

# Setup Guide

## Customizing Forms for your Business

### - Version 2.0

To complete the activities in the Customizing Forms for your Business curriculum, review the information in this setup guide to ensure you have the correct modules, case studies, and settings defined.

### *Software Requirements*

<i>Software</i>	<i>Version</i>
<b><i>Sage MAS 90 and 200</i></b>	
• Library Master	4.10
• General Ledger	4.10
• Accounts Payable	4.10
• Accounts Receivable	4.10
• Payroll	4.10
• Inventory Management	4.10
• Sales Order	4.10
• Purchase Order	4.10
• Custom Office	4.10
<b><i>Customizing Forms Case Study (SB1/LAB)*</i></b>	2.0
<b><i>Crystal Reports for Sage MAS 90 and 200</i></b>	10.0
<b><i>SOTAMAS90 ODBC Driver</i></b>	4.10.0700

\*\* **Note:** Refer to the Welcome and Introduction lesson in the Customizing Forms for your Business course curriculum for information on downloading the case study.

## Special Security Settings

Some activities may require you to select a specific user of RMD or Supervisor. These users were created in Sage MAS 90 as part of the classroom training and have full access to all tasks, security events, and module options.

- If you are able to create user logons and modify roles, create RMD and Supervisor as users. Assign them to a role with full access to all tasks, security events, and module options. Provide access to all companies created as part of the case study.
- If you cannot create these users, substitute your logon name when prompted to select either RMD or Supervisor.
- If security is not enabled, you may not be able to complete all steps in an activity. For example, some activities may require you to create a specific user logon. If this occurs, skip the activity.
- Unless you have purchased the MICR fonts from Adobe, you will not be able to complete the activities for customizing checks for MICR encoding.
- Other activities require special formatting to have been done before starting these activities. As this can affect Sage MAS 90, you may not be able to complete all of the challenge labs.

## Sales Tax Setup

Define the following sales tax information using the figures below. If you already have the sales tax codes defined, do not modify this information as it will affect your live company's sales tax calculations. If you do not modify the sales tax information, the totals entered in the activities may not match.

### Tax Codes

	Tax Class	Description	Tax Rate	Sales	Purchases	Nonrecoverable Pct
1	NT	Nontaxable	.000000	<input type="checkbox"/>	<input type="checkbox"/>	.000
2	TF	Taxable Freight	.000000	<input type="checkbox"/>	<input type="checkbox"/>	.000
3	TX	Taxable	7.250000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	.000
4			.000000	<input type="checkbox"/>	<input type="checkbox"/>	.000

**Sales Tax Code Maintenance (ABC) 12/1/2005**

Tax Code: CA OR  
 Description: Orange County  
 Short Description: Orange

Taxable Limit: 0.00  
 Calculate Sales Tax on Retention:   
 Expense to Vendor/Item:   
 Tax on Tax:   
 Tax Class: [ ]

	Tax Class	Description	Tax Rate	Sales	Purchases	Nonrecoverable Pct
1	NT	Nontaxable	.000000	<input type="checkbox"/>	<input type="checkbox"/>	.000
2	TF	Taxable Freight	.000000	<input type="checkbox"/>	<input type="checkbox"/>	.000
3	TX	Taxable	.500000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.000
4			.000000	<input type="checkbox"/>	<input type="checkbox"/>	.000

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### Tax Schedules

**Sales Tax Schedule Maintenance (SB1) 4/5/2005**

Tax Schedule: CA  
 Description: California  
 Print Tax Code Detail:

ZIP XRef... State XRef...

	Tax Code	Description
1	CA	California (Primary)
2		

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**Sales Tax Schedule Maintenance (SB1) 4/5/2005**

Tax Schedule: CA OR  
 Description: Orange County  
 Print Tax Code Detail:

ZIP XRef... State XRef...

	Tax Code	Description
1	CA	California (Primary)
2	CA OR	Orange County
3		

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## Special Settings for Crystal Reports

Set the parameters as displayed below and on the following page in Options on the File menu in Crystal Reports before beginning class.

