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**Headline News**

Sage Software's annual customer conference, Sage Summit, will be held November 5-8, 2006 at the Gaylord Opryland in Nashville. Here you can connect with fellow software users, product developers, support analysts, and product leadership—all under one roof. You'll be able to talk to the software publishers and learn what's ahead for Sage MAS 500 ERP. Call us for more details, or visit [www.sagesummit.com](http://www.sagesummit.com) to register.

**National Accounts**

See page 4 for more info!

**Sage MAS 500 Shipping And Warehouse Automation Enhancements**

If your organization ships products you are well aware that picking, packing, and shipping goods is a costly process. The current trend of rising fuel costs exacerbates the problem, as shipping rates spike to keep pace. To counteract the rising cost of shipping, cost conscious organizations need to become more efficient in their fulfillment and receiving processes.

Enter the latest version of Sage MAS 500 ERP, 7.0. This release streamlines shipping automation from every possible angle—customizable picking processes, the new Warehouse Automation module, and tight integration with the world class shipping system, StarShip. Let's look at how all these new capabilities work together to create a highly automated shipping system that can be customized to match the unique workflow of your organization.

**StarShip**

StarShip, an add-on shipping system, provides the bridge between Sage MAS 500 and the major package carriers. With StarShip you stay on top of changing shipping rates and regulations. StarShip handles the carriers listed below, as well as supporting a user-defined carrier.

- ▶ UPS
- ▶ FedEx Basic
- ▶ DHL (formerly Airborne)
- ▶ Speedee
- ▶ U.S. Postal Service

StarShip doesn't simply save money by saving time, there are even more tangible benefits. You can shop between carriers to find the lowest rate for the package size, weight, and destination.



Rising fuel costs are causing companies to look for ways to become more efficient in their fulfillment and shipping processes.

Integration with third-party insurance providers means you can shop for rates to insure your merchandise.

If you customarily mark up the actual freight for billing purposes, StarShip can calculate that as well, and write the final amount back to the Sage MAS 500 invoice, whether it's a flat rate per shipment or package, or a percentage of freight.

Another cost savings that can be realized is in the elimination of charge backs from shippers. StarShip checks to make sure the

address is valid, avoiding the possibility of misdirected packages due to typographical errors in shipping or order entry.

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Compliments of:



# Shipping And Warehouse Automation CONTINUED

## Tight Integration Features

Your default values set in Sage MAS 500 Maintain Customers will automatically flow through your StarShip shipping process. These include:

- ▶ Default Ship-to Address and Ship Via
- ▶ Residential Address Checkbox
- ▶ Default Carrier Bill Method (Sender, Recipient, Third Party)
- ▶ Default Carrier Account Number (UPS, FedEx, etc)
- ▶ Freight Method (Manual, Packaging, none)

Of course, all defaults can be modified in MAS 500 Sales Order Entry for those inevitable exceptions. All this information flowing from the customer record, to the order, to Starship, means shipping decisions can be made in the right place—the customer service department.

## Flexible Sales Order Options

You will want to set a number of options in the Sales Order module for use by StarShip.

Set the weight unit of measure for StarShip to pounds so StarShip can calculate the weight when you place the package on the scale. Choose from one of five selections for the method of calculating declared value for insurance purposes:

- ▶ Cost of Goods
- ▶ COG Plus Amount
- ▶ COG Plus Percent
- ▶ Fixed Amount
- ▶ Price of Goods

You can also choose which cost type of your inventory items to use in this calculation, Average, Last, Standard, Replacement, or Landed. You also can choose to mark up the declared value, using a fixed amount or percentage.

## Individualized Shipping Documents

In all probability, most of your customers want only a packing list in the box, with the invoice mailed separately. Others may want only an invoice, while still others may require both. With Sage MAS 500, the documents that print are customer-driven. You can save paper costs and shipping time by specifying which documents are required for your individual customers ahead of time.

## Warehouse Automation Module

We've just shown you how quickly StarShip can deliver a return on its investment. But what about the process of getting those products pulled from bins and into boxes for shipping? The new Warehouse Automation module, along with the enhanced Pick List generation processes in MAS 500 7.0, are here to provide the solution. Let's examine just one of many possible workflows in the process of fulfilling an order using the Warehouse Automation module.

### Creating Pick Lists

The warehouse supervisor now can create pick lists using the powerful **Pick List dashboard** enhanced in version 7.0. Orders are selected to pick using a variety of criteria, including ship date, warehouse, order priority, customer PO number, and item. For example, if a backordered

order lines that have been selected. Quantities to pick from each bin and lot are pre-assigned based on hierarchies set up elsewhere in the system. The supervisor can review the short picks and make decisions to adjust orders, select different bin locations, or modify lot/serial numbers to be picked. The next step is to print or preview pick lists to make them available to the picker's handheld device.

The picker selects a pick list, and the handheld directs him in the most efficient manner through the warehouse. If the goods are not in a bin as expected, the picker can adjust the quantity or do a look up to see if other bins have product available. If picking individual orders, the picker can generate the shipment directly from the handheld.


