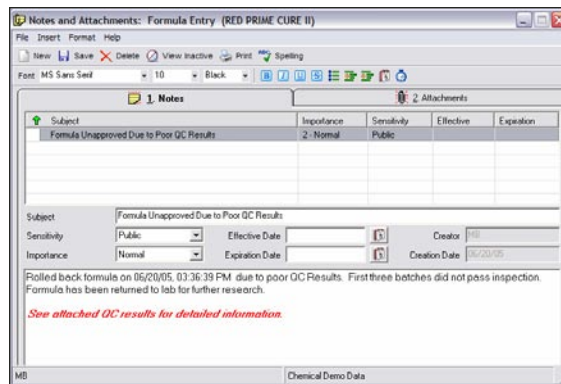
Only users with security access to the new Formulas Approval Utility can change a formula's status to *Unapproved*. Those users to whom you have granted security access to Formulas, Laboratory, and Costing menu items will be able to change and delete the Unapproved formula information. Production will not allow batch processing for any Unapproved formula. Once formulation is complete, users with security access to the new Formulas Approval Utility can set a formula's status to *Approved*.

Notes And Attachments

Universal **Notes and Attachments** were introduced in PFW in version 5.2. Now, Sage PFW 5.4 expands this powerful feature so that Sage PFW process manufacturing users can enjoy the same functionality for Items and Formulas. Use Notes and Attachments to keep item specifications, formula logs, or other important information easily accessible.

You can access the Universal Notes and Attachments feature for Item Keys in the Item Entry document entry screen and the Item Master file maintenance screen. Additionally, the Formula Entry document entry screen now supports Universal Notes and Attachments for Formula Keys. Notes and Attachments that you define for Item and Formula keys can be viewed in look-

up windows defined for these keys. Action notes are displayed for Item and Formula Keys in any entry screen in which they can be used.



Sage PFW 5.4 expands the Notes and Attachments feature to Sage PFW Process Manufacturing.

Enhanced Multi-Currency Pricing

Previously with BatchMasterPFW, all prices were represented in the Home currency and were later converted to the customer's Natural Currency based on the exchange rate as of the date of the transaction. This progression made it impossible to quote an exact price to a customer whose currency was not your Home currency. In version 5.4, the Sage PFW process manufacturing Pricing tables now support a Base Price and Price Break information in a Customer's Natural Currency rather than your company's Home Currency. Now your customer's pricing will not fluctuate due to a constantly changing exchange rate.

Expanded Template Availability

Sage PFW 5.4 adds the **Template** feature to Formula Entry. Templates offer tremendous flexibility as you can set default field values and customize the work flow through the use of tab stops, among other options. You can use the templates to select the desired lookups for the fields found in Formula Entry, to add field-level user security, to restrict entry to fields specific to your business, and to create screens that suit your unique business processes.

Business Insights Professional

Business Insights Professional presents Key Performance Indicators (KPIs) plus analytical and collaborative tools in an easily accessible format. Users can access a variety of graphs and tables that present data in a visual, efficient, and

effective manner.

Sage PFW 5.4 introduces two new Business Insights Profession KPIs: **Sales Analysis** and **Daily Order Summary**.

The Sales Analysis key performance indicator provides a multitude of views of invoiced sales to allow you to identify the customers, salespeople, and items responsible for your revenue stream. Use the information to identify trends, forecast future business, lower costs, and increase profitability.

The Daily Order Summary view provides a summary of orders over a specified number of days. Now, at any time, you can view information such as the number of orders entered, the average dollars per order, the total dollars per day, and much more.

Lot Recall Report

To help meet certain provisions of the BioTerrorism Act of 2002, a FDA requirement, Sage PFW 5.4 includes a new **Lot Recall Report**. You may be required to provide the FDA with the specific ingredient sources and the finished good recipients of a particular lot. The new report includes customer information for all products sold for which the selected item and lot was a raw material, either directly or indirectly through intermediate production.

