



# **Tools to Accelerate Productivity at Your Fingertips**

Presenter: Tracey Brinkman

# Presenter



## Tracey Brinkman

- ◆ Senior Consultant
- ◆ BKD Technologies

# Agenda



- ◆ Paperless Office
- ◆ Explore Views
- ◆ Custom Lookup
- ◆ Business Insights Reporter
- ◆ Sage Software online

# Paperless Office



## ◆ Setup

- Paperless Office Options
- Journal and Register Maintenance
- Period End Report Maintenance
- Report Maintenance
- Form Maintenance
- Electronic Delivery Message Maintenance

# Paperless Office (continued)



## ◆ Main

- Journal and Register Viewer
- Period End Report Viewer
- Report Viewer
- Customer Viewer
- Employee Self Service

## ◆ Utilities

- Purge PDF Documents

# Explore Views



- ◆ General Ledger, Accounts Receivable, Accounts Payable, Inventory Management, Sales Order, Purchase Order, RMA & BOM all have Explore View.

- Preview
- Explore
- Tasks

# Business Insights Explorer

- ◆ 28 Standard BI Explorer Views in 4.4
  - 11 Standard in 4.2
  - 23 Standard in 4.3
- ◆ New 4.4 BI Explorer Views
  - Vendor Purchase History View
  - Open PO by Vendor Name View
  - Bill of Materials View\*
  - Component Where Used View in BOM

# Business Insights Reporter



## ◆ Wizard

- Report Name
- Report Description
- Add Report to Custom Report menu
- Select module for Custom Report
- Select a Report Format
- Select a View

# Business Insight Reporter (Continued)

- ◆ Select Fields to be used as columns, sorts, and filters
- ◆ Define Sort Orders
- ◆ Define Groups
- ◆ Define Filters
- ◆ Define Report Options
- ◆ Define Report Chain
- ◆ Select Roles
- ◆ Run report or Access Crystal Designer when report Finished

# Custom Lookup

## ◆ Lookup

- Fields
- Filter
- Set Default

# Sage Software Online - Login

The screenshot shows a web browser window titled "Help Center" with a standard Windows taskbar at the bottom. The browser's address bar shows "Show Back Print Sage". The page content includes the Sage logo, navigation links for "CONTACT US" and "HOME", and a login form. The login form has fields for "User Name:" and "Password:", a "Login" button, and a "Remember my username" checkbox. There are also links for "Register now" and "Click here" for forgotten credentials. A "NOTE" section at the bottom of the page mentions system maintenance times. The taskbar shows several open applications: "Welcome Page - Window...", "Microsoft PowerPoint - [T...", "MAS 90 Desktop", and "Help Center". The system clock shows "10:49 PM".

Help Center

Show Back Print Sage

CONTACT US HOME

sage Sage Software Online

At Sage, we're committed to developing and delivering powerful accounting and business management software and services to small and mid-market companies.

**Please Login**  
To access Sage Software Online, please use Internet Explorer as your primary browser.

User Name:

Password:

Login

Remember my username

New to this site? [Register now.](#)

Forgot your user name and password? [Click here.](#)

Click any of the following for Forms:

- \*\* [Accounting Solutions -Authorized Contact Request Form](#)
- \*\* [Non profit Solutions -Authorized Contact Request Form](#)

**NOTE:** In order to provide you with the best possible service, we perform system maintenance on Sage Software Online Monday-Friday from 10:00pm-2:00am PST. During these times the system response may be quite slow and inconsistent.

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Start Welcome Page - Window... Microsoft PowerPoint - [T... MAS 90 Desktop Help Center 10:49 PM

# Sage Software Online - Knowledgebase

The screenshot shows a web browser window with the following elements:

- Browser Title Bar:** Sage InfoSource Knowledgebase Search Engine, Sage North America - Windows Internet Explorer provided by BKD, LLP
- Address Bar:** http://infosource.sagesoftwareonline.com/infasp/search.asp
- Navigation Bar:** Includes icons for Home, Back, Forward, Stop, Refresh, Print, Page, Tools, and Help.
- Header:** A green banner with the text "SAGE SOFTWARE ONLINE" and a sub-header "Customer Support".
- Breadcrumbs:** > [Support Home](#) > Sage InfoSource Knowledgebase > [Help for Sage InfoSource](#)
- Search Section:**
  - Quick Search:** A text input field containing "Enter Resolution ID" and an "Open" button.
  - Sage InfoSource:** The main heading for the search interface.
  - Select Product Line:** A dropdown menu with "Sage MAS 90 and 200" selected, followed by "\* required".
  - Select Application:** An empty dropdown menu.
  - Search Text:** An empty text input field.
  - Search Button:** A button labeled "Search".
- Feedback:** A link to a survey: "Did InfoSource help you? Please give us feedback through our [survey](#)."
- Search Results:** A section heading with a green bar below it.
- Footer:** © Sage | All rights reserved.

The Windows taskbar at the bottom shows several open applications: Start, Customer Support - Sage..., Sage MAS 90 and Sage..., Sage InfoSource Kn..., Microsoft PowerPoint - [T..., Sage MAS 90 Desktop, and Help Center. The system clock shows 10:59 PM.



# Next Webinar



Monthly Webinar Series - Held Third Tuesday of each month

## ◆ Sage MAS Intelligence

- Day: Tuesday, March 15, 2011
- Register By: March 14, 2011
- Register at: [www.bkdtechnologies.com/events](http://www.bkdtechnologies.com/events)

# BKD Technologies Help Desk



- ◆ Sage Software - 866.832.4253  
[SageSupport@bkd.com](mailto:SageSupport@bkd.com)
  
- ◆ Monday - Friday, 8 a.m. - 5 p.m.  
Support Center toll free

**BKD** LLP  
**CPAs & Advisors**

**Thank You!**

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