### Packing And Shipping

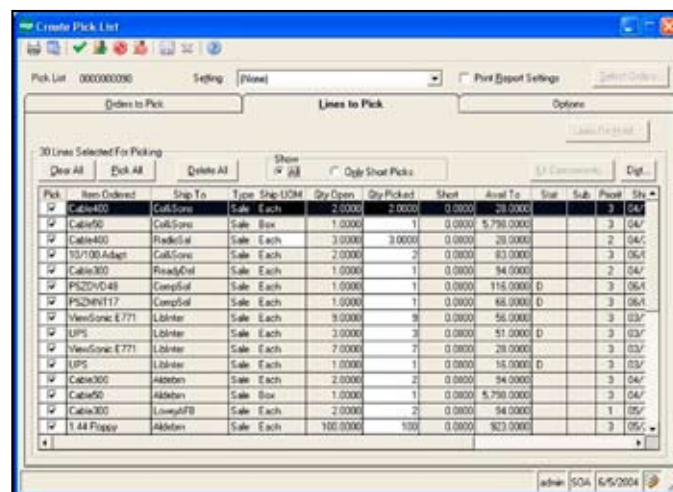
Next the order becomes available on the packing and shipping desktop. A carton size is selected, and the individual items are specified to be placed in the carton. You can even split quantities of one line item between multiple cartons.

Once the cartons are filled, packing lists are printed, and the shipper clicks the convenient icon to launch StarShip. Each box is placed on the integrated scale, and the weights are written into the StarShip screen. This is also where you can shop for rates between carriers. Lastly, StarShip prints shipping labels and writes

tracking numbers, weight and freight amount back to the Sage MAS 500 invoice.

This is just one example of the many workflows you can create with the powerful combination of Sage MAS 500 Sales Order, Inventory, Warehouse Automation, and StarShip modules.

Give us a call for assistance optimizing your warehouse operations. 



The Select Orders to Pick dashboard in Sage MAS 500 gives the warehouse supervisor the information needed to choose orders to pick for optimum productivity.

item has just come in, you can select all the orders containing that item. You can also choose whether you only want to pick sales orders, or also other order types, such as transfers.

The selection screen will display the number of orders and lines that have been generated by the selection. If this is a good amount for a picking run, the supervisor proceeds to the next step, or adjusts the criteria as needed. The supervisor can review the individual orders or

# Sage TimeSheet Automates Time And Expense Entry

If your solution for time and expense tracking isn't automated and integrated with your project management system you are probably spending too much time reviewing, approving, entering, and re-entering this information—and may be missing potential revenue opportunities.

Sage TimeSheet (formerly TimeSheet Professional) is an ideal project-oriented time and expense entry and tracking tool for Sage MAS 500 ERP and it is fully integrated with the Sage MAS 500 Project Accounting module.

Let's take a closer look at the benefits Sage TimeSheet can provide to your company.

## Expense Tracking

### Convenient Expense Entry

Spreadsheet-style data entry is speedy and convenient. Most of us are familiar and adept with this type of data entry where we can press the Enter key to quickly save an entry and move to the next cell.

Sage TimeSheet includes an **Expense Sheet View** where users can enter their expenses directly into an entry grid completely separate from time-sheet entry. In the Expense Sheet View, the rows represent tasks and the columns represent dates. If a user needs details about the expense codes or expense groups associated with a task, they simply expand the task cell to display the details.

Expenses can be either price or quantity based. *Airfare* is an example of a priced-based expense item, while *Copies* is an example of a quantity-based expense item. Employees can attach notes to an expense entry to offer supporting details. Users will always see a running total of their expenses by day and period, and Sage TimeSheet even applies any markup/markdown or tax rate to the expenses before displaying the total.

### Expense Approval Process

It's not always convenient to approve expense reports along with an employee's time sheet. Many companies process time sheets weekly, or twice a month while expense reports are processed on a monthly basis. Sage TimeSheet facilitates this by allowing managers to approve employee expense sheets independent of time sheets.

Using defaults can save you valuable data entry time, and reduce the opportunities for data entry errors. With Sage TimeSheet you can define several default expense values, for example: price, quantity, markup/markdown percentage, or tax percentage for each expense item. In addition, you can define a default description for each expense. For example, you could establish an expense item description *Rental Car* with a default quantity of one.

The screenshot shows the 'Expense View' interface in Sage TimeSheet. It features a grid with tasks listed on the left and dates (Jul 16, Jul 17, Jul 18) on the top. Each task cell is expandable, showing a list of expense codes and their corresponding amounts. For example, the 'Design' task shows a total of \$0.00, while 'Airfare (SOA)' shows a total of \$345.00. The interface includes a menu bar at the top and a status bar at the bottom.

Sage TimeSheet is an ideal project-oriented time and expense entry and tracking tool.

In addition to providing an ideal tool for the entry, tracking, and approval of employee expense reports, Sage TimeSheet is an efficient and effective time tracking tool.

## Time Tracking

### Multiple Time Entry Options

Sage TimeSheet offers three different **Views** from which employees can enter their time. You can decide which views to use depending on the workflow of your organization.

The **Time Sheet View** displays a list of tasks assigned to the employee. Entering time is as simple as clicking the cell representing the correct date and task. The spreadsheet look and feel provides an easy, intuitive interface.

