

I didn't know MAS could do that!


1. UDF Advanced Field Settings

- a. Custom Office > Main > User-Defined Field and Table Maintenance
- b. Double-click a Module, then right-click a Table.
- c. Select "Advanced Field Settings".
- d. Click Add, then choose a Field.
- e. Here you can set default Attributes and Validation.

2. Excel Data Query

- a. Open a new Excel spreadsheet.
- b. On the Data menu, select "Import External Data", then "New Database Query".
- c. Pick the SOTAMAS90 odbc driver. Typically it's the one *without* an asterisk (*).
- d. Enter your MAS 90 login info.
- e. Select the Table, then Data Field(s)s to bring into your document.
- f. Click Next to optionally set Filtering.
- g. Click Next to optionally set Sorting.
- h. Click Next, then Finish, then OK, and re-log in and your data will appear.

3. Creating a Custom ALE (Advanced Lookup Engine)

- a. With any F2 Lookup , click the Custom button.
- b. Give it a Name, and optionally set as the Default.
- c. Click Next to specify the Fields to include, as well as control the sort.
- d. Click Next to optionally set Filtering.
- e. Click Next to set other options, primarily the Default Search Column and Default Search Option.
- f. Click Finish.

4. Memo's

- a. Common Information > Main > Memo Manager Maintenance (or Non-Legacy Module > Setup > Memo Manager Maintenance)
- b. Once configured, Memo Attachments, Maintenance and Inquiry can be performed inside the respective screens (e.g., Vendor Maintenance, S/O Entry, A/R Invoice History).

5. Selecting a non-range of values

- a. Launch a standard A/R Report (e.g. A/R Aged Invoice Report).
- b. For the Customer # Selection field, specify "Equal to" and separate the values by comma's (e.g., 01abf,02custom,02orange).

6. My Tasks

- a. At the main MAS 90 desktop (where list of Modules are visible), click the My Tasks tab near the upper left-hand corner of the screen.
- b. Right-click in the white area on the left and create Public or Private Folders (e.g., Data Entry, Reports, External Docs).
- c. Then right-click on newly created folder(s) to add a Task (MAS 90 function) or Program (non-MAS 90 function). Or you can simply drag and drop to the folder(s).

7. Keyboard and Navigation Shortcuts

- a. Select the Help menu at top of the MAS 90 screen, then Help Topics.
- b. Click on the Contents tab, then click Navigating Through the Software.
- c. Then on the right, click Keyboard and Button Navigation.

8. Saving Report Settings and “Keep Window Open”

- a. Launch a standard A/R Report (e.g. A/R Customer Listing).
- b. Set a few options/criteria for running the report, and also select to “keep window open after preview”.
- c. Then in upper right-hand corner of the screen select the down-arrow and click “Save As”.
- d. Give your Saved Report a Name and Description, and click OK.
- e. Now you can run this specific report any time you wish without having to set those options/criteria each time.

9. Non-Custom Office screen personalization

- a. Primary and Secondary Grids
 - a1. Launch A/P Invoice Data Entry.
 - a2. On the Lines screen, drag the Description field name to the area above, between Comment and Amount.
 - a3. Then drag Comment down to where Description was.
- b. Screen Attributes
 - a1. Decrease the size of the G/L Account column.
 - a2. Click and drag any part of the screen border to re-size it.
 - a3. Now maximize the screen.

10. Creating a Business Object UDF

- a. First create a new field in A/R Customer Maintenance.
 - a1. Custom Office > Main > User-Defined Field and Table Maintenance
 - a2. Double-click Accounts Receivable, scroll down to AR Customer Master, and double-click it.
 - a3. Select Edit Fields.
 - a4. Click the Add icon on the right.
 - a5. Field Name = Source, and leave everything else as is – and click OK's until it prompts to update the Data Dictionaries, and do so.
- b. Next create the new field in S/O Entry for pulling the new Source field data in.
 - a1. Scroll down to Sales Order, double-click it, scroll down to SO Sales Order Header, and double-click it.
 - a2. Select Edit Fields.
 - a3. Click the Add icon on the right.
 - a4. Field Name = Source, **but select Business Object.**
 - a5. At Data Source, select CustomerNo.
 - a6. At Column, scroll all the way to the bottom and select UDF_SOURCE.
 - a7. Click OK's until it prompts to update the Data Dictionaries, and do so.
- c. Now add the A/R Source field to A/R Customer Maintenance.
- d. Then add the S/O Source field to S/O Sales Order Entry.

11. Custom Office Basics

- a. Launch A/P Vendor Maintenance
 - a1. With the keyboard, do Ctrl-F9, and create a “new Panel”.
 - a2. Right-click on the 3rd line address, go to the Options tab & select Hidden.
 - a3. Double-click on the Reference text label and change to Acct #.
 - a4. Click and drag the Hold Payment field an inch to the right.
 - a5. X out and say Yes to save changes.
- b. Adding Columns to an Inquiry Screen
 - a1. Launch A/P Vendor Inquiry, and go to tab 9 (P/O's).
 - a2. With the keyboard, do Ctrl-F9, create a “new Panel”, and right-click in the gray area.
 - a3. On the Format tab, click Add, scroll down and select ShipVia. (In the area where the Add button is clicked, the arrows allow for controlling the order in which the columns display on the screen.)
 - a4. Click OK, X out and save changes.

12. Associated Source Documents

- a. Set up the configuration: Paperless Office > Setup > Journal and Register Maintenance
- b. Specify the Associated Source Documents settings, primarily the default location of where the documents to attach will be located.
- c. Perform A/R Cash Receipts Entry, and when prompted, specify the .pdf file containing the “Associated Source Documents”.
- d. For later viewing, access Paperless Office > Main > Journal and Register Viewer, highlight the desired item and click the Open Associated PDF icon on the right.

13. Creating a Graph with Crystal Reports

- a. Launch Crystal Reports and create a new, standard document with some sort of Grouping (e.g., Vendor count by state).
- b. Click the Insert Chart icon.
- c. Select Pie, then the 3-D Pie graphic.
- d. Click on the Data tab and make sure Group is selected.
- e. “Change of” should default to State, and “Show” should default to Count of State.
- f. Click on the Text tab to specify the desired Graph title(s).
- g. Click OK.
- h. Right-click on the Graph and select Chart Options > General.
- i. Try playing with the sliders, as well as the options on the other tabs.