The new report is also capable of analyzing this information from a vendor perspective, identifying the vendor supplying the ingredients of the selected lot, as well as reporting the vendor supplying the ingredients of the intermediate product batches.

Sage PFW Is Available Now

Users with a current maintenance plan running Version 5.0 and higher will receive Sage PFW 5.4 automatically. Your shipment will include: Sage PFW, Crystal Reports 10, and PFWeb Decision and PFWeb Decision Support (for those who currently own PFWeb Decision Support). Give us a call to discuss the upgrade procedure and to schedule your installation.

If you do not have a current maintenance plan, or are still running an earlier version of the software, please give us a call to discuss your options. ★



Sage PFW In The Spotlight Crystal Reports

Cystal Reports by Business Objects SA is a practical tool that delivers immediate time-saving benefits, productivity increases, and first-class output. It is the standard reporting tool for Sage PFW. If you are not yet familiar with Crystal Reports, it is time to get friendly with this powerful, flexible report writer.

Crystal Reports Sets The Bar

Crystal Reports is a graphical WYSIWYG (what you see is what you get) report writer. It is easy to learn, easy to use, and amazingly powerful. Beyond report writing, by using Crystal Reports you can create customized mail merges and exports. A side benefit of Crystal Reports is that it is the standard report writer for many of today's software packages. Master Crystal Reports for Sage PFW, and the exact same skill set applies every other time you use it.

Huge Collection Of Custom Reports Included

Sage PFW includes over 200 Crystal Reports forms and reports. Each may be customized to suit your unique business needs. You can even add a company logo or custom colors to your reports and forms.

Creating Custom Reports Is Easy

Crystal Reports is easy to learn. A built-in tutor and an online help system offer context-sensitive help and tips for successful report writing. Simply follow the detailed set of instructions and you will be well on your way. You can quickly design interactive reports using an intuitive drag-and-drop interface.

Experts and Wizards guide you through common tasks such as connecting to the data source, selecting fields and records, grouping, sorting, and formatting. Reports created with Experts and Wizards can be further customized using easy drag-and-drop operations. Add your new reports to any Sage PFW desktop to provide easy access to users.

Infinite Reporting Flexibility

Crystal Reports includes over 160 built-in functions and operators as well as user-defined functions for complete control over report formatting, complex logic, and data selection. The powerful Formula Workshop lets you create valuable summary data that might not be present in your Sage PFW database.

Different users can view the same data in different ways without creating multiple reports. Users select from pre-defined parameters in a single report to receive their customized data. Sub-reports may be embedded in a main report allowing you to insert information from different tables with different formats into any section of a report. You'll be able to customize the look of your reports by adding logos, pictures, shapes and colors, or simply changing the font. Choose from 12 types of graphs, or add hyperlinks, drill downs, underlines, and running totals. Crystal Reports includes customizable templates and more than 100 formatting options for precise control over the presentation of your data.



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You can publish your reports to the Web with automatic HTML output, export the report to Microsoft Word or Excel, or email the reports in one of 15 file formats. Publish your finished reports to a variety of formats including: XML, PDF, Word, Excel, and text.

New In Version 10

Sage PFW 5.4 ships with a new version of Crystal Reports, Version 10. Crystal Reports 10 includes numerous changes, including the ability to dock the Field Explorer, which will make it easier to work on reports and see the formulas and fields simultaneously.

In Sage PFW 5.4 the data dictionary files for Platinum for Windows by Sage and BatchMasterPFW were combined. If you have existing customized standard reports using Crystal Reports, or if you have created new custom reports, a data conversion will be required to ensure they continue to run smoothly. We're happy to help with this process during the installation and configuration of Sage PFW 5.4.

We're Here To Help

We've got extensive experience designing and creating Crystal Reports and are happy to be a resource to you either by developing a report for you or aiding you in creating your own reports. If you have questions about Crystal Reports do not hesitate to give us a call. ★