The **Day View** provides a desktop calendar interface. Rows represent the hours of the workday. The range of time displayed is customizable for each employee. For example, you might choose to have the Day View display the hours from 8:00 AM to 6:00 PM in one-half hour increments. Employee simply click on the appropriate row, and a dialog box opens allow-

ing the employee to enter the details of their time entry.

The **Time Card View** allows employees to enter start and stop times for a specified day and task. The program then calculates the elapsed time. This view is useful for organizations that must capture start and stop times.

Time entries recorded in one view are visible from any of the other views; employees can select the entry view most appropriate at the time.

### Flexible Approval Process

Sage TimeSheet provides an approval process that allows for multiple approval steps and can be configured to match your company's procedures and policies.

It's likely that your employees divide their time between multiple projects, with potentially several project managers. In Sage TimeSheet, project managers can review and approve the hours and expenses for the projects they manage.

### Easy Access, Informative Reports

Sage TimeSheet offers both PC and Web-based time sheet interfaces, meaning that your employees can have easy access in the office or remotely.

Comprehensive reporting tools provide access to the data held in Sage TimeSheet. Analyze your data in multiple ways—by project, task, employee, manager and more. Sage TimeSheet makes it simple to export your report data to Excel, Word, or PDF for further analysis or to share via email. You can also use Crystal Reports® to create custom reports.

### Sage MAS 500 Integration

Sage TimeSheet integrates seamlessly with your Sage MAS 500 Accounts Payable, Accounts Receivable, and Project Accounting modules.

It can create Accounts Payable invoices for your employee expenses, Accounts Receivable invoices for employees' billable time, and transfer both time and expense data into the Project Accounting module for an accurate picture of your projects' profitability.

We would be happy to help you learn more about Sage TimeSheet; just give us a call. ☆



## Spotlight On Sage MAS 500 National Accounts

Many of your larger customers may have subsidiary companies or separate store locations. National Accounts, often referred to as parent/subsidiary corporate relationships, can be complex relationships to manage internally. For some purposes, like credit checking, you may wish to consider the entire account, for other purposes, sales comparisons for example, it's more appropriate to look at each subsidiary separately. If you have major retailers or distributors as customers, you are likely familiar with this situation—you may receive orders from individual stores, or a master purchase order from the parent with instructions to ship to individual stores.

Sage MAS 500 ERP provides a comprehensive feature set allowing you to manage these national accounts with ease. Let's take a quick look.

### All About Flexibility

Managing national accounts is all about flexibility, and flexibility is what Sage MAS 500 delivers. You may want to send a consolidated billing statement to the parent account, encouraging speedy payment and reducing your company's outstanding receivables. However, individual invoices may be best directed to the individual subsidiaries for approval. Regardless of the way you invoice, the check you receive may come from the parent company, requiring you to apply payments across one or more of the subsidiary account invoices.

The National Accounts functionality of the Sage MAS 500 Accounts Receivable module streamlines this processing, allowing you to manage your national accounts in the manner that best suits your business. You can select the default bill-to the customer—either the parent or the subsidiary. If appropriate, you can enter a separate credit limit for each subsidiary. You can further indicate whether it is permissible for the parent to pay invoices on behalf of the subsidiary account. You can establish contract pricing effective for the entire account family.

Credit checking is flexible as well. You can create two levels of credit checking, both at the parent and at the subsidiary level to minimize your credit risk while offering the best service to the account.

Various reports allow you to analyze activity for the national account family as a whole, as well as the details for each subsidiary account.

### Understanding The National Account Structure

Here are a few facts to help you understand the national accounts structure and use:

- ▶ A parent account may have multiple subsidiary accounts.
- ▶ Each subsidiary account may have only one parent account.
- ▶ A parent account and its subsidiary accounts are referred to as a national account family.
- ▶ Optionally, you may designate the parent account as the bill-to location on invoices, credit/debit memos, and sales orders.
- ▶ A parent account can make payments for or apply credit and debit memos to a subsidiary account.
- ▶ Credit checks are performed at the subsidiary account level and/or for whole family.
- ▶ Place an entire national account family in On Hold status.



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- ▶ Run reports, statements, and inquiries by subsidiary account or by national account family.
- ▶ View outstanding balances and open invoices for either subsidiary account or for the national account family.
- ▶ Establish contract pricing for national accounts.

National Accounts is part of the Accounts Receivable module, there's nothing additional to buy.

Please call us with your questions. ☆

### Version 6.2 Retirement Notice

Sage Software announced that the monthly updates and code fixes for Sage MAS 500 version 6.2 will end July 31, 2006. Customer support for version 6.2 of Sage MAS 500 will end on October 31, 2006.

Prior to October 31, 2006, it is recommended you upgrade to one of the available supported versions of Sage MAS 500 (6.3, 7.0 and 7.05) with version 7.05 being the recommended version. To receive 1099 reporting updates for calendar year 2006, customers must be running Sage MAS 500 Version 6.3 or higher.

If you have questions about upgrading, including details of the new features included in the latest release, please give us a call. ☆